

The UK During COVID-19

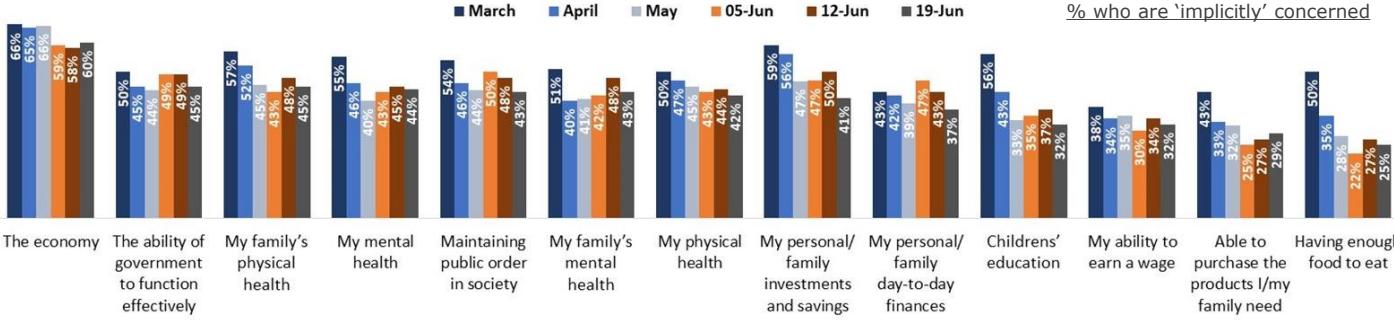
JUNE 19

WEEKLY HIGHLIGHTS OF HOW THE UK IS FEELING, BEHAVING AND THINKING
FROM OUR COVID TRACKER

HEALTH AND ECONOMY REMAIN MAIN EMOTIONAL CONCERN

Our in-house IAT capability uses reaction time to identify fast, instinctive choices, revealing which concerns evoke a 'system 1' or implicit emotional response in the brain, strongly influencing behaviour. We've now been tracking emotional response to concerns for over 3 months and have shown the top ranked 'Implicit' concerns below.

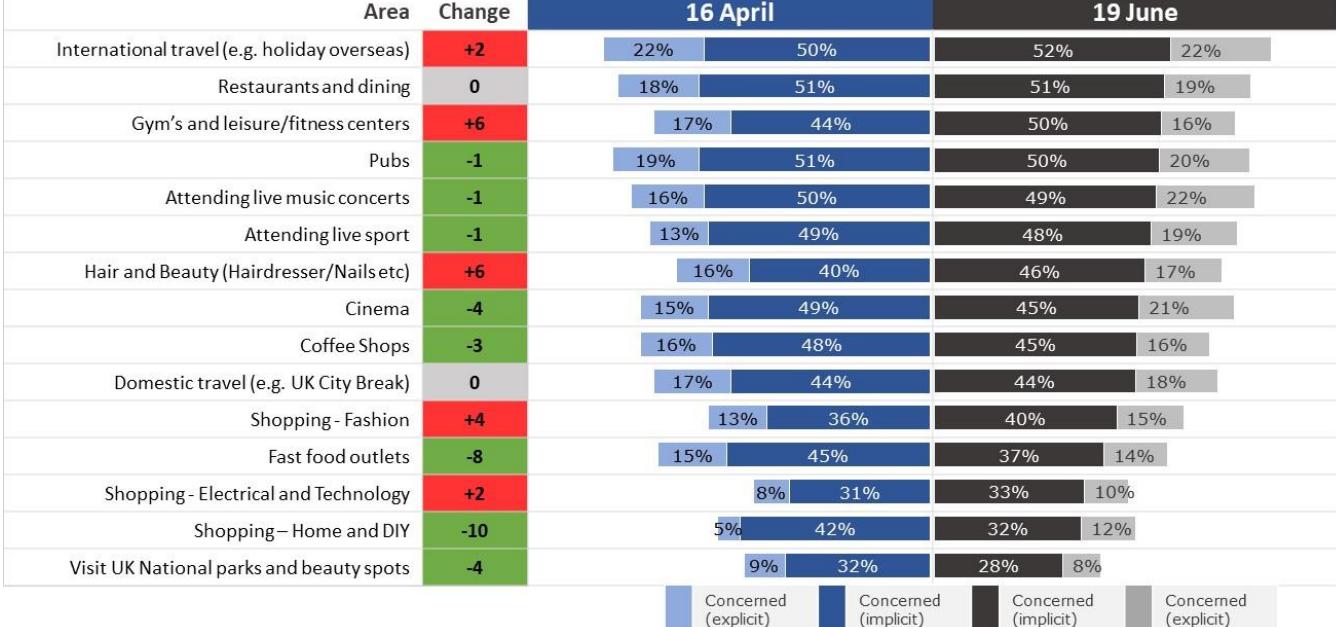
Physical and mental health measures have remained static throughout June despite reported Covid-19 statistics improving, demonstrating that health is still implicitly driving behavior for many. Economic concern remains high, although this general concern has not yet carried over to personal circumstances with 'ability to earn a wage' relatively low, as many are still supported by the government's furlough scheme, so are not yet exposed to any future economic impact.



HAS IMPLICIT SAFETY CONCERN CHANGED OVER 2 MONTHS?

SOME SECTORS HAVE INCREASED IN SAFETY CONCERN WHEREAS THOSE THAT ARE OPEN HAVE SHOWN DECREASES

We compared our April vs June IAT (Implicit Association Testing) results measuring 'implicit' concern with safety across different leisure sectors – revealing which areas have strong emotional concern and will drive behavior. International travel, gyms, hair/beauty and fashion have all increased since April. However, safety concerns have lessened for some sectors that have already re-opened, such as coffee shops, fast food (takeaway) and home/DIY. Once people experience the activity, and are satisfied safety is being taken seriously, then emotional concern lessens meaning operational delivery is key.



WHAT WAS THE EXPERIENCE LIKE WHEN SHOPS REOPENED?

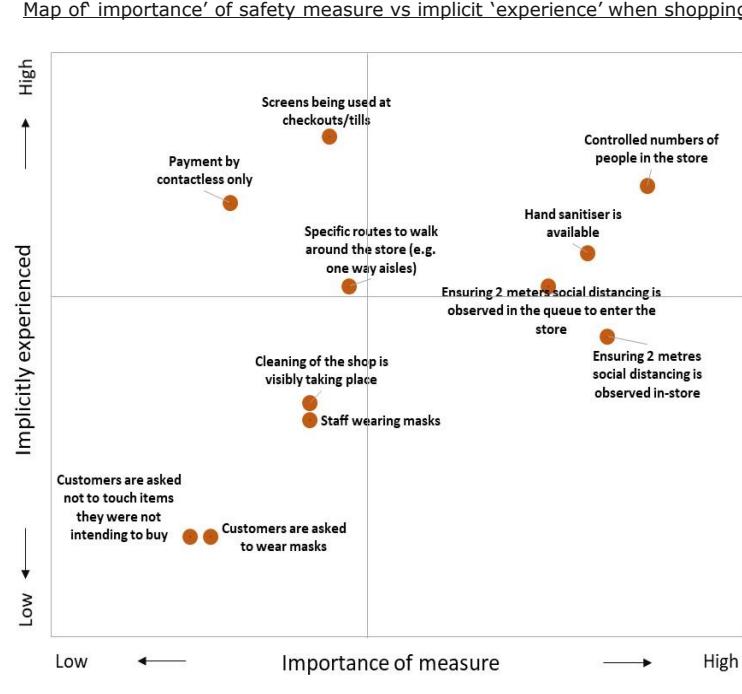
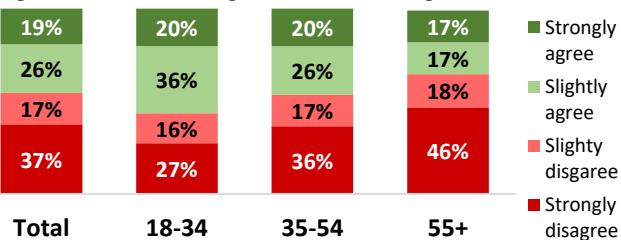
GENERALLY RETAILERS MANAGED TO DELIVER ON SAFETY MEASURES THAT ARE MOST IMPORTANT TO PEOPLE

We mapped how important different safety measures are to shoppers with the implicit recall of their actual experience when many stores re-opened last week.

Areas of most importance continue to be led by controlling numbers and physical distancing both in the store and when waiting to enter, which can be seen in the chart below, where over half disagree with a reduction to 1m in social distancing – and under 55s disagree the most.

Provision of hand sanitization is also important and was often experienced by shoppers. Screens and contactless payment are not as important to shoppers, but were observed in many shops. Few customers are being asked not to touch items or wear masks, but these are also less important to shoppers.

Agreement with reducing 2m social distancing rule to 1m?



Results are taken from Maru's ongoing, UK tracker of key elements related to how consumers are FEEL, BEHAVE, and THINK during the COVID-19 pandemic. We speak to 1,000 nationally representative UK adults twice a week. For more information, please go to www.marureports.com/coronavirus, or contact your account team or info@marumatchbox.com.