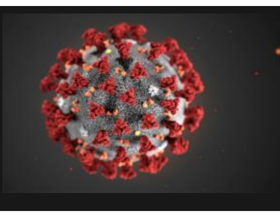


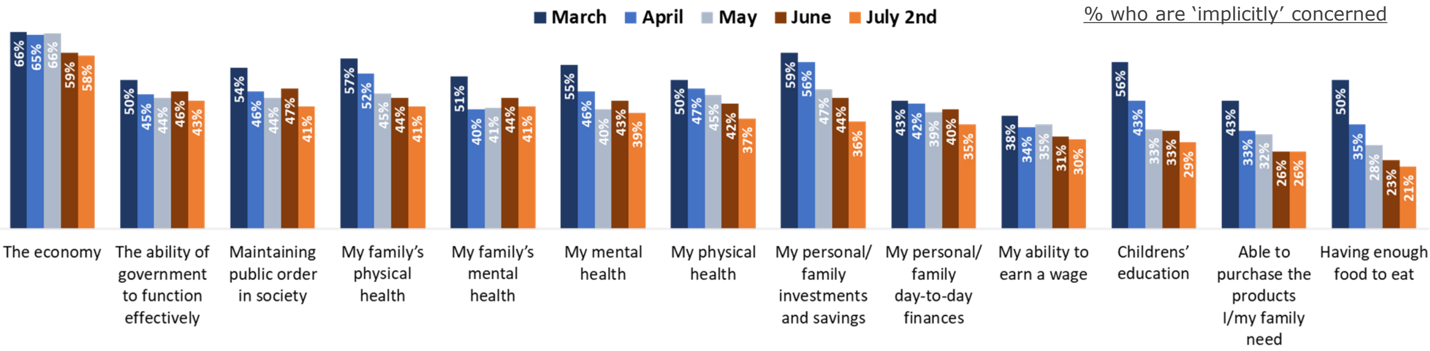
# The UK During COVID-19 JULY 2

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

## BRITAINS' CONCERN LESSENS AS THE ECONOMY OPENS UP

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 three months and have shown the top ranked 'implicit' concerns below.

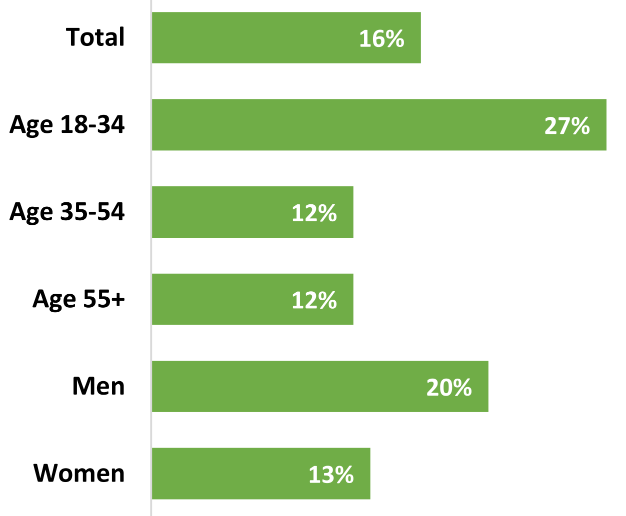
With a large swathe of retail and hospitality now open to the public, along with a date for international travel resuming, the UK began to feel some normality finally returning after 3 months of lockdown. This easing of lockdown has resulted in implicit concern for all measures reaching new lows compared to previous months. However, 'the economy', 'government' effectiveness' and 'health' remain the areas with relatively higher implicit, emotional, concern meaning these factors are still likely to strongly influence our behaviour.




## INTERNATIONAL TRAVEL RESUMES BUT EXPECT SLOW TAKE-UP

WITH INTERNATIONAL TRAVEL BANS BEING LIFTED THROUGH JULY WE ASKED OUR UK PANEL ON THEIR TRAVEL INTENTIONS

Likely to travel overseas in next 3 months? %=Yes




Last week the UK government said that from 10th July people in England will be able to travel to different countries which are on a 'reduced risk' list, without the need for quarantine when they return. Other UK regions have said they will follow suit a few weeks later.

We asked our UK panel on their intention to travel in the next 3 months and only 16% said yes, indicating no fast turnaround for the struggling airline and travel industry with the prospect of many Britons seeking a 'staycation' either at home or within UK.

The greatest propensity to travel overseas is for under 35's where around 1 in 4 (27%) indicated they would be likely to travel internationally in the next 3 months, but this decreases to 12% for those aged over 34. We've observed in earlier months how under 35's see themselves as less at risk to the pandemic and are more likely to socialize.

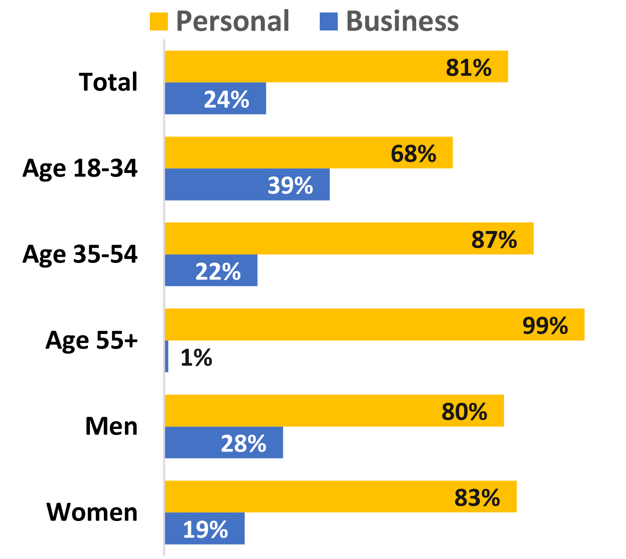
The propensity for men to travel was significantly higher at 20% vs 13% for women, although a large part of this difference is driven by business travel (see below).

## THOSE TRAVELLING FAVOUR EUROPEAN DESTINATIONS

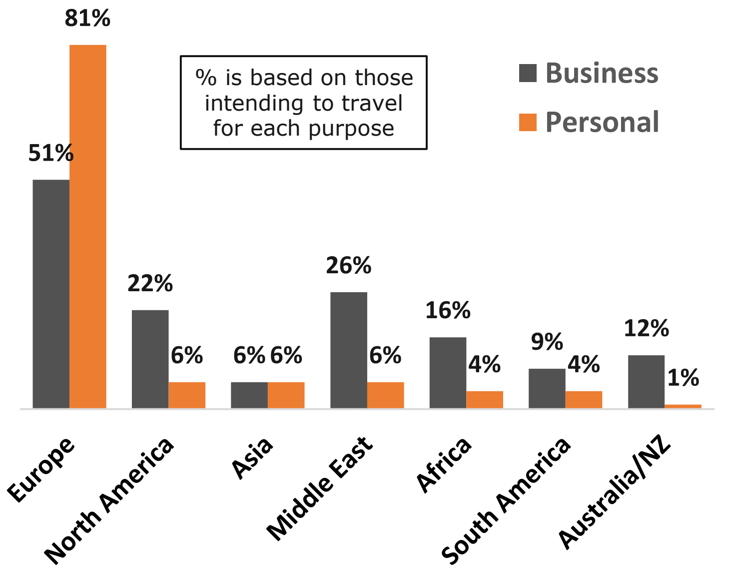
AROUND 80% OF TRAVEL WILL BE FOR PERSONAL/HOLIDAY REASONS, BUT BUSINESS TRAVEL IS MORE GLOBAL

The 18-34 year old age group are most likely to have a mix of business/personal international travel, whereas older age groups will only travel for personal/holiday reasons. Those looking to travel for holidays are overwhelmingly favouring European destinations, with very few considering the Middle East, Asia or America's. This insight indicates the leisure travel sectors should focus on promoting short hall popular European destinations this summer to encourage overseas travel. Some good news for airlines is that business travel has a more global outlook, although this is still dominated by European travel given some countries have yet to be approved by the UK government as 'safe' destinations.

Will international travel be for personal or business use?




Where will you be travelling to for personal/business use?




Results are taken from Maru's ongoing UK tracker of key elements related to how people are FEELING, BEHAVING, and THINKING 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.