

RESEARCH REPORT

COVID-19 Opinion Tracker

14 APRIL 2020 | EDITION 1

Contents

| | |
|---------------------------------|---------|
| METHODOLOGY | 3 |
| SEVEN KEY FINDINGS | 4 – 5 |
| 1 | |
| GOVERNMENT DECISIONS | 6 – 7 |
| 2 | |
| LEVELS OF CONCERN | 8 – 9 |
| 3 | |
| VIEWS OF WORK DURING THE CRISIS | 10 – 12 |

4

| | | |
|---|-----------------------------|---------|
| 5 | THE ROLE OF BUSINESS | 13 – 15 |
| 6 | PERFORMANCE OF INSTITUTIONS | 16 – 17 |
| 7 | EXPECTED DURATION | 18 – 19 |
| | BEHAVIOUR AFTER THE CRISIS | 20 – 21 |
| | CONTACT DETAILS | 22 |



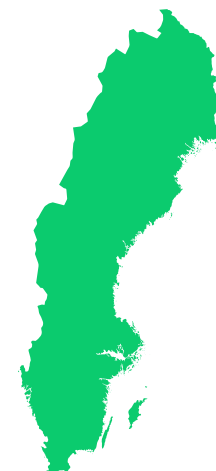
Methodology

Polling conducted by KEKST CNC

Nationally representative sample of



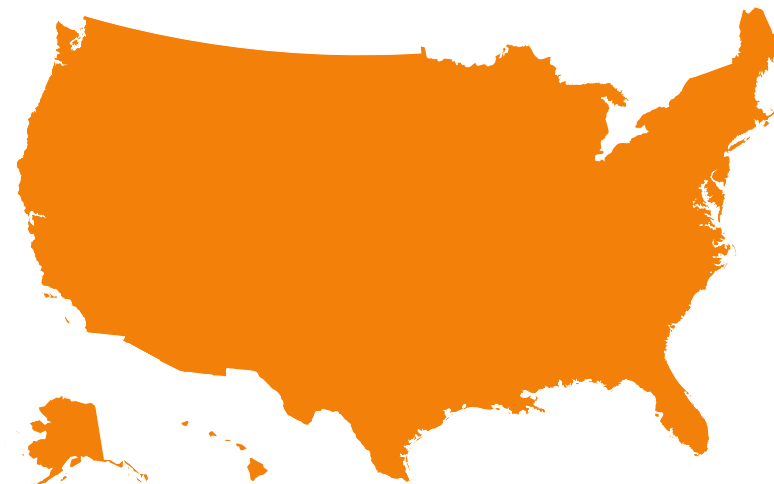
1,000 adults
in Great Britain



1,000 adults
in Sweden

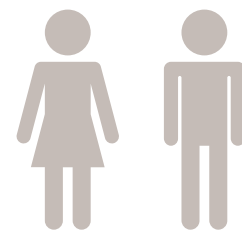


1,000 adults
in Germany



1,000 adults
in the United States

Fieldwork took place on
30th March - 3rd April 2020



Quotas and weights on **gender, age,**
and region in each country

Margins of error of **+/- 3.3%**
for all markets

Research conducted three weeks after pandemic declared by WHO.
Fieldwork from 30th March to 3rd April 2020. Polling conducted by Kekst CNC Research, data and analytics, covering qualitative and quantitative products and consulting services.



Seven Key Findings

1

Business behaviour matters

Large numbers of people across the UK, the US, Germany and Sweden think that **business should “step up” during the coronavirus outbreak**, and that businesses should prioritise others rather than themselves.

So far, business is seen to be doing just that – **68% of people in the UK, 61% in the US, 57% in Germany and 55% in Sweden all say businesses in their country are stepping up**. The costs of being seen not to act responsibly are high, with large numbers of people saying they will be far more likely to **give their custom to a business that they think has behaved well during the coronavirus outbreak**, rather than those that have not.

2

Employees trust their bosses – but potential cracks are appearing

Employees across all countries surveyed **feel they have received regular communications from their employers, and trust their bosses to keep them informed**. But workers are unclear on the longer-term effect on their jobs: 20-30% of workers across the UK, US, Germany, and Sweden say that they do not know how to carry on doing their job.

New home-workers are not finding it straightforward either, with significant minorities saying their productivity has gone down and one in three workers in the US saying they have not had enough support from their employer since they started working remotely.

3

There is huge public appetite for government intervention and bailouts

In a context of unprecedented government intervention in recent weeks, **consumers are extremely supportive of such moves**. Large numbers – as high as 82% in the UK – are comfortable with government taking on a bigger role during the coronavirus outbreak.

Majorities in the UK, Germany and Sweden (and 44% in the US) agree that government **should bail out any company that is in trouble during the pandemic**.



Seven Key Findings

4

Consumer behaviour is set to change

Sectors cannot assume consumer behaviour will go back to normal after the outbreak.

This research suggests **real changes are coming**, with people across the four countries surveyed saying they will travel abroad less, **travel by plane less**, **go to public events less**, and **eat out at restaurants less after the crisis has passed** – particularly in the US.

Nor can we assume that behaviours in place now will continue post-crisis – there is no sign that charity or community work will boom, that takeaway and delivery services will prosper afterwards, or that people will want to continue working from home.

5

The public overwhelmingly backs saving lives over protecting the economy

When asked to choose between limiting the spread of the disease and protecting the economy, significant majorities across all four countries surveyed opted for the former – **even if the trade-off is a major recession or depression and the loss of many jobs and businesses**. This is key to understanding democratic governments' decisions.

6

Public opinion in the UK on the crisis is substantially different to other countries

There is growing evidence of **'UK exceptionalism'** in the data. People in the UK are more likely to have gained confidence in their government, key institutions, and businesses in recent weeks than people in the US, Germany, or Sweden. They are also significantly more likely to think the outbreak will last longer than a year than residents in other countries, and are the most adamant that saving lives must come above protecting the economy – **by a margin of 74% to 13%**.

7

The media's reputation is under significant threat

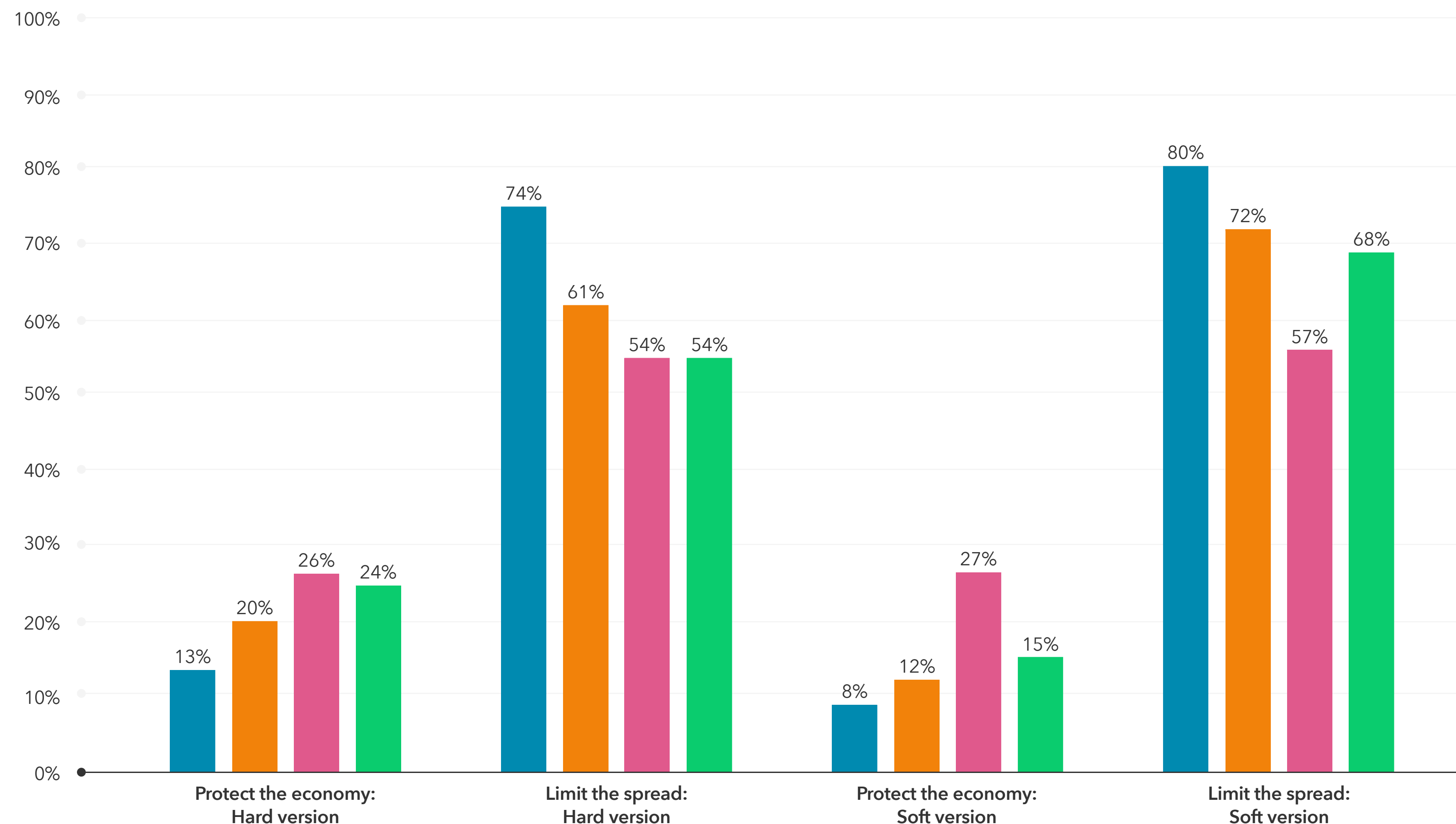
While people are generally positive about the way various sectors and organisations have responded to the outbreak, one glaring exception is the media: **we are seeing a substantial fall in public confidence in the media in all surveyed countries since the crisis began**. It is at its sharpest in the UK and Sweden, with a net fall in confidence of 21 points in the last two weeks alone.

1 Government decisions



The public wants the government to step in to support the economy and businesses during this time

Graph 1: Percentage of respondents in each country opting for a given statement



Cross-market comparisons

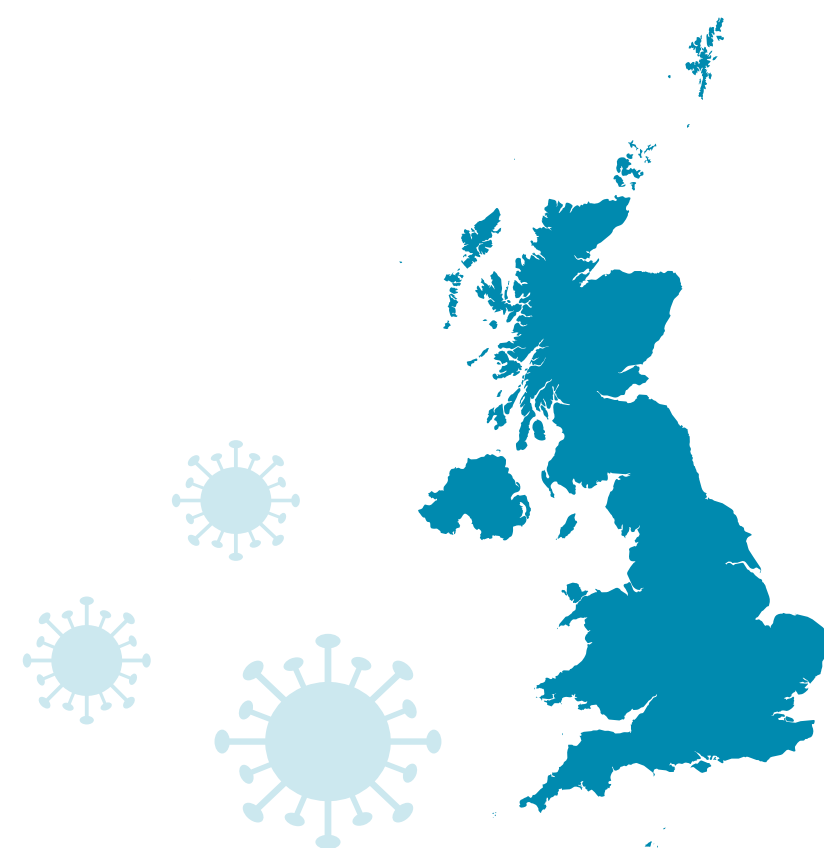
- To investigate the public's views on whether government should prioritise limiting the spread and saving lives, or protecting the economy, respondents in all four markets were given two statements to choose from. However, a split sample technique was used, asking half the sample one 'softer' set of statements which framed the economic cost as "businesses fail and people lose their jobs" and the other a 'harder' set of statements which framed the economic cost as "a major recession or depression, leading to businesses failing and many people losing their jobs".



1 Government decisions



The public wants the government to step in to support the economy and businesses during this time



In the UK

80%

prioritise limiting
the spread of
COVID-19

- Across all markets the message is clear: when asked upfront, **the public prioritise limiting the spread of the disease**, even if it means costs to the economy. This is particularly stark in the UK, where 80% prioritise limiting the spread when faced with job losses and business failure, and still 74% do so when faced with a major recession or depression and many job losses and business failures.



Germany is the
country most
likely to prioritise
protecting the
economy

- When presented with the softer language on the economic consequences, Germany is the country most likely to prioritise protecting the economy – but **'limit the spread' is substantially ahead of it by 57% to 27%**. The harder language on economic consequences does reduce support for limiting the spread (by -6 in the UK, -11 in the US, -3 in Germany and -14 in Sweden), and brings Germany and Sweden in line with each other as most likely to support protecting the economy. But here the margin remains one of around 30 points **in favour of limiting the spread even if that means substantial economic damage in both countries** – and higher still for the UK (61 points) and the US (41 points).

76%

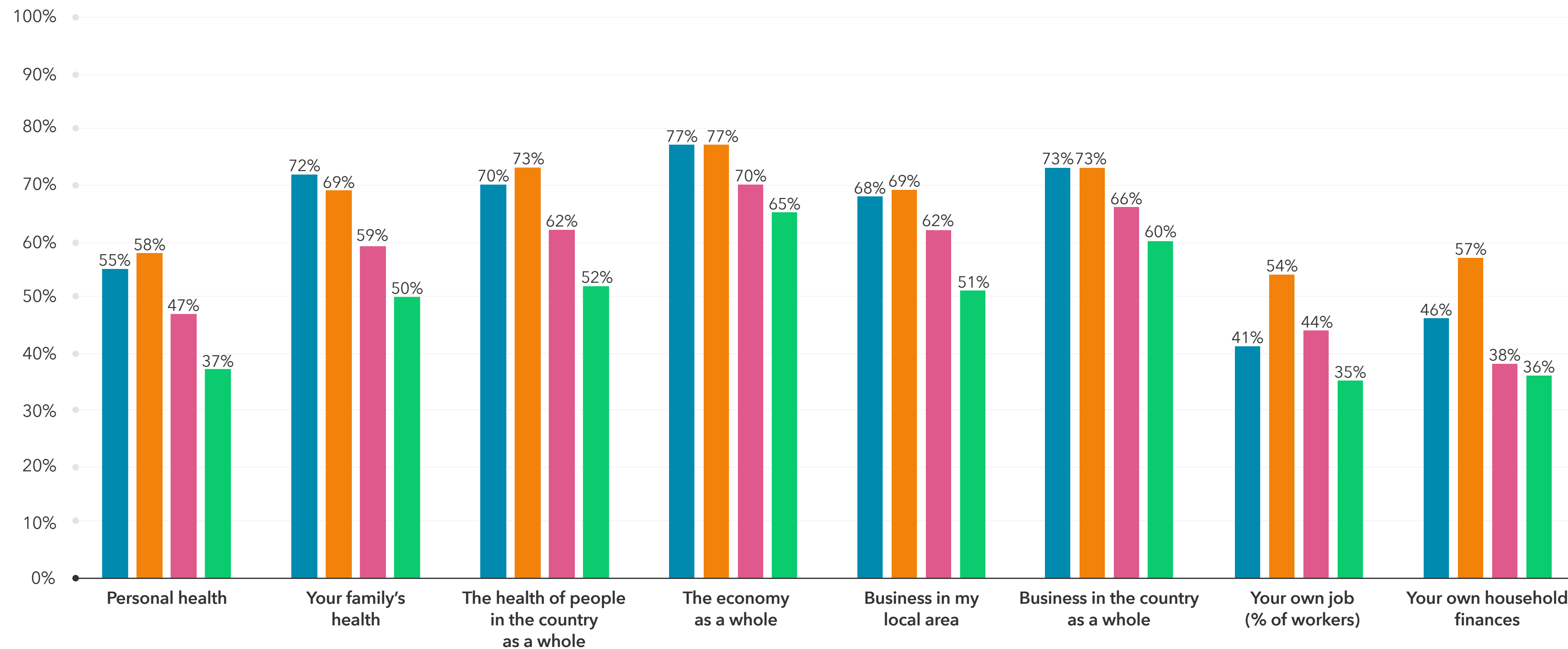
in Germany say
the government
should bail out any
company in trouble

2 Levels of concern



Concerns about the impact on the economy are greater than concerns about individual health

Graph 2: Differences in level of 'very concerned' (8-10/10) in USA, UK, Germany and Sweden



Cross-market comparisons

- Respondents across all four countries were asked to rate on a scale of 1-10 how concerned they are about the impact of the coronavirus on a number of things. Any response ranking at 8 or above is described as someone being "very concerned" about an issue.

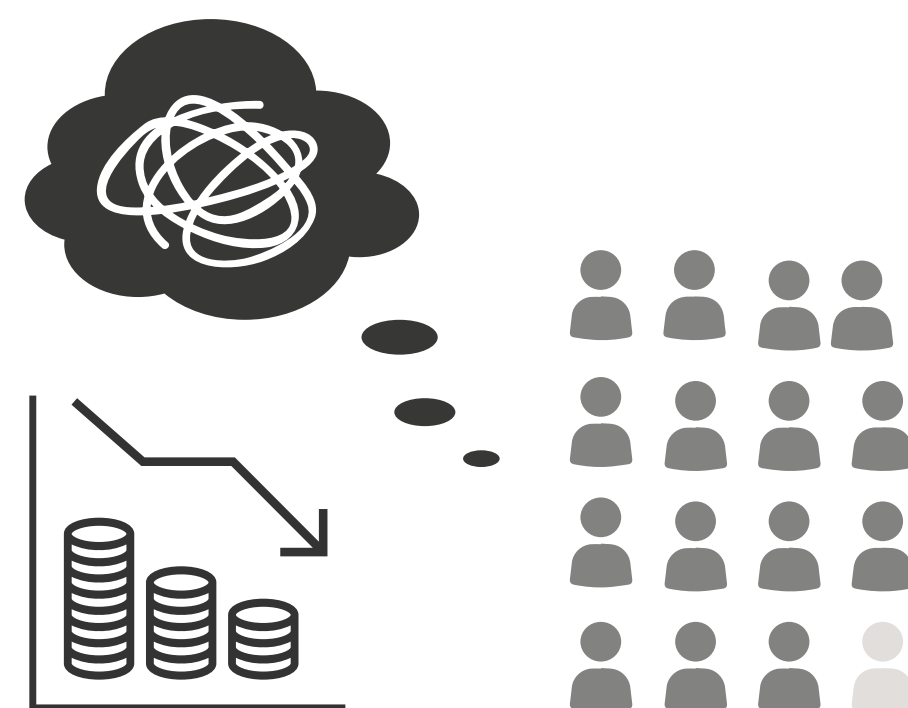




2 Levels of concern

Concerns about the impact on the economy are greater than concerns about individual health

- People in the US and the UK are the most concerned about the impact of coronavirus; on their personal health, their family's health and the health of people in their country as a whole. The two countries are also the most concerned about the economy, businesses in their countries, and businesses in their local areas. Germany is the next most concerned, follow by Sweden, where people are much less concerned about the impact of the virus on health, economy, and business.



- Big majorities of people across all countries are 'very concerned' about the impact of coronavirus on business in their country: 73% of Brits and Americans, 66% of Germans and 60% of Swedes. Similar majorities apply when asked about businesses in people's local areas – with 68% of British people, 69% of Americans, 62% of Germans and, lower but still just a majority, 51% of Swedish people 'very concerned' about the virus' impact on local businesses.

51%
of Swedes are
'very concerned' about
the virus' impact on
local businesses

In the US
73%
of are 'very concerned' about the
impact of the virus on the health
of people in the country as a whole

- Across all countries surveyed, people are more concerned about the impact of the virus on the country or economy as a whole than they are about the impact it will have on themselves or their local areas. For example:
 - In the United States 73% are 'very concerned' about the impact of the virus on the health of people in the country as a whole, while 58% are 'very concerned' about the impact of the virus on their own health.
 - In Germany, 70% are 'very concerned' about the virus' impact on the economy, but only 38% - nearly half – are 'very concerned' about the virus' impact on their own household finances, and 44% of workers about their own job.

57%
of workers in the US
are 'very concerned'
about their own job

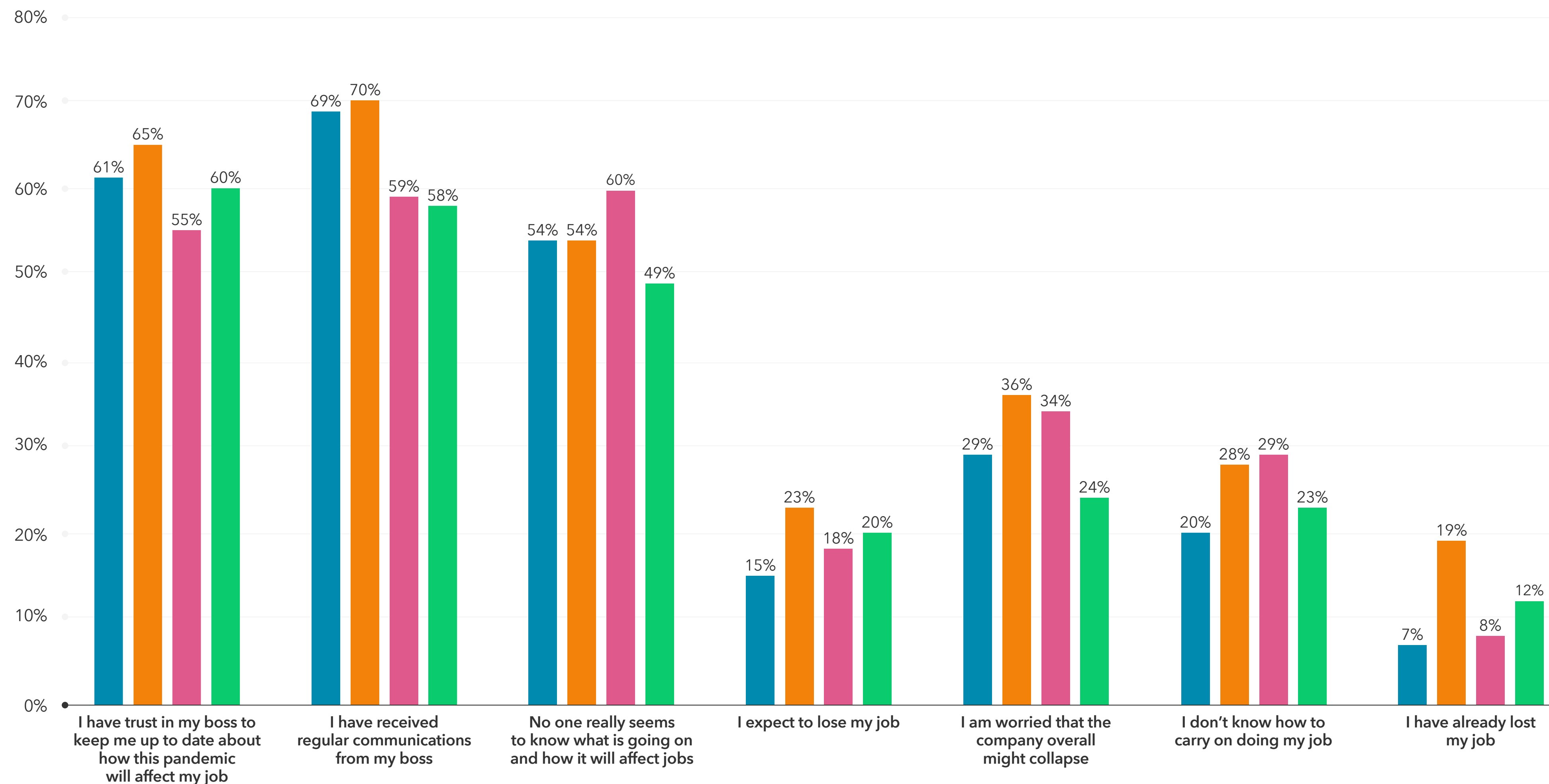
- Although people in the US are equally concerned as people in the UK about the economy and business, US workers are disproportionately concerned about their own jobs and their own household finances. More than half of American workers are 'very concerned' about their own job, compared to 41% of Brits, 44% of Germans, and 35% of Swedes – and 57% of Americans are 'very concerned' about their own household finances, compared to 46% of Brits, 38% of Germans, and 36% of Swedes.

3 Views of work during the crisis



People are worried about their jobs

Graph 3: Percentage of workers saying 'Strongly agree' or 'Slightly agree' to each statement



Cross-market comparisons

- Respondents across all four countries were asked whether they agreed or disagreed with a set of statements referring to their own employment and job. All statements here are filtered just by those who said they are working full-time or part-time, apart from "I have already lost my job" which is presented for all respondents.

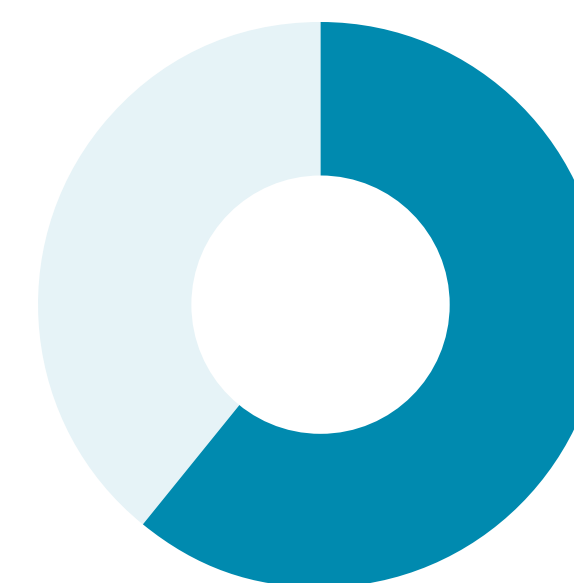


3 Views of work during the crisis



People are worried about their jobs

- Despite divergences elsewhere, **attitudes towards employment and jobs are relatively similar across markets**. Workers across all four countries say they have **received regular communications from their employers** – seven out of ten workers in the UK and US and six out of ten workers in Germany and Sweden. Similarly, the majority of workers have **trust in their boss to keep them up to date about how the pandemic affects their job**, with 65% of American workers agreeing with that statement, 61% of British workers, 60% of Swedish workers and – marginally lower – 55% of German workers. Though most say they do, between 20% and 30% of workers say they **do not know how to carry on doing their job** – with the highest rates in the US (28%) and Germany (29%).
- There is a broader concern that **“no one really seems to know what is going on and how it will affect jobs”**. German workers are most likely to think this, with 60% of them agreeing with the statement, and 54% of British and American workers. Swedish workers are less likely to agree with this statement, but 49% still agree with it, with 27% disagreeing.
- Though more disagree than agree, this still leaves **more than one-third of workers in the US (36%) worried that their company will collapse**. This applies to 34% of German workers, 29% of British workers and – a smaller proportion – 24% of Swedish workers. Not insignificant proportions say they **expect to lose their job** – almost a quarter in the US (23%) and, despite lower concerns about the virus overall, one-fifth (20%) of Swedish workers. **British workers are the least likely to expect to lose their jobs**, with only 15% saying so.
- Asked **whether they have actually lost their job**, 7% said so in the UK and 8% in Germany. But in Sweden this was 12%, and – in line with American concerns about the economy being higher – at its highest level of 19% in the US.
- 39% of Americans say they are now **working from home**. The same goes for 31% of Germans, 30% of Brits, and 24% of Swedes.



61%
of Brits trust in their boss
to keep them up to date
about how the pandemic
affects their job

//
**No one really knows
what is going on and
how it will affect jobs**
//

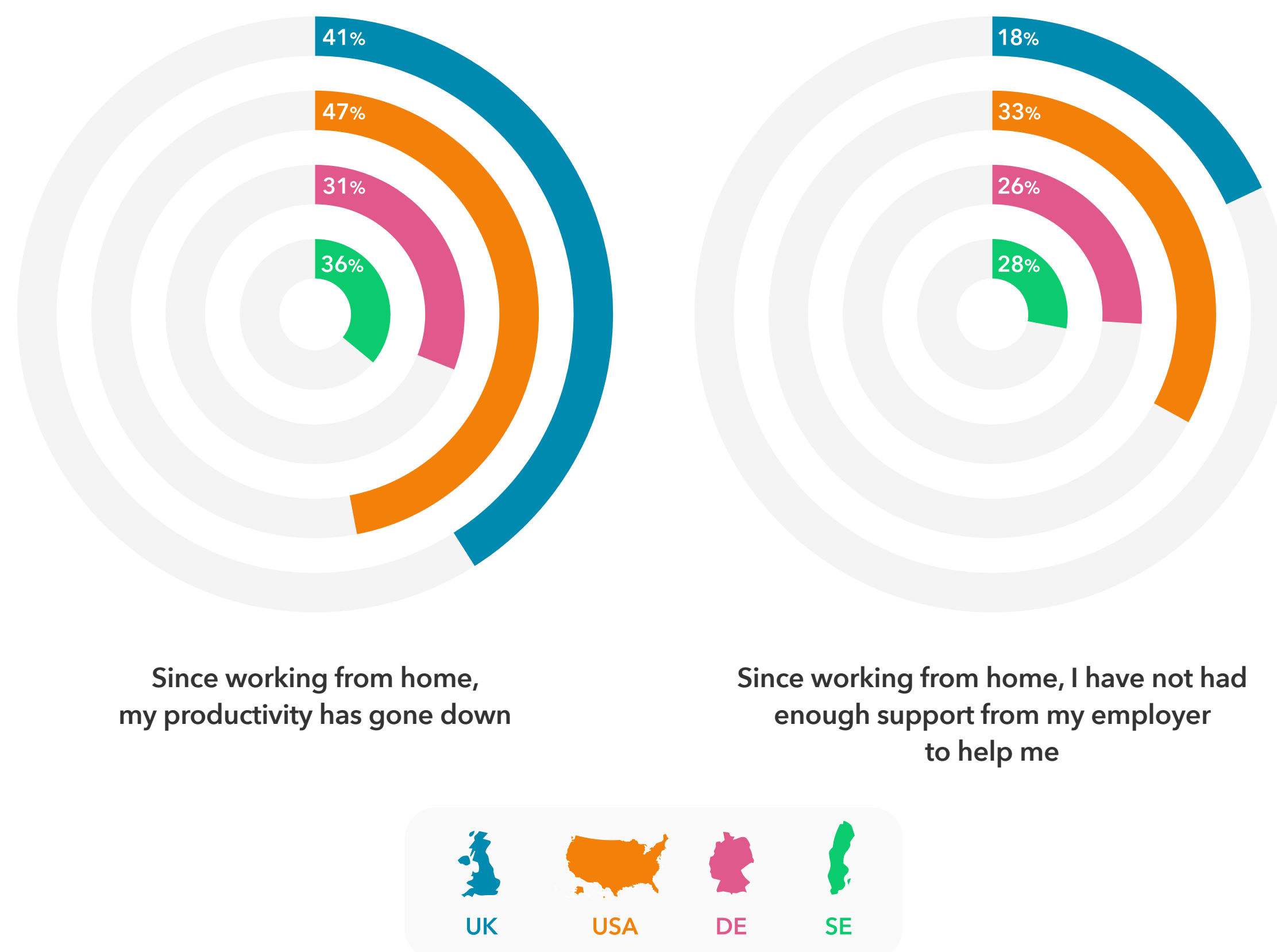
1 in 3 
of workers in the US (36%)
are worried their company
will collapse

3 Views of work during the crisis



Work has changed for many and, although companies are generally trying to stay in touch, productivity of those now working from home has fallen

Graph 4: Percentage of workers who are currently working from home saying 'Strongly agree' or 'Slightly agree' to each statement



- Looking only at those who are working from home, there are differences in the perceived impact of productivity in each country. In the UK, 41% say their productivity has gone down since working from home, while 41% also say this is not the case. The case is similar in Sweden, albeit a lower amount, with 36% saying their productivity has gone down and 34% saying it has not. **American workers seem to be struggling more with working from home**, with 47% saying their productivity has gone down and only 29% disagreeing. **German home-workers are marginally more positive than the UK and Sweden**, with 31% saying it has decreased their productivity, compared to 39% who disagree.

- Views of employer support for home workers differs too. Only 18% of UK home-workers say they have not had enough support, but this rises to one-in-four (26%) for Germans, 28% for Swedes, and a full one-third (33%) of American home-workers. Again, **American workers seem more lacking in work-from-home support than other countries**.



7/10 workers in the UK receive regular communications from their employers

- Workers across all four countries say they have received regular communications from their employers – seven of ten workers in the UK and US and six of ten workers in Germany and Sweden. Similarly, the majority of workers have trust in their boss to keep them up to date about how the pandemic affects their jobs, with 65% of American workers agreeing with that statement, 61% of British workers, 60% of Swedish workers and – marginally lower – 55% of German workers.

1 in 4

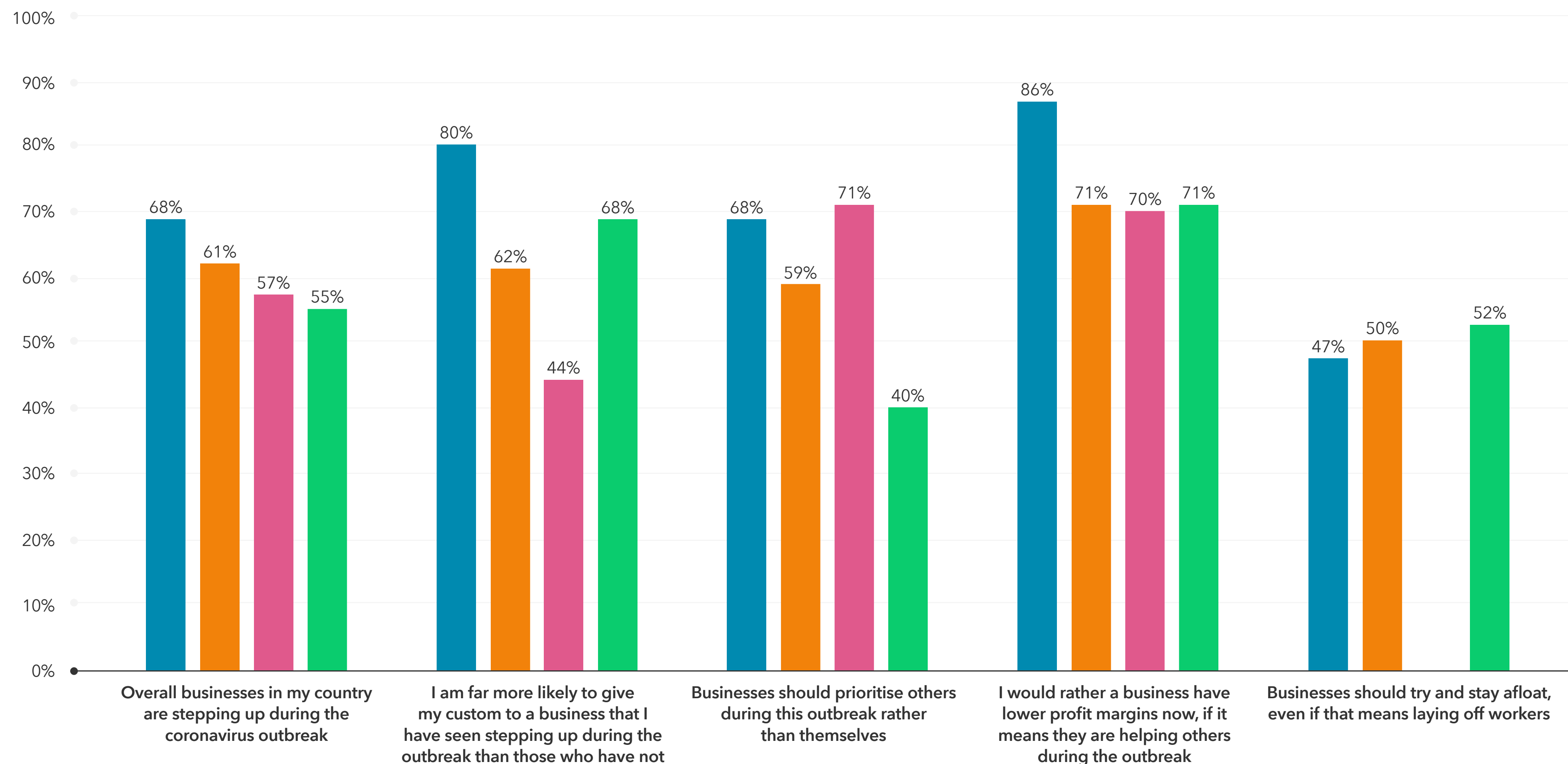
German home-workers say they have not had enough support

4 The role of business



Businesses are seen to have a duty to wider society and have been seen to be stepping up

Graph 5: Percentage of the public saying 'Strongly agree' or 'Slightly agree' to each statement



Cross-market comparisons

- Respondents across all four countries were asked whether they agreed or disagreed with a set of statements referring to businesses and government during the crisis

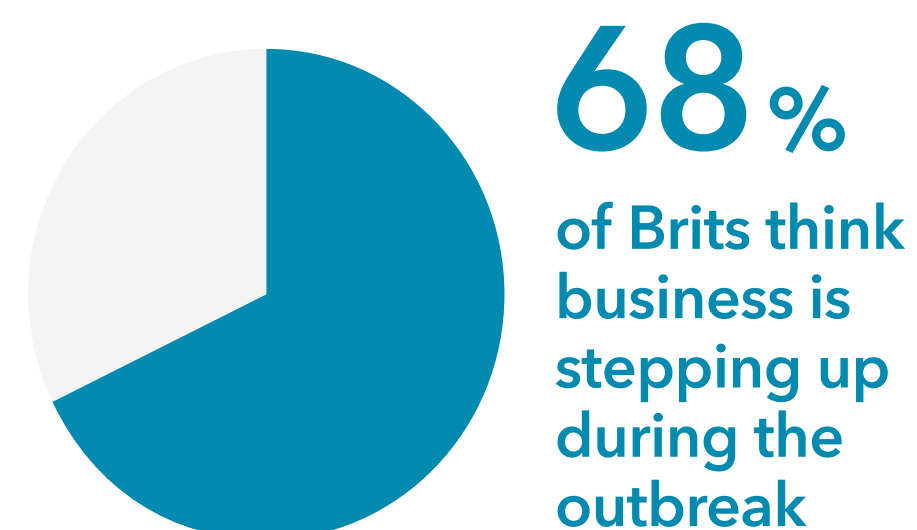


4 The role of business



The public wants the government to step in to support the economy and businesses during this time

- Business behaviour clearly matters in this crisis. **Large majorities across countries think that business should step up during the crisis** – though there are some differences. Large numbers in the USA (62%), Sweden (68%) and most strikingly the UK (80%) say **they will base which business they give custom to on how they responded during the coronavirus**. Germany is the exception, where 44% agree and a large proportion say they do not have an opinion. **Large margins also say business should prioritise others during the outbreak rather than themselves**. Here Sweden is the exception with 40% agreeing, due to a large proportion not taking a view. There is, though, **a universal view that it is better for a business to have lower profit margins now if it means they are helping others during the outbreak** – with around 70% agreeing in the US, Germany and Sweden, and an enormous 86% in the UK.



- Not only do people expect business to step up, **they largely think that they are**. 68% of Brits think business is stepping up during the outbreak, with 61% of Americans, 57% of Germans, and 55% of Swedes saying the same.
- Although very large majorities say they would rather a business have lower profit margins if it means helping others, people also think that **businesses should try and stay afloat at the current time - even if that means laying off workers**. 52% in Sweden think this, 50% in the US, and 47% in the UK. Although they want them to help, the public are clearly aware that businesses need to survive after the crisis too.

There is a universal view that it is better for a business to have lower profit margins now if it means they are helping others during the outbreak

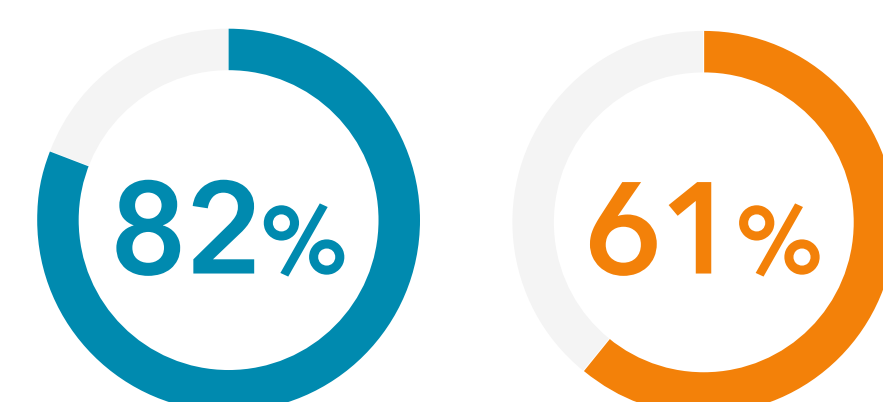
4 The role of business



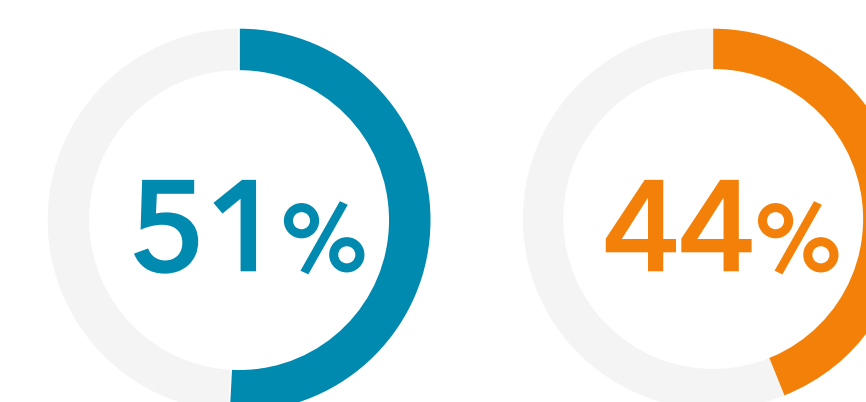
The public wants the government to step in to support the economy and businesses during this time

- The era of 'Big Government' is back, with **large majorities comfortable with government taking on a bigger role during the coronavirus outbreak in all four countries** – rising to 82% in the UK.
- That also applies to bailouts. **Majorities in the UK, Germany and Sweden agree that governments should bail out the most important companies that are in trouble because of the outbreak**, as do a sizeable portion of Americans with 44% agreeing and 21% disagreeing. But this also extends to **any company** that is in trouble because of the outbreak, with 51% of Brits, 50% of Swedes, 44% of Americans, and 76% of Germans saying the government should bail out **any company** in trouble because of the coronavirus outbreak.

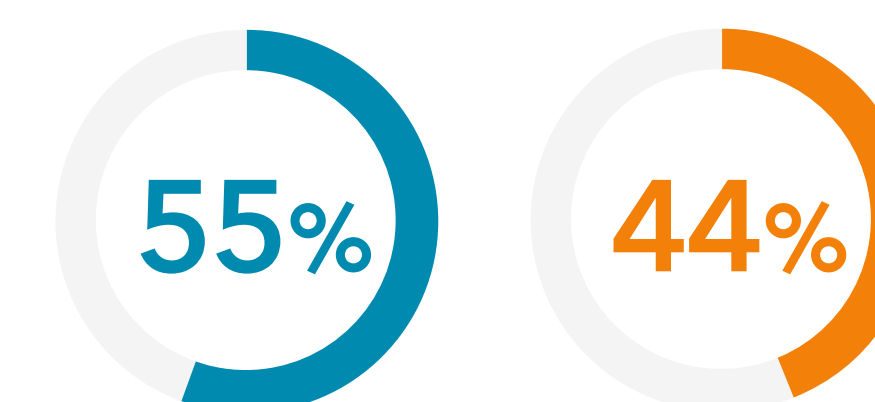
Graph 6: Percentage of the public saying 'Strongly agree' or 'Slightly agree' to each statement



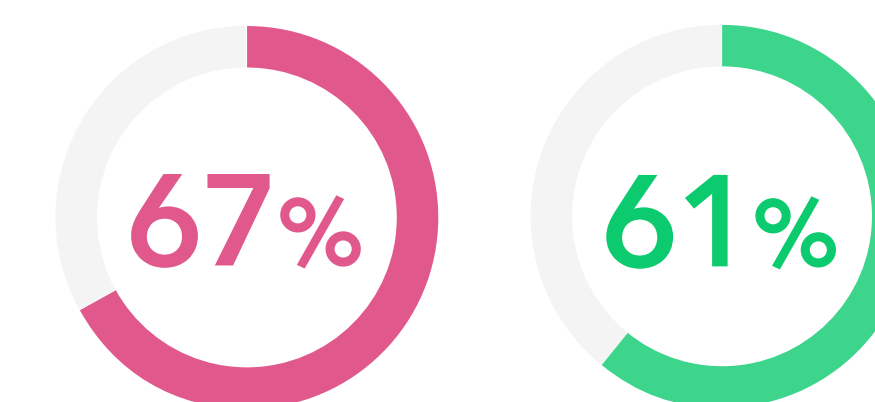
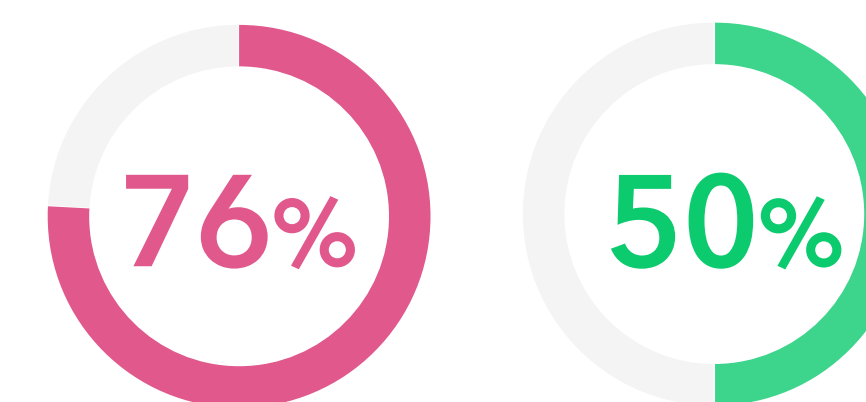
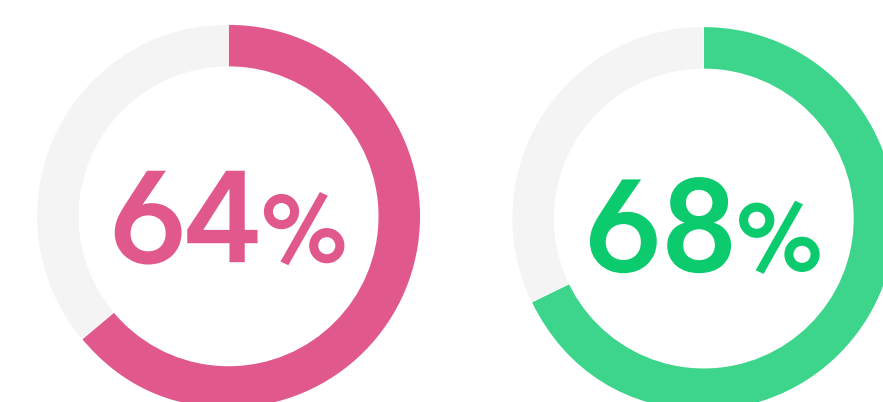
I am **comfortable** with government taking on a **bigger role** in the economy during the coronavirus outbreak



The government should bail out **any company** that is in trouble because of the outbreak



The government should bail out the **most important** companies that are in trouble because of the outbreak



UK



USA



DE



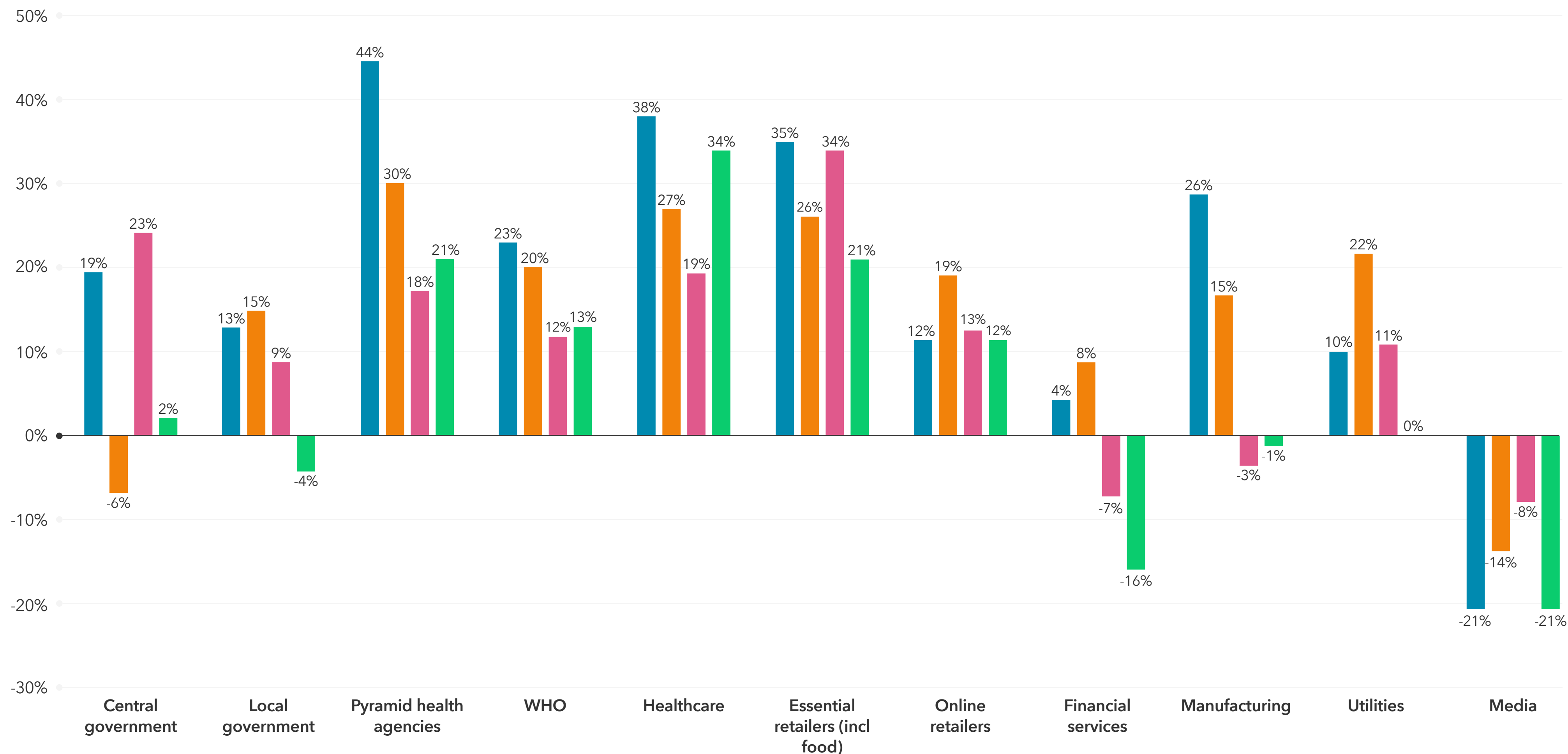
SE

5 Performance of institutions



Certain types of businesses are making a positive impression on the public, alongside the public health authorities

Graph 7: Net effect on confidence of respondents per sector in UK, USA, Germany and Sweden



Cross-market comparisons

- Respondents across all four countries were asked whether the activities of a number of sectors over the last two weeks had increased or decreased people's confidence in those sectors' ability to respond effectively to the coronavirus outbreak. A net 'confidence score' was calculated by deducting the proportion of respondents who said they had decreased confidence from those who said they had increased confidence



5 Performance of institutions



Certain types of businesses are making a positive impression on the public, alongside the public health authorities

Cross-market comparisons

- Most sectors across most countries have seen **increased public confidence** over the last two weeks. **Public health agencies, healthcare, and essential retailers** have seen particular increases in confidence across all four countries. For example, 54% of UK adults say they have increased confidence in essential retailers, with only 19% saying reduced confidence and 24% saying it has made no difference (a net score of +35), and in Germany 48% say they have more confidence in essential retailers with only 14% saying reduced confidence and 34% saying it has made no difference (a net score of +34)
- **The UK has seen some of the biggest increases in public confidence across some sectors.** For example, the net improvement to confidence for public health agencies in the UK is +44, compared to +30 in the US, +18 in Germany, and +21 in Sweden. Similar patterns are clear for healthcare and manufacturing companies, with the UK registering net improvements to confidence of +38 and +26

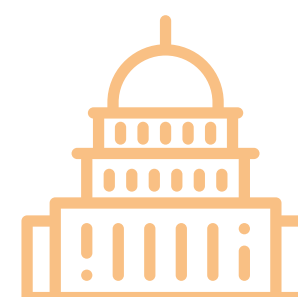
54%

of UK adults say they have increased confidence in essential retailers

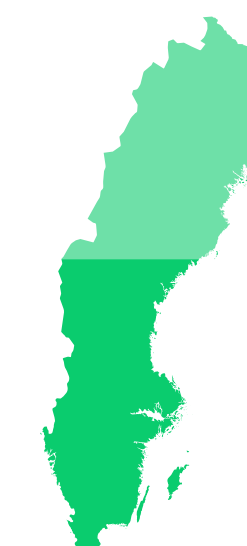


35%

of Americans have decreased confidence in the United States federal government



- There is some divergence on views of government. **The UK and Germany see improved confidence in their national governments**, with 40% of Brits saying it has increased their confidence, 21% decreased, and 32% saying it has made no difference. Germany is similarly positive, with 44% saying it has increased their confidence, 21% decreased and 29% that it has made no difference. **The United States federal government is greeted with a more negative picture**, with 29% of people saying they have increased confidence in it, 35% decreased confidence, and 29% saying it has made no difference to their view. **In Sweden, the effect is neutral**, with people more likely to say it has made no difference (35%), than increased confidence (32%) or decreased confidence (30%). **The US has, however, seen an uptick in confidence in local government** – with 40% saying they have increased confidence in local government and agencies, 25% saying decreased confidence and 29% saying it has made no difference



56%

of Swedes say their confidence in local government is unchanged

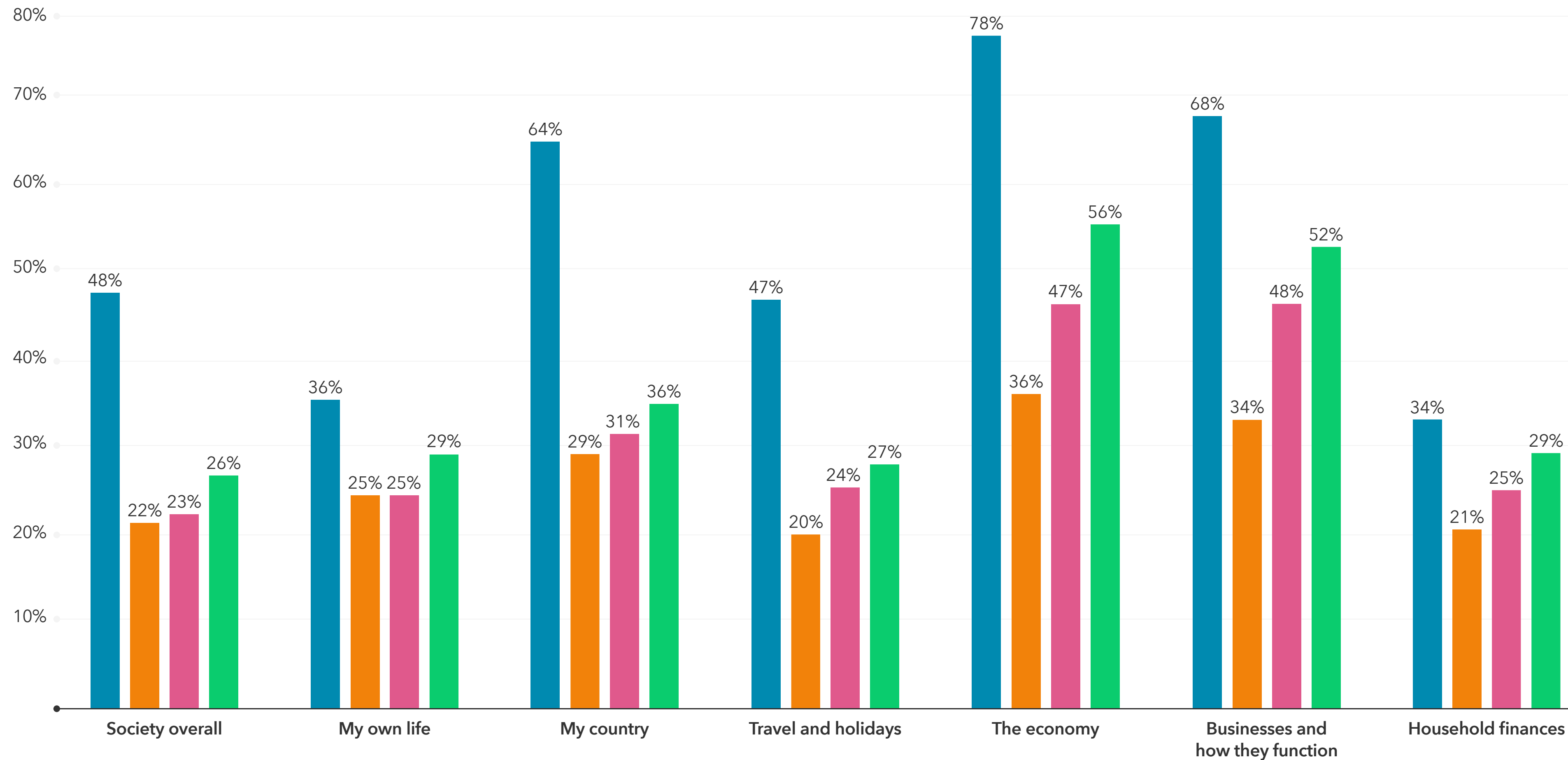
- **Sweden is much more likely than other countries to say that the actions of various sectors over the last two weeks has made no difference to their confidence in them** – likely a result of them not being in a state of lockdown. For example, 56% say they are no more or less confident in local government, 48% say the same of the WHO, and 50% say the same of essential retailers. The number who say their levels of confidence have not changed is higher for online retailers (61%), financial services (53%), manufacturing (60%) and utilities (69%), but these four sectors see similarly low engagement in other countries too

6 Expected duration



People think the impacts of the pandemic will last a long time

Graph 8: Percentage from each country choosing "Longer than a year" for each issue



Cross-market comparisons

- Respondents across all four countries were asked how long they think the effects of the virus on a range of different issues will last for



6 Expected duration



People think the impacts of the pandemic will last a long time

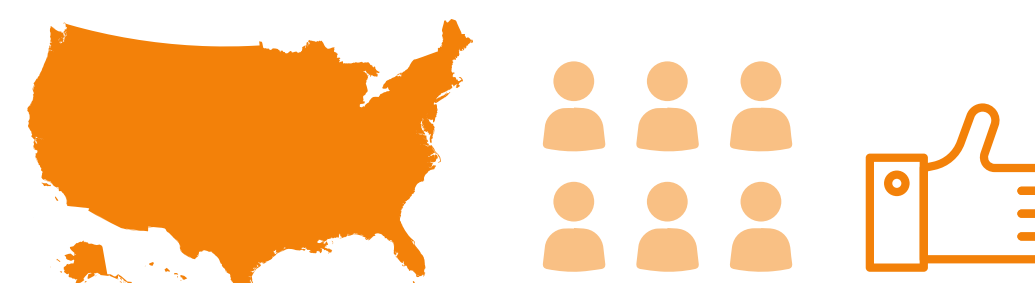


- **People in the UK are much more likely to expect the effects of the outbreak to last for more than a year.** That applies to the impact on society overall, their own life, the country, travel and holidays, the economy, businesses, and people's own household finances.

78%

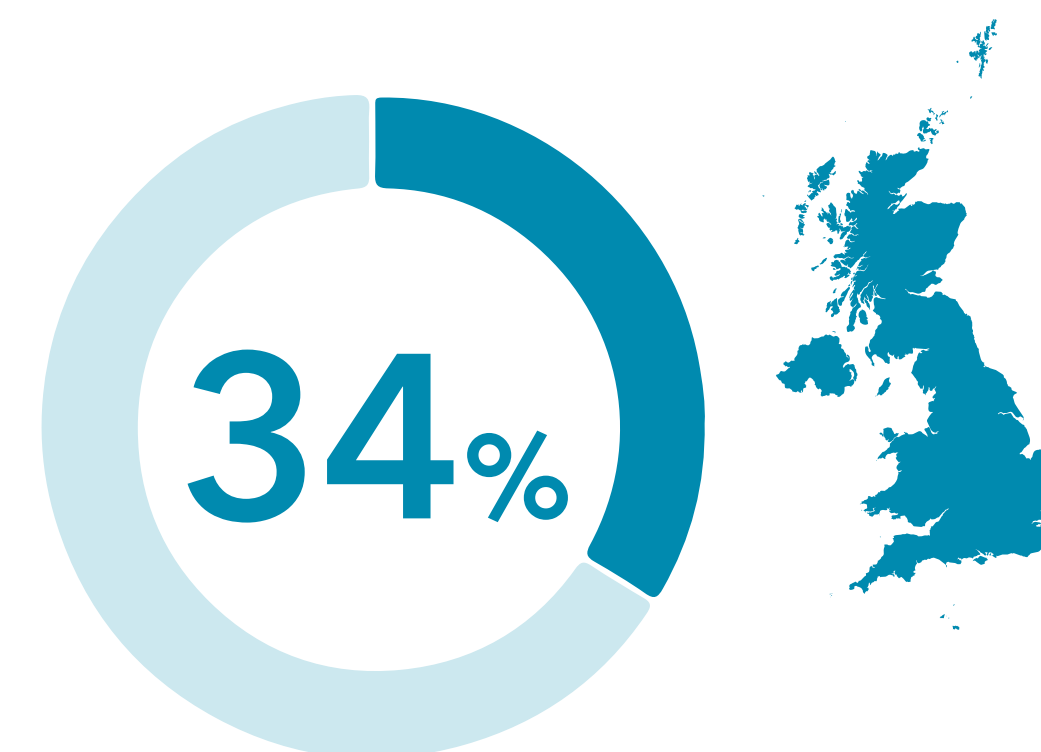
For example, 78% of British people think the impact on the economy will last beyond 2020, while only 36% of Americans think the same.

- Though significantly lower than the UK, people in Sweden expect the outbreak to last beyond the end of the year more than people in Germany, and the **American public are the most optimistic that the outbreak will be over earlier.**



- Across all countries, people think the **impact on the economy and on business will last longer than on them personally or on society.** 47% of Germans and 56% of Swedes expect the economic impact of the virus to be felt for longer than a year, and 48% and 52% respectively feel the same about the impact of the virus on businesses and how they function. As with the economy, people in the US are the least likely to say that the impact on businesses will last beyond the end of 2020.

- Although substantial proportions see the economic and business impact of the virus continuing for a long time, **fewer think this about their own household finances.**

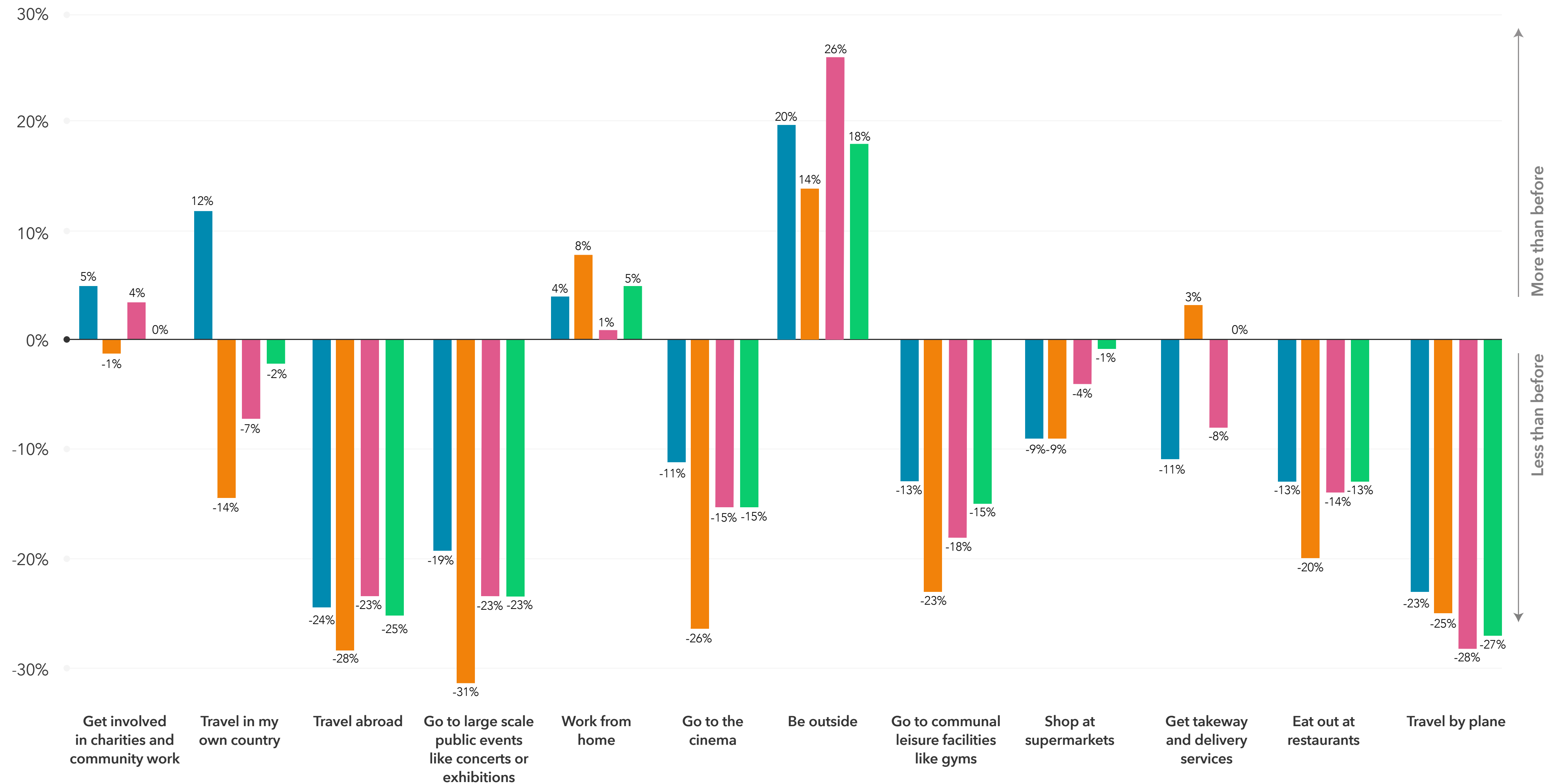


This disconnect between the personal and the general exists across countries, and even in the more pessimistic UK, only 34% of Brits think the impact on their own finances will last longer than a year despite double that number (68%) thinking the impact on the economy will last that long.



People's behaviour will change after the outbreak is over, with big implications for business

Graph 9: Net percentage of 'more than before' or 'less than before' for each consumer behaviour



Cross-market comparisons

- Respondents across all four countries were asked how they expected their own lifestyle after the outbreak is over to be different from before the outbreak took place for a range of consumer behaviours





People's behaviour will change after the outbreak is over, with big implications for business

- Before assessing the net changes, it is important to note that significant majorities across countries say **their behaviour will not change between prior to the outbreak and after**. For example, 65% of British people say they will eat out at restaurants the same amount as before, 60% of Swedes say they will go to gyms the same amount as before, and 57% of Americans and 70% of Germans say they will shop at supermarkets the same amount as before. However, this is accounted for in the above graph, which tracks the net change in behaviour that people are saying they will follow.

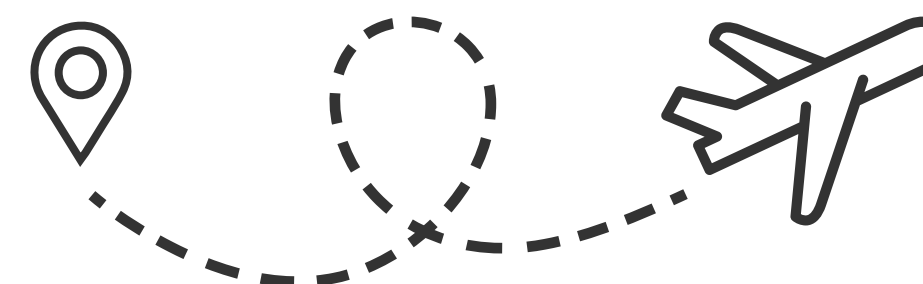
65%



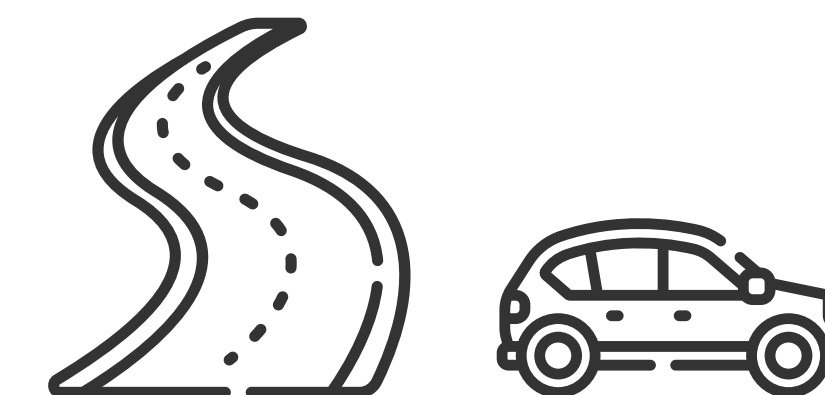
of British people say they will eat out at restaurants the same amount as before

Significant numbers of people are planning to travel by plane less

- This suggests that **many consumer behaviours will decline after the outbreak is over**. For example, on balance significant numbers are **planning to travel by plane less** in each country, **travel abroad less**, and **go to large scale public events like concerts or exhibitions less** – particularly in the US. Other behaviours that people say they will do less include going to the cinema, going to communal leisure facilities like gyms, and eating out at restaurants.



- The behaviour that sees the **largest expected increase is being outside**, with significant margins saying they will be outside more than before the outbreak the started – particularly marked in Germany (+26).
- **There does not look to be a great charity and community work resurgence after the outbreak, with only minor net changes in behaviour expected** – and actually a small decline (-1) in the United States. **Nor are takeaway and delivery services likely to prosper in the long-term**, with significant net reductions expected in the UK and Germany, and only a marginal increase in the US.



- **Working from home does not look set to be a new behavioural pattern**, with only a small net increase in the amount of expected people working from home – and only +1 in Germany. **There are also net expected reductions in use of supermarkets**, particularly in the US and the UK (both -9 net).
- **Travel in one's own country is also expected less**, particularly in the US (-14) and Germany (-7). The exception to this is in the UK, where there is a net expected increase (+12) in the amount of travelling within the country.

For further information please contact
Covid19Research@kekstcnc.com