

RESEARCH REPORT

# COVID-19 Opinion Tracker

27TH APRIL - 1ST MAY 2020 | EDITION 2

# Contents

---

**METHODOLOGY** 3

---

**SEVEN KEY FINDINGS** 4 – 5

---

**1 GOVERNMENT DECISIONS** 6 – 7

---

**2 LEVELS OF CONCERN** 8 – 9

---

**3 THE LABOUR MARKET DURING THE CRISIS** 10 – 11

---

**4 PERFORMANCE OF INSTITUTIONS** 12 – 13

---

**5 LEVELS OF INFLUENCE** 14 – 15

---

**6 EXPECTED DURATION** 16 – 17

---

**7 BEHAVIOUR AFTER THE CRISIS** 18 – 22

---

**8 VIEWS OF BUSINESS SUPPORT** 23 – 24

---

**9 BUSINESS BRANDS** 25 – 28

---

**10 A CHANGED ECONOMY?** 29 – 32

---

**11 COUNTRY DEEP DIVES** 33 – 37

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**CONTACT DETAILS** 38

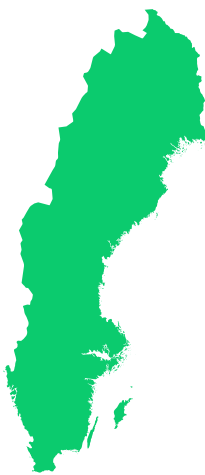


# Methodology

Polling conducted by KEKST CNC, nationally representative sample of



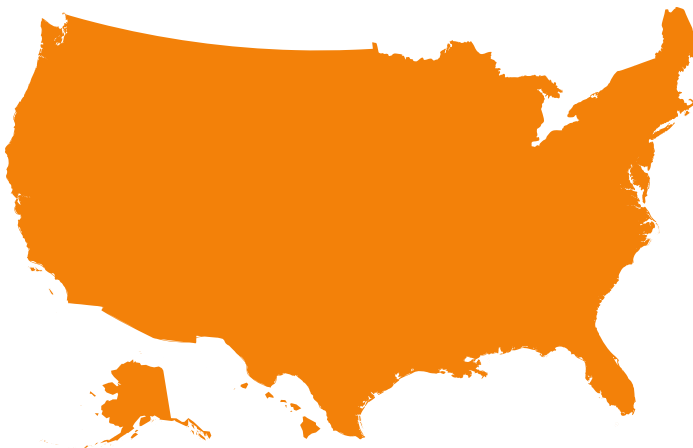
1,000 adults  
in Great Britain



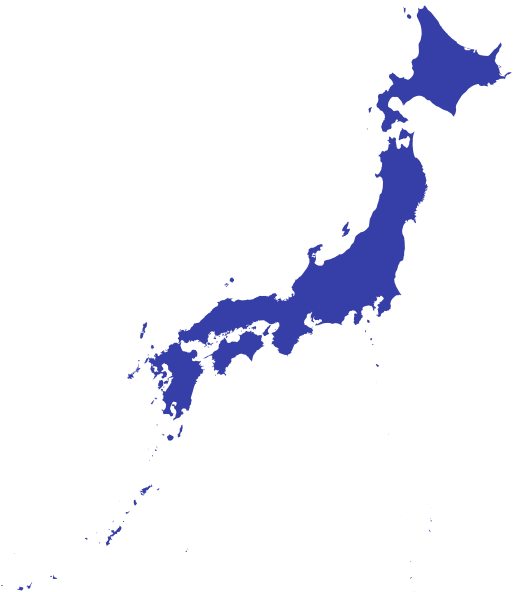
1,000 adults  
in Sweden



1,000 adults  
in Germany



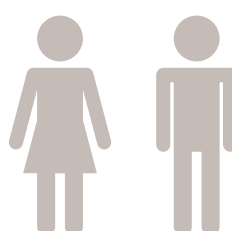
1,000 adults  
in the U.S.



1,000 adults  
in Japan

**Fieldwork of wave 2** took place on  
27th April - 1st May 2020

*Fieldwork of wave 1* took place on  
30th March – 3rd April



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

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



# Seven Key Findings

## 1

The public continues to prioritise health over the economy in most countries, though this is narrowing fast in Germany and Sweden

In all countries, more people say governments should focus on limiting the spread of the disease, even if that means major damage to the economy. This is at its highest in the UK, where **73% say government should prioritise limiting the spread, and in Japan, where 60% do so**. The margin is, however, **smaller in Germany and Sweden**, and has narrowed further over the last month in these two countries with an increase in the number of people saying the economy should be protected – as well as in the U.S..

## 2

Concern about the virus is falling – but people think it will last longer than they did a month ago

Two months into the pandemic, **concern about the virus is falling in the UK, U.S., Germany and Sweden**. Concern about the economy does, however, remain high. And despite a fall in the number who are very concerned about the virus, **many more people think the impact of it will be felt for years to come – especially its impact on the economy**. This is especially stark in the UK, with almost eight out of ten saying they think the impact of coronavirus on their country will last for more than a year.

## 3

Business support measures are having a positive impact in most countries, with an improved view of people's economic and financial situations

Though the position of American workers remains difficult, in most countries **fewer workers expect to lose their job or expect their company to go bust** than they did last month. People are also less concerned about the risk of the virus to their own livelihoods than they were at the start of April. This looks to be a result of business support measures introduced by governments, with people in the UK, U.S., Germany and Sweden of the view that **their governments are giving business the support it needs**, even if they are less sure that it is getting to the businesses that really need it.



# Seven Key Findings

## 4

**In Japan the public are extremely critical of government, business, and deeply concerned about their economic situation**

Japan is the exception to this and is sharply different to all other countries in how it views its government, business, and the threat to people's own livelihoods. **Japanese workers are extremely worried about their jobs**, with more than a third of them expecting to lose their job due to the coronavirus crisis. They are also **sharply critical of government**, with 58% of the Japanese public saying they have become less confident in central government in the last two weeks. Only 13% say they think government is giving business the support it needs.

## 5

**Consumer behaviour looks set to change even beyond a vaccine**

Though majorities say they expect their behaviour to return to normal, on balance people are saying that they **will change their consumer behaviour after the crisis - even if a successful vaccine is found and rolled out**. Plane travel is set to reduce, as is going to concerts and largescale events. People also say they will use public transport less, and countries differ on whether they will travel more domestically – with the UK and Sweden seeing a potential uptick in domestic travel while others do not.

## 6

**Some actions that businesses take will lead to bigger rewards than others**

**Slightly fewer** people think that business is stepping up during the coronavirus outbreak than they did a month ago. And, when it comes to what business actions the public want to see, it is clear that business brands will be rewarded for some actions more than others. In Germany and the U.S., the main thing the public want to see from business is **executive pay cuts**, while in Japan, the UK, and Sweden, people want to see businesses helping the health effort by manufacturing or supplying health goods and services. Monetary donations, and dividend cuts, are likely to receive less praise from the public.

## 7

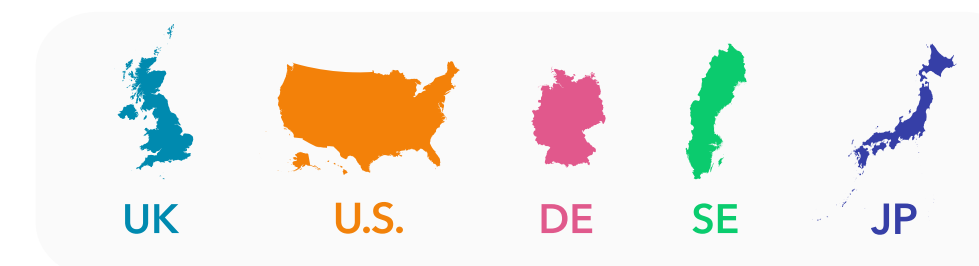
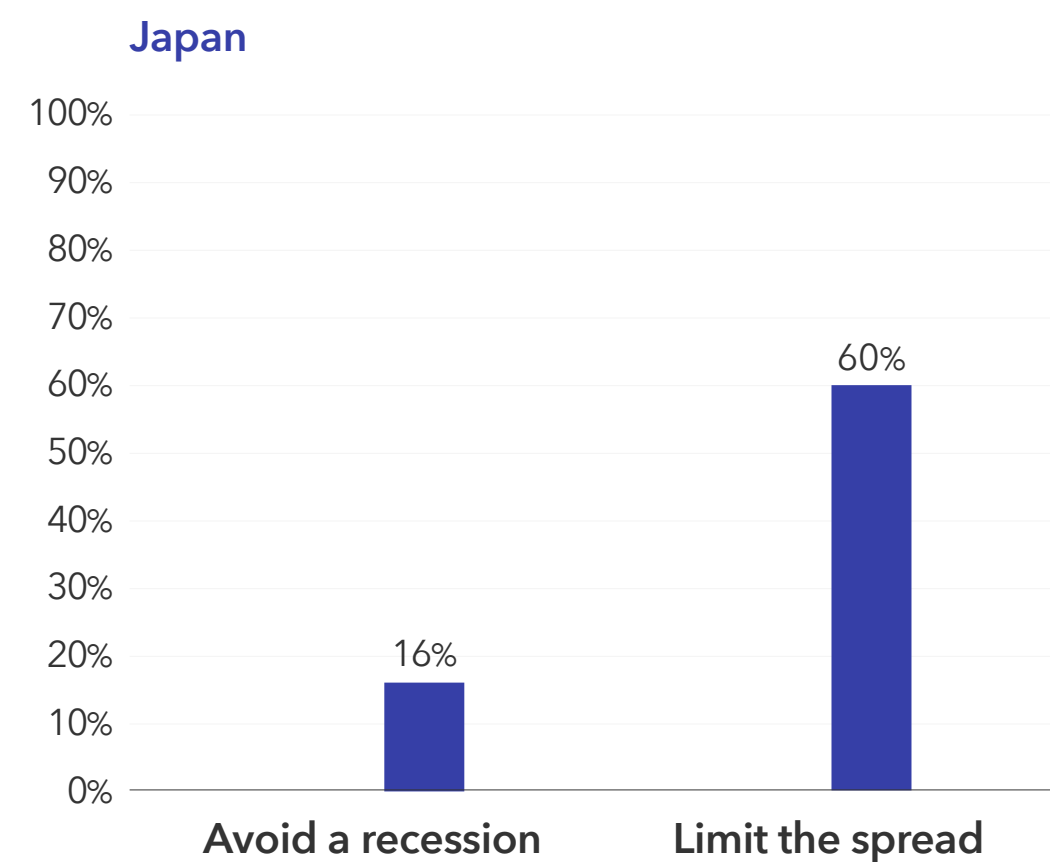
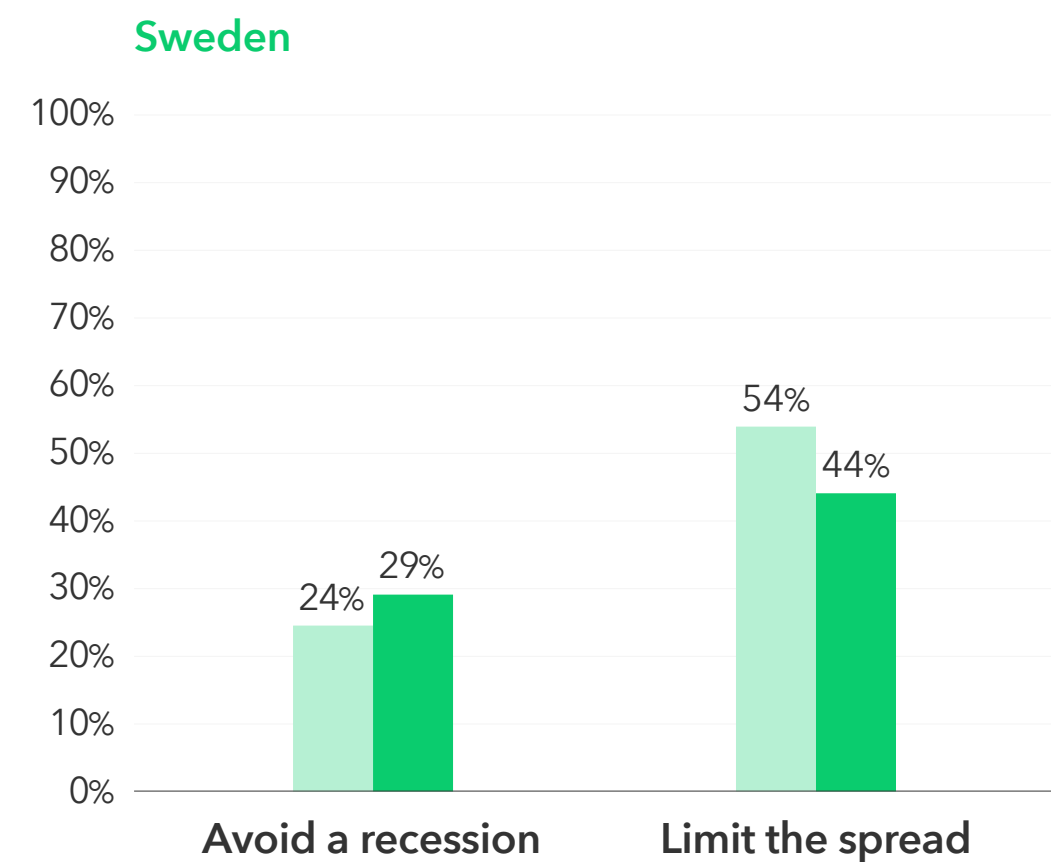
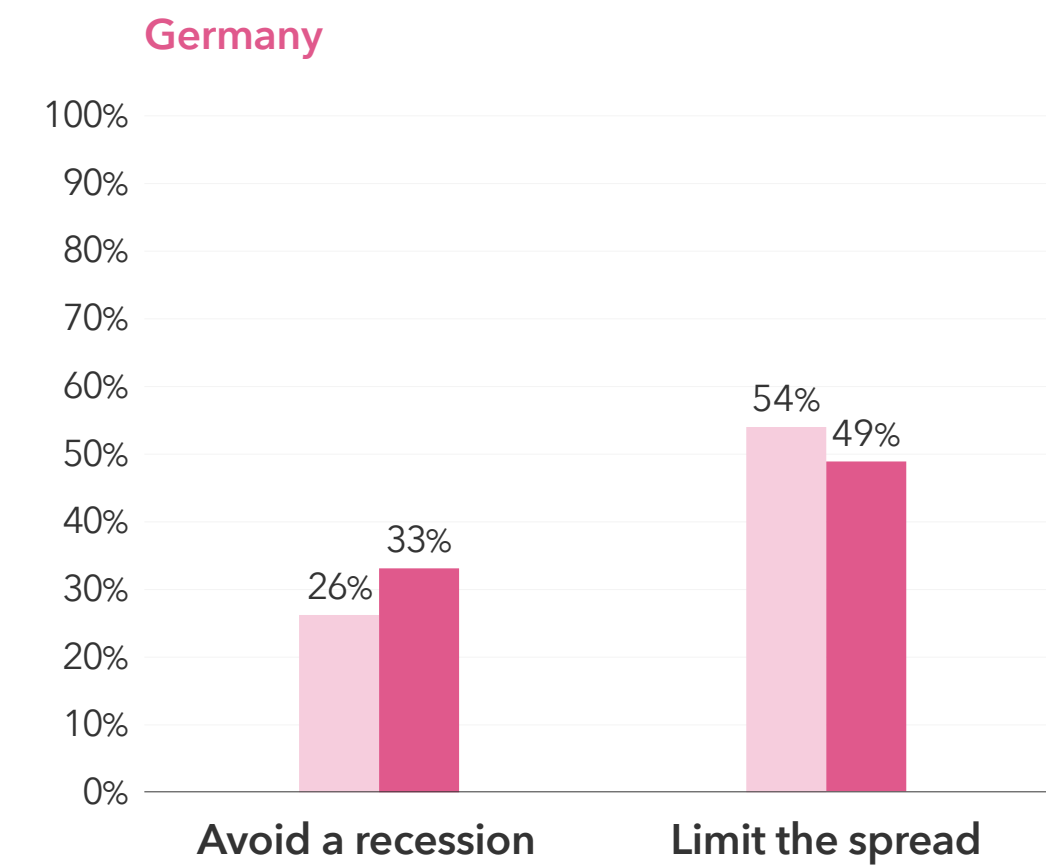
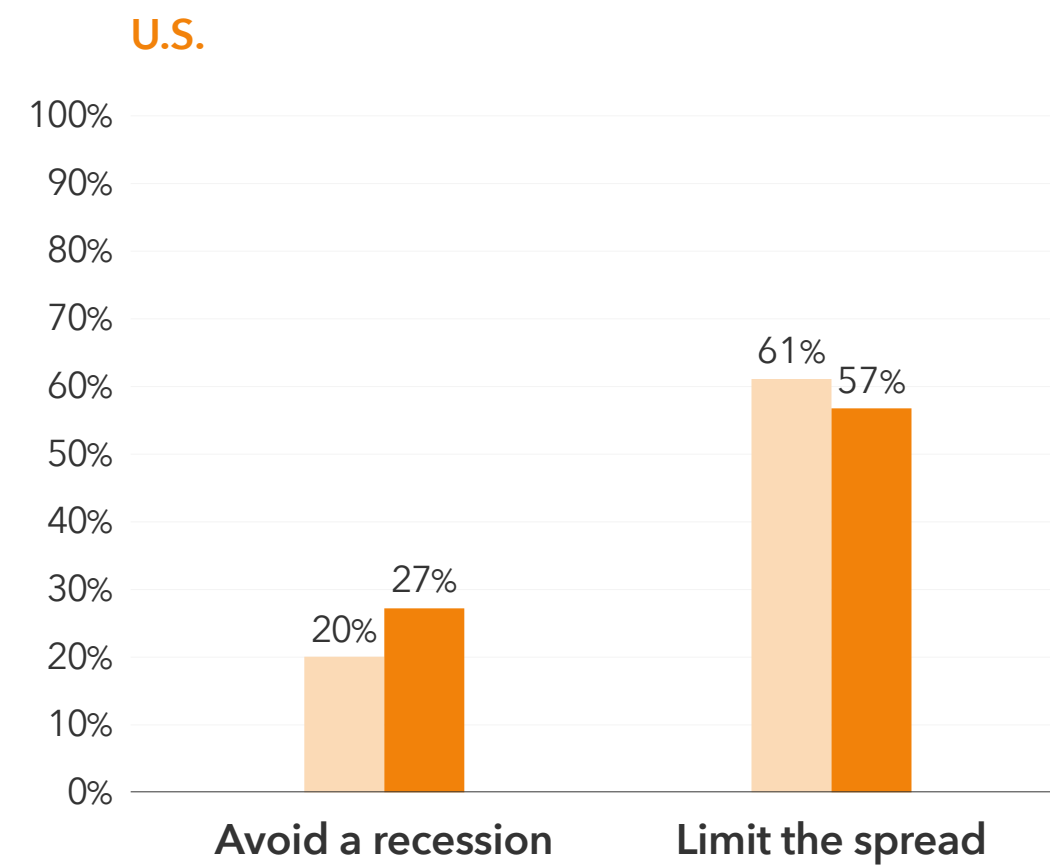
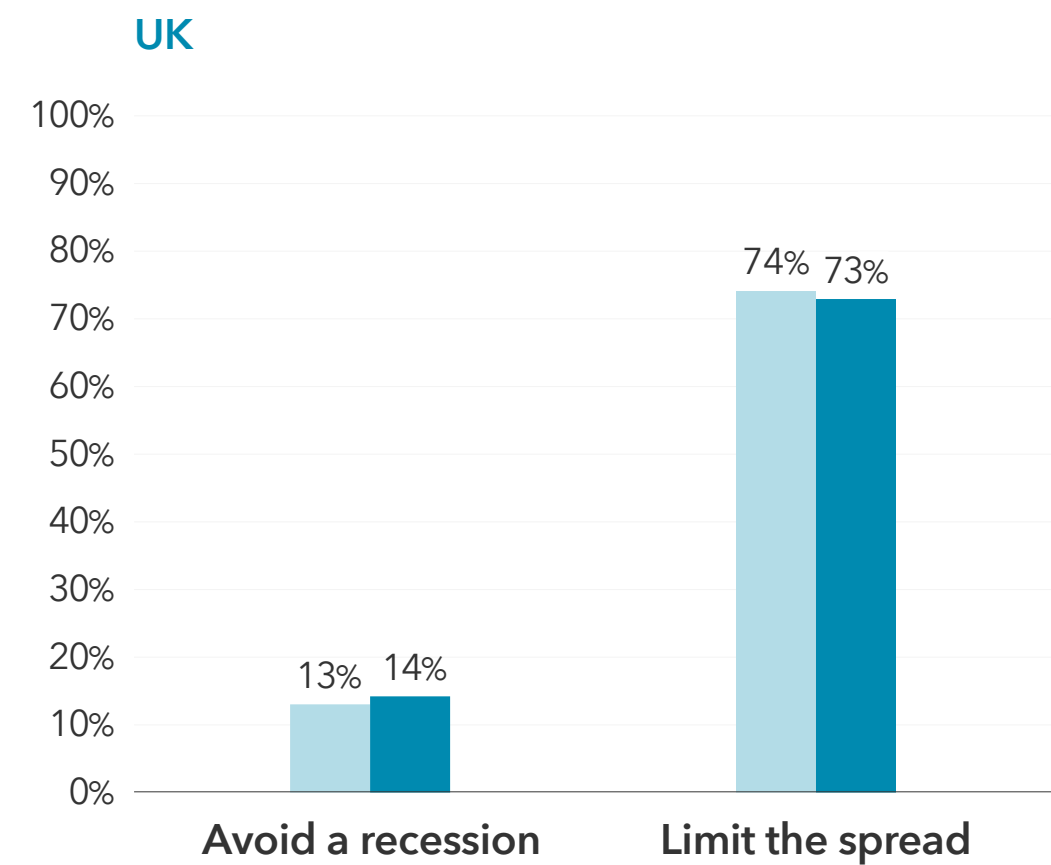
**People say they want a reorganised economy after the crisis, but it is there to be defined**

After the coronavirus crisis is over, most people say they want to see an **economy fundamentally changed** – though this is less marked in the U.S. and Sweden. However, across all countries people do not have a clear view of what this looks like, with a mix of people prioritising **pandemic preparation, higher pay for key workers, a bigger focus on helping the most vulnerable** as key tenets of a reorganised economy. Environmental protection, though desirable, is not one of the top priorities, and a significant number of people say they **just want things to return to what they were before**.

# 1 Government decisions



The UK and Japan place a significant priority on limiting the spread of the virus, but the U.S., Germany and Sweden narrow

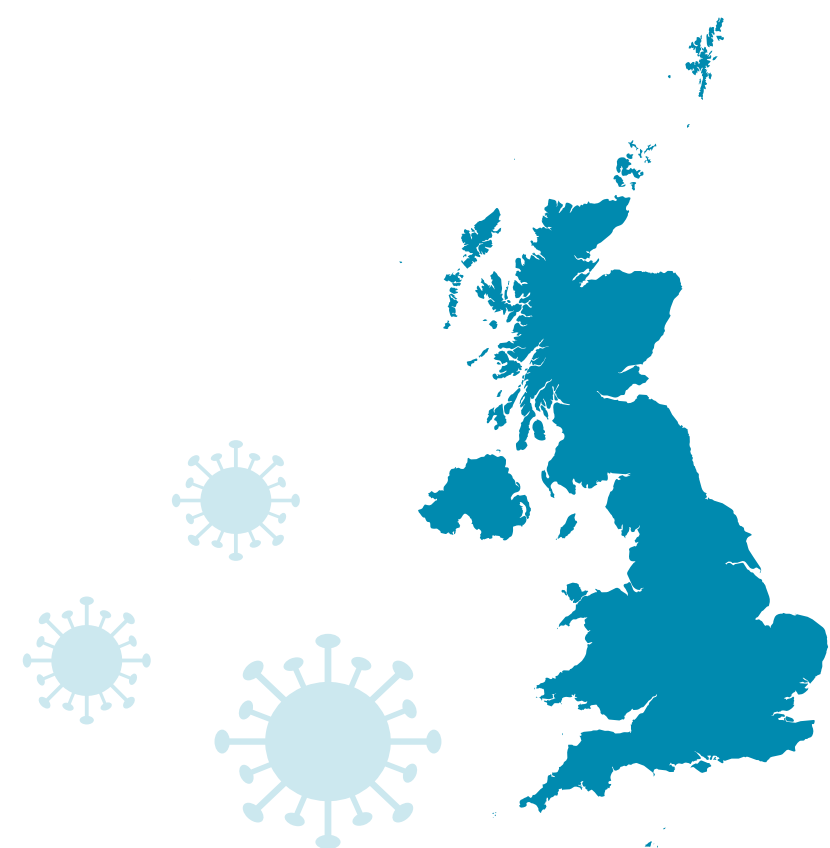


- To investigate the public's views on whether government should prioritise limiting the spread and saving lives, or protecting the economy, respondents in all four markets were given two statements to choose from: "The priority for the Government should be to limit the spread of the disease and the number of deaths, even if that means a major recession or depression, leading to businesses failing and many people losing their jobs" and "The priority for the Government should be to avert a major recession or depression, protecting many jobs and businesses, even if that means the disease infects more people and causes more deaths".



# 1 Government decisions

The UK and Japan place a significant priority on limiting the spread of the virus, but the U.S., Germany and Sweden narrow



In the UK  
**73%** prioritise limiting the spread of COVID-19

- Over the last month, and despite moves to ease the lockdown, **the British public have not changed their view: the public prioritise limiting the spread of the disease, even it means costs to the economy.** Compared to 74% in April, 73% prioritise limiting the spread when faced with a major recession or depression and many job losses.

Just **16% of people in Japan** want the economy to be prioritised



- **The margin is also stark in Japan**, where 60% think the government should focus on limiting the spread compared to just 16% who want the economy to be prioritised. And in the U.S., where there is pressure to ease lockdowns, a **majority (57%) want the government to limit the spread compared to 27% who want to prioritise the economy.**
- **The gap between limiting the spread and protecting the economy has, however, narrowed in other countries.** Though a majority still back limiting the spread in the U.S., 30 points now separate the two options amongst Americans, whereas it was 41 points in April. In Germany, 49% want to limit the spread compared to 33% who want to protect the economy: a gap of 28 points has become one of 16.



**Sweden is the country most likely to prioritise protecting the economy**

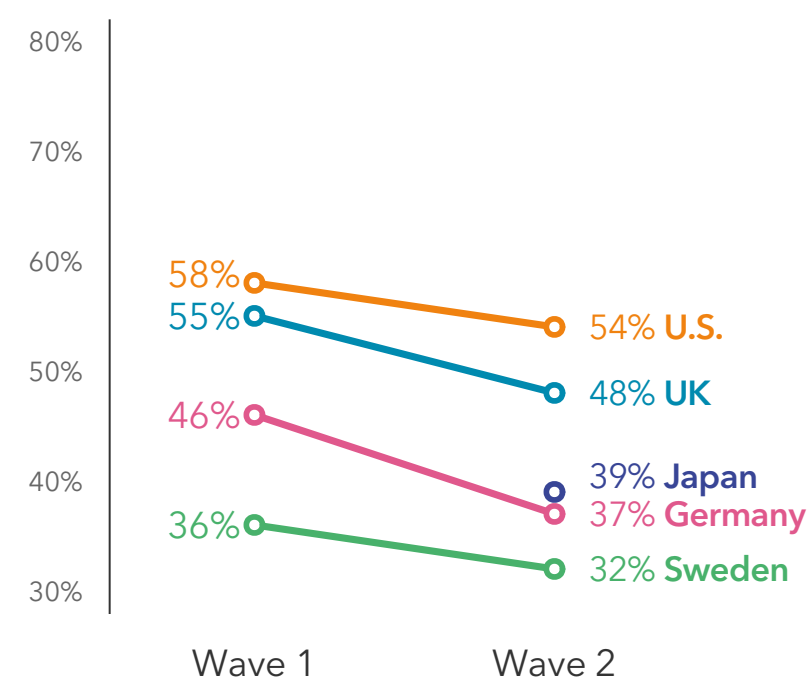
- **Sweden is the country most likely to prioritise protecting the economy**, with 44% in favour of limiting the spread and 29% in favour of protecting the economy. The gap between the two has halved over the last month, from 30 points to 15.

# 2 Levels of concern

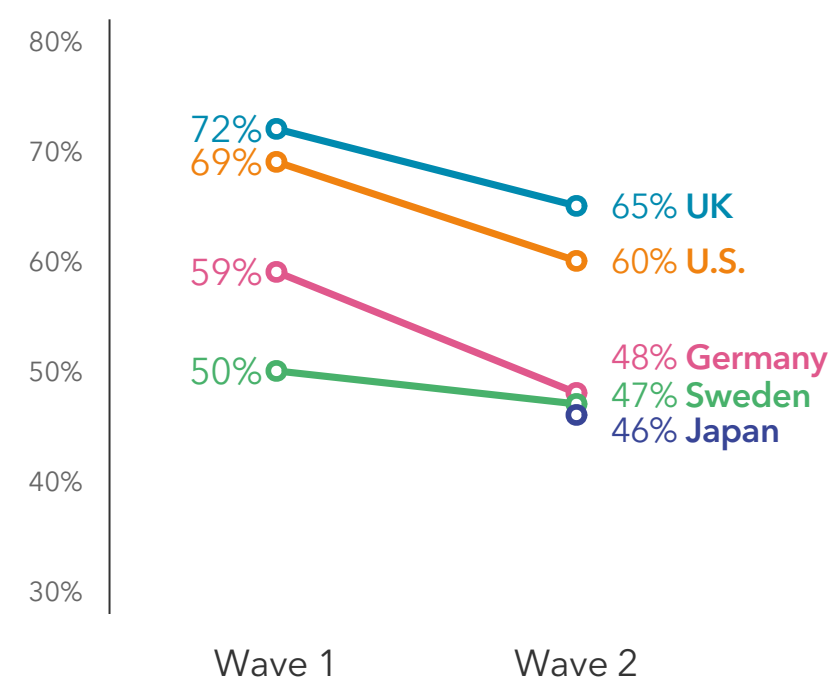


Concern about the impact of the virus is trending down, particularly in Germany and Sweden; though concerns about the economy remain high overall

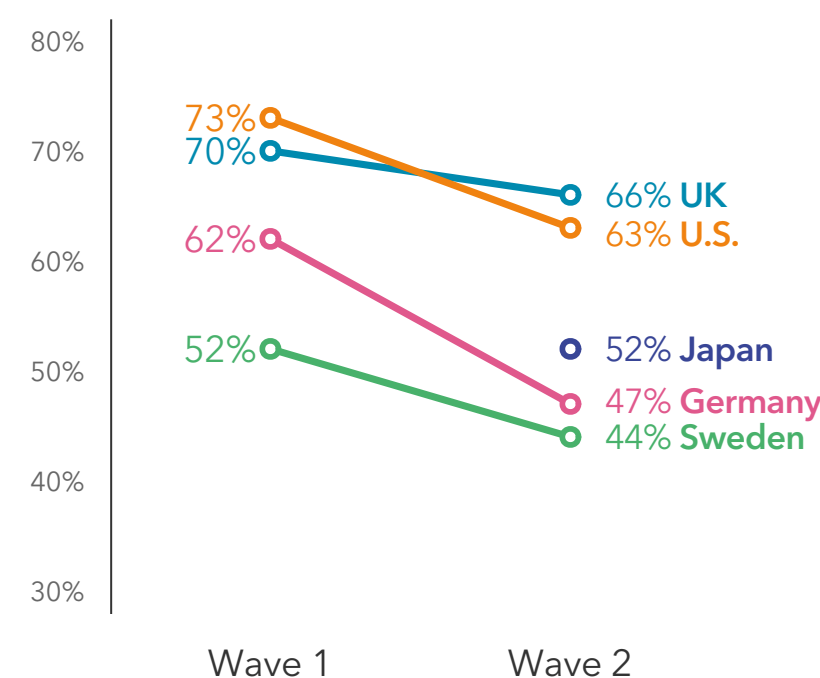
Your personal health



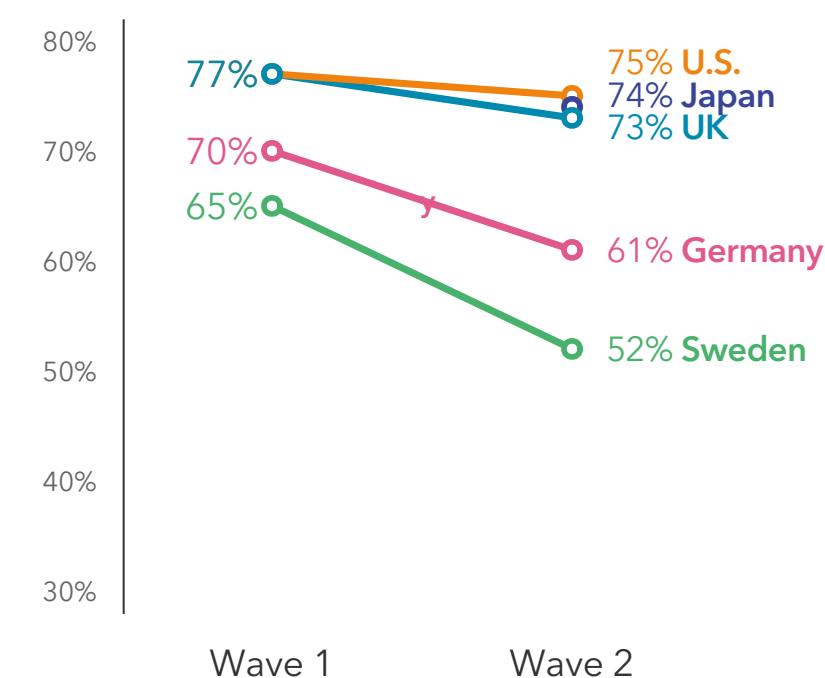
Your family's health



The health of people in the country as a whole

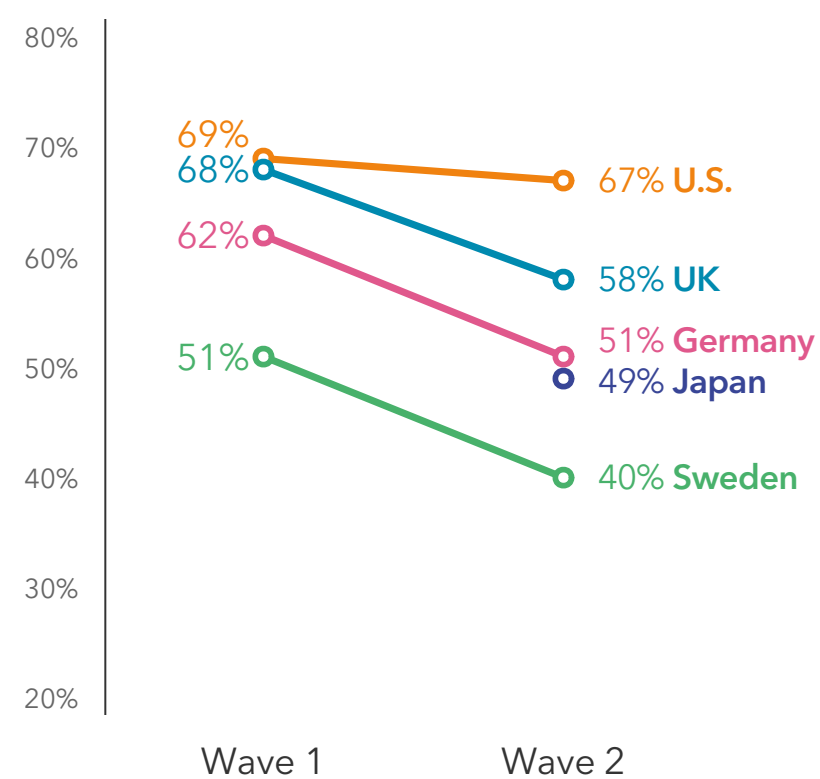


The economy as a whole

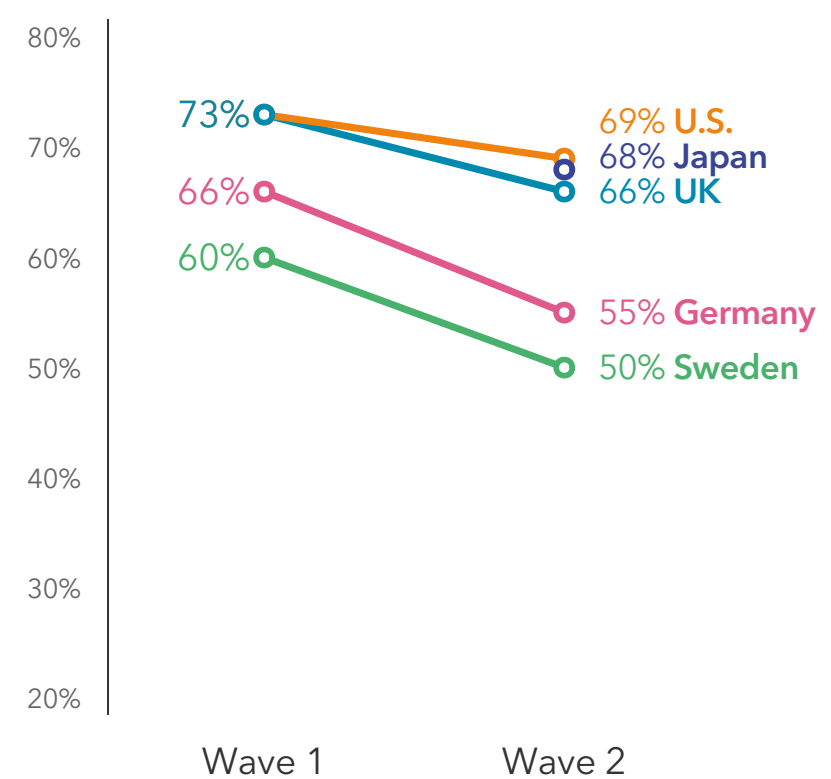


- Respondents across all countries were asked to rate on a scale of 1-10 how concerned they are about the impact of the coronavirus on a number of things. Any response ranking at 8 or above is described as someone being "very concerned" about an issue.

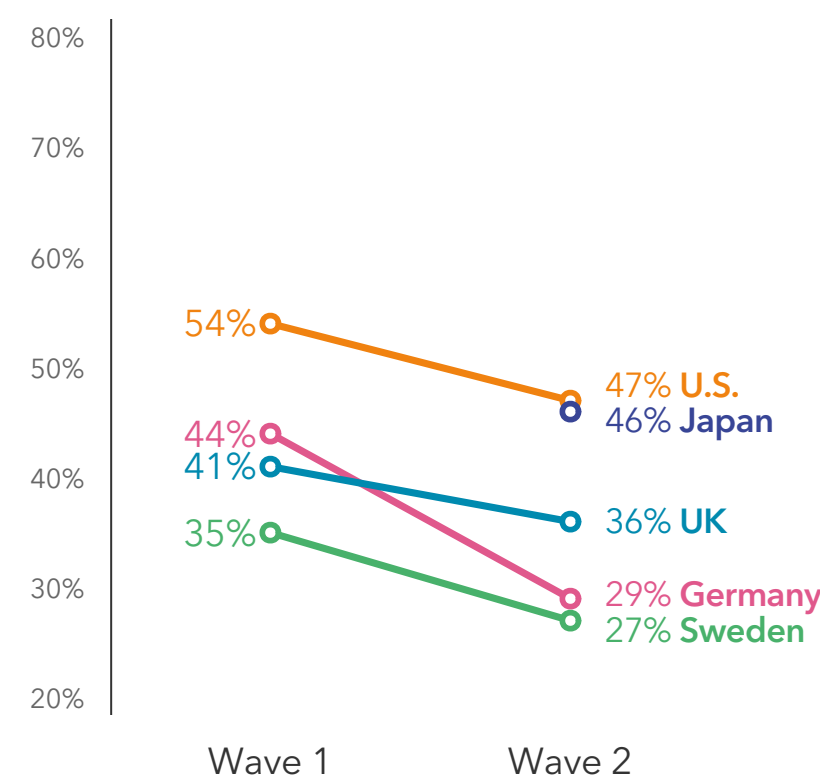
Businesses in my local area



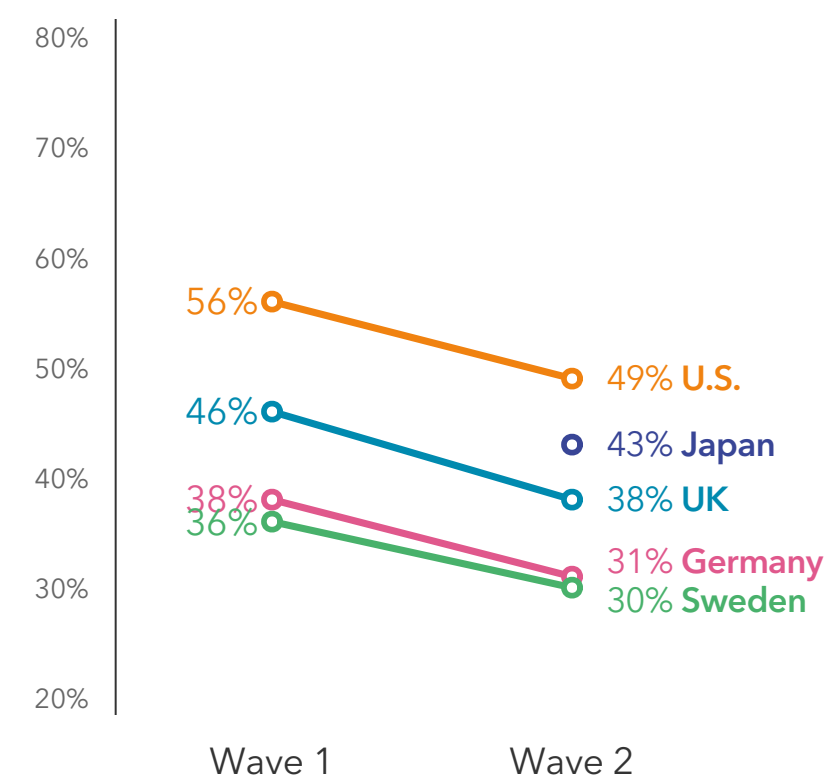
Businesses in the country as a whole



Your own job



Your own household finances







# 2 Levels of concern

Concern about the impact of the virus is trending down, particularly in Germany and Sweden; though concerns about the economy remain high overall

- Over the last month, **people in all countries have become less concerned about the impact of coronavirus.** For example, the number of people very concerned about the impact of the virus on their family's health has gone from 72% in the UK to 65%, and also fallen in the U.S., Germany and Sweden.
- The overall pattern, however, remains, with **people in the U.S. and the UK remaining 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.** People in Japan are less concerned about the virus' impact on health, and are closer to Germans and Swedes on concern about health than the more concerned Brits and Americans. However, they are more concerned about the economic impacts.

- People in Germany and Sweden are less concerned, and have seen **the most significant drop** in concern over the last month. This applies on health measures (e.g. 62% of German were very concerned about the virus' impact on the people in Germany as a whole in April, that is now 47%) and also about the impact on the economy (e.g. 65% of Swedish people were very concerned about the virus' impact on the economy as a whole in April, that is now 52%).

People in **all countries** have become **less concerned** about the impact of coronavirus

This now means that **fewer than half of Germans and Swedes are very concerned about the virus' impact on people in their country as a whole.** This is closer to a third in terms of the virus' impact on their personal health. German and Swedish


workers are also those least likely to be concerned about their own job, with only 29% of German workers and 27% of Swedish workers saying they are very concerned – compared to 47% in the U.S. and 46% in Japan.

In the U.S.

**75%** 

**of people are 'very concerned' about the impact of the virus on the economy**

- As in April, **concerns about the economy are higher than those about health.** As many as three-quarters of people are very concerned about the virus' impact on the economy in the U.S. (75%), Japan (74%), and the United Kingdom (73%) - as are majorities in Germany (61%) and Sweden (52%).

**46%** 

**of workers in Japan are 'very concerned' about their own job**

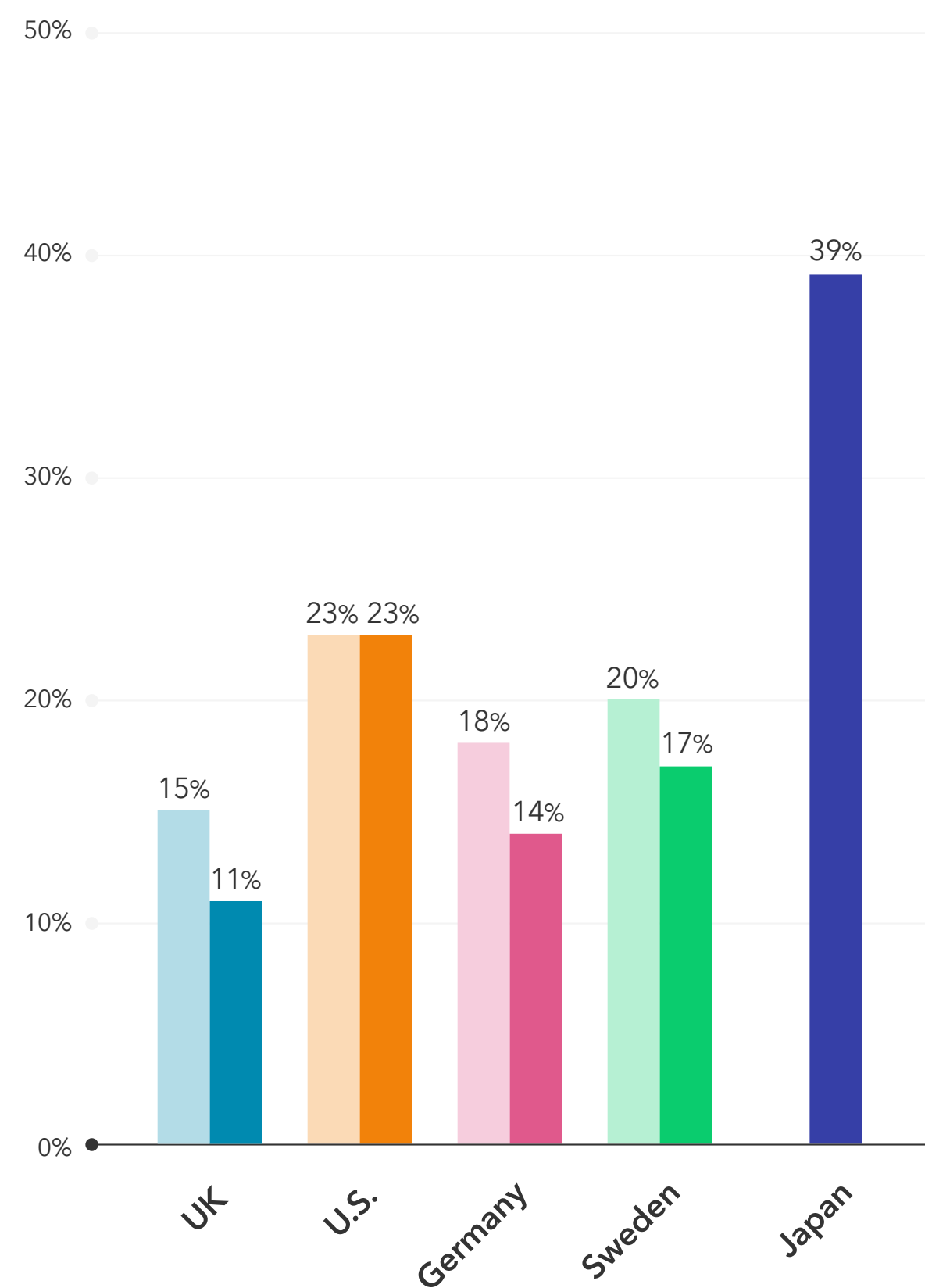
- American and Japanese workers are disproportionately concerned about their own jobs and their own household finances.** 47% of American workers and 46% of Japanese workers are very concerned about their jobs, compared to 36% of Brits, 29% of Germans, and just 27% of Swedes. 49% of Americans and 43% of Japanese people are 'very concerned' about their own household finances, compared to 38% of Brits, 31% of Germans, and 30% of Swedes.

# 3 The labour market during the crisis

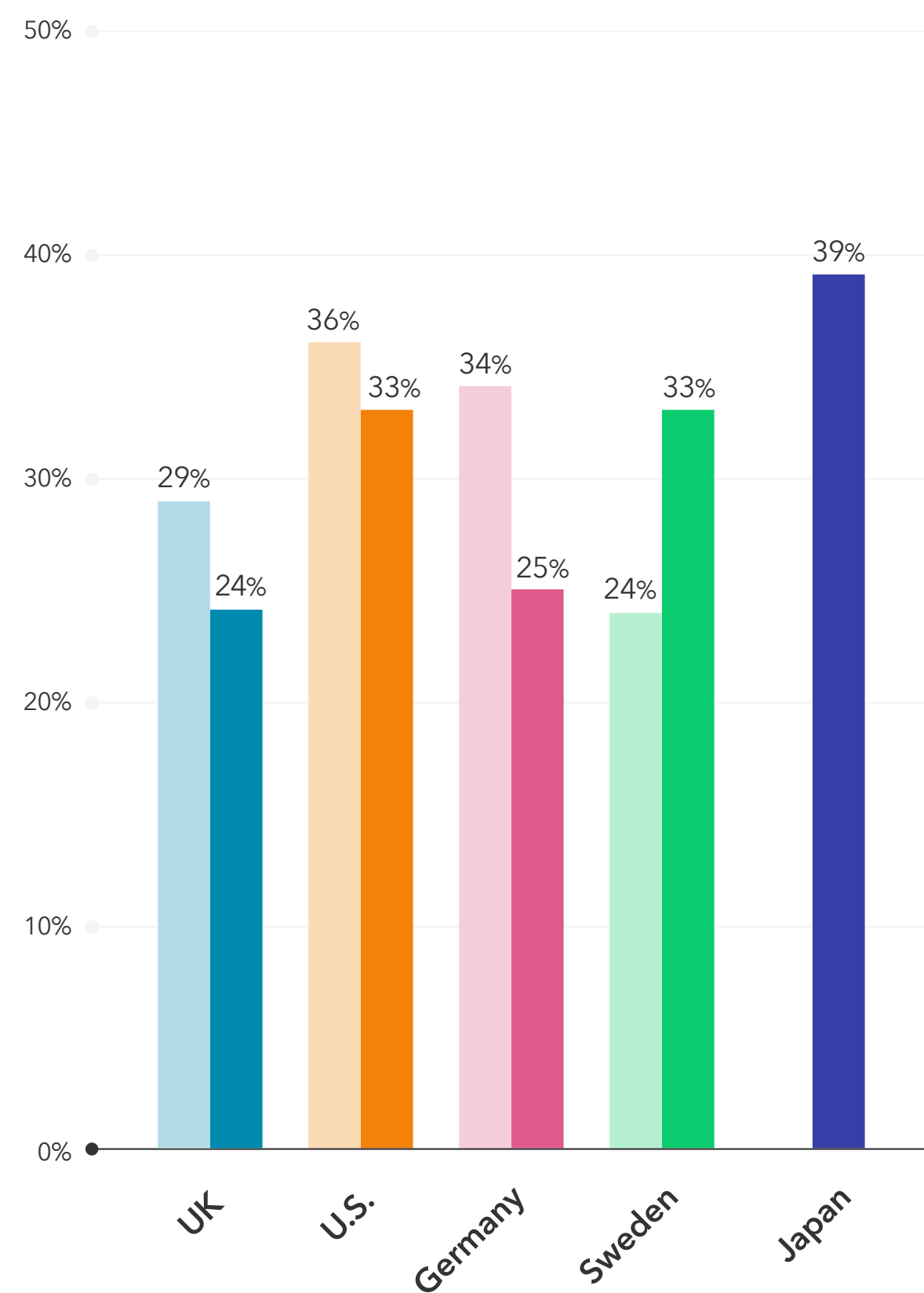


People are worried about their jobs - particularly in Japan and the U.S.

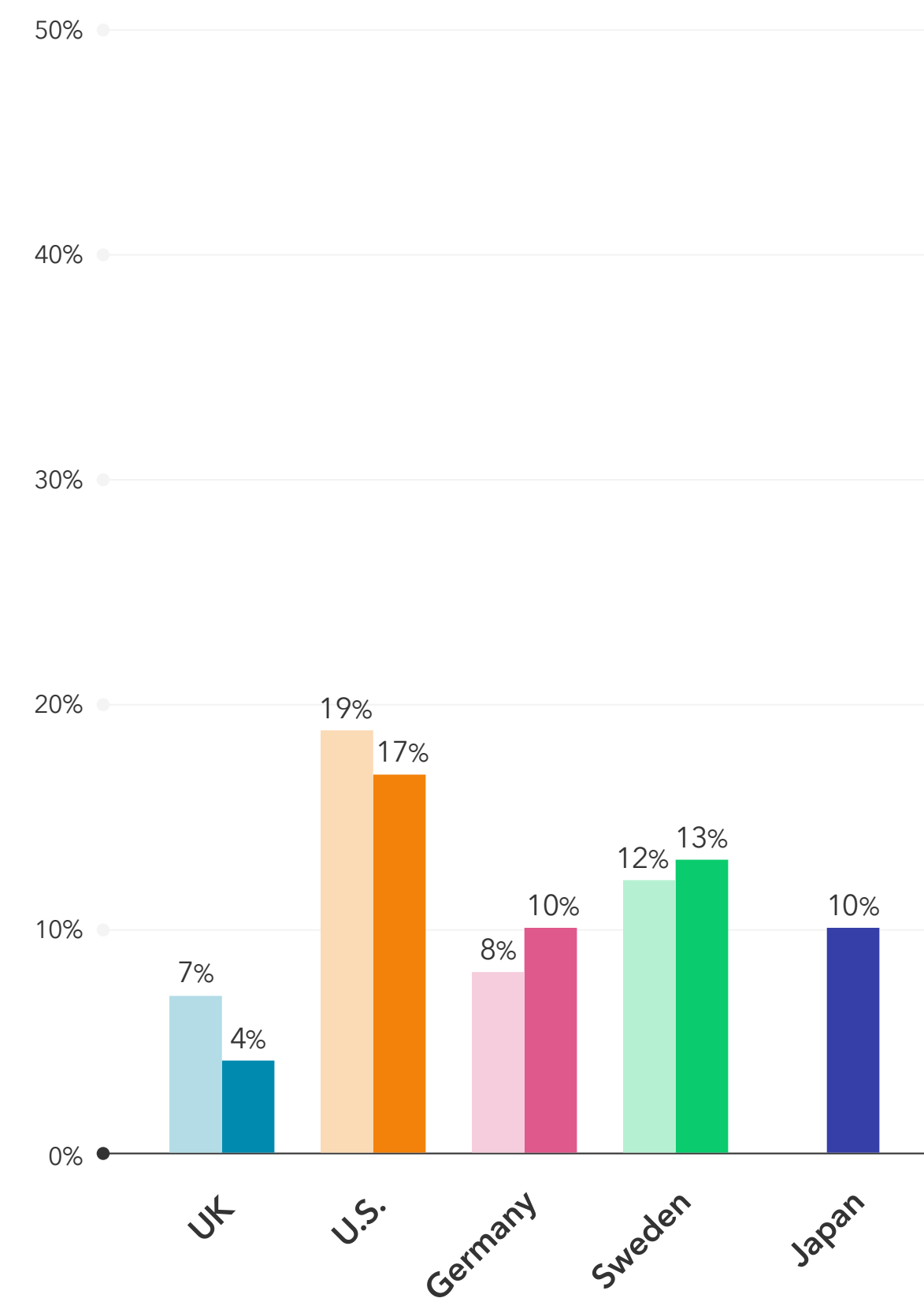
I expect to lose my job



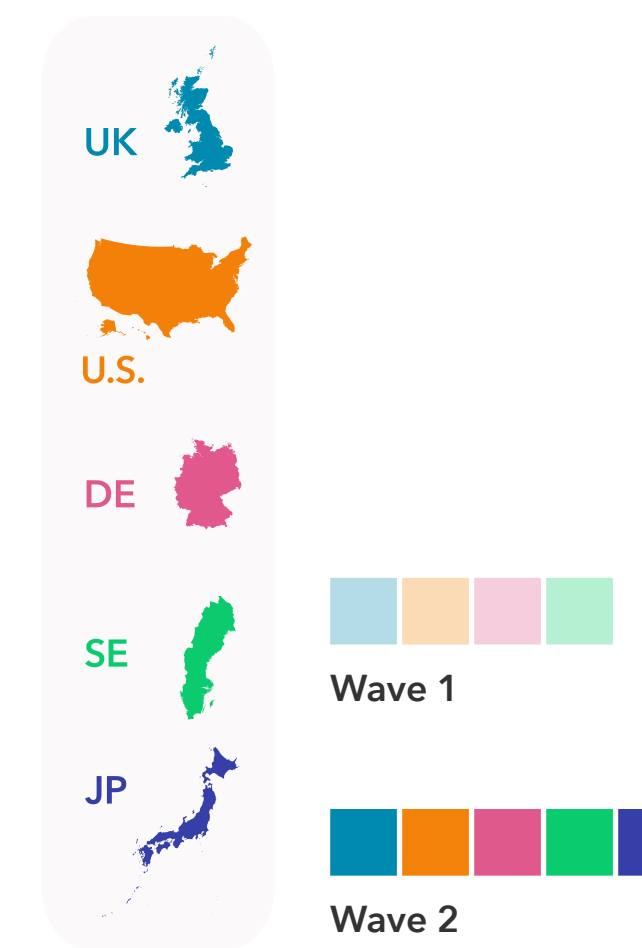
I expect the company to collapse



I have already lost my job



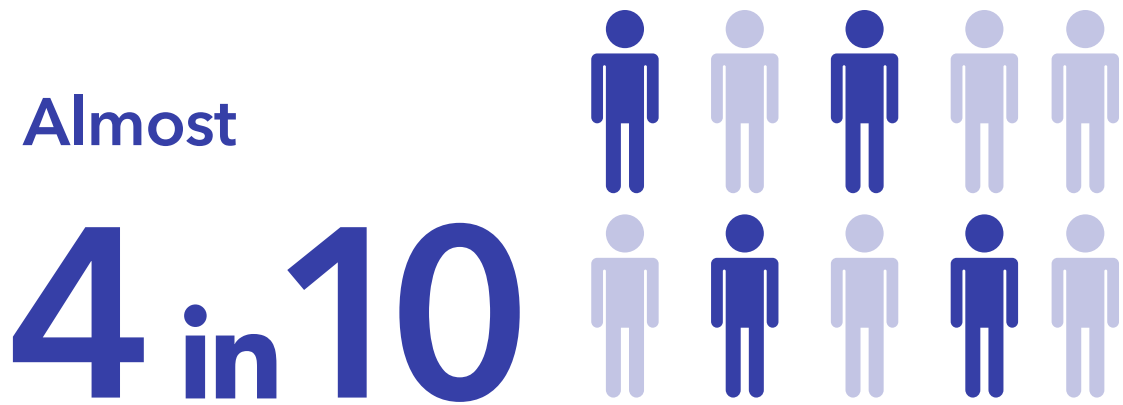
- Respondents across all countries were asked whether they agreed or disagreed with a set of statements referring to their own employment and job. All statements here are filtered just by those who said they are working full-time or part-time, apart from "I have already lost my job" which is presented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





# 3 The labour market during the crisis

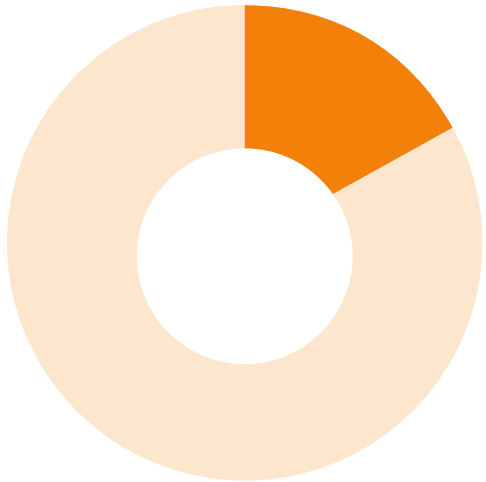
People are worried about their jobs - particularly in Japan and the U.S.



Japanese workers (39%), by far the highest across all countries surveyed, expect to lose their job

- The potential economic hit from the virus looks at its biggest in Japan. Almost four in ten Japanese workers (39%), by far the highest across all countries surveyed **expect to lose their job**. The same number, 39%, also expect their company to collapse, and one-in-ten Japanese people say they have already lost their job during the crisis.

- American workers are also clearly concerned about their jobs, with 23% of American workers saying they expect to lose their job, a third saying they expect their company to collapse, and the highest number in all countries who say they have already lost their job (17%).
- Overall, fewer expect to lose their job in the UK (11% of workers), Germany (14%) and Sweden (17%). This number has also gone down over the last month, falling from 15% in the case of the UK. Similar trends are apparent on those who expect their company to collapse, with 34% of German workers saying this in April but now only 25%. This may suggest that levels of business support in these countries are having a positive effect on people's economic situation. **The exception is in Sweden, where although fewer now expect to lose their own job, people are more worried about their company folding** - an increase from 24% to 33% in the last month.



**17%** of American workers say they have already lost their job, the highest number in all countries



People in Sweden are more worried about their company folding, an increase from 24% to 33% in the last month

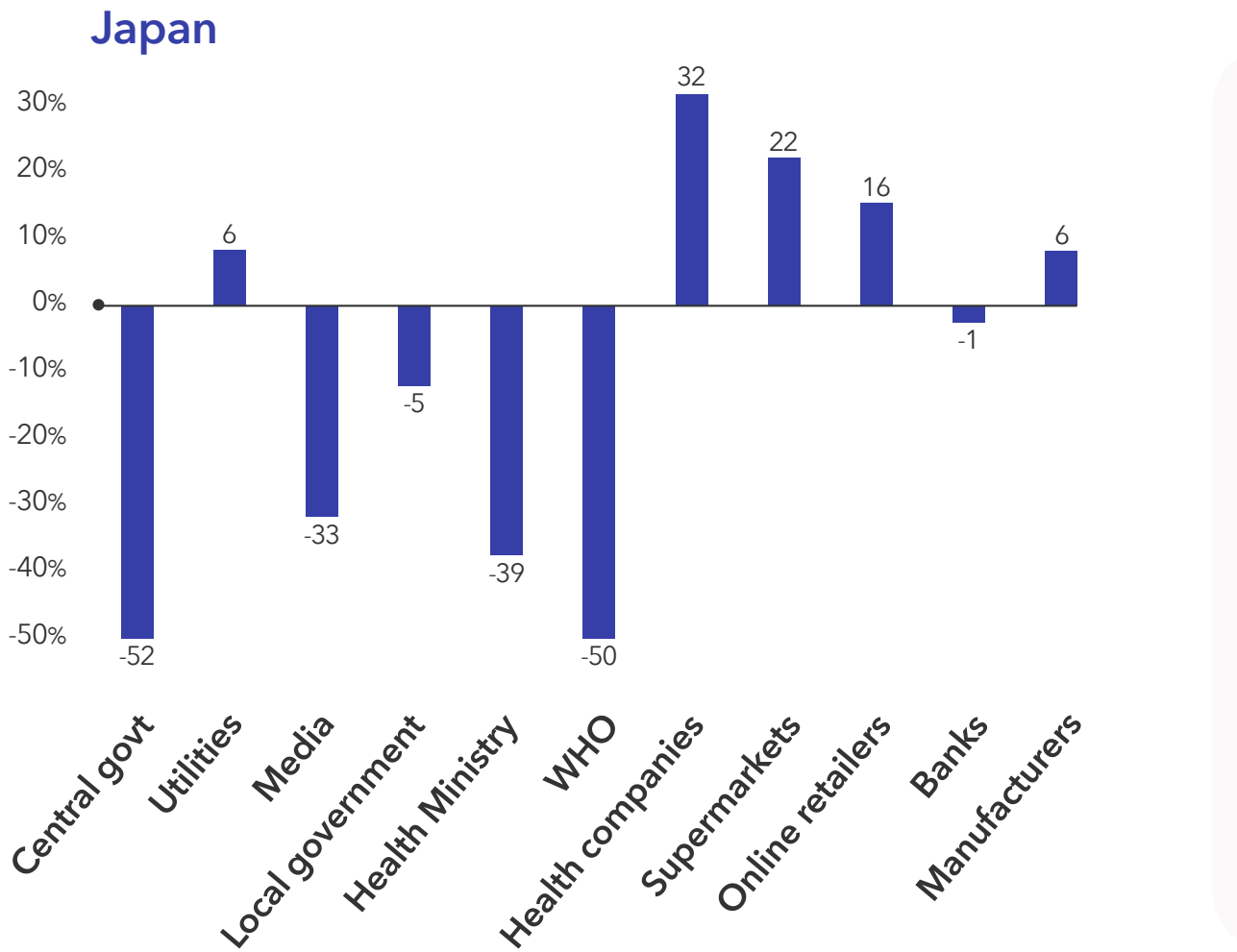
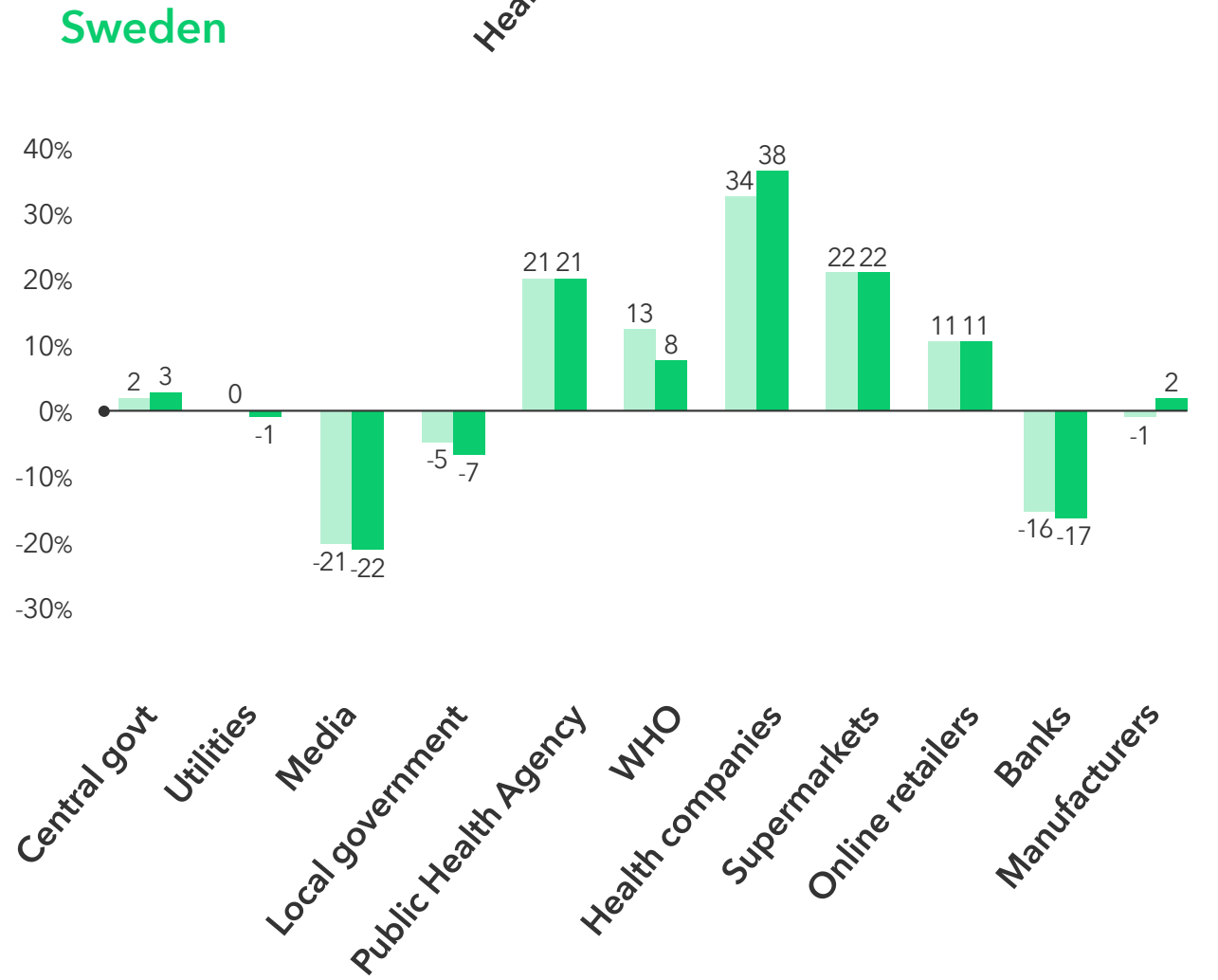
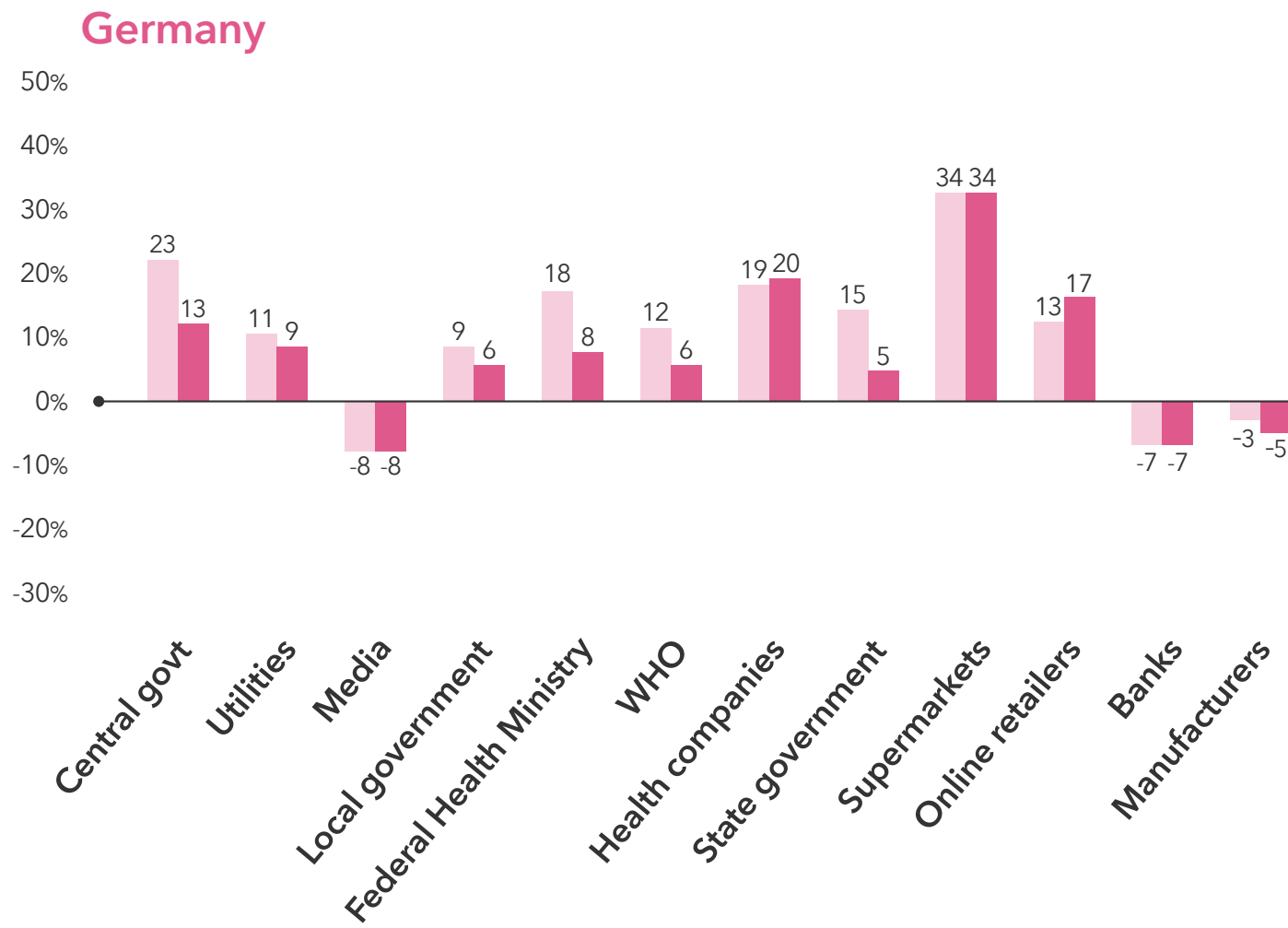
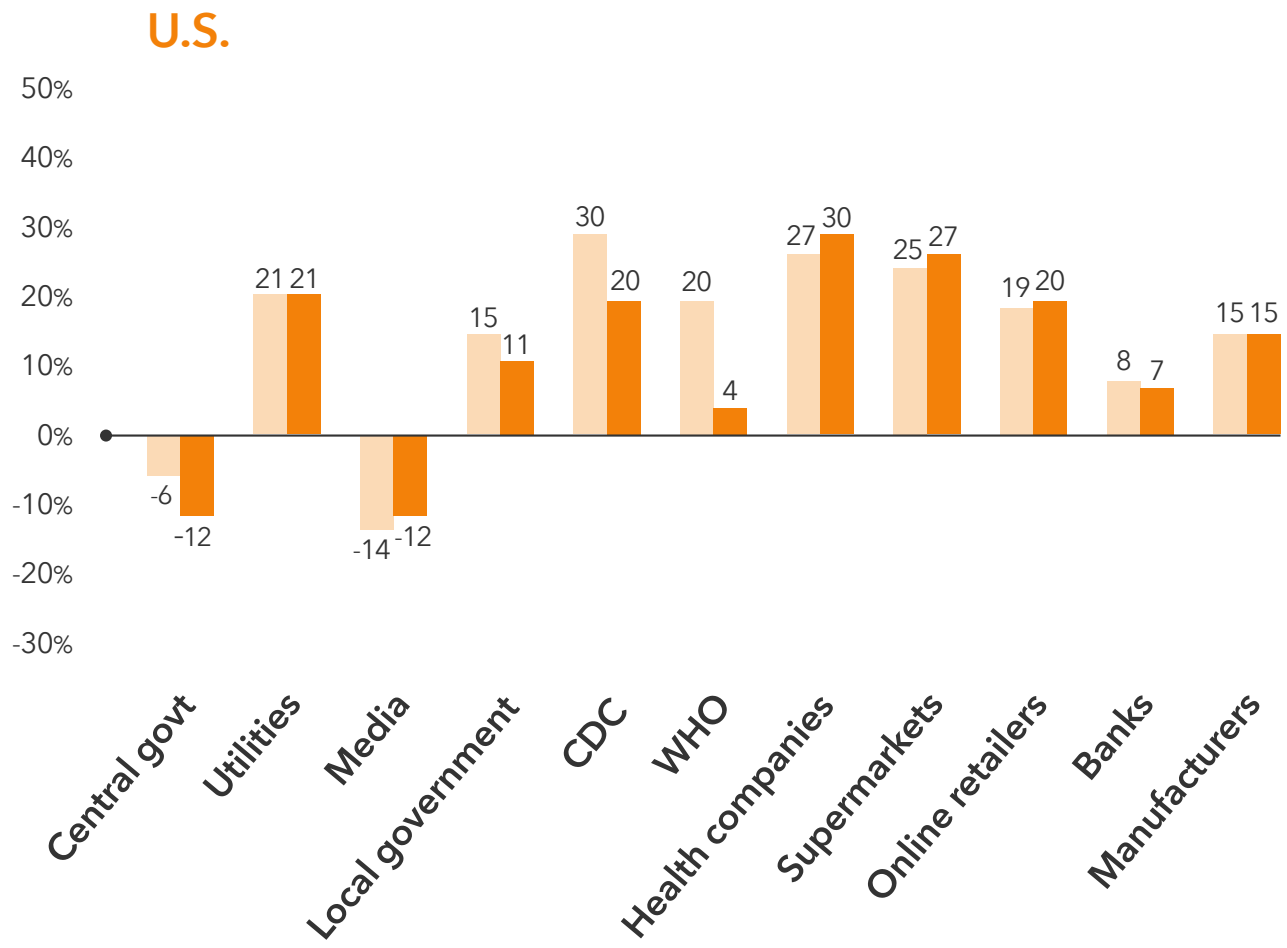
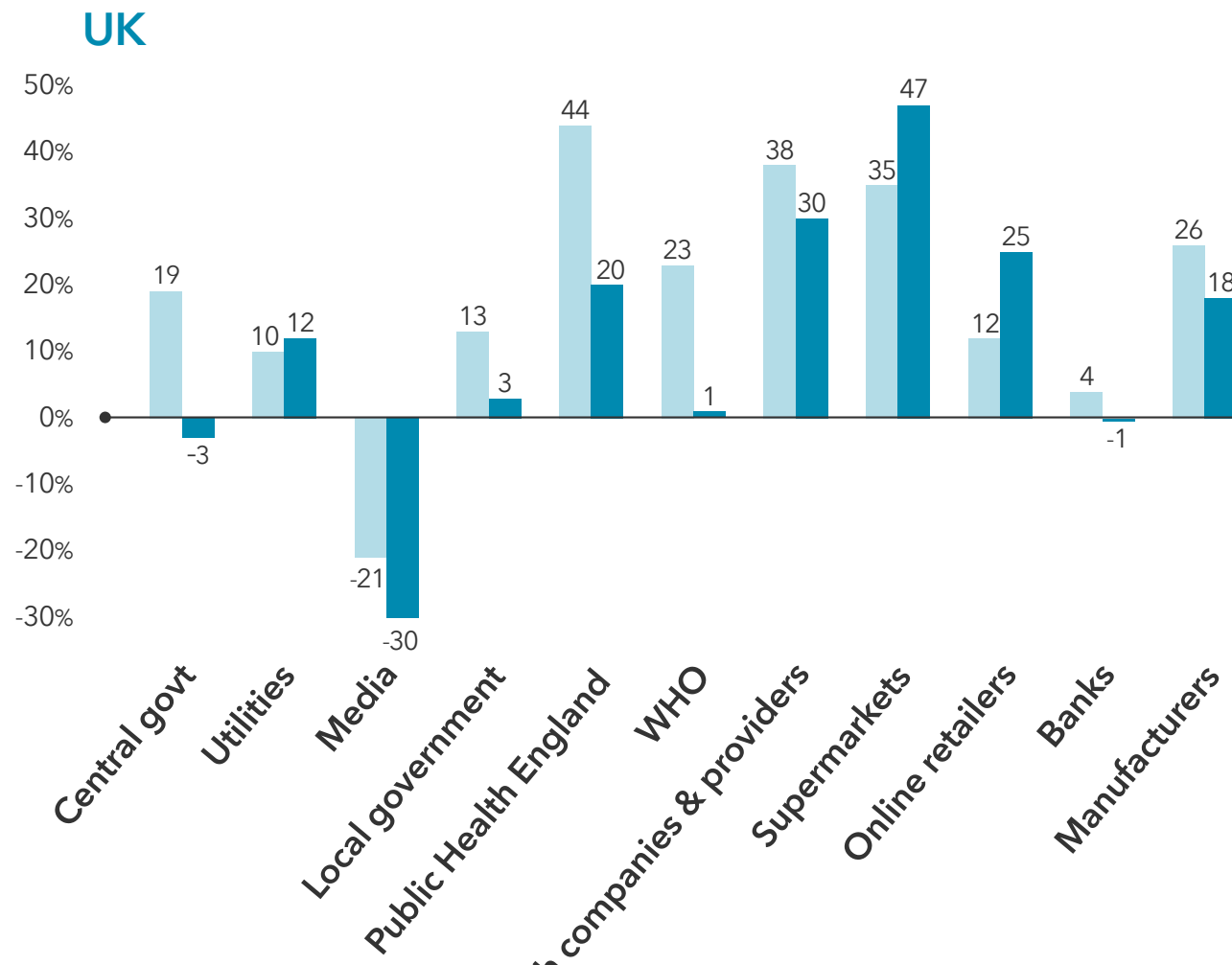


Fewer people expect to lose their job in the UK (11% of workers), a decrease from 15% the previous month



# 4 Performance of institutions

Certain types of business are performing well with the public, while the last two weeks have had a negative impact on governments in some countries



UK (light blue), U.S. (orange), DE (pink), SE (light green), JP (dark blue)

Wave 1 (light colors), Wave 2 (dark colors)

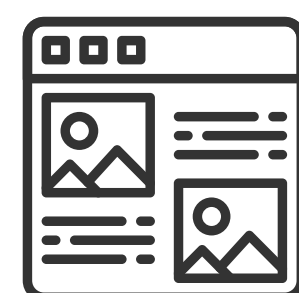
- Respondents across all countries were asked whether the activities of a number of sectors over the last two weeks had increased or decreased people's confidence in those sectors' ability to respond effectively to the coronavirus outbreak. A net 'confidence score' was calculated by deducting the proportion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

# 4 Performance of institutions



Certain types of business are performing well with the public, while the last two weeks have had a negative impact on governments in some countries

- Most sectors across most countries have seen **increased public confidence** since the start of the crisis with the position mostly stable from last month. The last two weeks, though, have been more difficult for some countries' governments, with pattern of declining confidence in central government to do their jobs during the pandemic and this has spilled over to local and state governments. This is especially the case in the UK, where a net 2% say they have decreased confidence in central government based on the last two weeks, and the U.S. where this is net 12%. It is **most striking in Japan, where net 52% say they have decreased confidence in their government based on the last fortnight.**
- **Public health agencies continue to see increased levels of confidence in contrast to governments generally**, in the UK, Sweden and Germany they have seen increases in confidence from last month or have stayed stable. In the U.S. the CDC has lost its place as the institution with the highest increase of confidence compared to in April.



Over the last two weeks, more people have lost confidence in the media and World Health Organisation

**58%**  
of people in Japan say they have decreased confidence in their government



- **The media and the World Health Organisation (WHO) have seen more people saying they have lost confidence in them over the last two weeks.** The media is in negative territory in all 5 nations and the WHO falling in all 4 countries from the first wave of the survey and the Japanese public in particular have an incredibly poor assessment of its role.
- **In the rest of the private sector the picture is more mixed** with healthcare companies, supermarkets and online retailers continuing to receive positive reviews across countries whilst banks and manufacturers do not. U.S. and Swedish healthcare companies continue to fare very well in the public's eyes and are now highest ranked of the institutions surveyed in both countries.
- **Overall public confidence in institutions outside of government is being driven by local perception** rather than the severity of each country's epidemic, at least at this stage of the global pandemic. UK and U.S. institutions continue to fare well despite the severity of their epidemics whilst confidence in institutions in Japan over the last two weeks is extremely low despite its relative success so far in controlling disease numbers.
- **Institutions in Germany and Sweden receive confident assessments, particularly state institutions, but neither country is very far out of line with the UK and the U.S.** despite being at very different points on the epidemic curve.

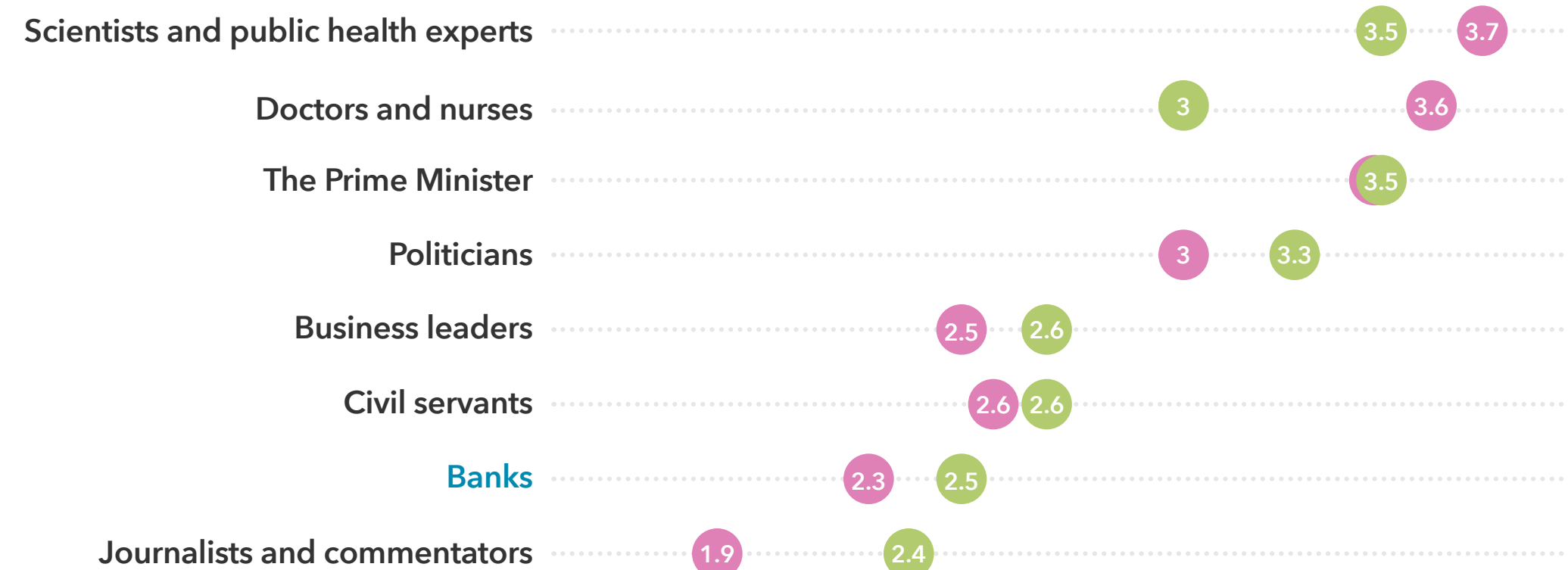
# 5 Levels of influence



People want scientists, public health experts, and doctors and nurses in charge of their nation's response

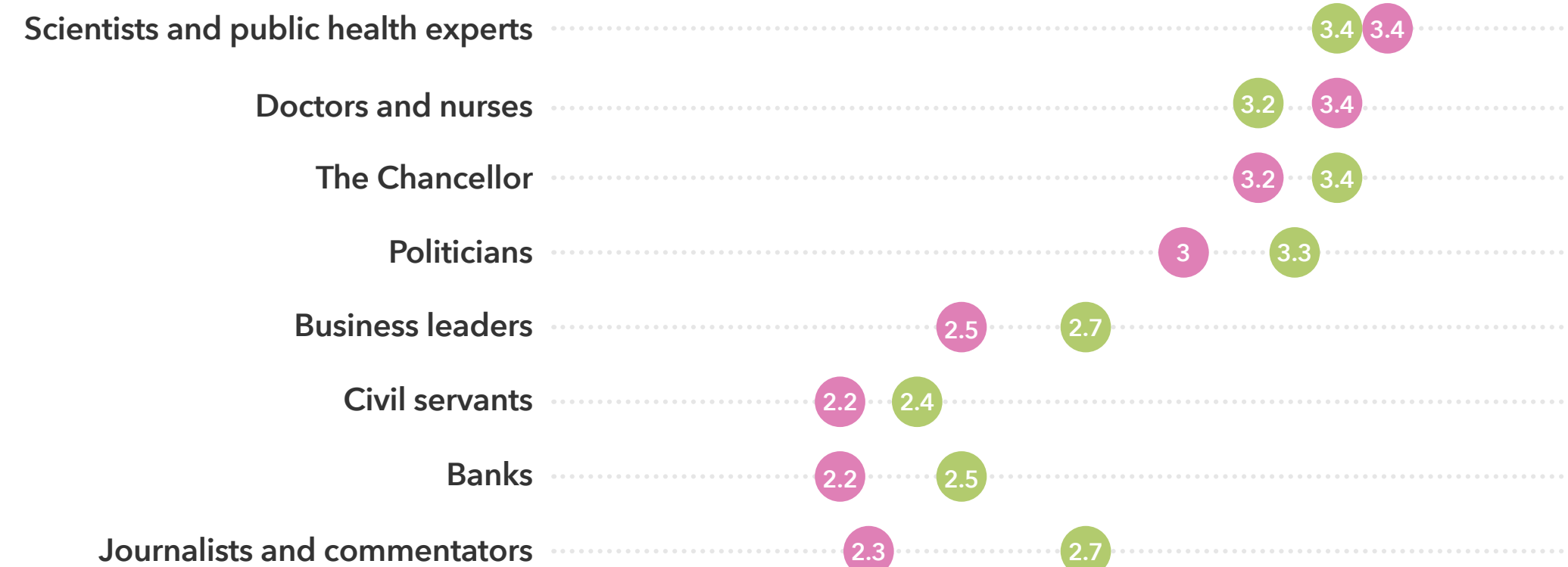
## UK

Difference between 'should influence' and 'does influence':



## Germany

Difference between 'should influence' and 'does influence':



## U.S.

Difference between 'should influence' and 'does influence':



## Sweden

Difference between 'should influence' and 'does influence':



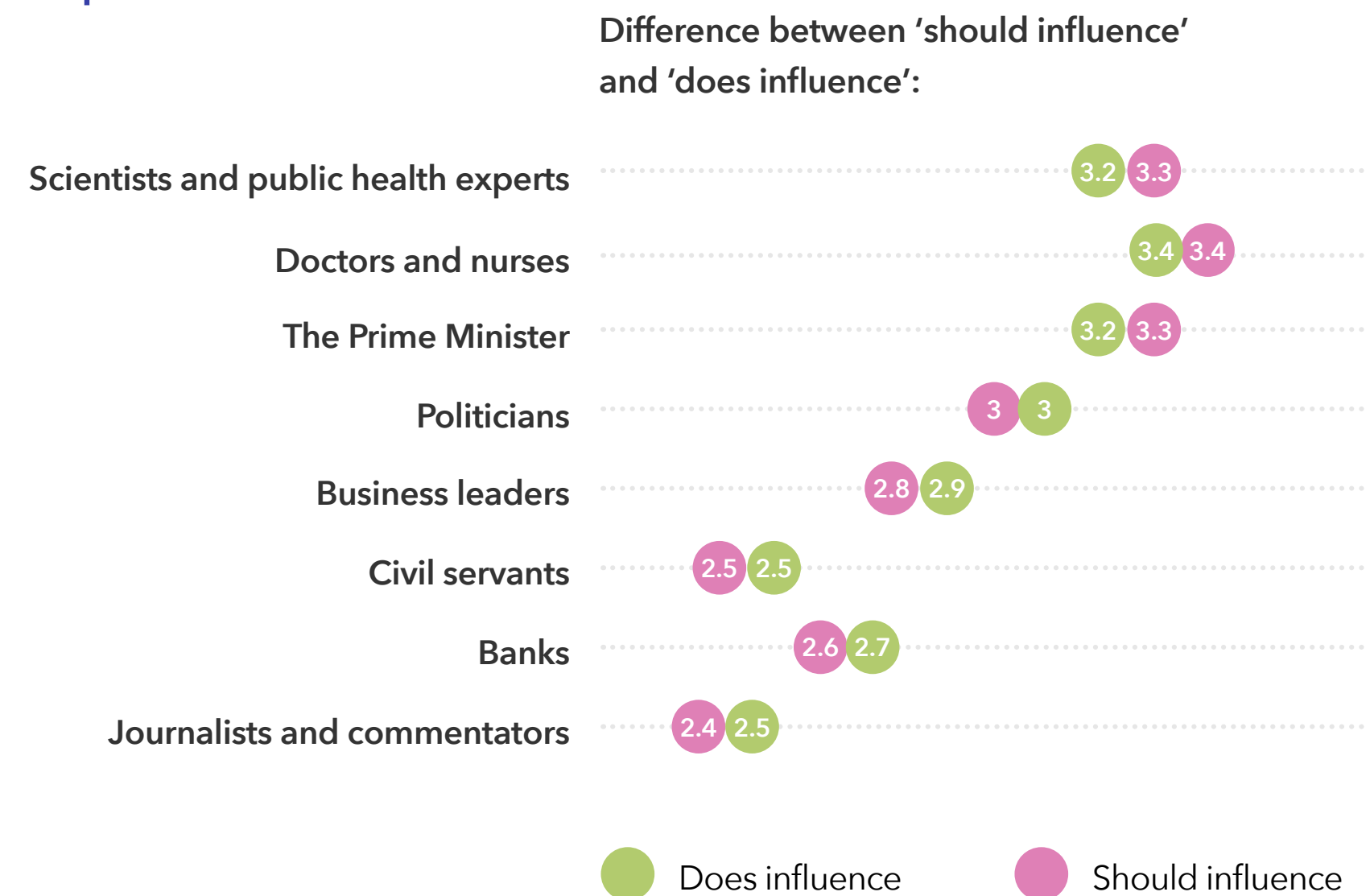
● Does influence  
● Should influence

# 5 Levels of influence



## People want scientists, public health experts, and doctors and nurses in charge of their nation's response

### Japan



- Across all five countries, people want to see **scientists and public health experts**, as well as **doctors and nurses**, have greater influence on their country's response to the coronavirus crisis than they do. These professions, alongside the political classes and leadership, come above **business leaders**.
- **Americans think doctors and nurses/scientists and public health experts are in charge of the government's response to coronavirus - more so than the President - and want them to play an even larger role.** They want to see less of a role for politicians, for business leaders and – marginally – for President Trump.
- **Germans see scientists and public health experts, as well as Angela Merkel and politicians as being in charge.** They want a lesser role for politicians and the Chancellor, and more of a role for doctors and nurses, as well as public health experts and scientists.
- As with other nations, **Sweden sees scientists and public health experts as the most influential in Sweden's decision-making on the virus**, followed by a mix of the Prime Minister, politicians, and doctors and nurses. They want to see a bigger role for doctors and nurses than there currently is, as well as an increased role for scientists and public health experts – and less for politicians, though they are **largely happy with the amount of influence the Prime Minister has**. Sweden is the country least keen to see business leaders taking a role, with only 32% wanting them to have a great deal or a fair amount of influence in this crisis.
- Despite dissatisfaction with the Government, and high levels of concern about the impact of the virus on the economy, **the Japanese public are the most content with who has influence over their nation's response to coronavirus.** The Japanese believe doctors and nurses have the most influence – and that this is correct – followed by the Prime Minister and then scientists and public health experts. They also think the amount of influence that civil servants, journalist and commentators, as well as the banks have is about right.
- The British position is not an outlier in its perceptions and preferences for influence overall, but **the disconnects for the British public between those who they believe do influence the response to the virus and those who should be amongst the largest.** There is a gulf between the influence the public in the UK want doctors and nurses to have and the influence they think they do have in reality.
- **The UK is the only country where people think the Prime Minister has the most influence** – higher even than scientists and public health leaders. This is similar in Germany, where the **Chancellor is seen as having as much influence as scientists and public health experts.** These two countries, then, seem to have a more personalised sphere of influence when it comes to tackling the coronavirus – and voters are largely happy with that.

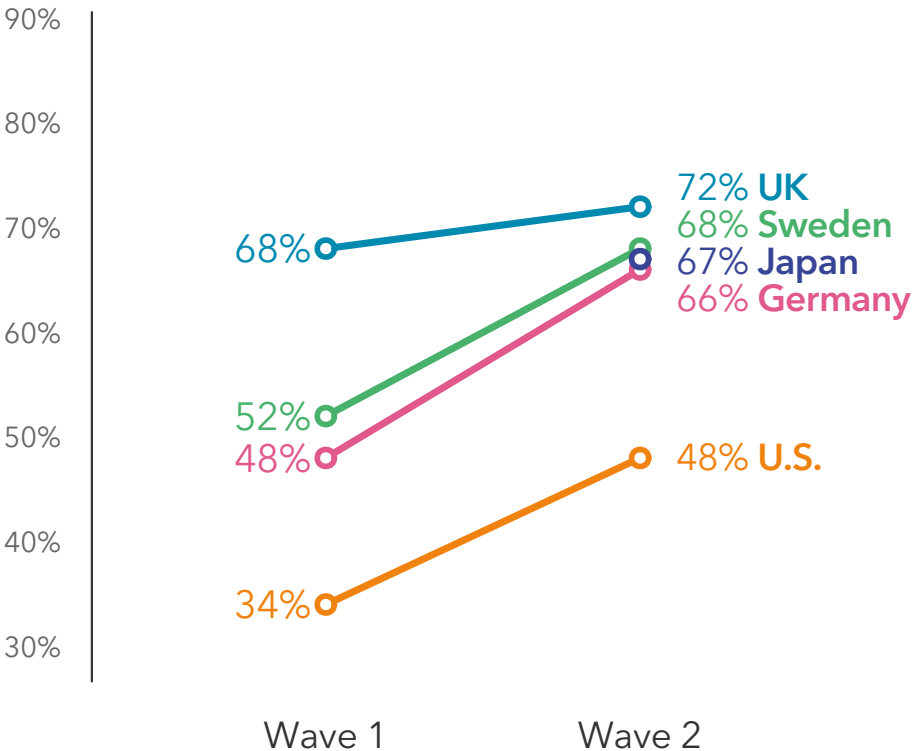


# 6 Expected duration

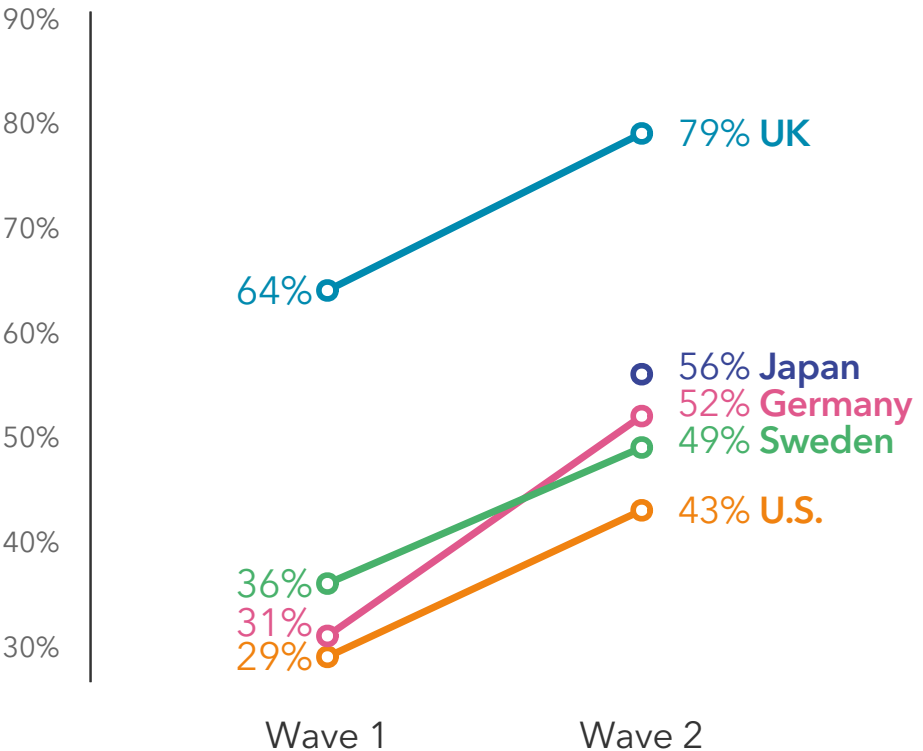
## People now expect the impact of the virus - especially on the economy - to last for much longer than they previously thought

Percentage from each country choosing "Longer than a year" or "Longer than two years" for each issue

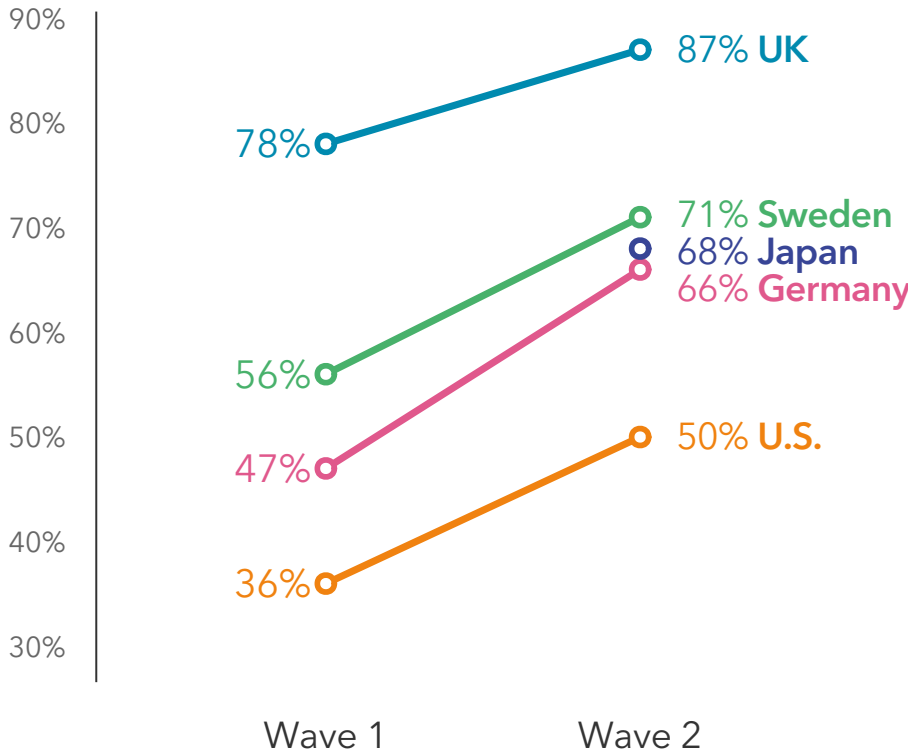
### The impact on businesses and how they function



### The impact on my country

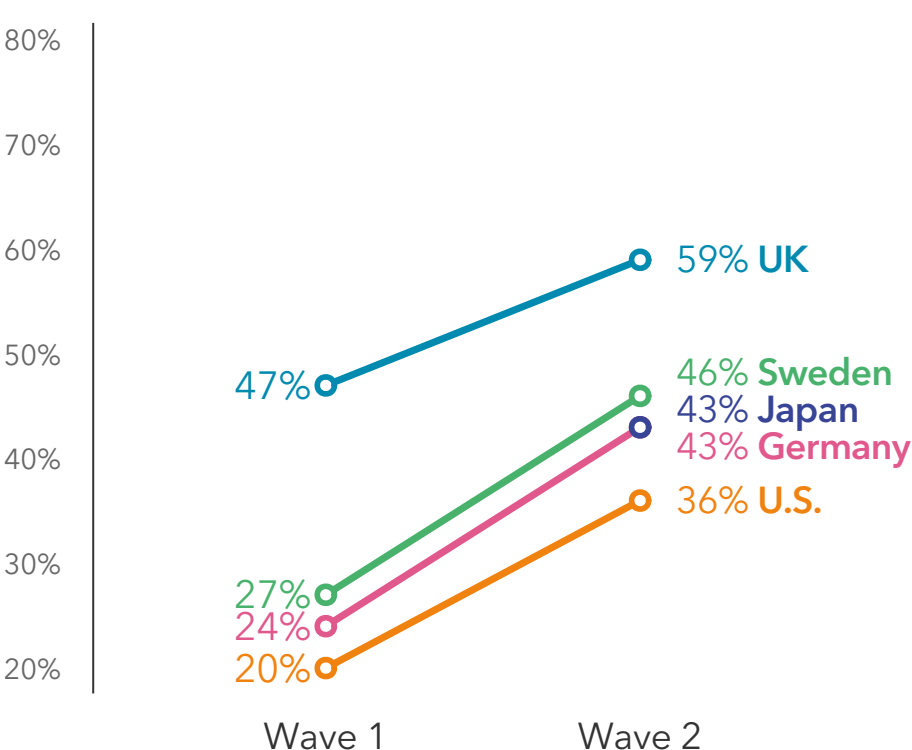


### The impact on the economy

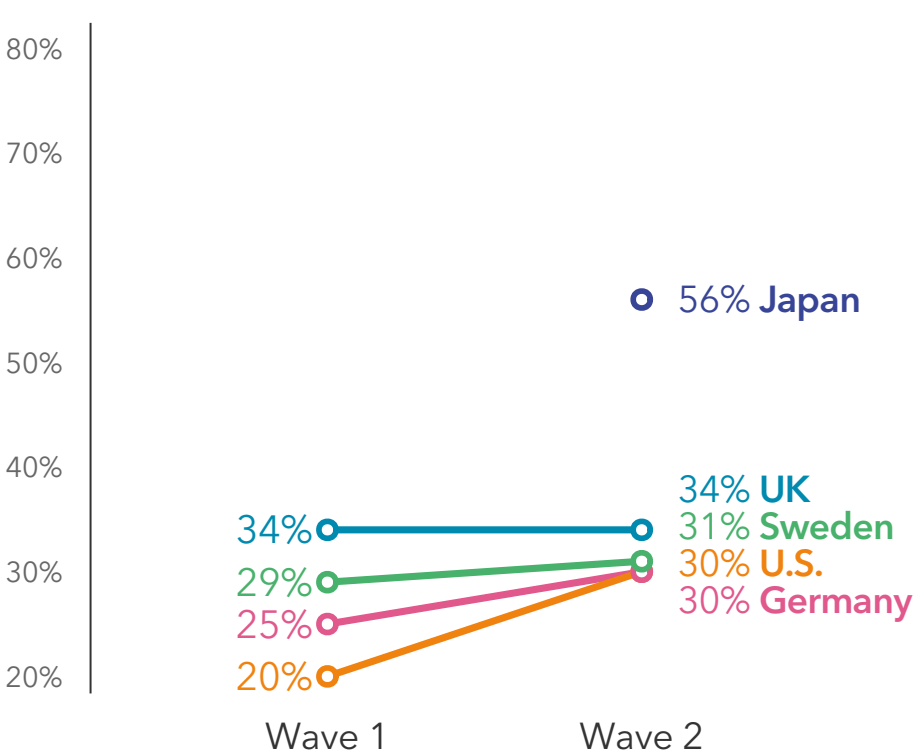


- Respondents across all countries were asked how long they think the effects of the virus on a range of different issues will last for.

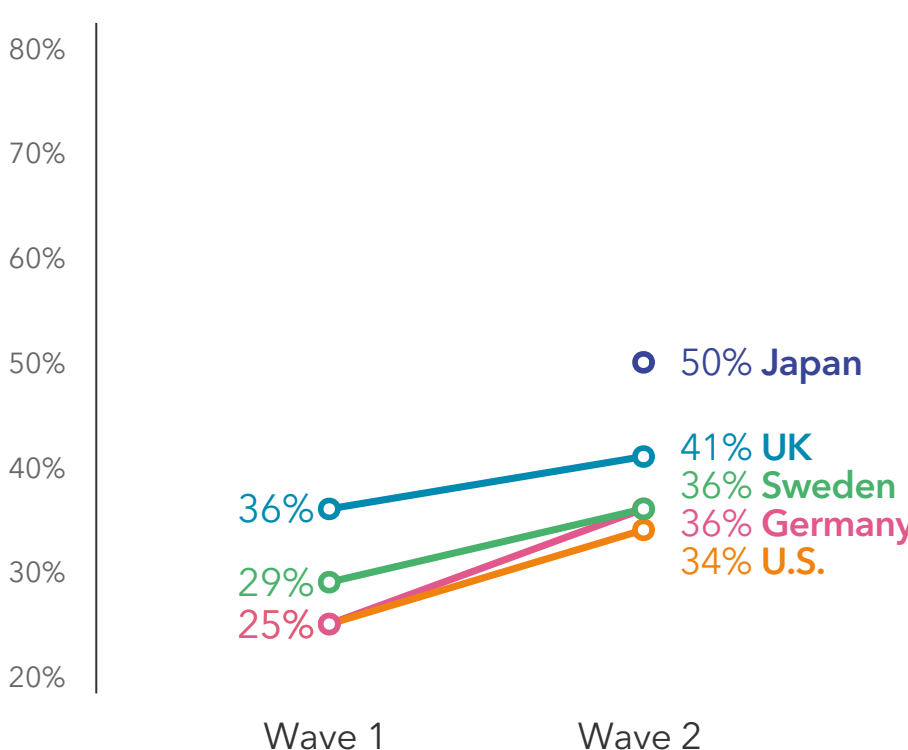
### The impact on travel and holidays



### The impact on your own household finances



### The impact on your own life

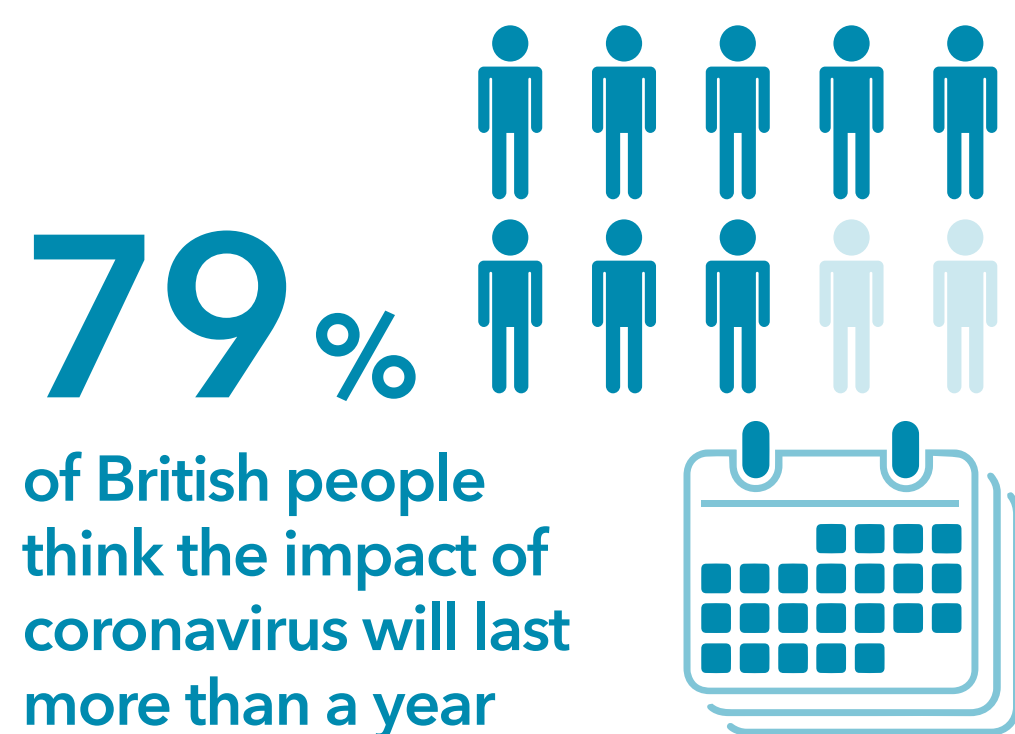






# 6 Expected duration

People now expect the impact of the virus - especially on the economy - to last for much longer than they previously thought



- People in the UK are still by far the most likely to think the impacts of coronavirus will last for a long time. 79% of British people think the impact on their country will last more than a year, and 87% see the economic effects lasting into 2021 and beyond. **Conversely, people in the U.S. tend to think it will not last so long**, with fewer than half Americans saying they expect to see the impact on their country last beyond the end of 2020 and just over a third (36%) saying they expect the impact on travel and holidays to last that long.

- Across all countries, **more people think the impacts of the virus will last longer than a year compared to in April**. In April, just 31% of Germans and 29% of Americans thought the impact of coronavirus on their country would last more than a year; that is now 52% and 43% respectively.

**Big majorities in the UK (87%), Sweden (71%), Japan (68%) and Germany (66%) expect the impact on the economy to last beyond the end of the year**

- Big majorities in the UK (87%), Sweden (71%), Japan (68%) and Germany (66%) expect the **impact on the economy to last beyond the end of the year**, along with 50% of Americans. High numbers also expect such an impact to last on businesses and how they function.

- However, looking at the differences compared to April, **people are not any more likely to think the impact on their own household finances will last longer than a year**. Low in any case, only 34% of Brits, 31% of Swedes, 30% of Americans and 30% of Germans think the impact on their own household finances will last this long, despite high numbers expecting a long macro-economic impact. Similar numbers apply to the perceived impact of the virus on people's own life. This disconnect between the macro and the personal is concerning and important for businesses and others to continue to monitor.

- **The exception to this is in Japan, where there is no such disconnect between the personal and general impacts of the virus**. 56% of the Japanese public think the impact on household finances will last beyond a year, as do 50% when asked about the impact on their own life. This may link closely to the extent of business support in the countries surveyed.

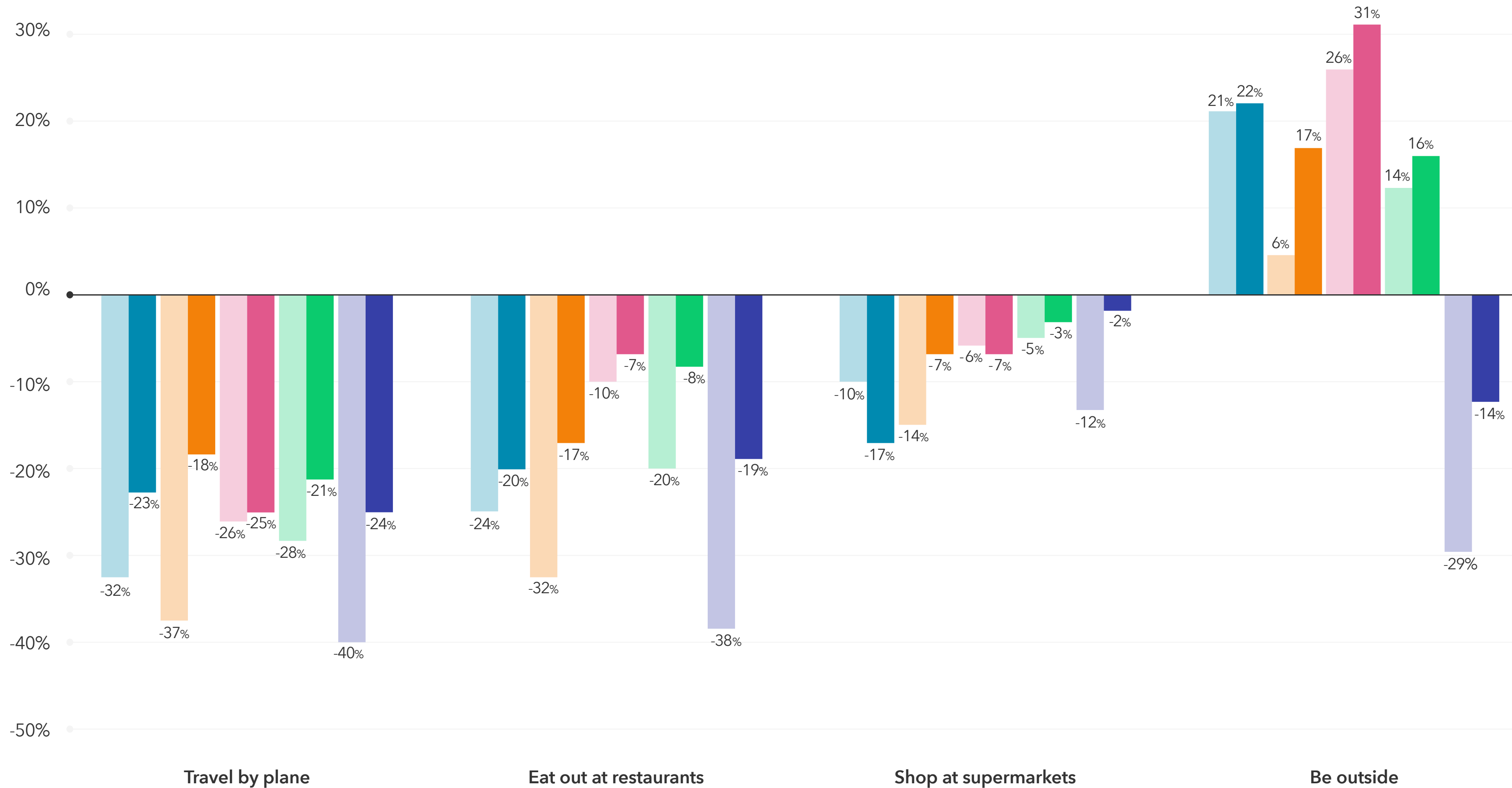
# 7

## Behaviour after the crisis

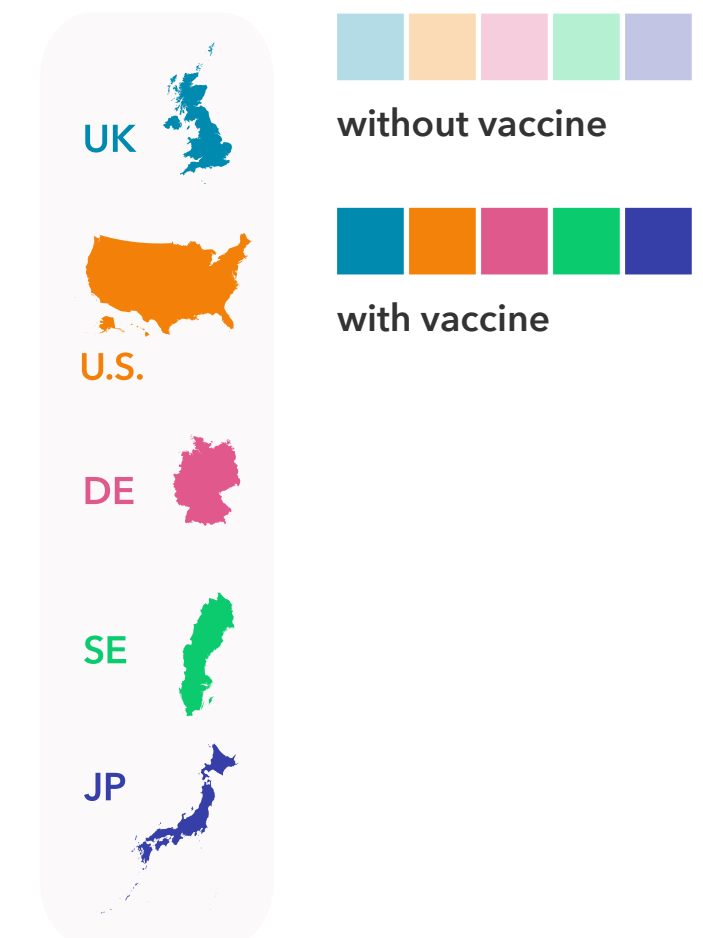


### People's behaviour will clearly change after restrictions are lifted

Net percentage of 'more than before' or 'less than before' for each consumer behaviour, both after lockdown restrictions and after a vaccine



- Respondents across all countries were asked how they expected their own lifestyle to be different from before the outbreak for a range of consumer behaviours. **A split sample was used, with the first half of respondents asked how they would behave if a successful vaccine was rolled out and the second half of respondents asked how they would behave if only current coronavirus restrictions were lifted.**



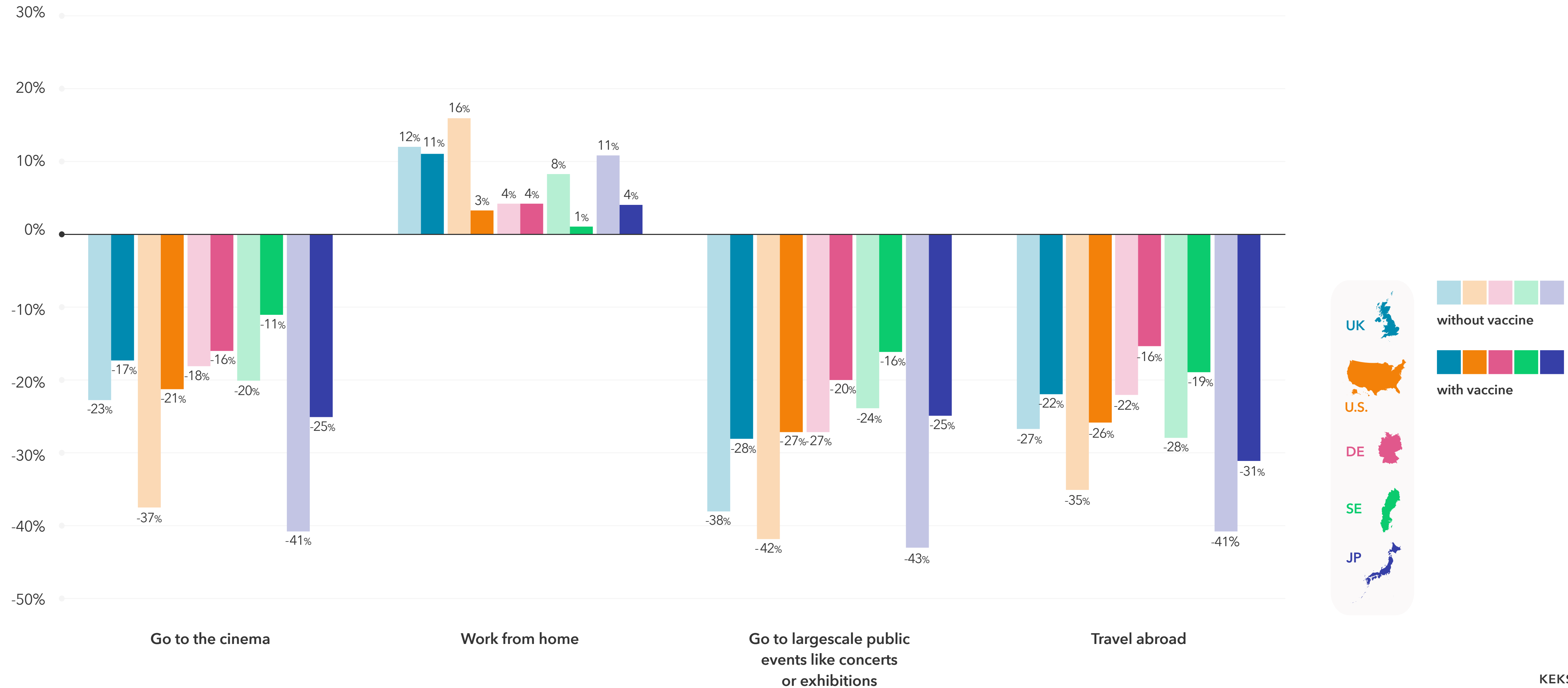
# 7

## Behaviour after the crisis



People's behaviour will clearly change after restrictions are lifted

Net percentage of 'more than before' or 'less than before' for each consumer behaviour, both after lockdown restrictions and after a vaccine



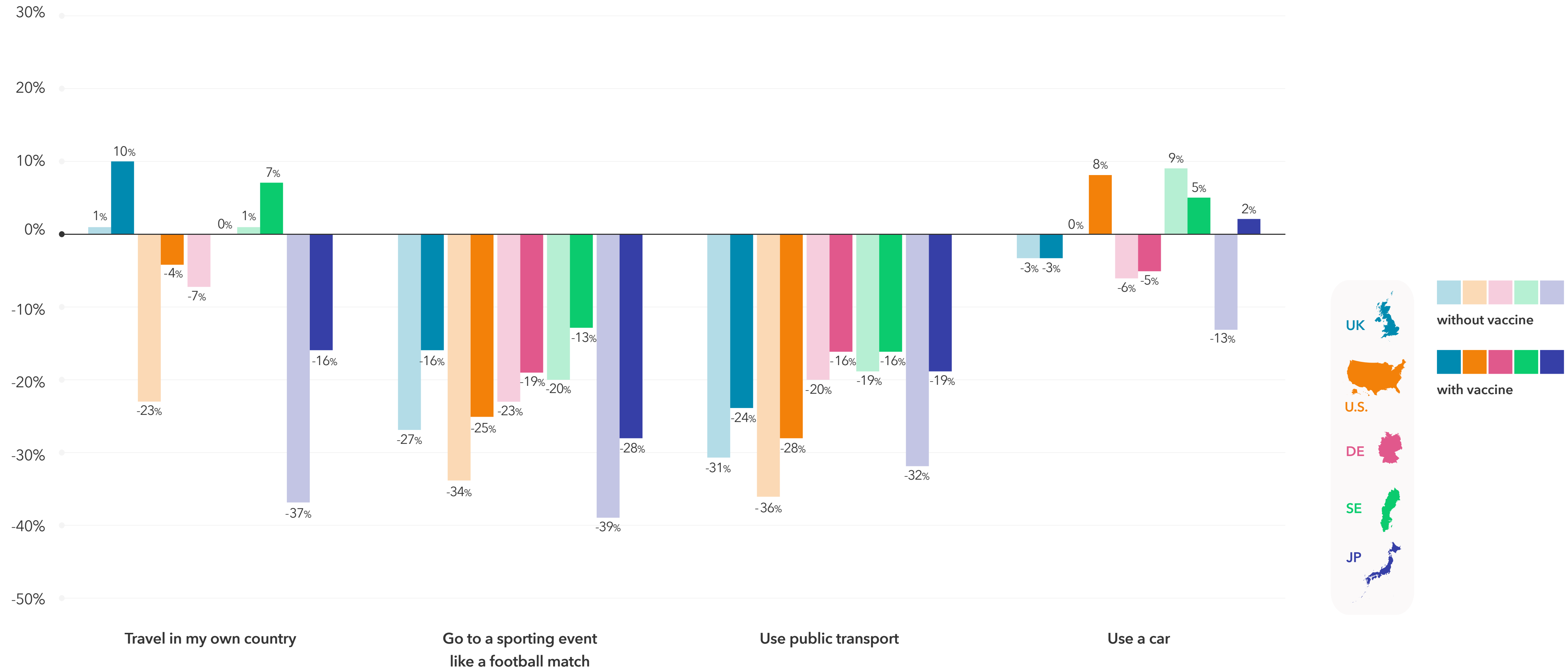
# 7

## Behaviour after the crisis



People's behaviour will clearly change after restrictions are lifted


Net percentage of 'more than before' or 'less than before' for each consumer behaviour, both after lockdown restrictions and after a vaccine





# 7 Behaviour after the crisis

- Before assessing the net changes, it is important to note that **significant majorities across countries say their behaviour will not change after the outbreak if there is a vaccine**. For example, 64% in the UK say they will eat out at restaurants the same amount as before, 64% in Sweden say they will go to the cinema the same amount as before, and 57% in the U.S., 70% in Germany, and 71% in Japan 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: there will be clear marginal effects.

64% 

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

- Expected behavioural change after lockdowns are lifted show that **the public will be slow to return to their normal behaviour**. But even when considering a post-vaccine situation, this data suggests that **many consumer behaviours will decline after the outbreak is over - even if there is a successful vaccine**. 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. Other behaviours that people say they will do less include going to the cinema, eating out at restaurants, using public transport, and going to a sporting event like a football match.

- **Belief in the potential power of a vaccine seems highest in the U.S. and Japan**. In these countries, the differences between people's expected behavioural change post-lockdown and post-vaccine are the starkest, compared to smaller margins in the UK, Germany and Sweden.



Belief in the potential power of a vaccine seems highest in the U.S. and Japan



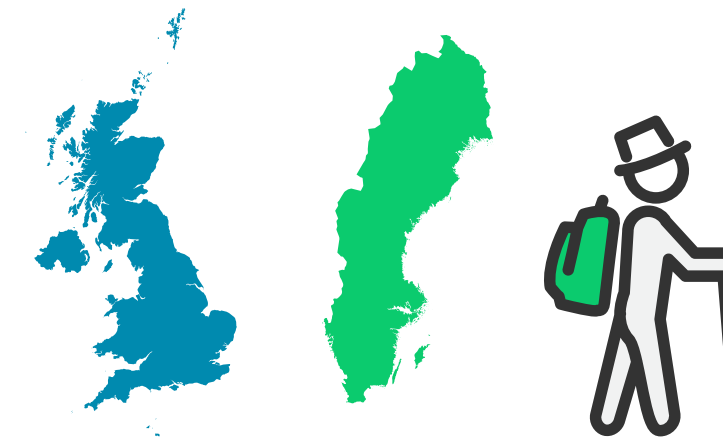
Data suggests that many consumer behaviours will decline after the outbreak is over - even if there is a successful vaccine

# 7 Behaviour after the crisis



- In line with their levels of concern about the virus, **expected post-vaccine behaviour changes are smaller in Sweden and Germany.** For example, only a net 7% expect to eat out at restaurants less in Germany, and a net 8% in Sweden, compared to a net 20% in the UK and 19% in Japan. They are also more likely to go to the cinema in a post-vaccine world, as well as travel abroad.
- **People in Japan are saying they will behave especially differently.** The Japanese are the least likely to attend the cinema after the crisis (-25%) and to travel abroad (-31%), as well as attend sporting events (-28%). While other nations look to aim to be outside more after a vaccine, the Japanese public seem to associate this with the virus, with a net 14% saying they will aim to be outside less – compared to a net 31% saying they will be outside more in Sweden.

- **There are differences too on domestic travel.** The British and Swedish look to enjoy more travel in their own country (+10% more in the UK, and +7% in Sweden). Even while the coronavirus outbreak is still underway but restrictions have been lifted, Brits and Swedes say they will look to travel more in their country. However, even in a post-vaccine world, Americans (-4%) do not appear as keen to do so. And in Japan, a net 16% say they will travel in their own country less after the coronavirus outbreak is over and a vaccine is found.
- **There is an expected decrease in the use of public transport, but this does not look - currently - to be compensated by increased car use.** Though on balance people across all five countries say they will use public transport less, **projected car use is not significantly up.** In the U.S. it looks to increase marginally, with net 8% saying they would use a car more – and in Sweden where it is a net 5%. But in the UK this figure is net 3% saying they would use a car less, and in Germany the figure stands at 5% net saying they would use a car less.



**Brits and Swedes say they will look to travel more in their country**

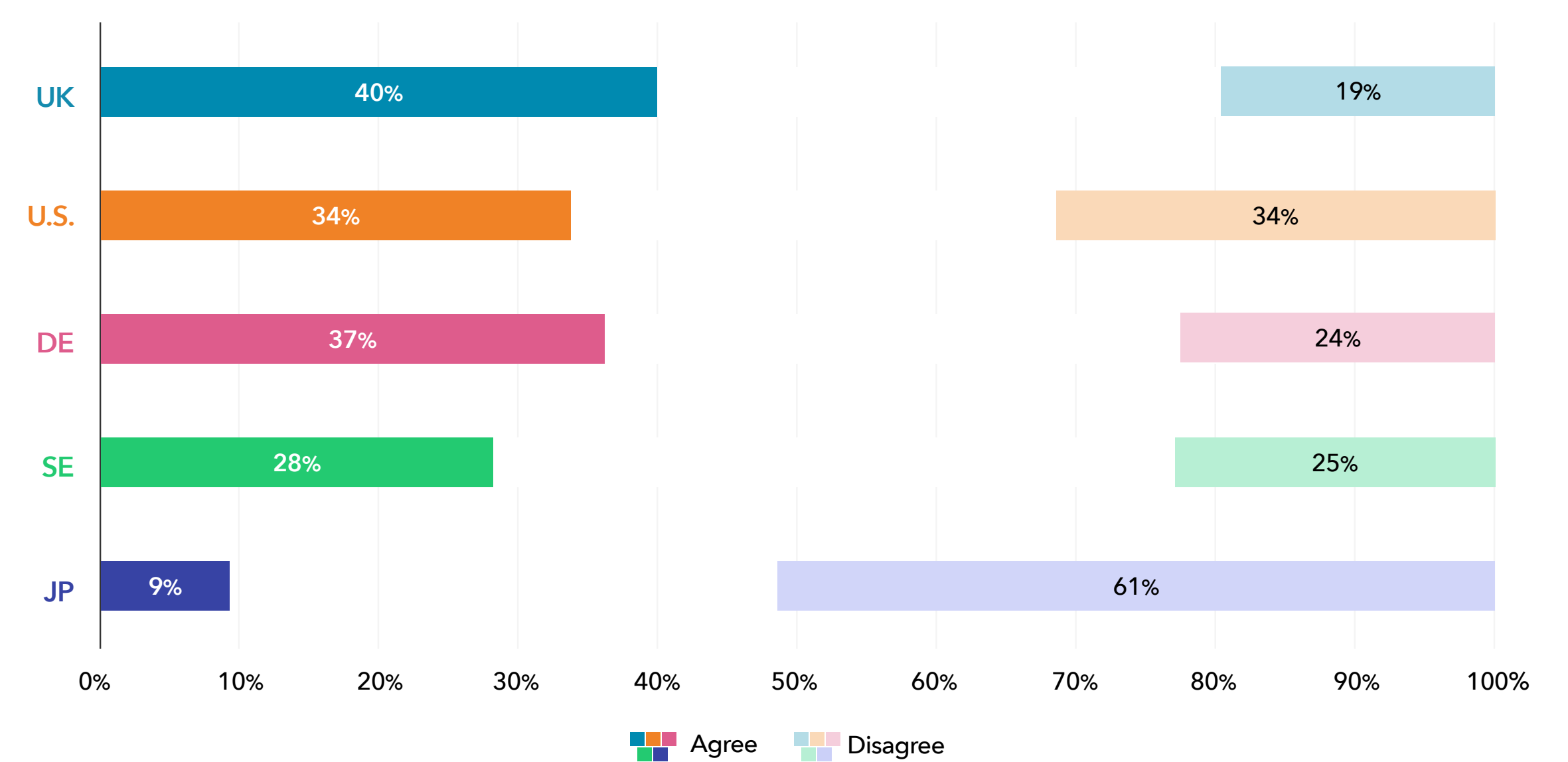
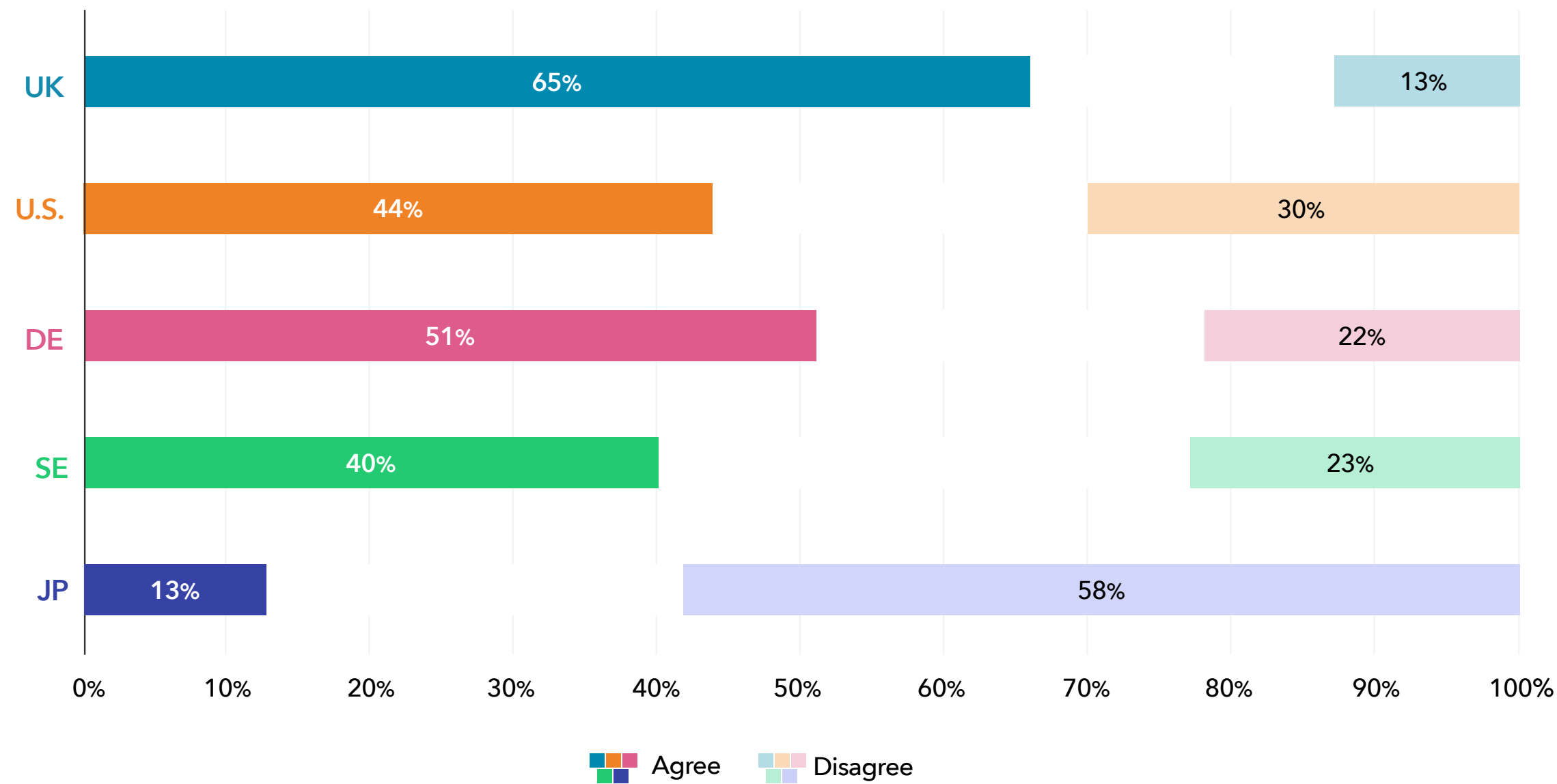
# 8 Views of business support



People think their governments are giving business the support it needs but are less sure it is going to the right businesses - and the Japanese public are sharply critical

The government in my country is giving business the support it needs during this crisis

The business support the government in my country has announced is getting through to the companies that really need it



- Respondents across all countries were asked whether they agreed or disagreed with statements about the amount of business support that their government is providing during the coronavirus outbreak.





# 8 Views of business support

People think their governments are giving business the support it needs but are less sure it is going to the right businesses – and the Japanese public are sharply critical

- A majority in Germany (51%) and almost two-thirds in the UK (65%) think their government is **giving business the support it needs during this crisis**. This applies to a lesser degree in the U.S. (44% agree) and Sweden (40% agree) but more people still agree that it is than say it is not.


Only

13%



of people in Japan believe the government is giving business the support it needs

- **Smaller numbers think that business support measures already announced are getting through to the companies that really need it.** In the UK, Germany and Sweden, more agree that it is compared to those who think it is not. In the UK, people say it is by a margin of two to one (40% to 19%). In Germany, the picture is narrower, with 37% agreeing and 24% disagreeing. In Sweden things are tighter still, with 28% saying business support is getting to the businesses that need it most, and 25% saying it is not. In the U.S., the public are split - with 34% saying it is and 34% saying it is not.
- On both measures, the picture in Japan is stark. **Very few people in Japan believe the government is giving business the support it needs** – only 13% compared to 65% in the UK. And only 9% - **fewer than one in ten** – believe the business support the government has already announced is getting to those who really need it, with 61% saying it is not.

65%   
of Brits think their government is giving business the support it needs during this crisis

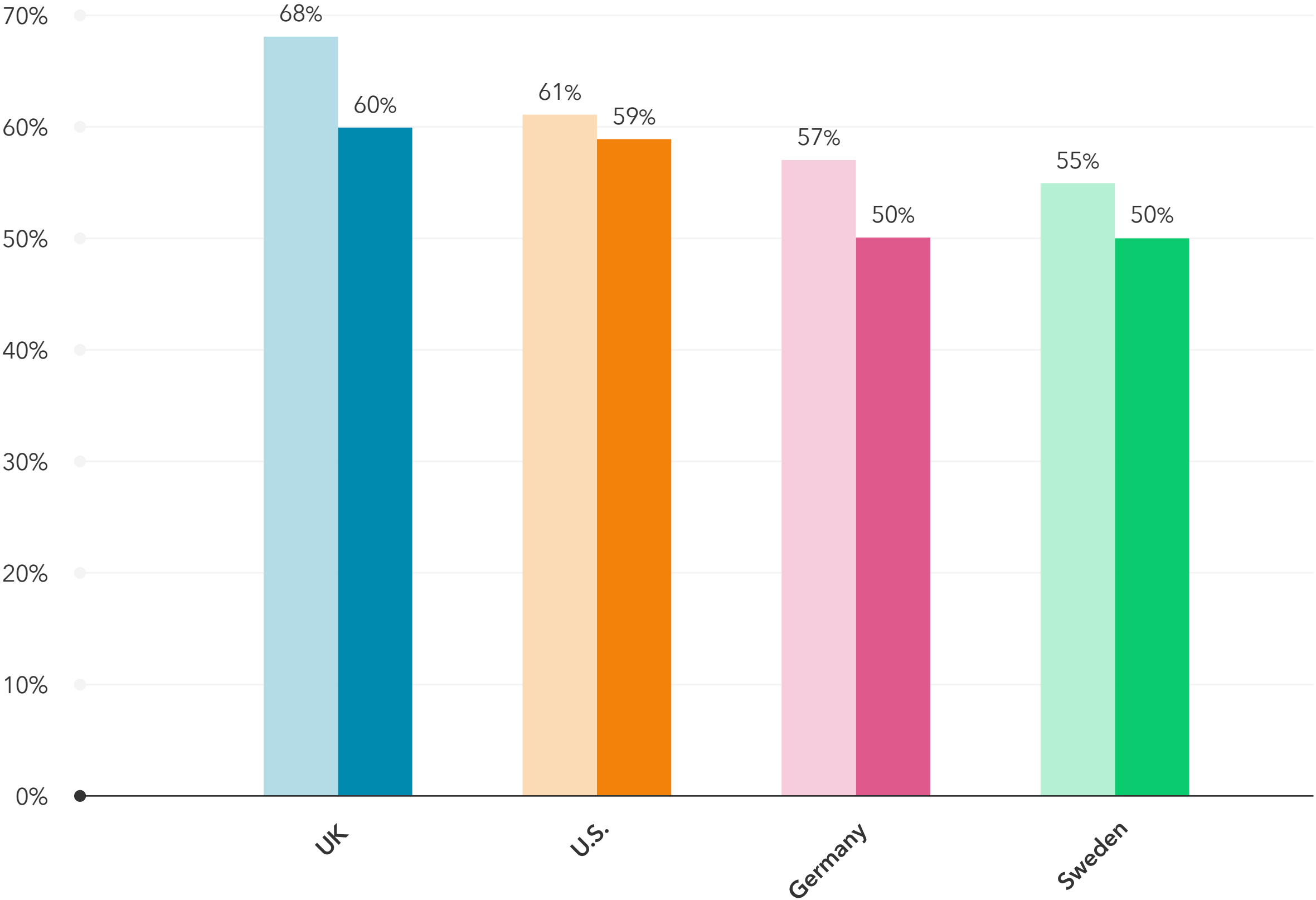




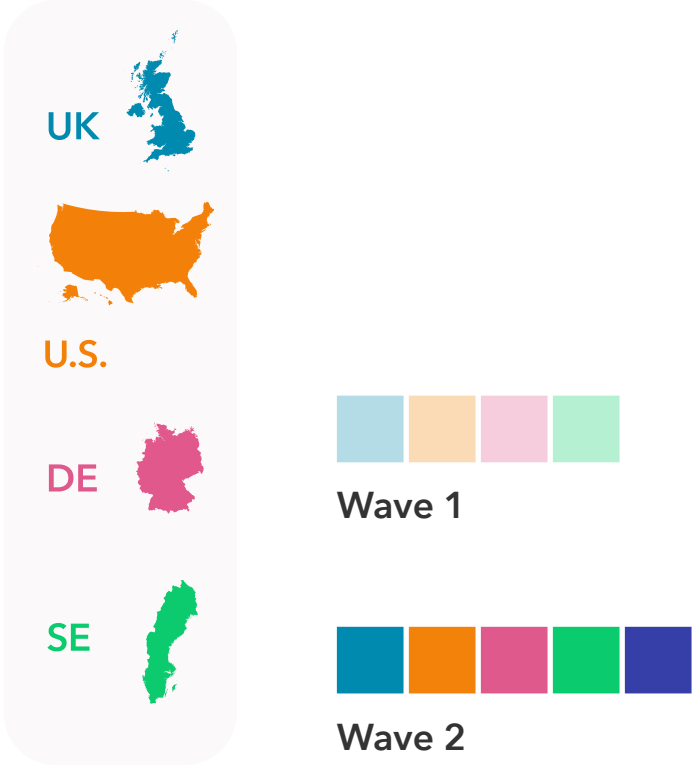
# 9 Business brands

## Slightly fewer people think business is stepping up during the coronavirus outbreak than last month

Overall businesses in my country are stepping up during the coronavirus outbreak



- Respondents across all countries were asked whether they agreed or disagreed with a set of statements referring to businesses and government during the crisis.
- People have become **marginally less sure that business is stepping up in their country during the outbreak**, but majorities in the UK, U.S., Germany and Sweden **still agree that it is**.

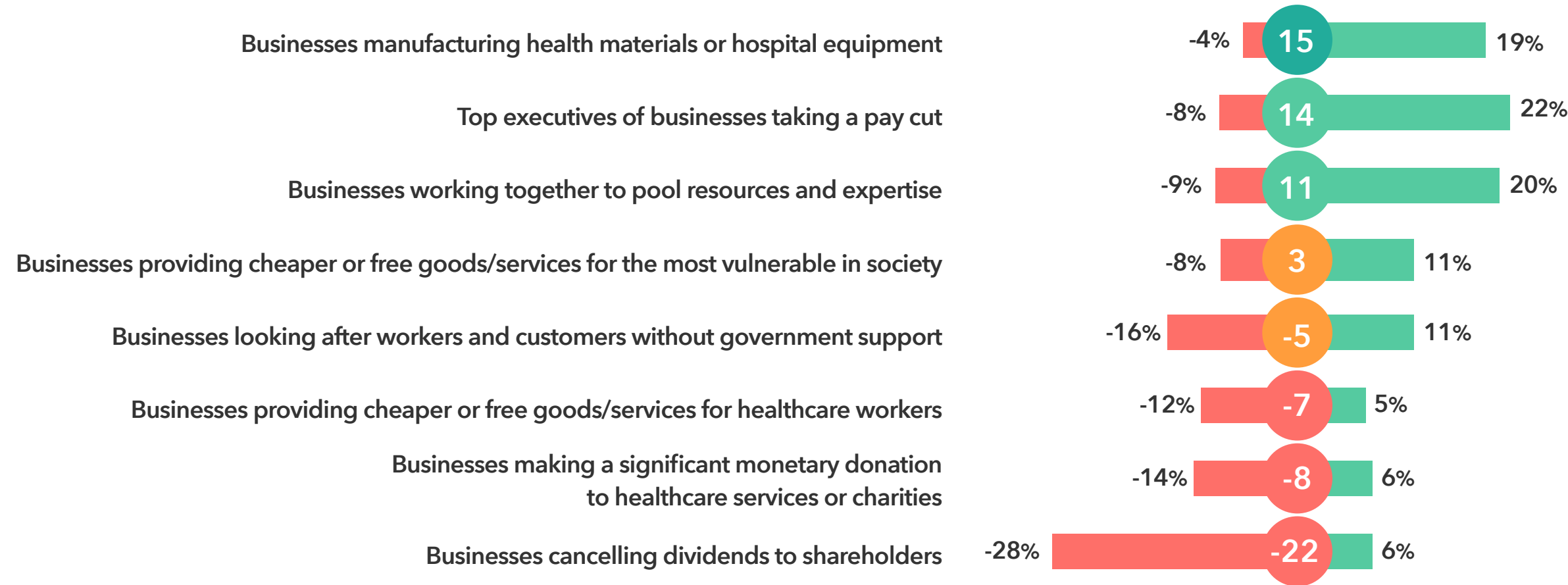


# 9 Business brands

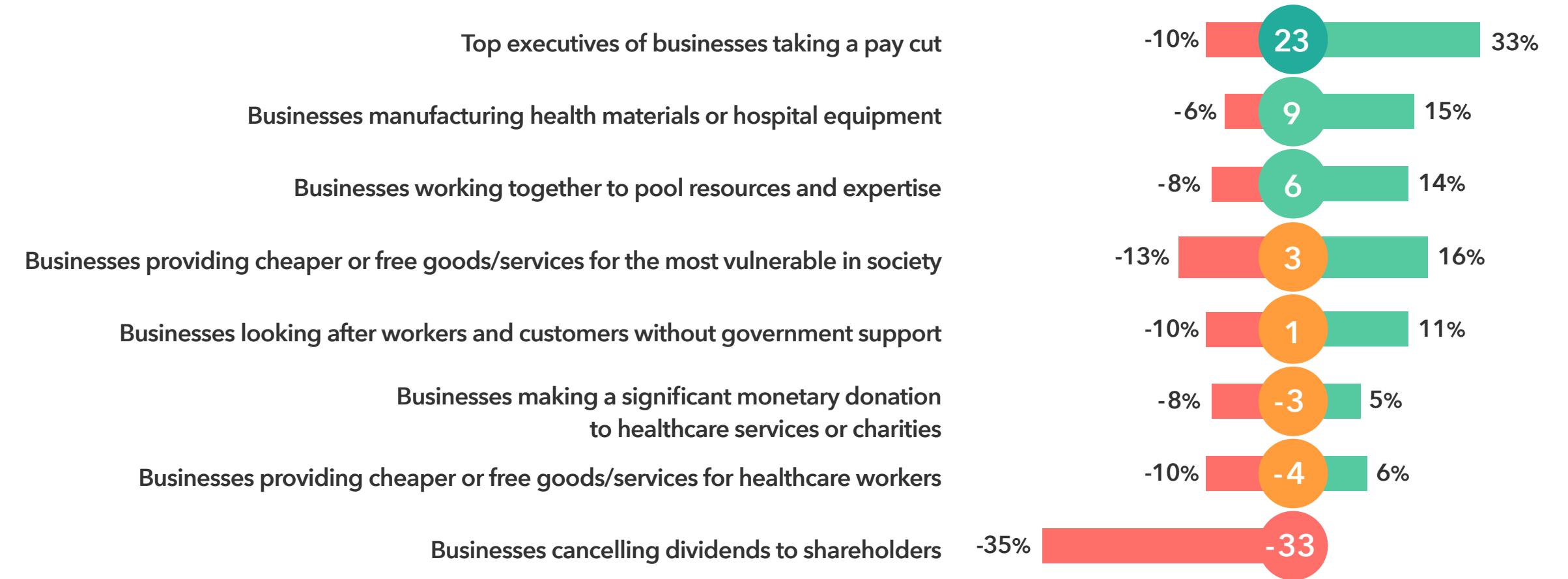


Asked what they most want to see business doing, executive pay cuts are high, as is manufacturing health equipment

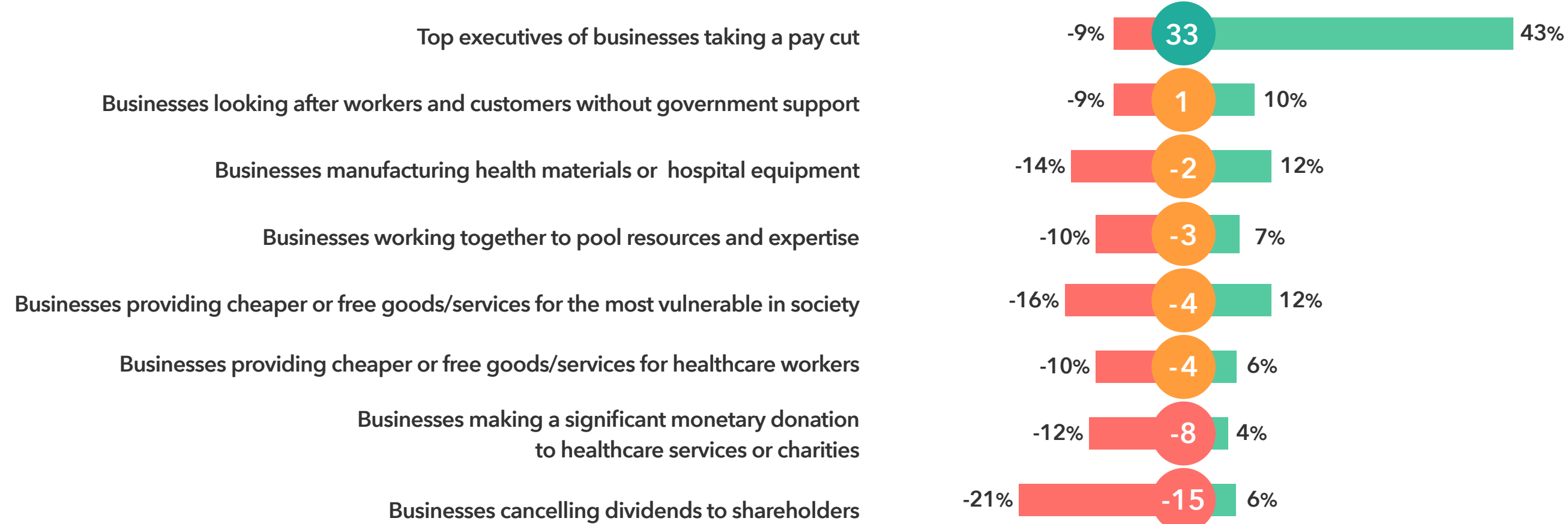
## UK



## U.S.



## Germany



- Respondents across all countries were presented with a set of options, and asked to choose the action they want to see the most from business, and the one they want to see least. These were then netted out to show the actions that people want to see most and least.

# 9 Business brands



Asked what they most want to see business doing, executive pay cuts are high, as is manufacturing health equipment

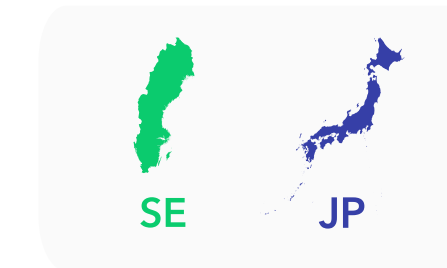
## Sweden



## Japan



- Respondents across all countries were presented with a set of options, and asked to choose the action they want to see the most from business, and the one they want to see least. These were then netted out to show the actions that people want to see most and least.



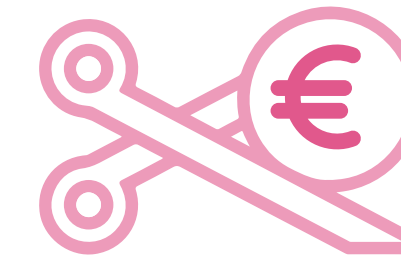


# 9 Business brands

Asked what they most want to see business doing, executive pay cuts are high, as is manufacturing health equipment

- The top action that people want to see business take in Sweden, the United Kingdom and Japan is for **businesses to manufacture health materials or hospital equipment**. This was especially marked in Japan where 27% chose this option as their most important, compared to 19% in the UK and 21% in Sweden.
- In the U.S. and Germany, however, the **top action that people want businesses to take is for top executives to take a pay cut**. This was most decisively chosen in Germany, where 43% opted for it. Pay cuts were also relevant in the UK, where 22% chose it as the most preferred action they want to see business take.

- Other desired business actions include **businesses working together to pool resources and expertise** (particularly in the UK, U.S., and Sweden). **Businesses providing cheaper or free goods for the most vulnerable in society was a preference in Japan** (18% chose this as their most preferred option).
- Though most actions here would be welcomed by the public on their own terms, businesses choosing to prioritise their own workers, or make monetary donations, are not likely to substantially improve their stock with the public. And **the action the public want to see least across all five markets is businesses cancelling dividends to their shareholders** – with people in the U.S., UK and Japan particularly adamant that this is the action they want to see the least.



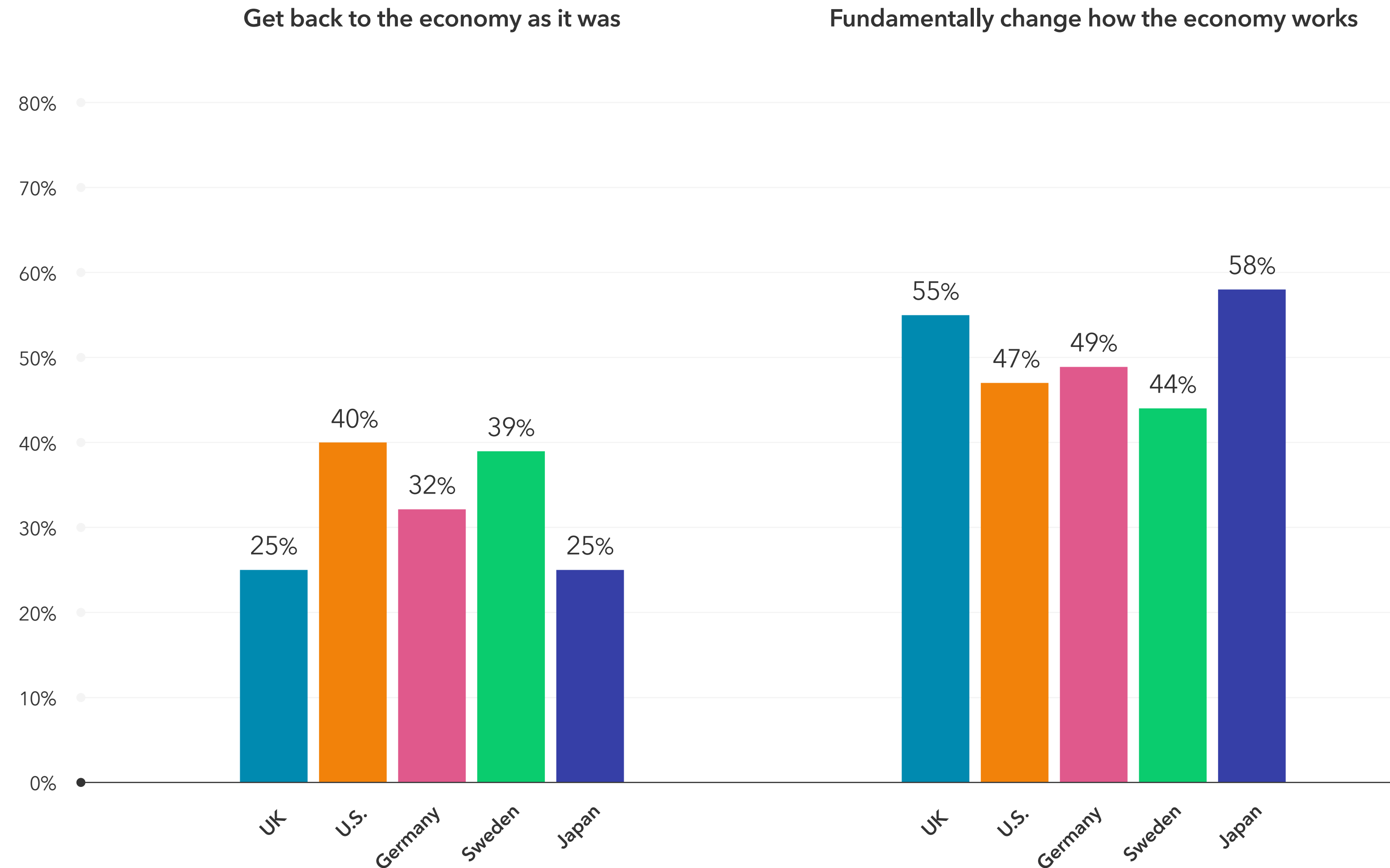
43%

in Germany believe CEOs should take a pay cut

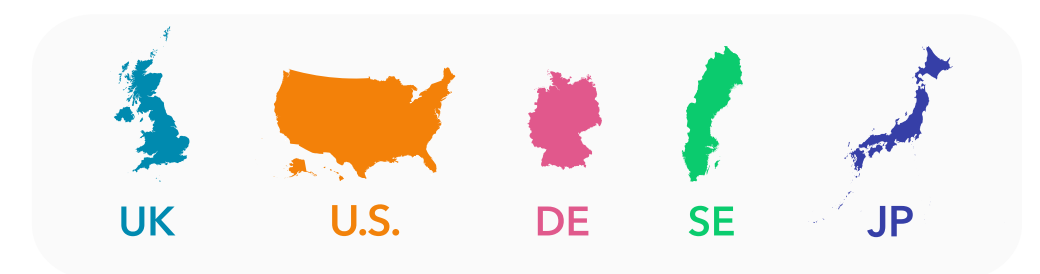
# 10 A changed economy?



People want to see the economy changed for good after the crisis - but this is less marked in the U.S. and Sweden



- Respondents across all countries were asked to choose whether – after the coronavirus outbreak is over – they want to see the economy return to how it was, or for a more fundamental change to how the economy works.
- **Pluralities in all countries want to see the economy fundamentally change.** This is greatest in the UK (55%) and Japan (58%), and at its most narrow in Sweden and the U.S., where only a narrow proportion want to see fundamental change (44% to 39% in Sweden and 47% to 40% in the U.S.).

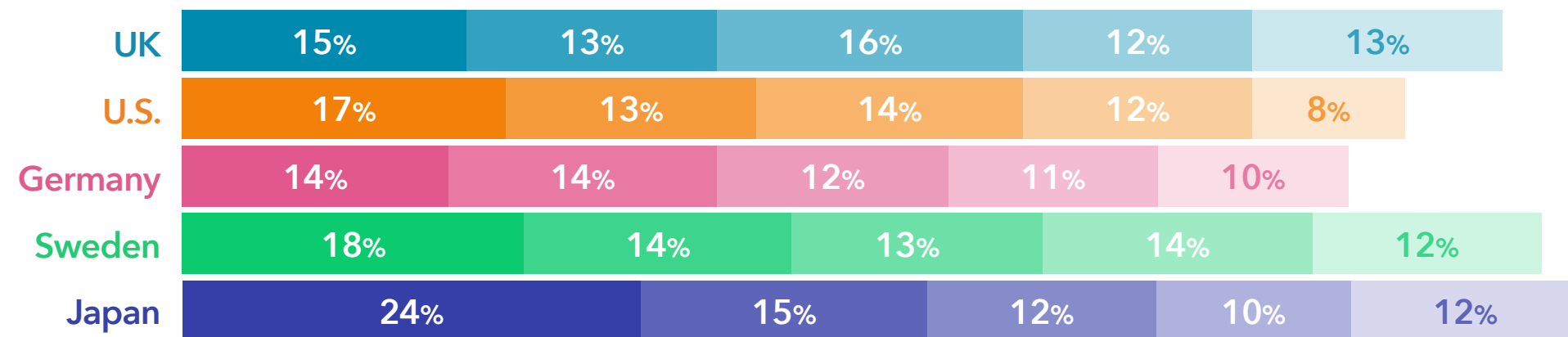


# 10 A changed economy?

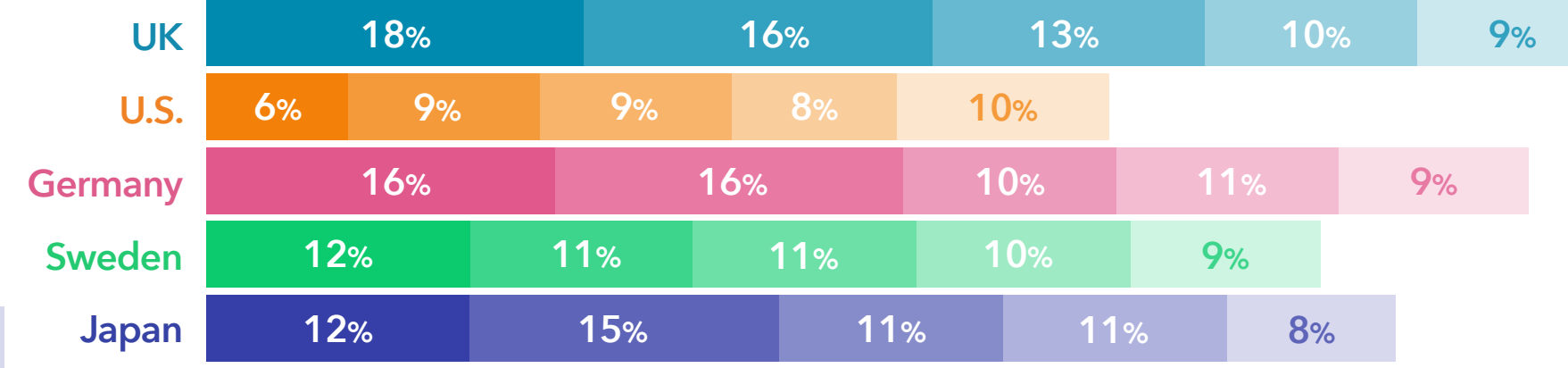


But this may not mean economic revolution, with people less clear on what they want the focus of a changed economy to be

Preparing properly for future pandemics and health threats

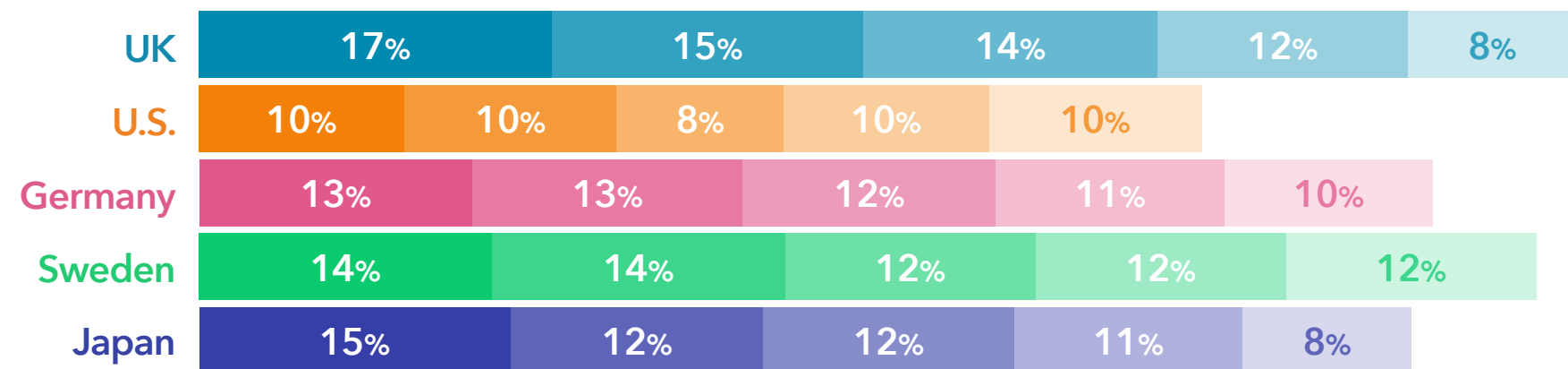


Paying and funding key workers, including healthcare workers, more

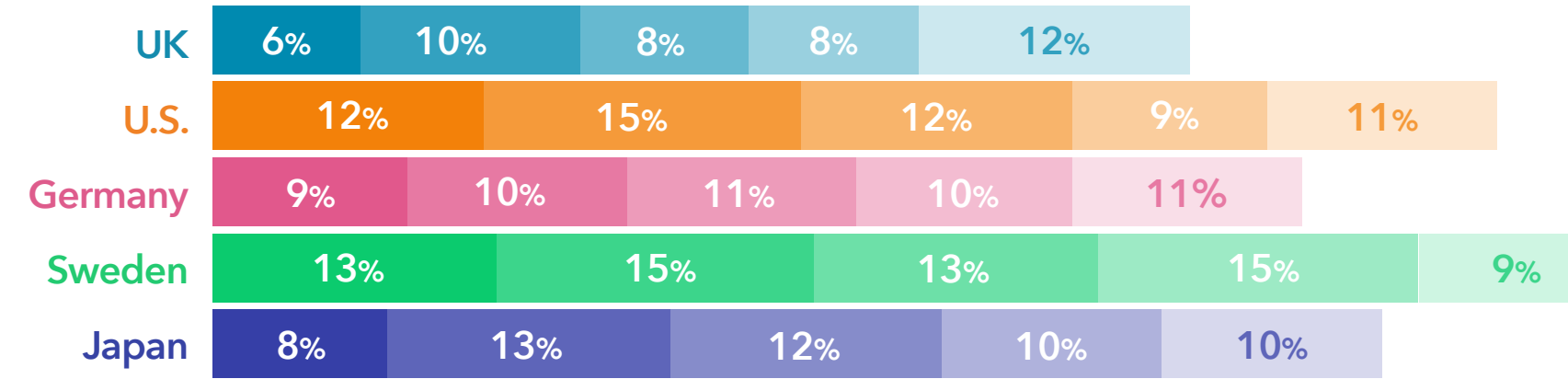


• Respondents across all countries were asked to rank which things they most want to see as the economy recovers after the coronavirus outbreak in the coming months. This graph shows the percentage of each country's public that chose an issue as their first priority, their second priority, their third priority etc.

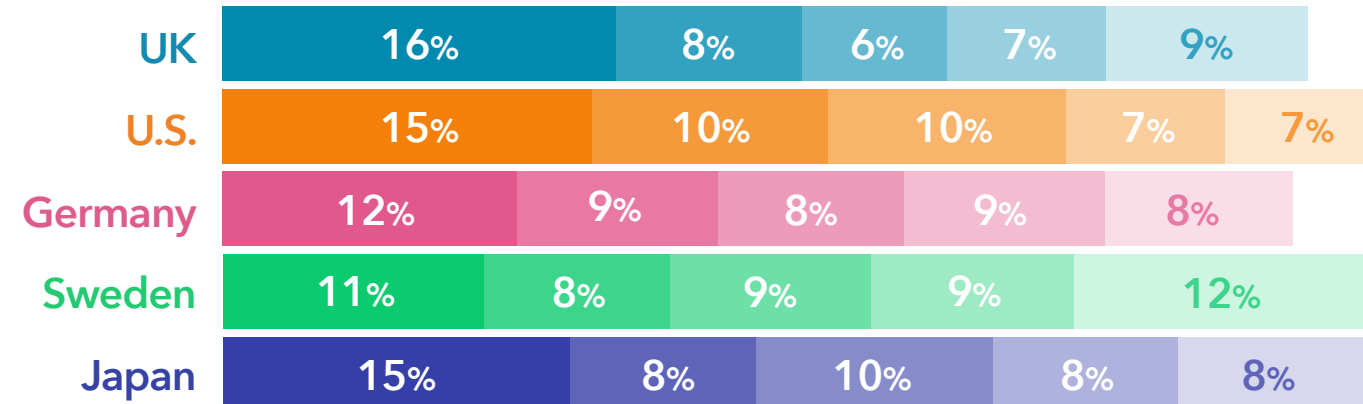
Looking after the most vulnerable in society



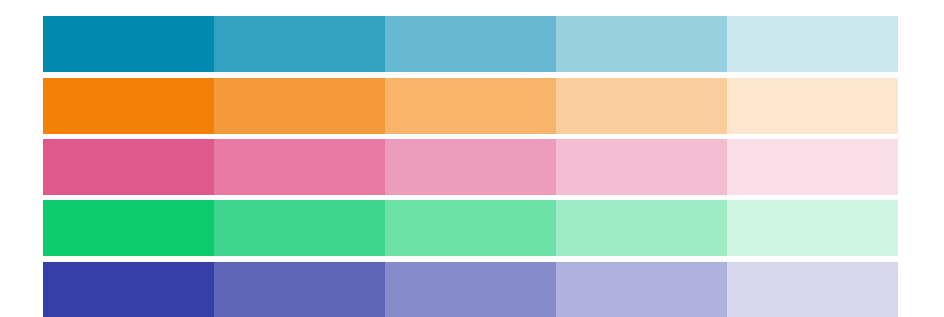
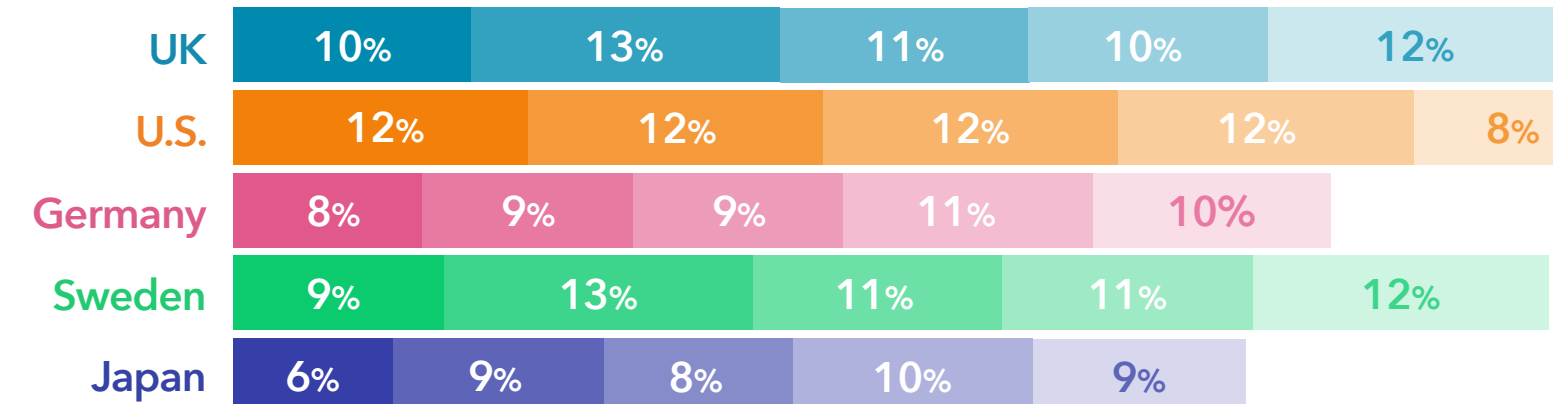
Reducing unemployment



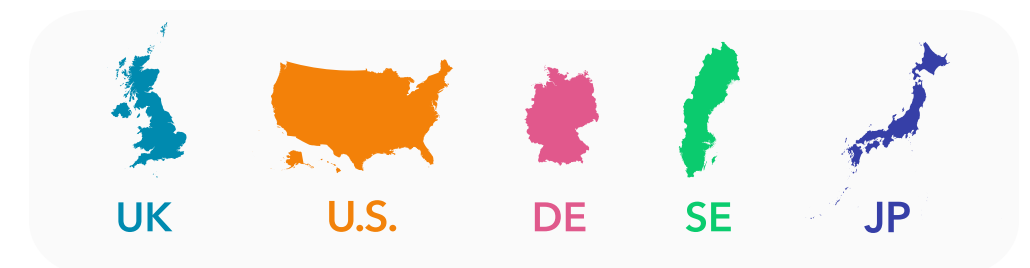
Get back to normal as quickly as possible



Growing the economy



Highest Priority → Lowest Priority

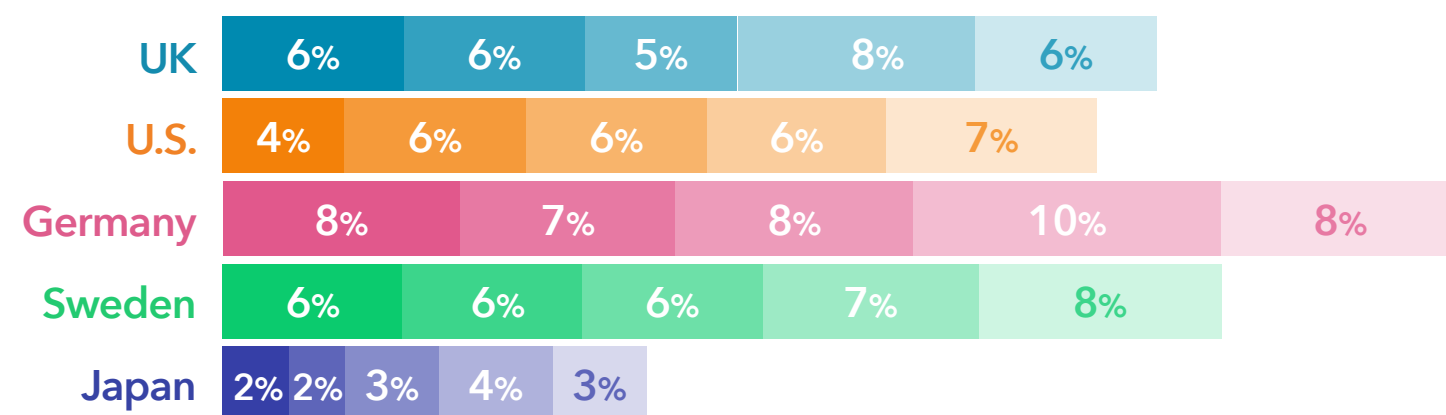


# 10 A changed economy?

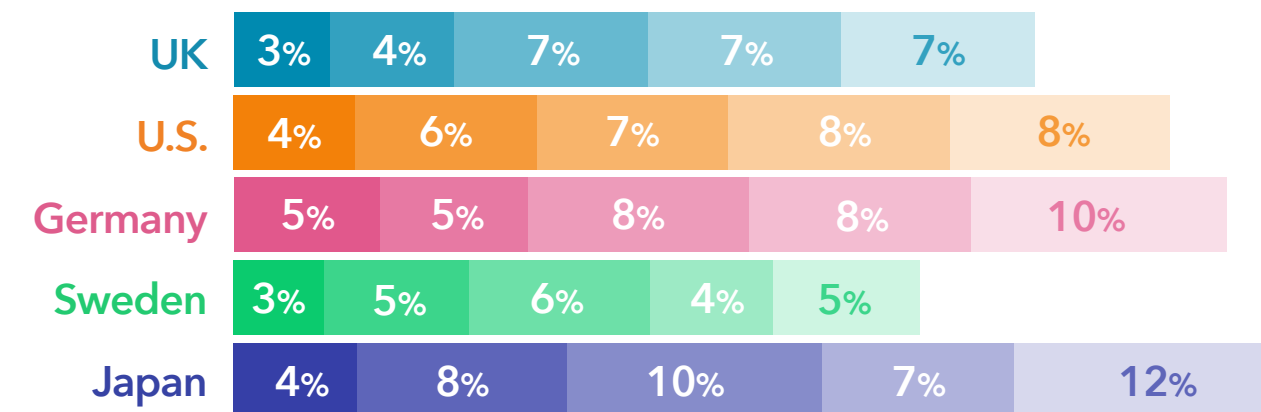


But this may not mean economic revolution, with people less clear on what they want the focus of a changed economy to be

## Focusing the economy around climate protection

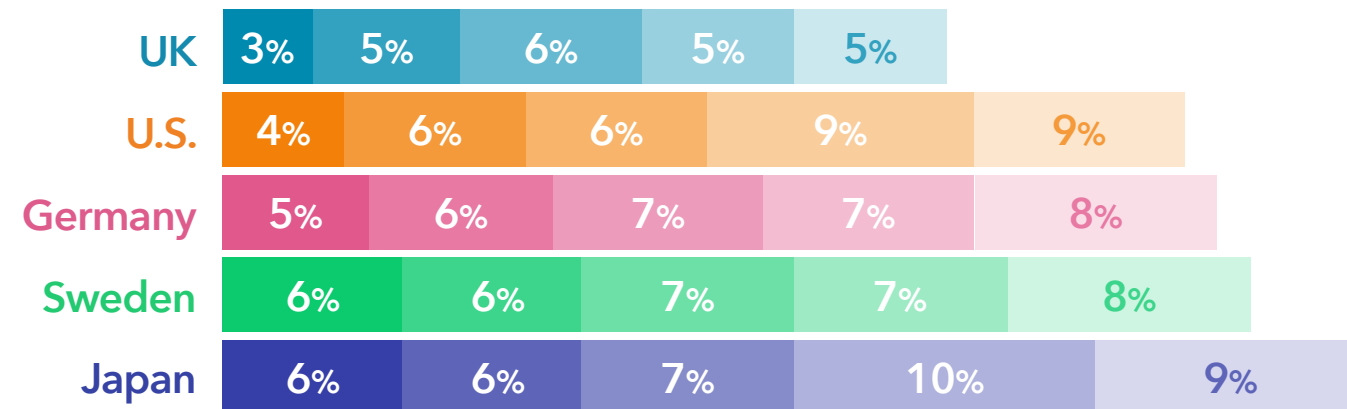


## Providing more flexibility for workers

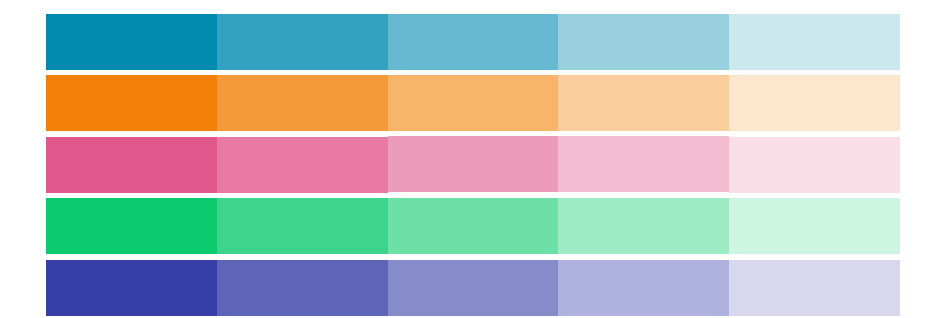
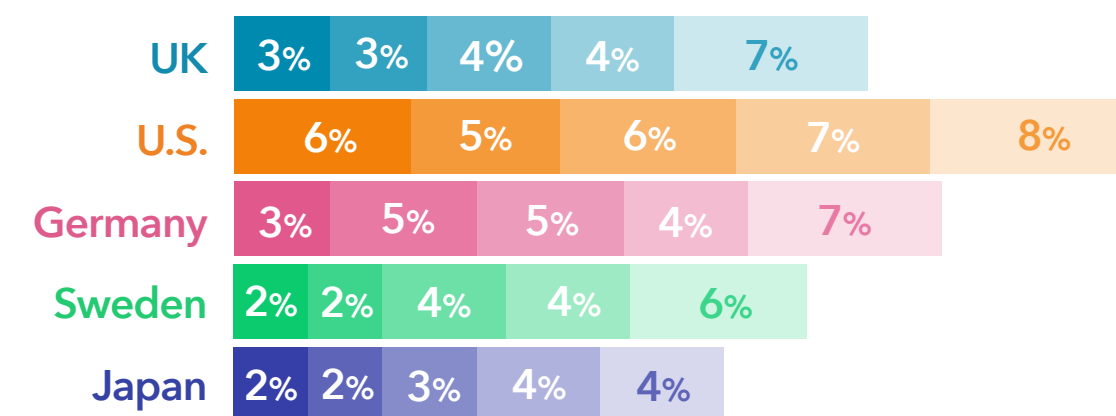


- Respondents across all countries were asked to rank which things they most want to see as the economy recovers after the coronavirus outbreak in the coming months. This graph shows the percentage of each country's public that chose an issue as their first priority, their second priority, their third priority etc.

## Keep income taxes from going up

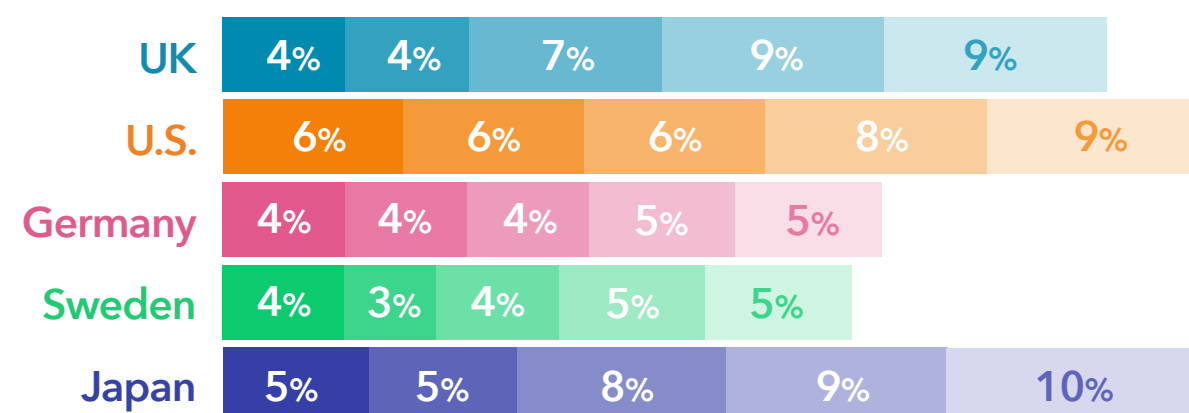


## Reducing government debt

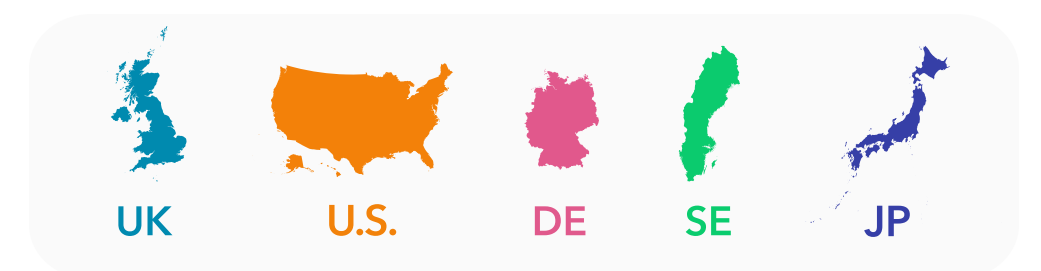
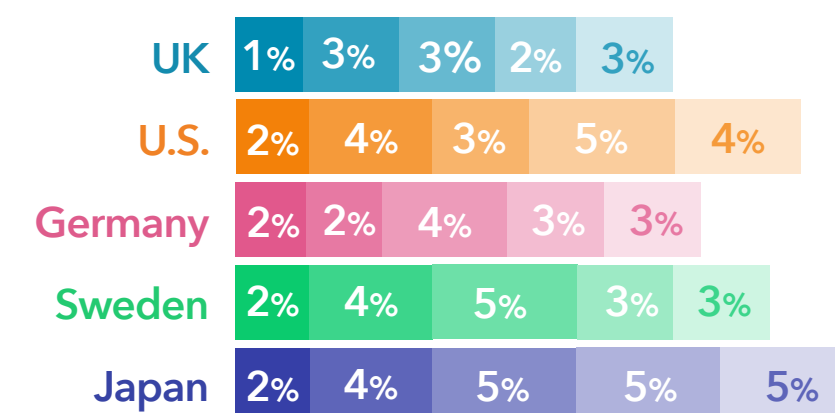


Highest Priority → Lowest Priority

## Ensuring a good work-life balance



## Keep business taxes from going up





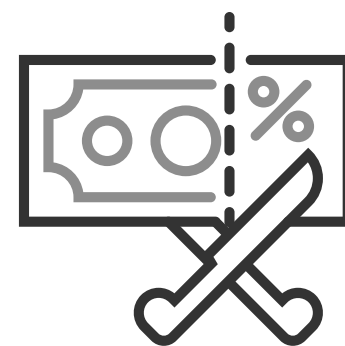
# 10 A changed economy?

But this may not mean economic revolution, with people less clear on what they want the focus of a changed economy to be

- Despite a desire to see a reorganised economy, people do not have a clear sense of what that may look like. **Overall, the top priority for a post-coronavirus economy is to prepare properly for future pandemics and health threats.** This is most marked in Japan, where 24% choose this as the top priority for the economy once it recovers, as well as the U.S. (17%) and Sweden (18%).
- Another top priority is to **look after the most vulnerable in society, as well as paying and funding key workers, including healthcare workers, more.** This is – marginally – the number one priority in the UK (18%) and Germany (16%), but people in Japan and Sweden want to see this too. This is less of a priority in the U.S., however, where only 6% choose this as their top option.



**Preparing properly for future pandemics and health threats is a top priority for a post-coronavirus economy**



**Reducing government debt and making sure business taxes don't increase are the lowest priorities for all countries**

- Far from a major reorganisation of how the economy works, one option chosen as the top priority across countries for the economy is **simply to get back to normal as quickly as possible.** This is the top option for 16% in the UK, 15% in the U.S., and 15% of people in Japan.
- **Focusing the economy around climate protection is not a top priority for people when it comes to the future economy.** Only 8% in Germany cite this as their top priority for the economy, and this is 6% in Sweden and the UK, 4% in the U.S., and only 2% in Japan. Nor are keeping income taxes down, ensuring a good work-life balance, or providing job flexibility for workers particularly high priorities for the public in these countries.
- Bottom of the priority list for all countries surveyed are **reducing government debt and keeping business taxes from going up** – with the latter chosen by only 1-2% of people across all five countries.



# 11 UK: Deep dive



**1. Almost three-quarters - 73% - of the British people want the government to limit the spread of the disease, even if that means a major recession or depression.**

While other countries have become more inclined to protect the economy over the last month, and the UK moves towards easing its lockdown, the people in the UK have not changed its mind and remains adamant that saving lives should be the priority. This applies across all demographic groups, including the youngest, and the party divide – with 72% of Conservatives and 76% of Labour voters saying so too.

**2. The effects of the coronavirus crisis look set to stay with the British people for a long time - even in the event of a successful vaccine.**

Brits say they will travel abroad less (-22% net change), eat out at restaurants less (-20%), and avoid sporting

events (-16%). The only activity that looks set for an uptake after the crisis is over is domestic travel, with net +10% saying they will travel in their own country more, the highest of all countries surveyed.

**3. The last two weeks has seen confidence in the NHS continue to rise, but there has been a fall in confidence in Government's ability to respond effectively to the coronavirus crisis.**

People say that their confidence in central government has declined over the last two weeks, with a net change of -3. This trend is also apparent in other markets.

**4. The British people are also the most likely to think the impact of the virus will last for more than a year.**

Almost eight in ten think the impact of the virus on the country will last beyond the end of the year, significantly more than in other countries, with just 43% saying the same in the U.S.

The British people also think the impact on the economy will last a long time, with half saying the impact on the economy will last for **longer than two years**.

**5. People in the UK think the government is giving business the support it needs, with 65% saying so. However, only 40% agree that this support is getting through to the companies that really need it.**

**6. British workers are the least likely to expect to lose their job**, with only 11% saying so. One in four British workers, however, are worried that the company they work for may collapse. The age differences are also less stark than last month, with younger and older workers alike now equally concerned about losing their job – whereas before this skewed heavily towards the young.

**7. More than half of the British people want to see the economy fundamentally changed after the coronavirus outbreak is over. The British people are looking beyond the crisis and want to see a more caring, compassionate nation**, with the top priorities for after the crisis being for the government to **pay and fund key workers, especially healthcare workers more** (18% choose this as their top priority), as well as to **look after the most vulnerable in society** (17%).

**8. The climate and environmental protection is not a big priority for the British people after COVID-19.** Only 6% name climate protection as their top priority, including only 12% of 18-24 year olds. People are more focused on the above outcomes, or on simply returning to normal (the top priority of 16% of the public) or growing the economy (the top priority of one in ten).



# 11 US: Deep dive



**1. Even as the U.S. moves towards opening up the country, 57% of Americans want the government to limit the spread of the disease - even if that means a recession or depression.** However, this has narrowed in the last month; in April 61% wanted to limit the spread and 20% protect the economy, this is now 57% and 27% respectively.

**2. Big consumer behaviour changes look to be coming to the U.S., even if there is a vaccine - though belief in what a vaccine can do seems highest in the U.S.** Americans say that they will travel by plane less, eat out less, attend the gym less frequently, and use public transport less than before the crisis hit. However, along with Japan, Americans seem to have the highest levels of faith in a vaccine, with some of the sharpest behavioural changes when presented with a vaccine scenario compared to the lifting of lockdown restrictions.

**3. Large numbers of Americans are concerned about the impact of coronavirus on the economy and on their own jobs.** While in other countries workers have got more positive about their own economic situation, American workers are just as concerned. Just under one in four say they expect to lose their job, and one-third say

they expect their company to collapse. **Younger workers face the biggest threat to their economic situation**, with 38% of 18-24 year old workers saying they expect to lose their job, and more than half – 52% - say they are worried that the company they work for might collapse.

**4. Despite these concerns, the U.S. is the country where the fewest people think the impacts of the virus will last a long time.** Though more think it will last longer than they did last month, only 34% of Americans expect the impact of the virus on their own life to last more than a year, and only 43% the impact on their country to last beyond a year. Half of Americans believe the impact on the economy will last more than a year, but this is significantly lower than levels in other countries – such as 87% in the UK.

**5. Confidence in businesses remains high - but confidence in central government, the CDC and especially the WHO is falling.** Asked whether their confidence in various institutions had increased, fallen or stayed the same in the last two weeks, central government now sees a net 12% fall, down further from a fall of net 6% in April. This is not only powered by Democrats: Republicans have gone from a net 21% increase of confidence

in April to a net increase of +3% this month. The WHO has also taken a hit: though on balance more people say their confidence in the WHO has increased rather than decreased, this is only by a margin of 4 points, whereas in April this was a margin of 20 points.

**6. The American public is not convinced that government support for business is getting through to those who really need it.** The public is split on the issue, with 34% saying it is and 34% saying it is not. This is another issue where political party makes a big difference – almost half (49%) of Republicans think it is getting through, but only 31% of Democrats think the same.

**7. The action that Americans most want to see from business is executive pay cuts.** Though other things come top in other countries, the top action that the American public want to see businesses take is executive pay cuts, with this coming above a range of other actions including manufacturing hospital equipment or helping the most vulnerable. Businesses that cancel dividend pay-outs do not look set to benefit from the public either.

**8. Americans want less of a change to the economy after the crisis compared to other nations:** for the U.S. public, the priority for the economy after the crisis is over is to focus on future pandemic preparation (the top choice of 17%), along with getting back to normal (15%). Americans are less likely than their European counterparts to want to see more funding for key workers (only the top priority of 6%) or to look after the most vulnerable in society (10%), with more of a focus on growing the economy (12%) and reducing unemployment (12%). Unsurprisingly, Democrats are much more likely to want to see big changes to the way the country is run than Republicans.

**9. Polarisation on party political grounds has got much more intense in the last month.** For example, in April Republicans had seen an increase of confidence in the WHO of net +18, this is now net -14, opening up a 42 point gulf between Republicans and Democrats. And party divisions are even impacting views of how long the impacts of the virus will last on the country: the gulf between Republicans and Democrats has doubled on this, with Republicans much less likely to think the impacts of the virus will be felt for longer than a year than Democrats.

# 11 Germany: Deep dive



**1. Germans still want to prioritise limiting the spread of the virus over preventing a recession or a depression, but the gap has narrowed this month.** 33% of people now want to prioritise avoiding a recession, up 7 percentage points, whilst 49% want to prioritise limiting the spread of the virus. This move has moved Germany further from the UK and closer to Sweden in terms of priority.

**2. Consumers in Germany report that their behaviour is set to be changed substantially regardless of the development of an effective vaccine.** Even post-vaccine net -20% of Germans said they would be less likely to attend large public events and net -16% less likely to use public transport. That is only 7% and 4% more respectively than before a vaccine. This despite changes in consumer behaviour in Germany being joint lowest of the countries surveyed.

**3. Levels of concern about aspects of the virus in Germany have fallen since last month.** We see falls in all four countries from last month, but Germany's are particularly steep especially in concern over jobs. In March 44% of Germans said that they were concerned about their own job, but as people have adjusted to the reality of the new normal now only 29% of Germans are very concerned about their Job (14% now directly expect to lose their job – down 4 points from last month). This is clearly still a worrying level, but is amongst the lowest with Sweden (27%). **Health concerns have also fallen substantially amongst the German public.** The proportion of people very concerned about their family's health is down 9% from 59% to 48%, whilst for 'your personal health' the proportion is down from 46% to 37%.

**4. Where levels of concern are falling perceptions of the longevity of the impact are rising significantly.** Here too Germany is experiencing larger changes since last month than the other three countries surveyed. When asked how long the impact of the virus 'on my country' would last 31% said it would last into 2021 in March, with that figure rising 21% to 52% this month.

**5. Close to half (49%) of Germans want to see the economy change fundamentally post-virus** rather than to get back to the economy as it was. This call comes from parties across the political spectrum, from the Greens to the SPD to supporters of the AfD. Underlying this stark finding is a more mixed picture to other countries about what that fundamental change looks like. Most Germans as their top priority say they want key workers to be paid more (16%). But closely behind is preparing properly for future health threats

(14%) and looking after the most vulnerable in society (13%). This even spread continues, but notably only 8% of Germans think that the top priority is climate change versus 12% who want to get back to normal as quickly as possible.

**6. 50% of Germans are saying that businesses are stepping up during the crisis and this is a drop from last month of 7 points and one to keep a close eye on. People's top priority for business response in Germany is for executives to take pay cuts** (43% cited as the top priority). Businesses looking after workers (10% top) and manufacturing health equipment (12% top) follow next.

**7. Levels of concern about the economy are shared evenly across the main political parties and none stands out. AfD and SPD supporters are the most concerned about their own job in the crisis** (38% and 42%).



# 11 Sweden: Deep dive



**1. Though limiting the spread of the virus is still the priority, Swedes are becoming more keen on protecting the economy than any other nations.** 44% of Swedes say that limiting the spread of the virus should be the main priority of government, even if that means a recession or depression. However, this is down ten points from last month, and 29% now say that the Swedish government should work to avoid a recession or depression even if that means lives are lost. This 15 point difference is the smallest of all nations surveyed. As last month, the youngest Swedes are most likely to want to prioritise the economy, with the gap narrowing to just seven points amongst 18-24 year olds – and Moderate Party supporters want to prioritise the economy over lives, by a margin of 43% to 36%.

**2. More Swedes expect the impacts of coronavirus to be felt for longer than they did last month.** In April, 36% of Swedes felt the impact of the virus on Sweden would last longer than a year; that is now 49%. This

has also increased in terms of the number of Swedes who think the impact on the economy will last longer than a year, up from 56% to 71%.

**3. Sweden remains sharply divided on partisan lines, with party allegiances informing people's levels of confidence in public health agencies and the WHO.**

Public confidence in institutions is the same as in April, with an overall net +3% in public confidence in central government, and a net -7 decline in local government. Healthcare providers also perform well, with a +38% increase in public confidence. However, views of public health agencies and the WHO are still pervaded by one's support for a political party. By a margin of two to one, Social Democrats say they have increased confidence rather than decreased confidence in the WHO, whereas Sweden Democrats are more likely to have less confidence in the WHO.

**4. Swedes are also the least concerned about the virus.** Whether on the economy or on health, the Swedish people are the least concerned about the impact of the virus – for example, only 32% of Swedes are very concerned about the impact of the virus on their personal health, compared to 54% of Americans. They are also least worried about the risk to the economy – with just over half of Swedes (52%) very concerned compared to three-quarters of those in the UK, U.S. and Japan.

**5. Despite this, stark changes in consumer behaviour could come - even if there is a successful vaccine.** Fewer Swedes say they will travel by plane, eat out, go to the cinema, or go to sporting events like a football match once the crisis is over. This change in behaviour is smaller than in the UK, U.S. or Japan, but still marked. Domestic travel, however, does look to increase, with Sweden the only country alongside the UK to show a potential increase in holidays taking place within one's own country.

**6. Four in ten Swedes feel the government is giving business the support it needs during the coronavirus crisis.** However, only 28% feel this business support is getting through to the companies that need it, with 25% saying it is not. This is the smallest proportion in all the countries surveyed besides Japan.

**7. Swedes are the people most likely to want the economy to return to how it was, without a major reorganisation.** Though a narrow plurality (44%) wants to fundamentally change how the economy works after the crisis, 39% do not, and this is the narrowest margin of all countries surveyed. Where there is an appetite for changes, Swedes want to see better pandemic preparation and more focus on the most vulnerable in society – but there is no desire for wide-ranging changes to the way the system works in Sweden. Desire for widespread changes tends to be limited to supporters of the Left Party and the Greens.



# 11 Japan: Deep dive



**1. A large majority of Japanese people are committed to prioritising limiting the spread of the virus** over preventing economic recession or even depression. This puts Japan in line with other countries in the survey much more severely impacted to date by the virus. The oldest and the youngest age groups stand out in opposite directions – Japanese 18-34 year olds are somewhat less convinced that limiting the spread of the virus should be the priority (50%). Whereas amongst over 65s, 73% think that limiting the spread is the priority rather than averting recession.

**2. Overall confidence in the government's ability to respond effectively to the crisis has decreased** to a net -52% based on the last two weeks, very low in international comparison. The Abe government's own supporters have decreased confidence in government of net -34%. But despite that there is a perception amongst the public that the right types of people are influencing the response to the crisis with influence scores matching closely

the preferred levels of influence amongst the Japanese public.

**3. There is also a clear finding that the Japanese Government is not giving business the support it needs.** Only 13% of people agree and 58% disagree that the government is giving business the support it needs.

**4. Levels of concern about aspects of the virus in Japan are also in line with the other countries surveyed.** The Japanese are the least concerned about their family's health (46% and still a high number), but very nearly the nation showing the most concern about the country as a whole (68%) and the economy (74%) and in both cases the U.S. is just 1 point higher. Despite reasonable differences by age in terms of limiting the spread of the virus there is not marked generational difference in levels of concern. Where that difference does reappear is in concern for one's own job where 68% of 18-24 year olds are very concerned; 13 points higher than any other age group.

**5. 45% of people on lower incomes up to JPY 4 million p.a. expect to lose their jobs.**

The overall value of 39% across all income groups is much higher than even the US standing at "only" 23%. And it comes on top of **10% of Japanese who already lost their jobs.** 39% of Japanese also expect their company to collapse.

**6. In Japan 56% of the public think that the effect of the crisis on their household finances will last into 2021 and beyond.** This is well above the next highest country surveyed (the UK on 34%) and the pattern repeats in terms of the duration of the crisis' impact 'on my own life'. In terms of the impact on the economy, travel and business the Japanese sit within the range of duration expected in other countries.

**7. In Japan more people want to see the economy change fundamentally post-virus than in any other country surveyed.** 58% said they wanted fundamental change rather than a return to the economy as it was.

Strikingly - and Japan is the only country where this is the case – **majorities across all political parties, including the governing Liberal Democratic Party, want to see fundamental change to the economy.** Underlying this headline finding, 24% of people said that the change they wanted to see proper preparedness for future health threats and 15% said looking after the most vulnerable was their top priority in reconstructing the economy with another 15% saying getting back to normal as quickly as possible was top. Only 2% said that focussing the economy around climate protection was their number one priority.

**8. Japanese consumer behaviour is going to change in substantial ways** with or without a vaccine. Japanese consumers, exhibit **some of the largest changes pre-vaccine (net -38 for eating out)**, but the effect of a vaccine produces the largest shift back to 'normal' levels of activity of any country (down to net -19% for eating out).



The background of the entire page is a microscopic image of a virus particle, likely a coronavirus, showing its characteristic spherical shape and surface covered in small protrusions (spikes). The image is rendered in shades of blue and cyan.

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