

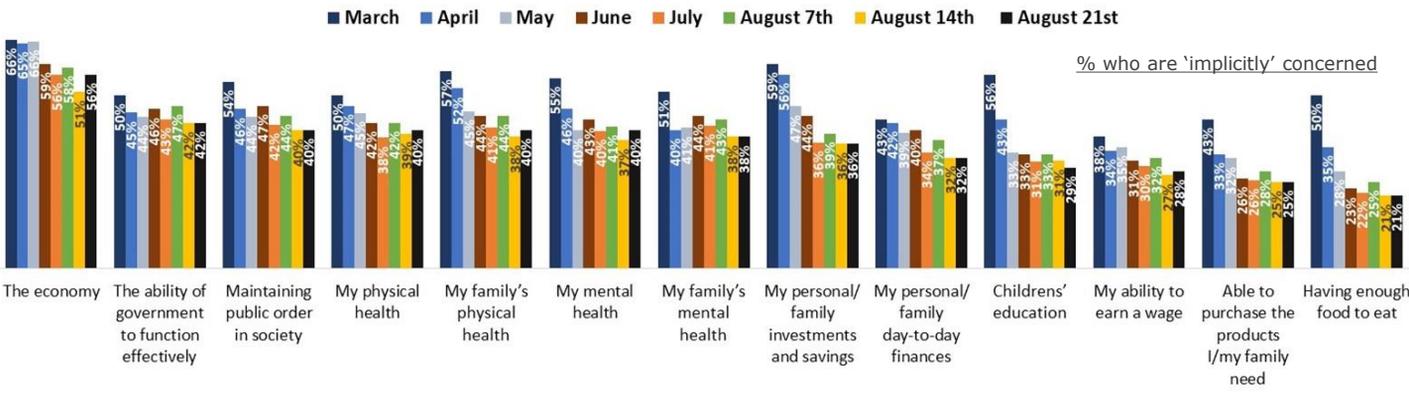
The UK During COVID-19 AUGUST 21

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

ECONOMIC CONCERN ON THE INCREASE AND REMAINS KEY

Economic concern is now back to levels seen in July indicating this key factor is strongly influencing peoples' emotions and behaviour. The next greatest area of concern is the effective functioning of the government, which has seen one of the smallest declines since the start of the Pandemic suggesting people are looking to the government for guidance and support through challenging times. Despite relatively small UK Covid-19 infection rates through August, health concerns remain strong with 40% concerned for their personal and family's physical health, indicating fear of the Pandemic is still present for many.

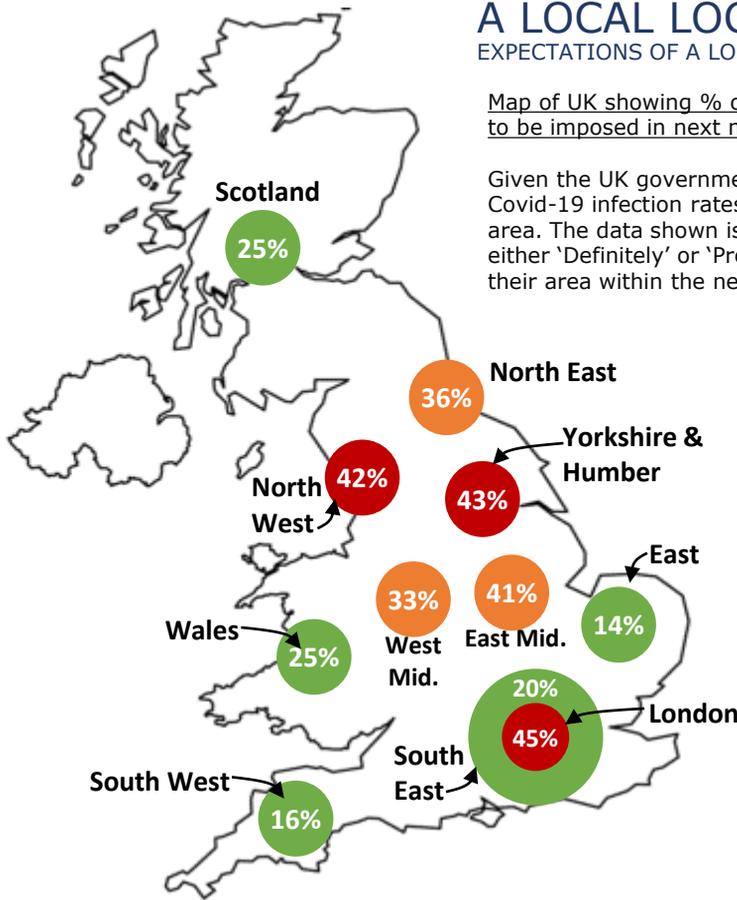
Our IAT capability uses reaction time to identify fast, instinctive choices, revealing which concerns evoke a 'system 1' or implicit emotional response in the brain, strongly influencing behaviour. We've now been tracking emotional response to concerns for five months and show the top ranked 'implicit'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



A LOCAL LOCKDOWN MAP OF THE UK

EXPECTATIONS OF A LOCAL LOCKDOWN HAVE LARGE VARIATION ACROSS THE UK

Map of UK showing % of people in each region who think a local lockdown likely to be imposed in next month



Given the UK government policy of implementing local lockdowns on the basis of Covid-19 infection rates, we asked the UK what they thought about their local area. The data shown is based on the % of people within each UK region who either 'Definitely' or 'Probably' think that a local lockdown will be imposed in their area within the next month.

There are large regional variances across the UK with the regional hot spots being within major conurbations where large cities are present with the top 3 being, London, Yorkshire/Humber and the North West. Both these northern regions have densely populated cities such as Manchester and Liverpool (North West) and Leeds and Bradford (Yorkshire), which have already been the subject of lockdown within specific districts.

For London there is a large variation between the City itself (45% expect a local lockdown within the next month) when compared to the home counties in the South East region surrounding London, where only 20% of people think a local lockdown will be imposed.

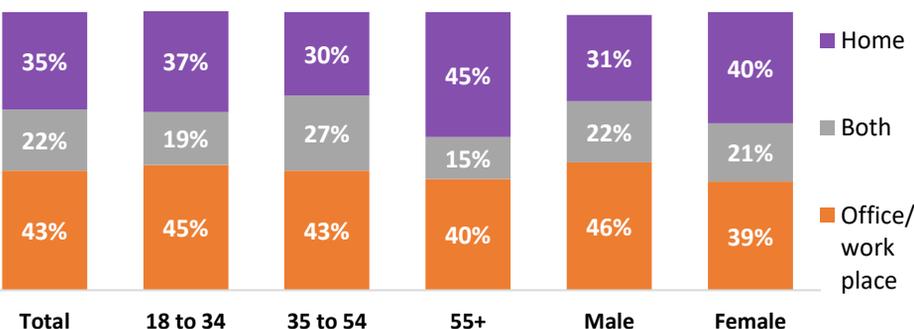
The East Midlands is next highest, which has already seen a local lockdown within the city of Leicester, indicating residents expect a repeat in the coming month.

There is a clear pattern between the density of population and peoples' expectation of a local lockdown.

FLEXIBILITY IS GOING TO BE KEY FOR RETURNING OFFICE WORKERS

We asked office based workers who were still working from home when they would expect to be returning to the office and what their personal preference would be for their working set-up in the future. Whilst around 45% of workers expect to return during the Autumn, a sizeable 38% do not expect to return until 2021 or at any point in the future.

Do you have a preference when it comes to your working set-up?



This reveals that the enforced home working during lockdown has led to home workers re-evaluating their work set up.

Employers are going to need to consult and listen to their workers as people are equally divided between a preference for the office vs home working, with 1 in 5 happy to have a flexible mix. Under 35s and men have highest preference for the office, whereas women and over 55's value flexibility of home working.

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.

This Maru/Reports initiative is brought to you in partnership by Maru/Matchbox and Maru/Blue.