

RESEARCH REPORT

COVID-19 Opinion Tracker

1ST - 5TH JUNE 2020 | EDITION 3

Contents

COVID-19 OPINION TRACKER EDITION 3
15 JUNE 2020

METHODOLOGY	3	8 BARRIERS TO OFFICE WORKERS RETURNING	20 – 21
SEVEN KEY FINDINGS	4 – 5	9 VIEWS ON PUBLIC HEALTH, ANTIBODY TESTS, AND A SECOND WAVE	22 – 23
1 GOVERNMENT DECISIONS	6 – 7	10 VIEWS OF BUSINESS SUPPORT	24
2 LEVELS OF CONCERN	8 – 9	11 BUSINESS BRANDS	25
3 THE LABOUR MARKET DURING THE CRISIS	10 – 11	12 ESG PRIORITIES	26 – 30
4 PERFORMANCE OF INSTITUTIONS	12 – 14	13 SPENDING HABITS	31
5 COUNTRY RATINGS	15 – 16	14 MAIN COUNTRY FINDINGS	32 – 37
6 PERCEPTIONS OF THE VIRUS	17	CONTACT DETAILS	38
7 EXPECTED DURATION	18 – 19		

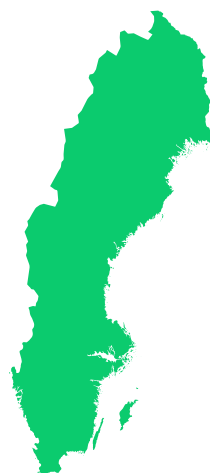
Methodology



Polling conducted by KEKST CNC, nationally representative sample of



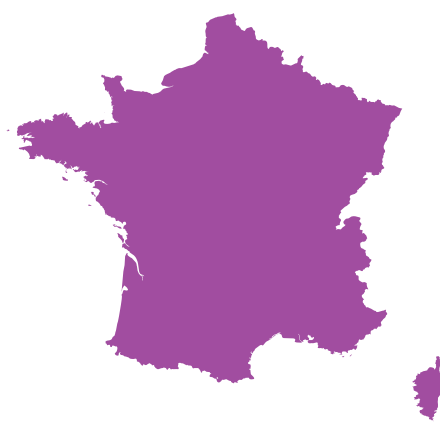
1,000 adults
in Great Britain



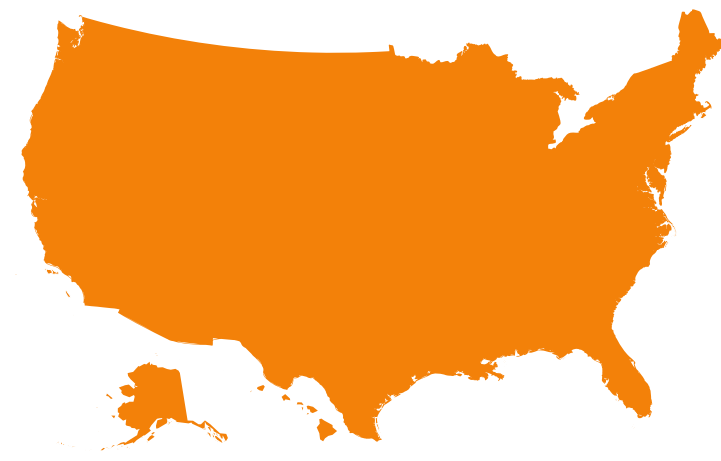
1,000 adults
in Sweden



1,000 adults
in Germany



1,000 adults
in France



1,000 adults
in the U.S.

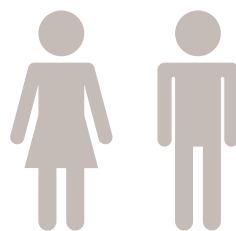


1,000 adults
in Japan

Fieldwork of wave 3 took place on
1st June - 5th June 2020

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

Fieldwork of wave 2 took place on
27th April – 1st May



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 end of the beginning: the need to protect the economy is becoming more important to the public in most countries, though in Sweden the picture is moving the other way

Though people in all countries wanting lives to be prioritised over the economy, the gap between the two is narrowing. This is true even in the UK and Japan, which - though still the nations most focused on protecting lives - now have more than a fifth of their people wanting to put the economy first. This is especially true in France, surveyed for the first time in this tracker, where 42% prioritise limiting the spread with 34% putting the economy first – the closest margin of all countries. **The exception to this is Sweden, where the gap is widening, with Swedes becoming more focused on limiting the spread of the disease in the last month.** Across countries, which political party someone belongs to is having a bigger impact on how they think government should respond to the pandemic, and older people in particular are moving towards protecting the economy.

2

Flattening the concern curve: worries about the virus are down but people expect it to last for longer

Concern about the virus has fallen in all countries for the second month in a row. The highest average level of concern across markets now relates to the economy as a whole, yet at the same time the lowest average level of concern relates to personal finances and job security, suggesting a dissonance between the two. Despite these declines, **people expect the impacts of the virus to last longer than they did a month ago or at the start of the pandemic** – again this is most marked on the economy, where an average 73% of people think the economic impact of the virus will be felt for more than a year.

3

Germany is perceived as the country that has handled the pandemic the best - and its population is the most relaxed about the virus

While the U.S. and the UK languish below China and Russia, **Germany is seen as the country that has handled the coronavirus crisis the best.** Its own public agrees, giving Germany a net score of +61%. The German people are also the **most positive about their institutions**, have the **lowest levels of concern about coronavirus**, see the virus as **more mild than other nations do**, and are more likely to feel there are **no significant barriers for them when it comes to returning to work.** While other Western nations and leaders receive poor appraisals, Chancellor Angela Merkel has a net positive approval rating with every age group and region in Germany.



Seven Key Findings

4

People are braced for a second wave of illness and perceive the virus as extremely dangerous

A clear majority of people in the U.S., Sweden, Japan, and the UK expect there to be a second wave of the pandemic and large pluralities in France and Germany agree. Though people are less worried about losing their job or their company closing, health concerns are still significant amongst the public. **People's perceptions of the severity of the disease show that it is seen as extremely dangerous** – with most countries scoring it as an 8, where 0 is very mild and 10 is very dangerous. Perceived severity and expectations of further waves suggest that governments continue to face pressure from public opinion to take a cautious approach to reopening the economy and that consumers will be mindful of longer term risks as opening up continues.

5

The UK could be headed towards the worst of both worlds – and a perfect storm for public trust

Nowhere are expectations more bearish than in the UK, where the public are simultaneously concerned about the economy but are also the country most adamant that the government should prioritise lives over avoiding economic damage. **Two-thirds also think that lockdown measures have been lifted too quickly.** With declining approval ratings in the Prime Minister and Government, alongside the UK being seen to have performed badly by its own people, the UK may be headed towards a **perfect storm for public trust, where the government is punished for both a high death toll and a damaged economy.**

6

Businesses have come out of the 'first phase' of the pandemic stronger

Customers in all markets think business has done a good job during the coronavirus pandemic so far. The more exposed a sector has been to the pandemic the better it tends to be rated – for example grocers/essential food retailers are amongst the best-rated institutions – as well as online retailers. With the 'first phase' of the pandemic over, attention on business and perceptions of business reputation and brands will now **shift towards redundancies and workplace protection as businesses reopen and the economic impact sets in.**

7

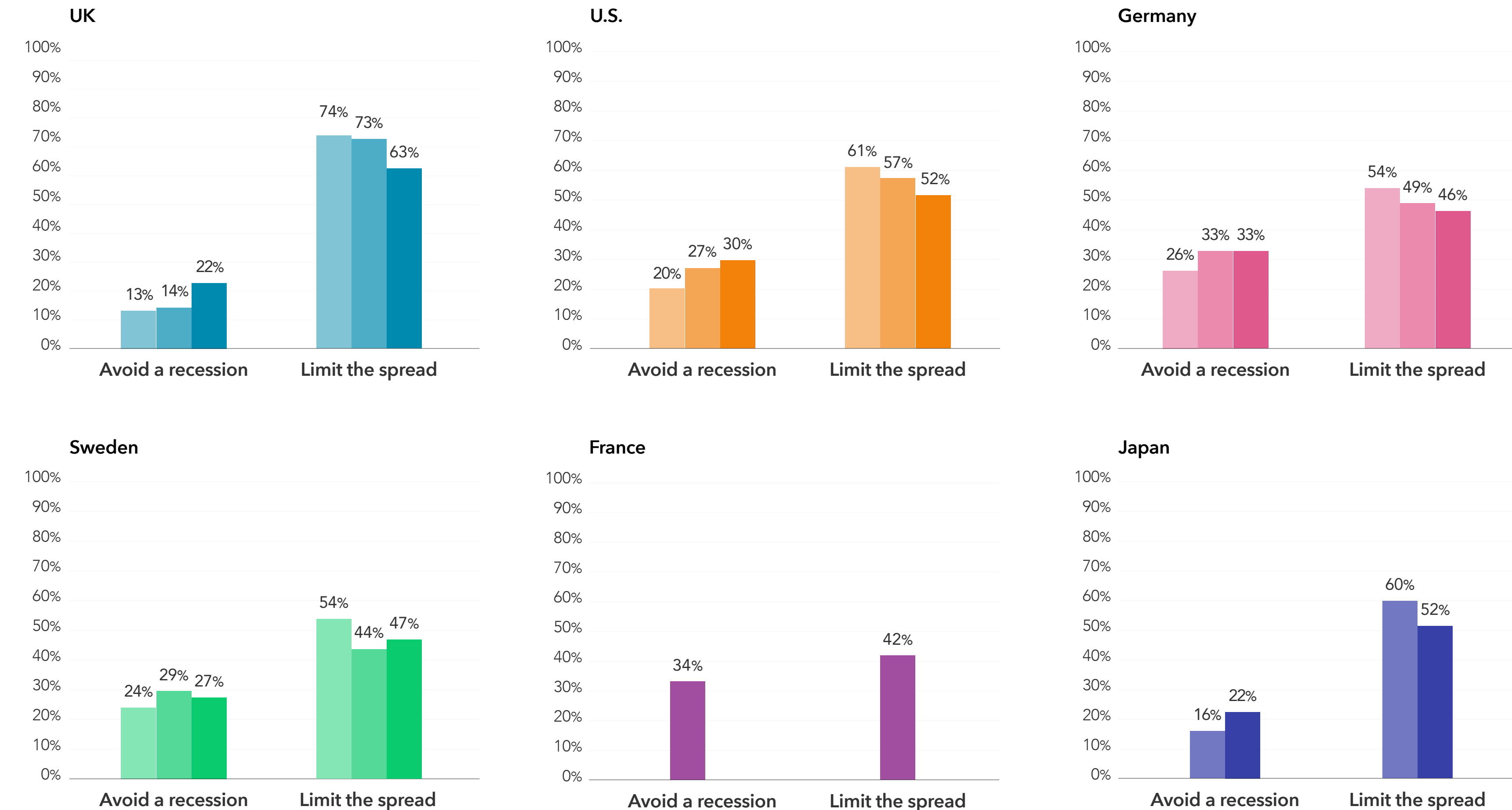
Employees first: the general public want businesses to put actions to help society and people above the environment and climate

Asked what they want businesses to focus on after coronavirus, **in all countries 'Social' elements of ESG come above 'Environmental' concerns.** Coronavirus looks to have made tangible and relatable business actions to help society much more pronounced for the general public, particularly in relation to health and safety for employees and mental health support. This also applies to younger people, who though more focused on the environment than older people, still put societal measures ahead of the environment. **The pandemic may have made the 'S' of 'ESG' more important than the 'E'.**

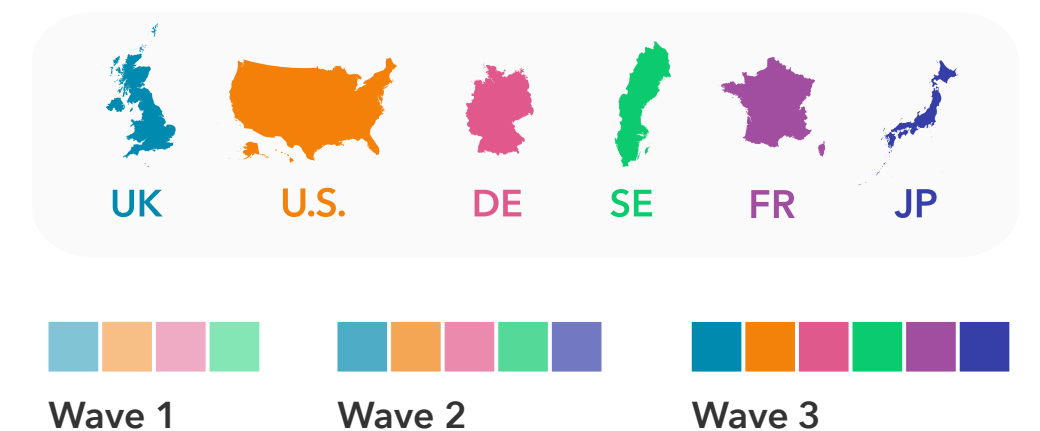
1 Government decisions



The gap between prioritising lives and the economy is narrowing in many countries, but not in Sweden



- To investigate the public's views on whether government should prioritise limiting the spread and saving lives, or protecting the economy, respondents in all six 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".

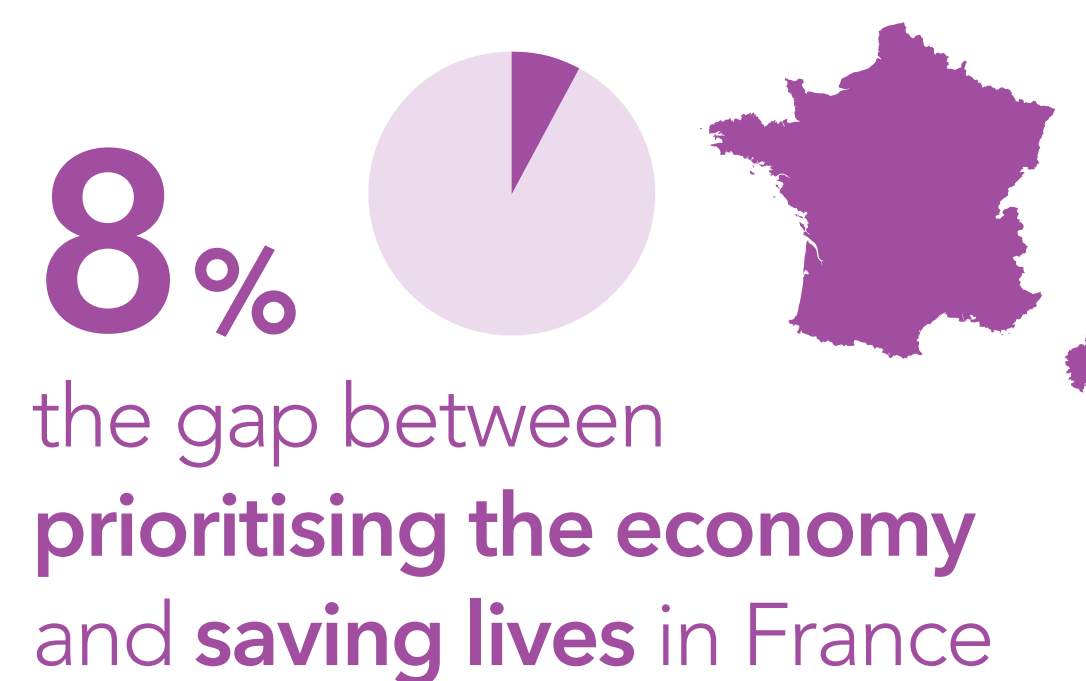


1 Government decisions



The gap between prioritising lives and the economy is narrowing in many countries, but not in Sweden

- In all countries apart from Sweden, economic considerations are reasserting themselves. **The gap between prioritising lives - even if that risks a major recession - and avoiding economic damage - even if that risks a major loss of life - is narrowing.** In the U.S., the gap has gone from 30 points last month to 22 points this month, from 16 points in Germany to 13, from 44 points to 30 points in Japan, and from 59 points to 41 points in the United Kingdom.



- France, being surveyed for the first time this month, has the **narrowest gap between the two**, with more wanting to prioritise the economy than in any other country. Only by a narrow margin of 8 points do the French public prioritise saving lives.

- Sweden has, however, bucked the trend. **There the gap between the two is widening rather than narrowing and is now closer to the United States than to Germany.** Last month this gap was 15 points – it is now 20 points. This perhaps reflects the different path Sweden has taken to the coronavirus, where lockdown measures have been significantly less stringent than in other nations – attitudes are not shifting to the economy quite so dramatically.

Republicans in the US 
favour prioritising the **economy**
over **saving lives** by **46% to 37%**

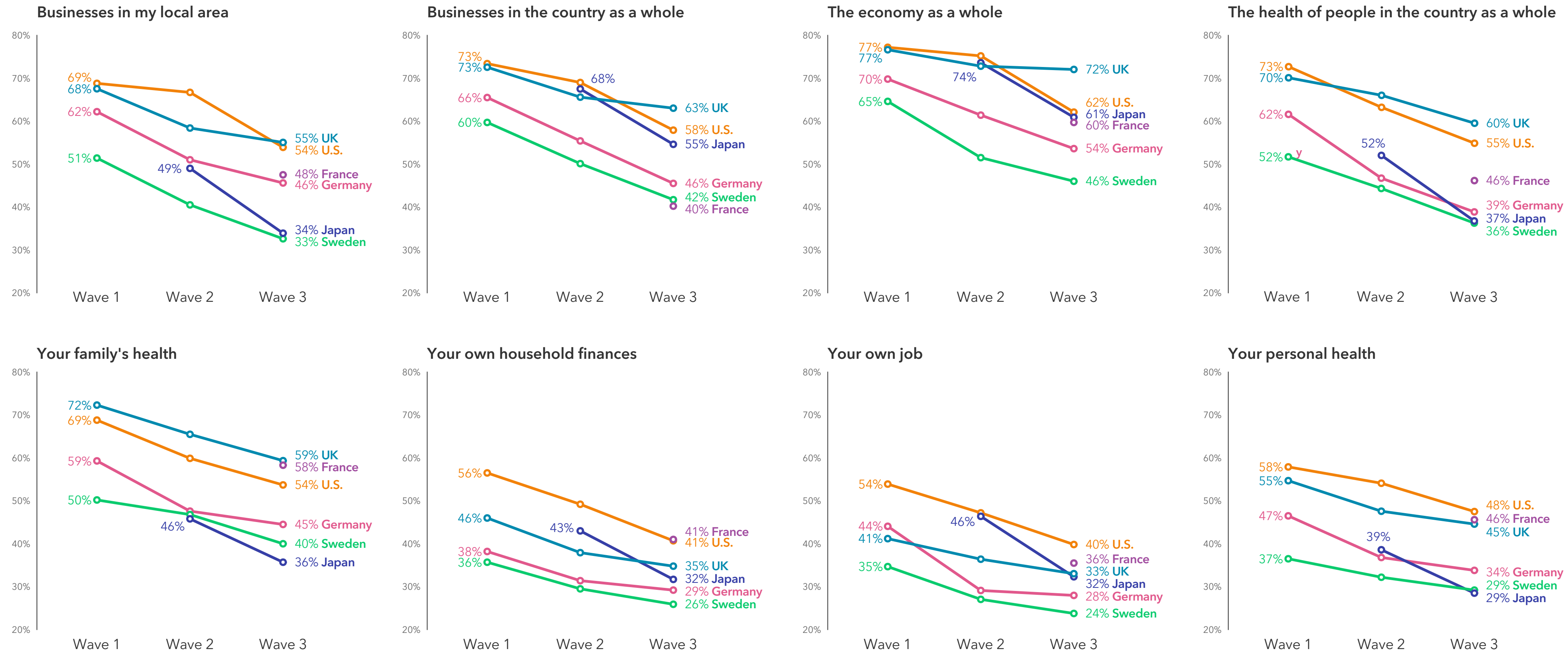
- Despite a narrowing of the gap, the United Kingdom remains the country where **the population is most adamant about saving lives over the economy**, with 63% saying this should be the focus.
- In the U.S., **polarisation on party lines has got starker**, with Republicans now in favour of protecting the economy over saving lives (by 46% to 37%), and Democrats strongly in favour of protecting lives over the economy (69% to 19%).

- **The UK has also seen, for the first time, party affiliation determine views on how to respond to the pandemic.** In May, 72% of Conservative voters and 76% of Labour voters prioritised limiting the spread of the virus. But now, this applies to 57% of Conservatives and 71% of Labour voters – a much wider gap.
- In some nations, **the oldest people in society - who to date have been the most adamant about saving lives - are moving towards thinking the economy should be put first at the fastest rate.** For example, in the U.S. the biggest swing away from limiting the spread above all is amongst over-65s (a shift of -14%). And in the UK, the biggest moves are also with over-65s (a shift of -14%) as well as 35-44 year olds (a shift of -17%). Japan shows a similar pattern – in May, 73% of Japanese over-65s prioritised saving lives, that is now 57%. Germany is the main exception to this, where 18-24 year olds have become the most enthusiastic to get the economy started up, with a swing of 15% away from prioritising lives. In France the reverse is true, with the youngest group (18-24 year olds) being the most adamant that lives should be prioritised over the economy.

2 Levels of concern



Concern about the impact of the virus is trending down, particularly in Germany, Sweden and Japan, marking the end of the beginning for this pandemic



- 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.


2 Levels of concern



Concern about the impact of the virus is trending down, particularly in Germany, Sweden and Japan, marking the end of the beginning for this pandemic

- **The trend of declining global concern about coronavirus continues this month.** In every market, concern has reduced from May to June. The changes are remarkably consistent between markets, suggesting that there is a global consensus on the change albeit from different starting points in different countries.

72%




of the UK public are very concerned about the economy as a whole

- The UK bucks the trend, with less steep declines than other countries. **This leaves the UK as the most concerned nation on five of the eight metrics this month, particularly in relation to the economy,** meaning the UK is now more worried about the economy than even the U.S. On the impact of the virus on the economy as a whole, the British public have remained just as concerned as last month, while other nations see significant falls. This could signify that the UK is headed towards the 'worst of both worlds': deep concern about saving lives, but also high economic risk.

- **Japan has seen the most dramatic change in levels of concern over the last 30 days.** Falls across the board of around 10 points leave concern in Japan much more in line with the scale of the epidemic to date.

-15%



the decline in concern about the virus' impact on personal health in Japan

- **The highest average level of concern across markets now relates to the economy as a whole, whilst the lowest average levels of concern across markets relates to personal finances and job security.** There is evidence of dissonance in thinking here as consumers adapt to extremely clear negative signals about the macro-economy, whilst similar signals about personal impacts are not reflecting the same. Levels of concern about personal finances and job security display the lowest levels of variance with all the countries surveyed taking

a similar view of the level of risk the virus poses. Personal economic concern is felt equally in Germany – a country that is well on the way to unlocking with few new cases – and the UK – still in lockdown with ongoing deaths (29% versus 35% for household finances).

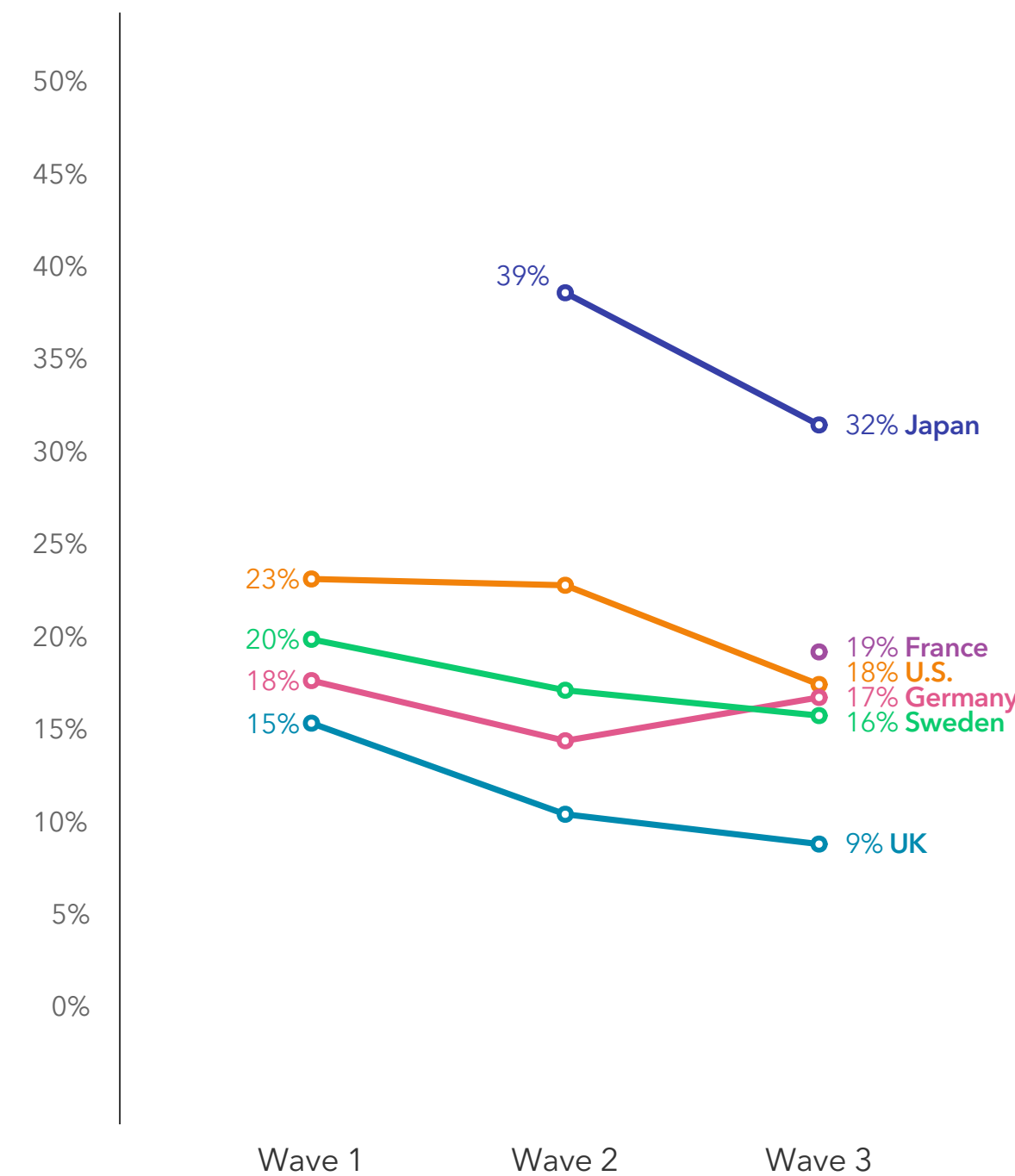
- The largest average month-on-month decline across markets is in **concern about one's own family's health.** Concern about personal health does not fall along age lines despite the impact of the virus. In France, the gradient of concern over personal health runs counter to the impacts of coronavirus, with young people most concerned. **In the U.S., the UK and Sweden, the older one is, the more concerned they are about the impact of the virus on their personal health.** In Japan and Germany, any age-related impacts have fallen out and people of all ages are equally concerned for their personal health.

3 The labour market during the crisis

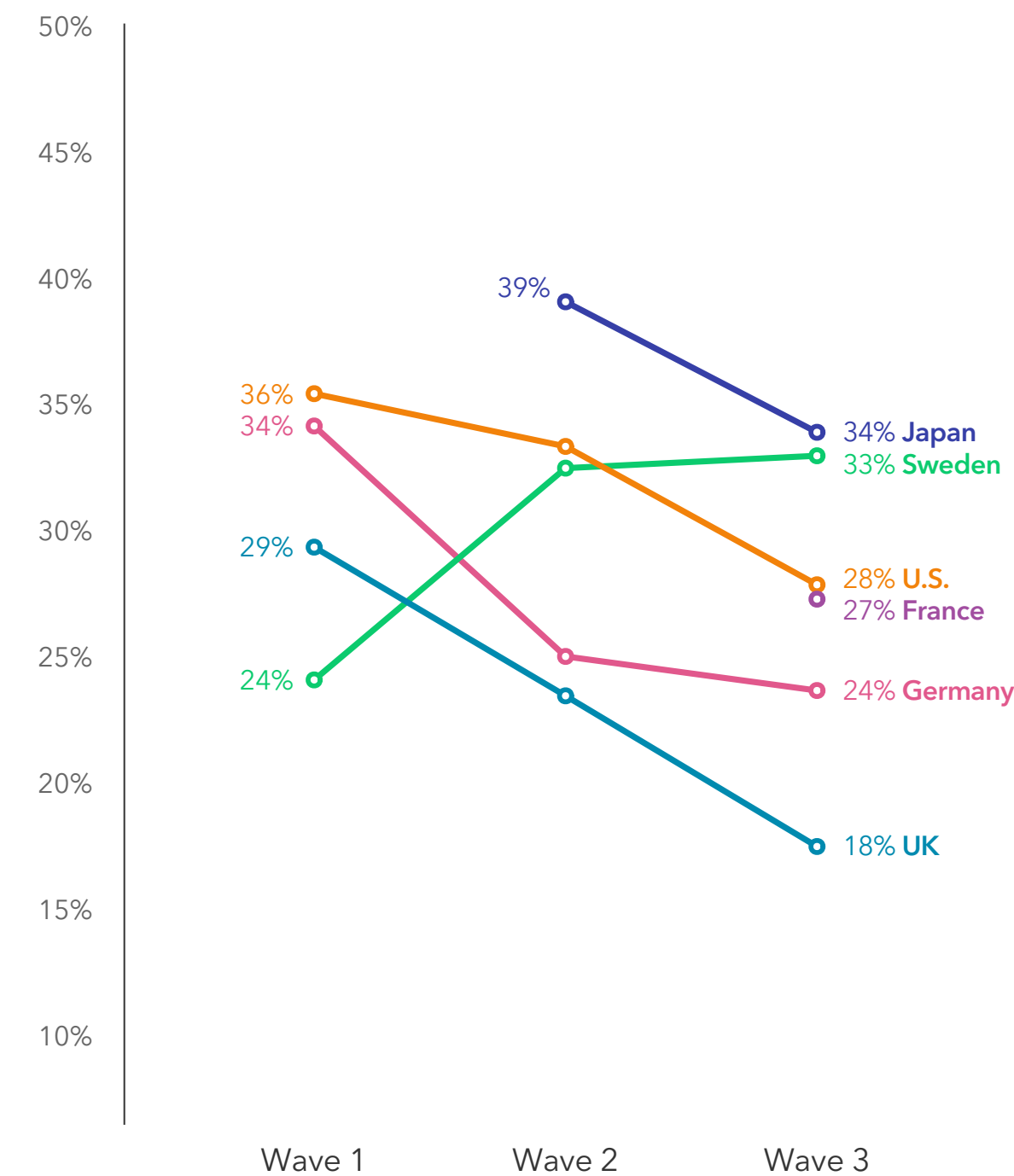


In general, fewer expect to lose their job compared to the start of the crisis

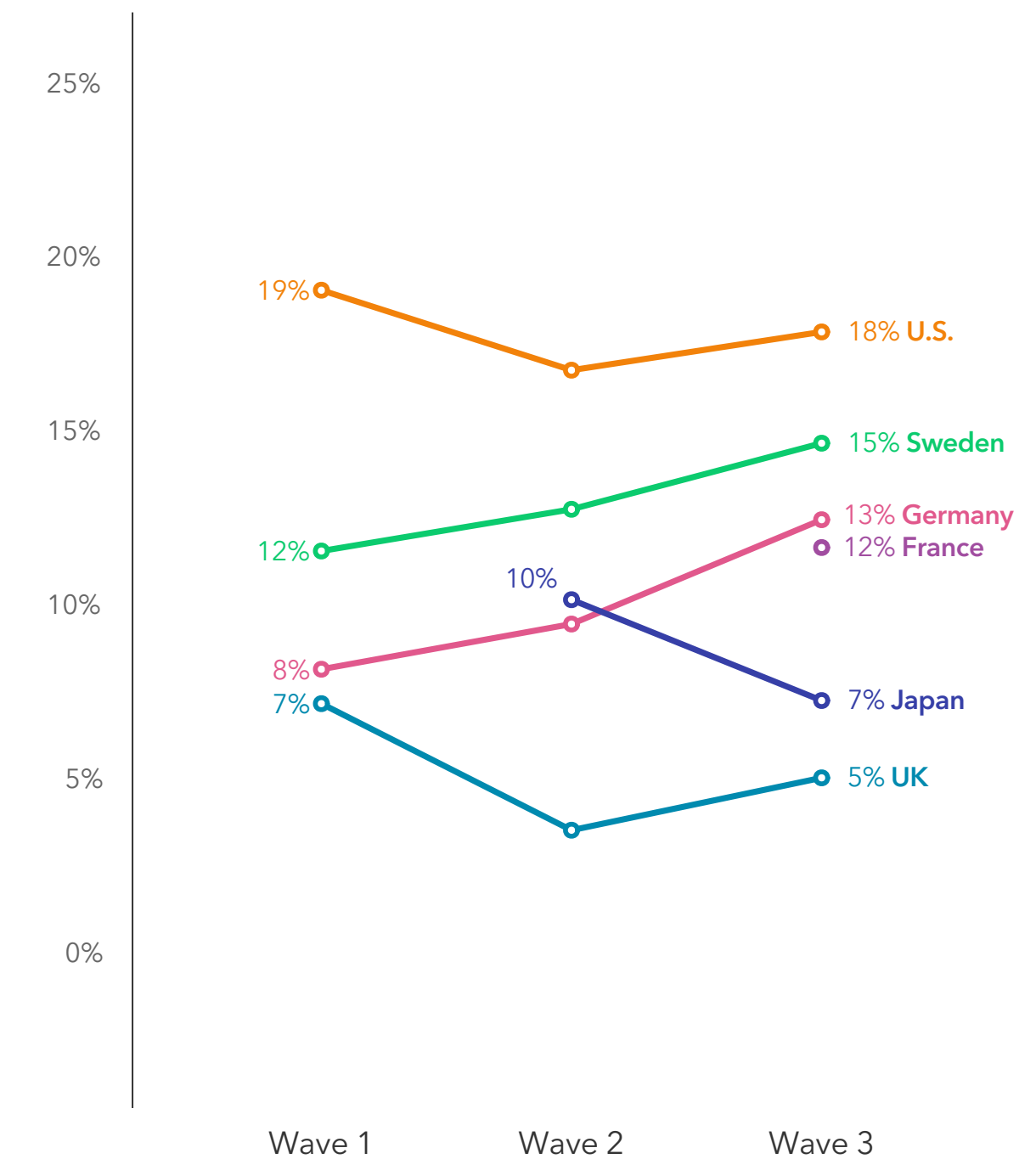
I expect to lose my job



I am worried that my company overall might 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.

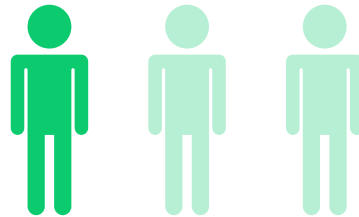
3 The labour market during the crisis



In general, fewer expect to lose their job compared to the start of the crisis

- For the second month in a row, **fewer workers are worried about losing their job or think that their company might collapse.** In terms of expectations of job losses, from April to now this has gone from 23% to 18% in the U.S., 20% to 16% in Sweden, 39% to 32% in Japan, and 15% to 9% in the UK. Germany has seen a less stark trajectory, with 17% of Germans saying they expect to lose their job compared to 18% in April. Overall, Japan's workers are those most worried about their own job, and the UK the least – despite the British public being the most concerned about the impact of the virus on the economy.
- **Similar trends are apparent for how many are worried that their company might collapse.** Here, though, Swedish workers have become more concerned than in April and are not experiencing the same decline in concern seen in other markets. Fully a third of Swedish workers are worried that their company may fold, almost in line with Japan on 34%.

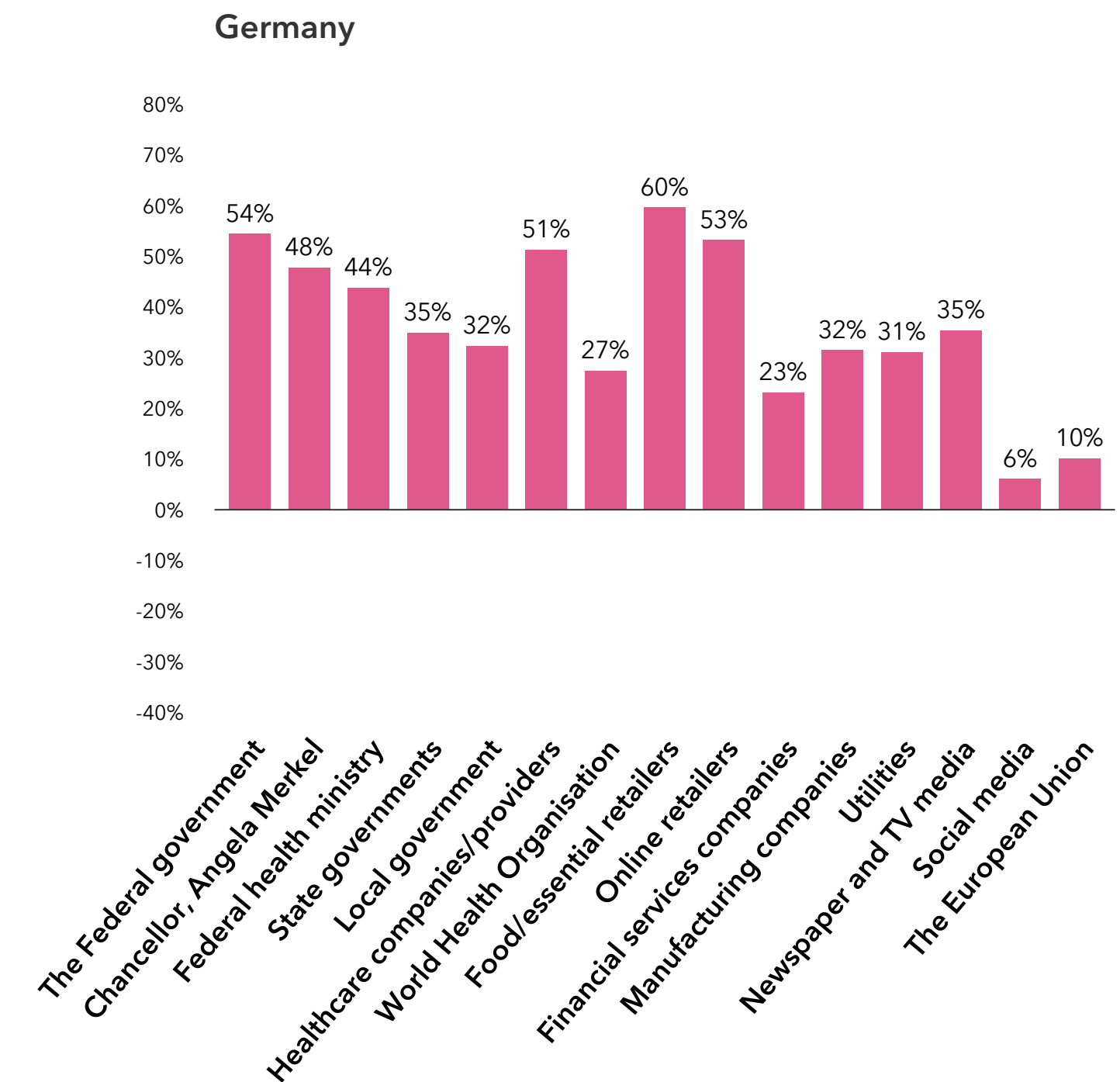
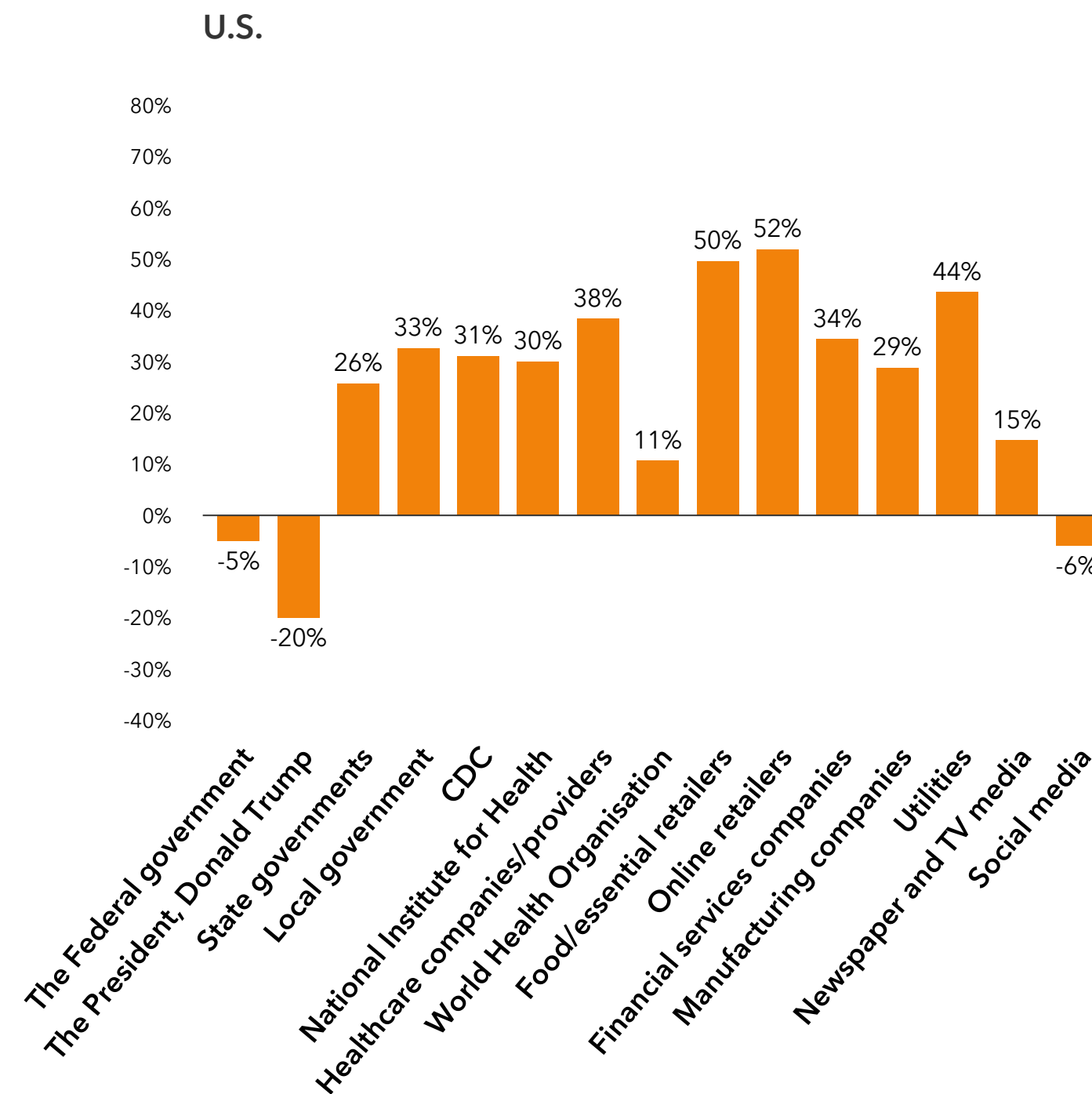
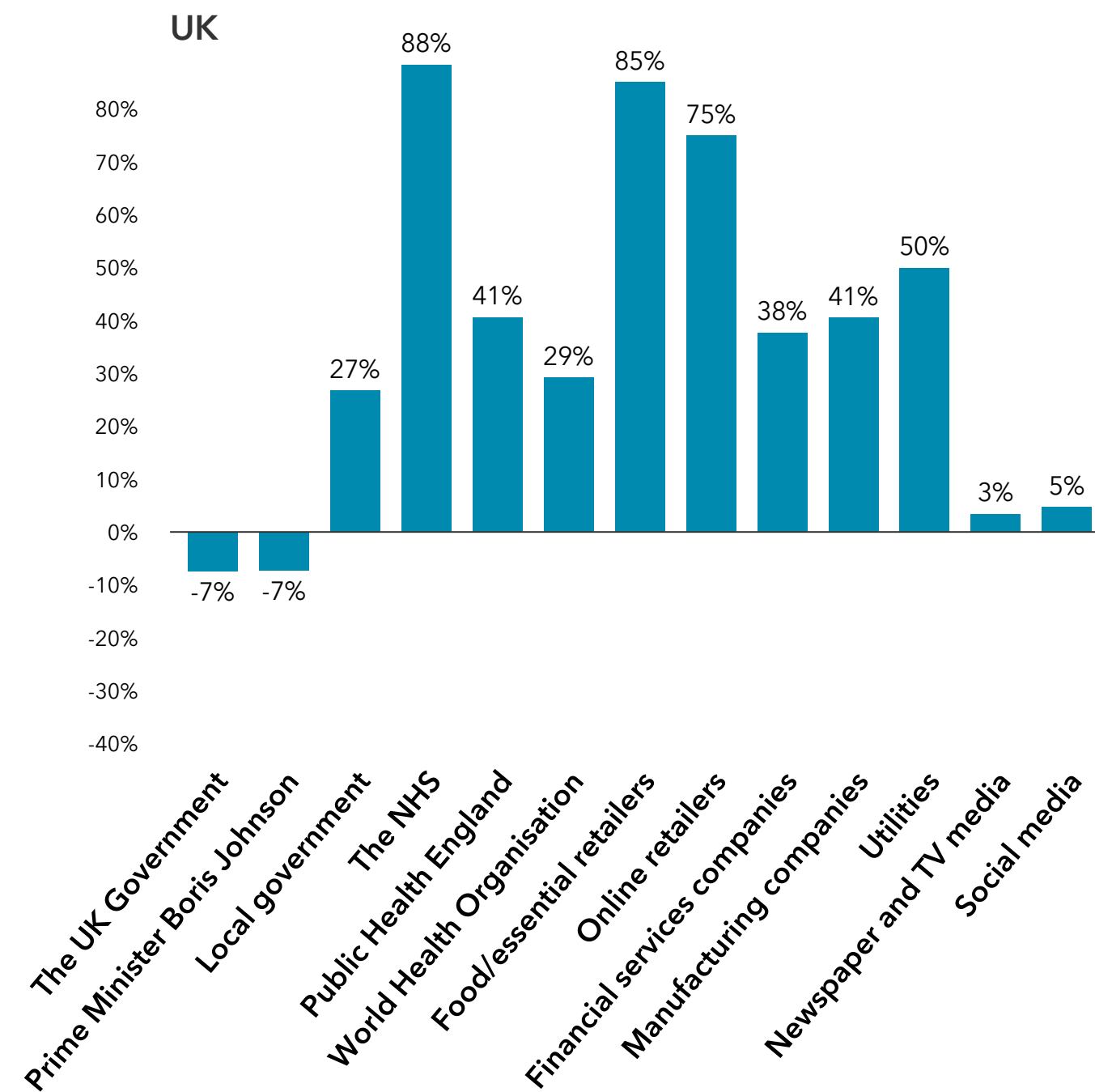
28% 
of workers in the U.S. are worried their company might collapse

1 in 3 
Swedish workers are worried that their company may fold, almost in line with Japan on 34%

4 Performance of institutions



Businesses perform well across countries, and the German public are the most positive about how their institutions have performed

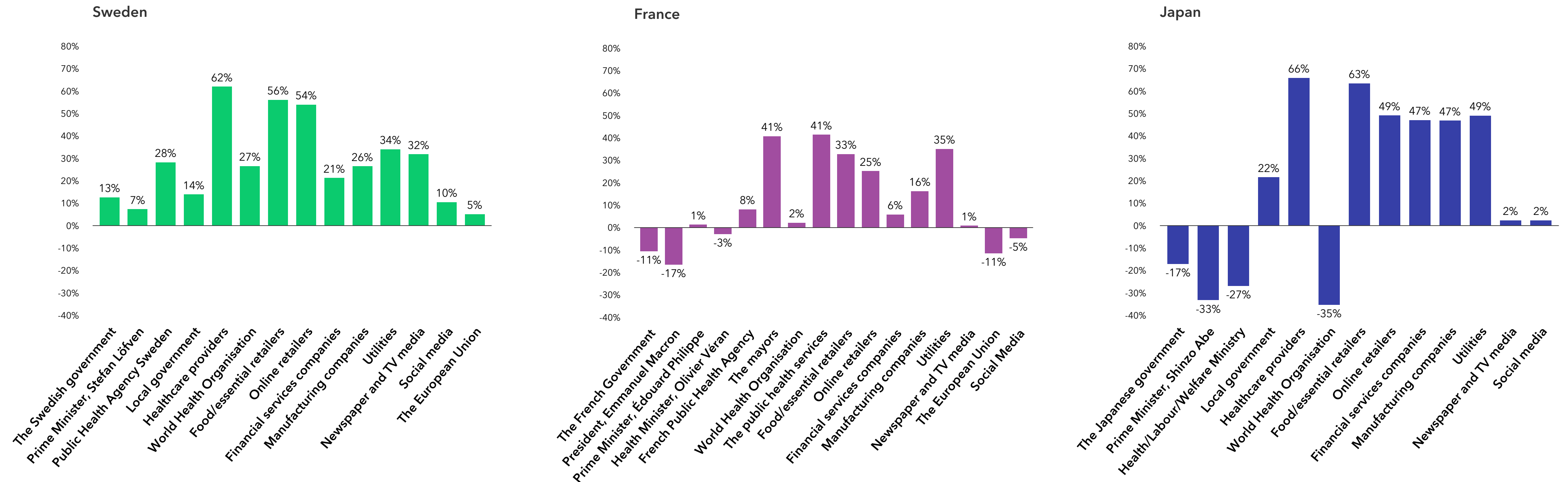


- Respondents across all countries were asked whether they thought a number of institutions had done well or badly in responding to the coronavirus. Displayed is the net 'well' score in each country.

4 Performance of institutions



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4 Performance of institutions



Businesses perform well across countries, and the German public are the most positive about how their institutions have performed

- Customers in all markets have been impressed with the performance of essential retail businesses. **The more exposed a sector has been to the pandemic the better it tends to be rated.** Grocers/essential retailers are amongst the best rated institutions in every market except the U.S., and online retail is only slightly behind. U.S. consumers have been particularly impressed with their online retailers' performance (+52) rating them the best performing institution. Financial services and utilities form a third tranche behind but are still well into net positive territory with the public for their handling of the crisis.
- **In Germany, faith in institutions is highest** – every single institution is rated well into positive territory for its handling of the pandemic – the lowest being social media on +6. The same is true in Sweden, though less marked than in Germany.
- Most institutions in most markets receive positive performance scores for their response to the pandemic. However, **political executives have come under severe pressure** with the lowest performance assessments in each market surveyed with the stark exception of Angela Merkel in Germany (Boris Johnson -7, Donald Trump -20, Stefan Lofven +7, Shinzo Abe -33, Emmanuel Macron -16). Angela Merkel has a positive approval rating in every age group and region of Germany; even 30% of traditionally hostile AfD voters think she has done a good job.

+58 POINTS

the average net well figure
for food/essential retailers
handling of the pandemic
across all markets

-11 POINTS

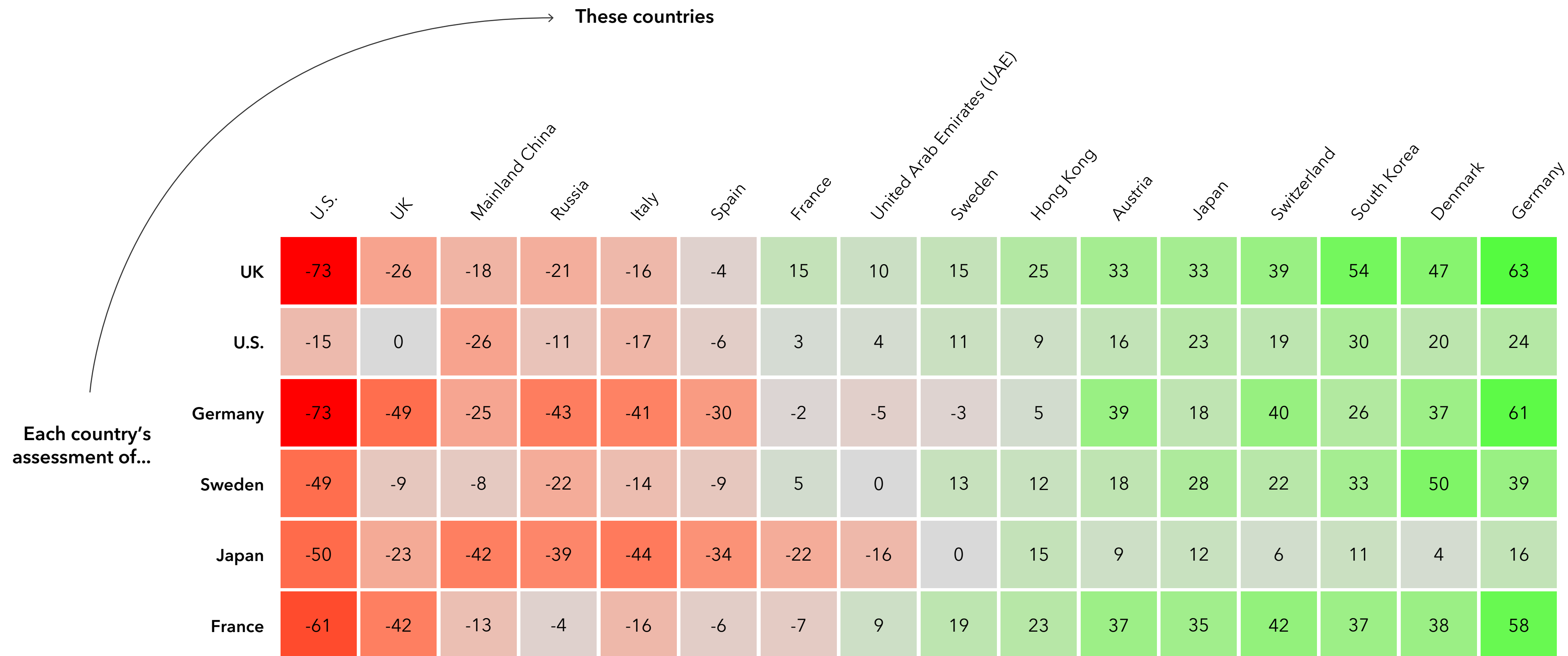
average global score
for political executives
handling of the crisis
outside Germany

- **National and Federal governments in these same countries tend to fare better** but they do so only marginally (UK Govt -7, U.S. Federal Govt -5, Swedish Govt +13, Japanese Govt -17 French Govt -20). In markets where national government performance is rated poorly the local and state governments outperform by a sizable margin (UK +27, U.S. [States] + 26, Japan +22, France [Mayors] +41).
- **Disappointment in government does not stretch to public health institutions other than the WHO.** Even in markets with high relative levels of deaths public health bodies are yet to feel the ire of the public (CDC (+31) and NIH (+30) in the US, PHE (+41) in the UK and the PHA (+28) in Sweden). Unlike domestic counterparts the poor performance scores for the WHO should be a cause for introspection. In a crisis that offered the WHO a chance to lead, publics in all markets say that it has done relatively badly relative to other institutions – even when allowing for political attacks in the U.S. and the exceptional Japanese view.
- **Healthcare providers in all the countries surveyed are in the top three performing institutions**, particularly the NHS in the UK on +88 – the highest scored institution of any polled. The exception is the US where healthcare providers are 4th, but they still have very strongly positive ratings (+38).
- **Traditional media are a poor performer relative to other institutions in each market.** Newspapers and TV media hover around positive territory. Social media is viewed as having done less well.
- **In the three EU member markets the assessment of the EU's performance during the pandemic so far has been relatively weak.** Even in Germany the EU receives the second lowest performance score (+10) and in Sweden it is rated lowest (+5). In France the EU is rated second lowest.

5 Country ratings



The U.S. and the UK are seen to have handled the coronavirus crisis the worst - and global opinion feels Germany has had the best handling of the crisis



- Respondents across all countries were asked how well or badly they thought a range of countries around the world had handled the coronavirus crisis overall.

Displayed here is the net score given for each country in each of the markets surveyed.

5 Country ratings



The U.S. and the UK are seen to have handled the coronavirus crisis the worst - and global opinion feels Germany has had the best handling of the crisis

- **Germany is by far seen as the nation that has been most effective in handling the coronavirus crisis overall** – with an average global rating of net 44% saying Germany has done well. It is placed top by the British public, by the Japanese and by the French. It is also the top choice of the German public themselves. The Swedish and U.S. public differ slightly, still scoring Germany highly but opting for Denmark and South Korea as the best performing countries respectively.

- At the other extreme, **the U.S. is seen as the country that has handled the virus the worst** - with an average global rating of net 54% saying the U.S. has done badly. The UK and Germany are particularly critical of the U.S., while the American public scores Italy and China more negatively than itself. Indeed, China is perceived as the worst performer by the United States with a net rating of -26%.

The average rating given for handling the pandemic by the five other markets:

-61 POINTS
given to the U.S.

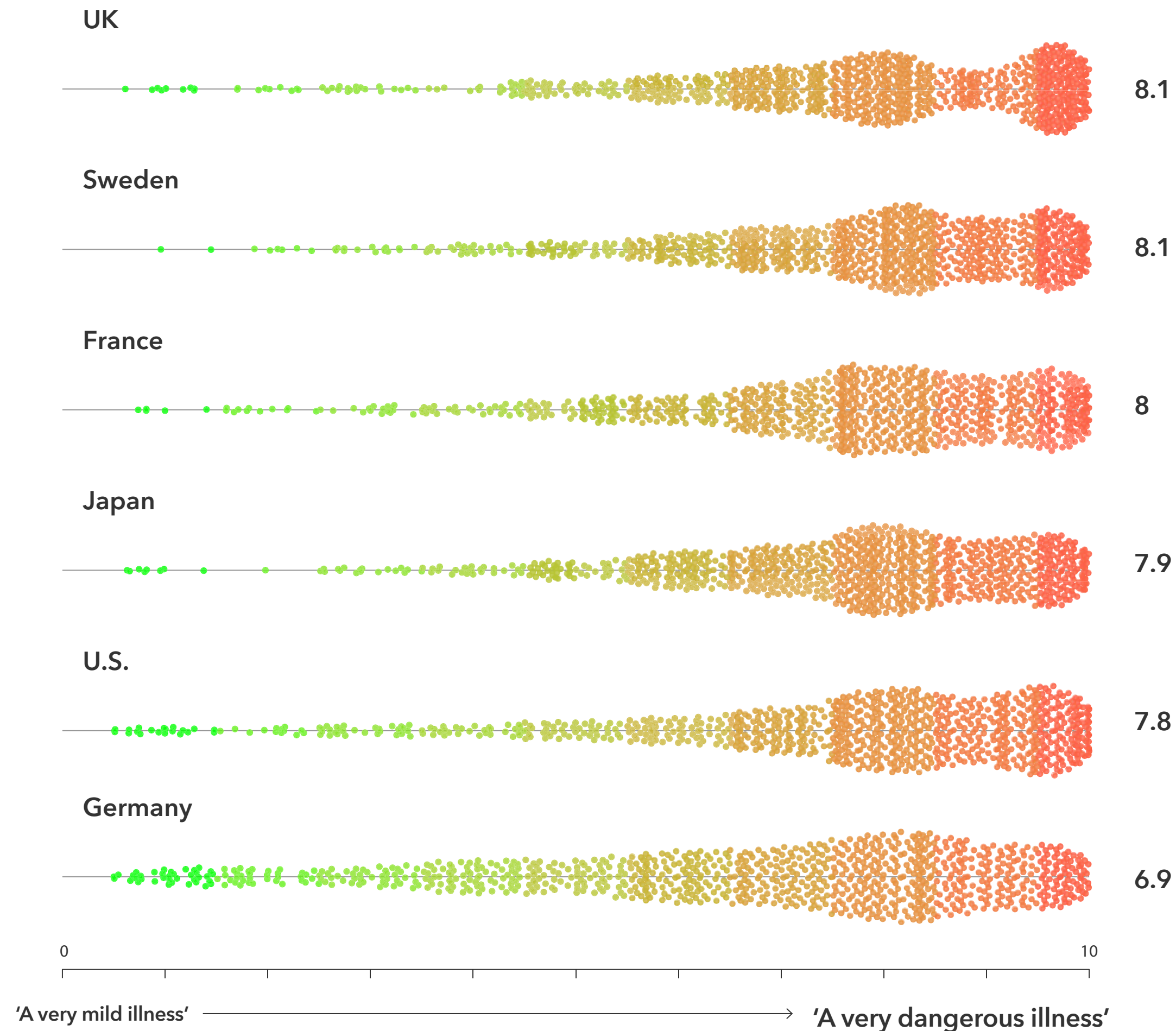
+40 POINTS
given to Germany

- The next tranche of countries viewed more negatively than positively are the **UK, China, Russia and Italy** – all with relatively similar negative scores of between -22% and -25%. France and Germany are most critical of the UK (scores of -42% and -49% respectively) while the United States and Sweden are less scathing (+0% and -9% respectively). Despite its relatively low number of coronavirus cases, China's reputation is viewed poorly across the board, with the least negative perception from France (-13%) and Sweden (-8%). **In the U.S., Democrats and Republicans alike are negative about China's performance** (-19% and -33% respectively).
- Japan is seen as having performed well in handling the virus, including by its own population (+12%). This is despite negative views within Japan of their government overall, suggesting negative views of government in general is driving perceptions there. **Sweden, despite having taken a somewhat different approach to the virus, is rated positively** – with the exception of the German public who give them a net rating of -3%.

6 Perceptions of the virus



The virus is viewed as very dangerous across countries – though less so in Germany



- The majority of the public in all markets agree that **coronavirus is a very dangerous illness** – arguably more so than it actually is – with responses tending to cluster at the very high end of the 0-10 scale.

35%
of the UK public rank
coronavirus as a 10/10
disease, the most
dangerous there is



- There is remarkably little to choose between the overall assessments of the disease in the five markets outside Germany and all have very narrow tails towards the less severe ratings. **In Germany on the other hand there is a significant proportion of people who say the virus is less dangerous.**
- The UK and Sweden have particularly large proportions of their populations clustered around the very highest assessment of severity (10/10). **In the UK this is 35% - fully more than a third of people.**

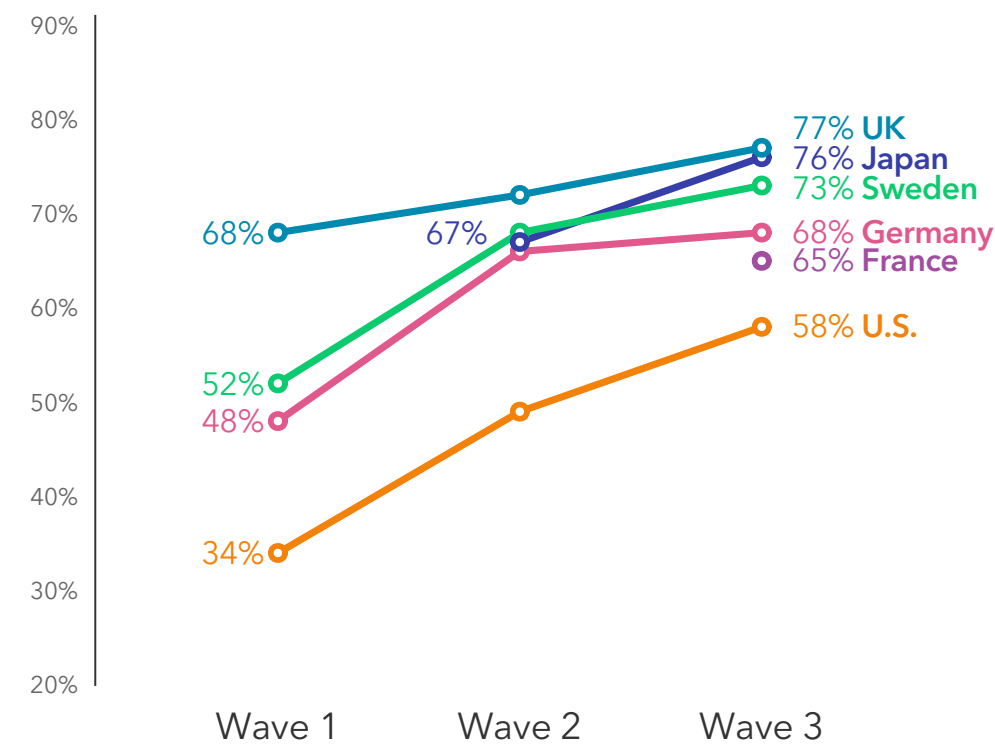
- **Older people rate the virus as more dangerous to some degree** in each country other than Japan, but the differences are slight. In Japan where both under-45s and over-45s view the virus as equally dangerous (DE – 6.4/7/1, FR – 7.7/8.2, SE - 7.6/8.4, US - 7.6/8, UK - 7.7/8.4, JP - 7.9/7.9).
- Globally, if someone thinks their government has done a good job during the pandemic, **they are less likely to think the virus is dangerous** regardless of which market they are in.

7 Expected duration

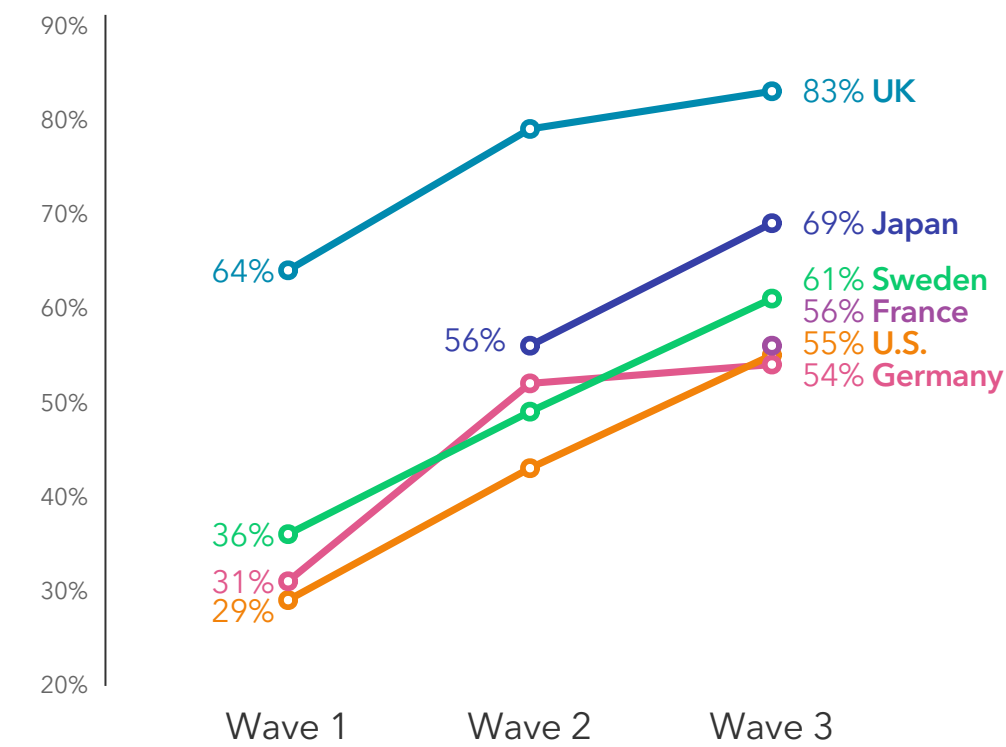


People expect the impact of the virus to last for much longer than they previously thought

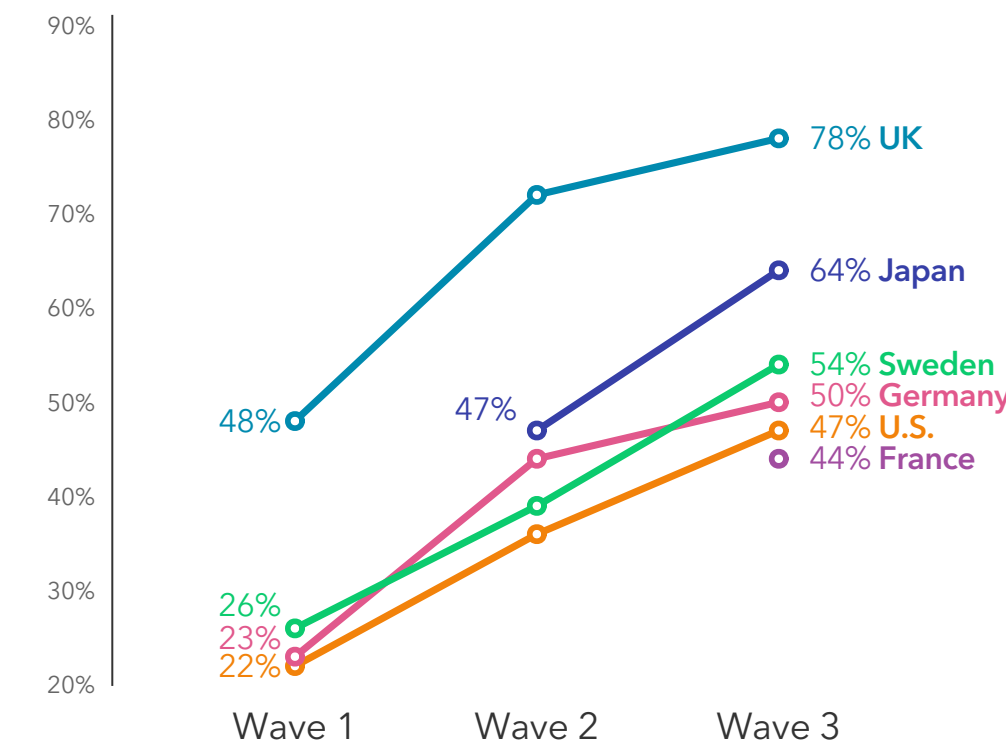
The impact on business and how they function



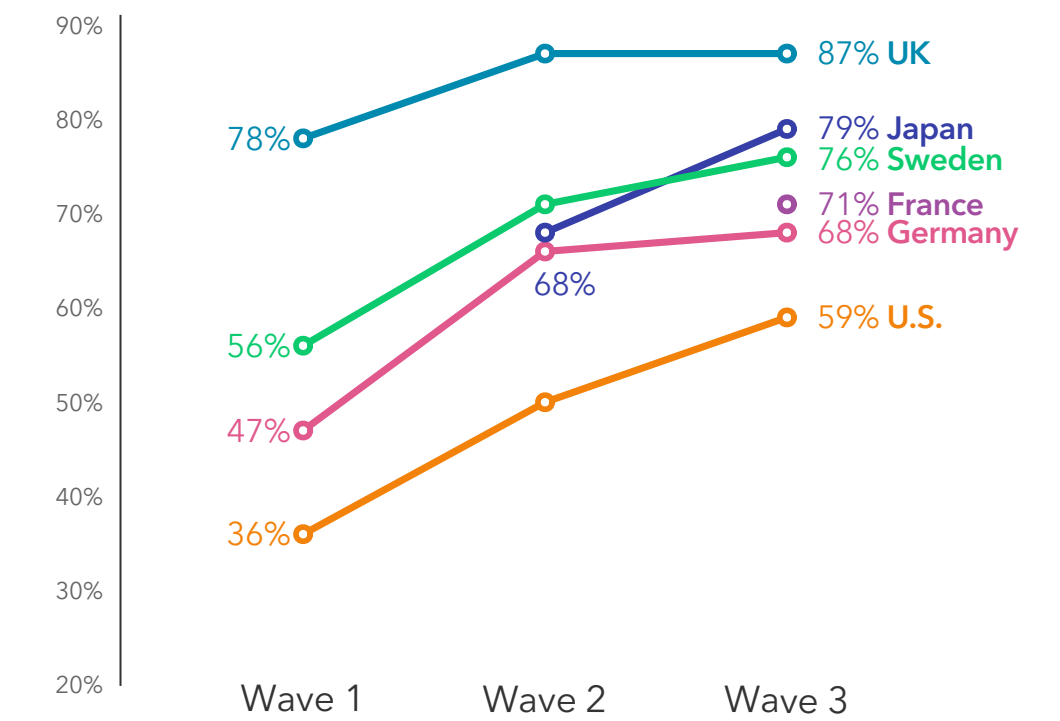
The impact on my country



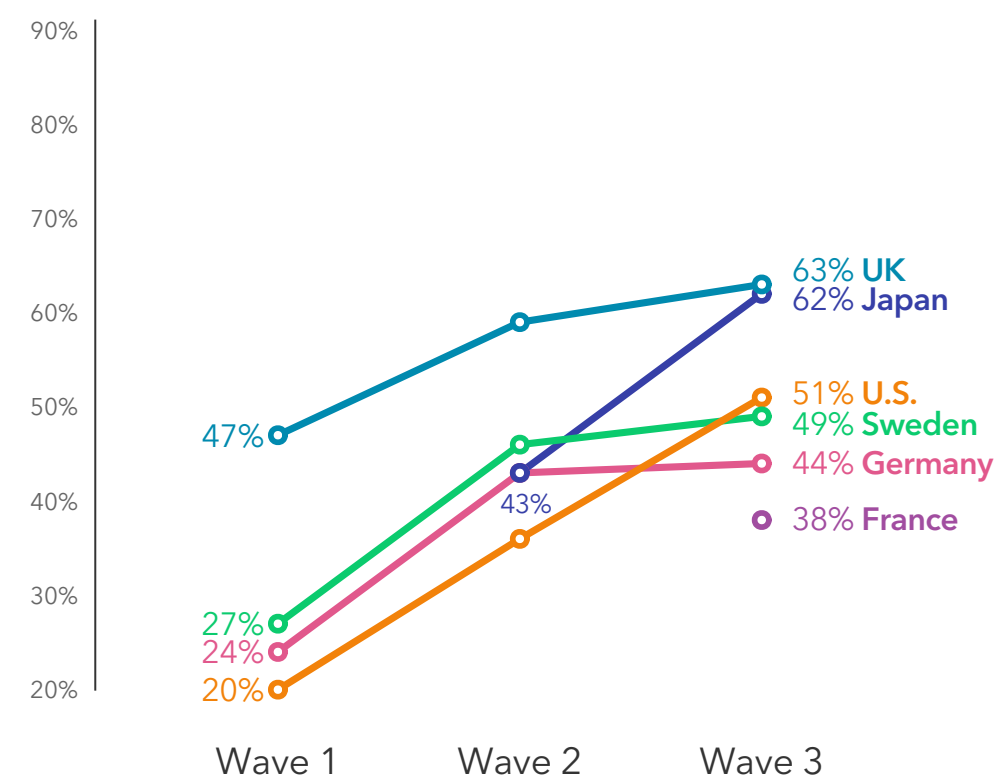
The impact on society overall



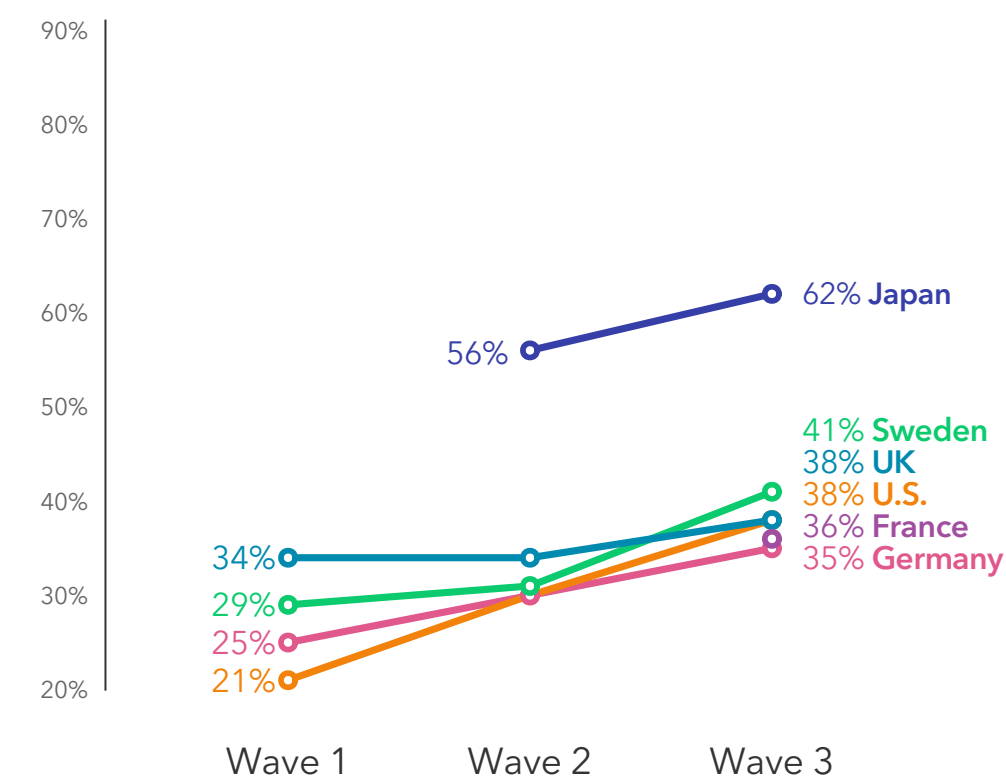
The impact on the economy



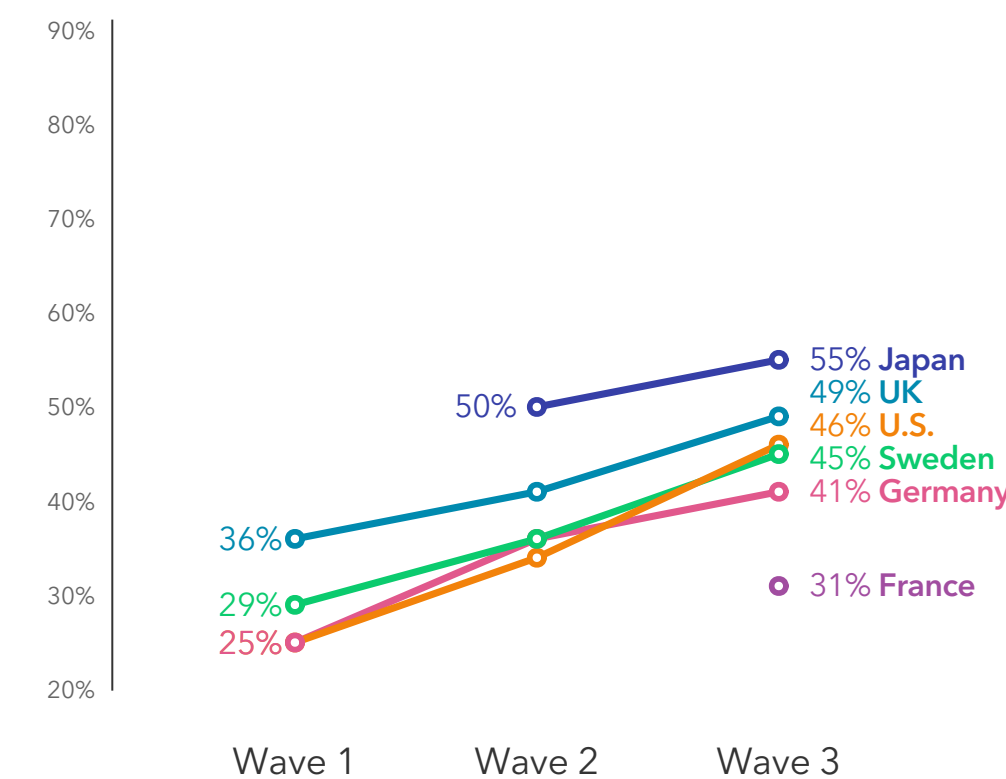
The impact on travel and holidays



The impact on your household finances



The impact on your own life



- Respondents across all countries were asked how long they think the effects of the virus on a range of different issues will last for.
- Percentage from each country choosing “Longer than a year” or “Longer than two years” for each issue.

7 Expected duration



People expect the impact of the virus to last for much longer than they previously thought

- Across all countries surveyed, **people think the impacts of the virus will last longer than they did in April or May**. This is the impact of curves flattening in countries: immediate concern has trended down, but people have become more pessimistic about how long the crisis will last. Majorities in all nations now expect coronavirus to impact their country for more than a year, with this rising to 69% in Japan and 83% in the UK.

23% ↑

the average increase in people expecting the effect on their country to last longer than a year between April and June



- People in the UK are still by far the most likely to think the impacts of coronavirus will last for a long time, particularly on the economy. 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 Americans than other countries' publics saying they expect to see the impact on the economy last beyond the end of 2020.

70%

the average proportion of the public across markets saying the impact of the virus on business will last longer than a year

- **Germany has seen a slower increase in expected duration of the virus**, likely reflecting its positive view of its country's handling of the virus and their economic optimism. Where are other populations become more likely to see it lasting a long time, the same proportion of Germans think the virus will impact the country or the economy for more than a year than they did last month.

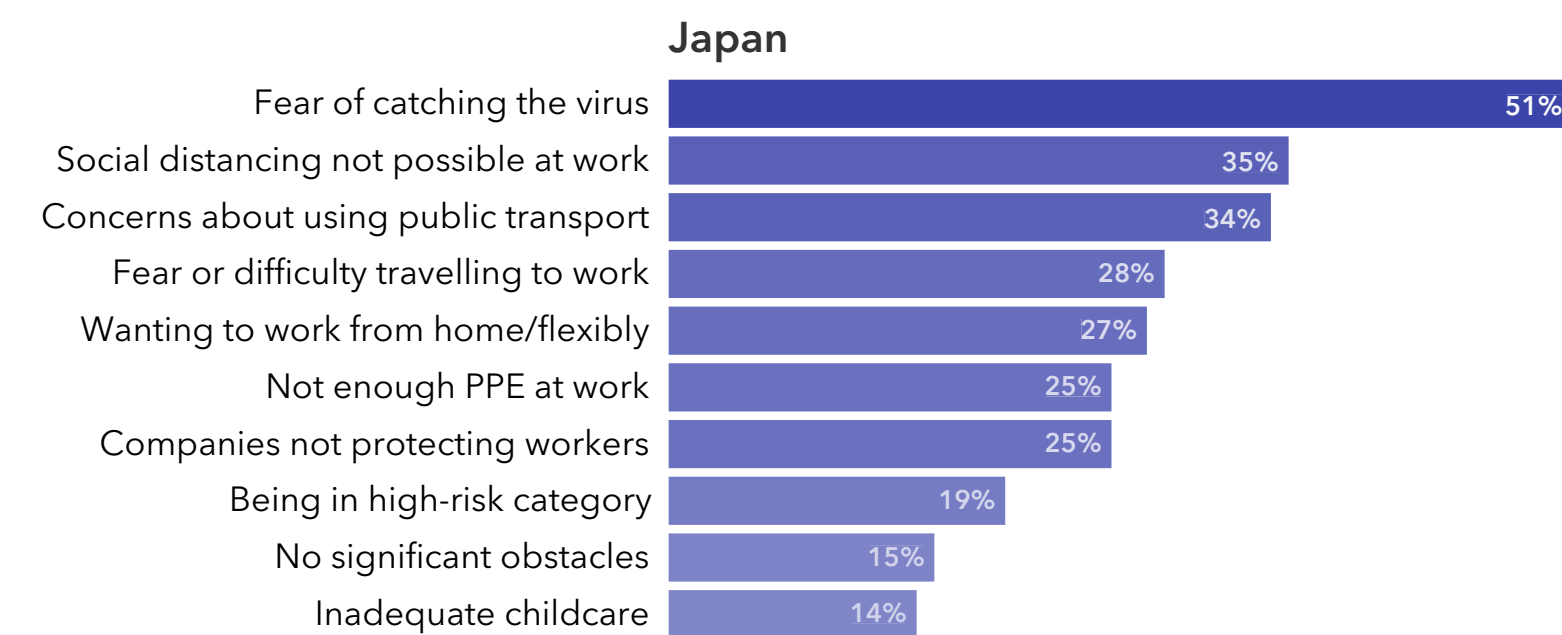
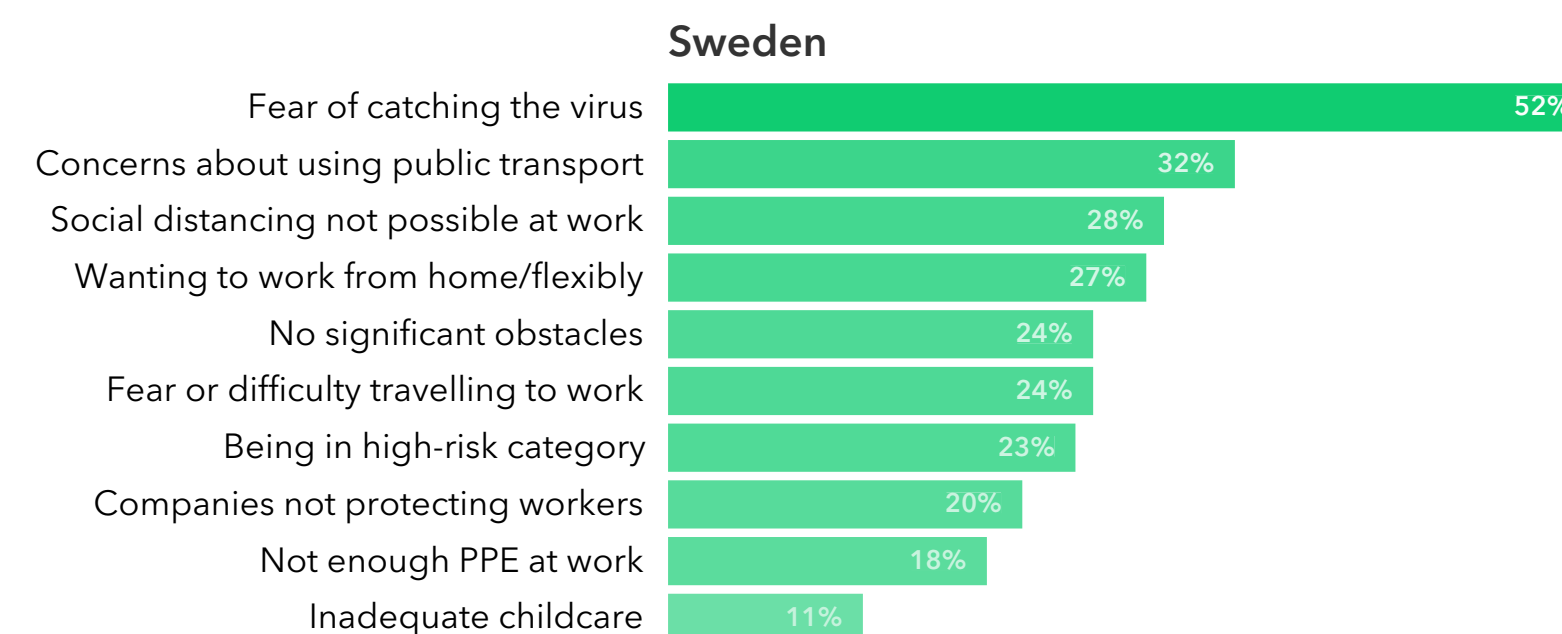
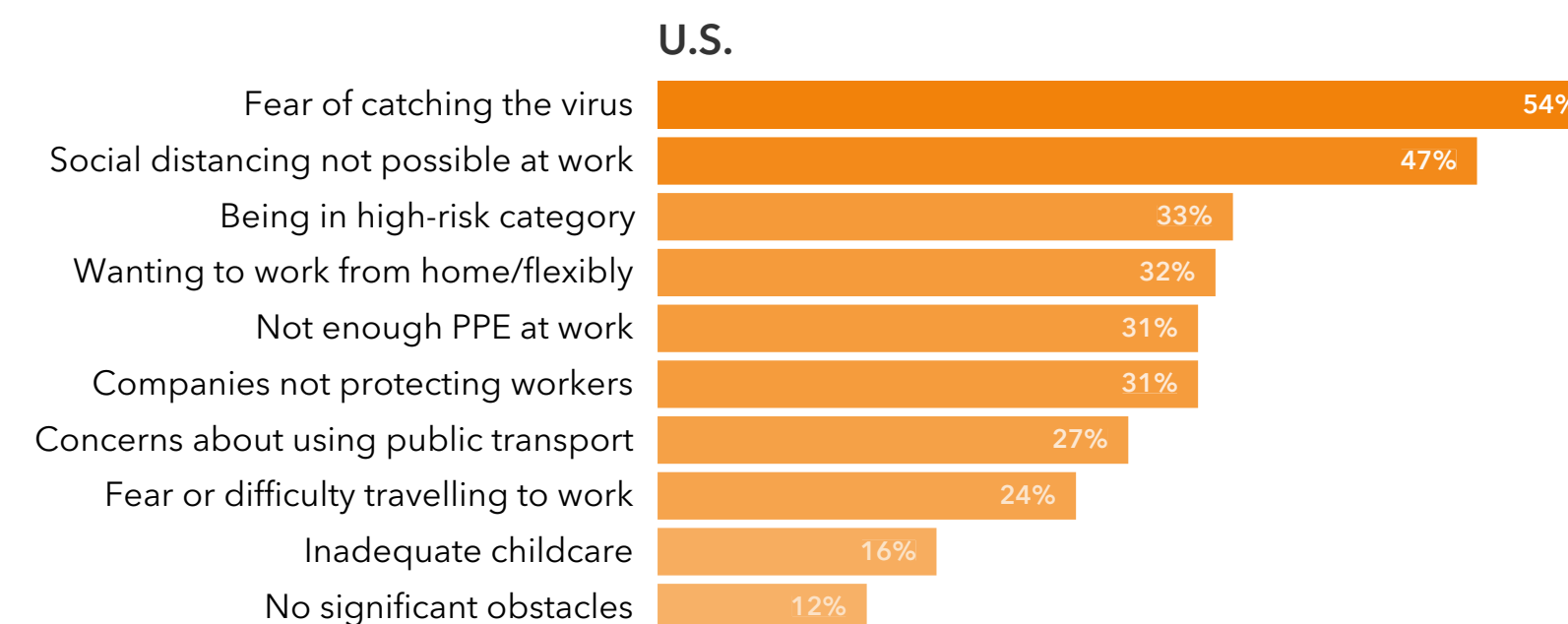
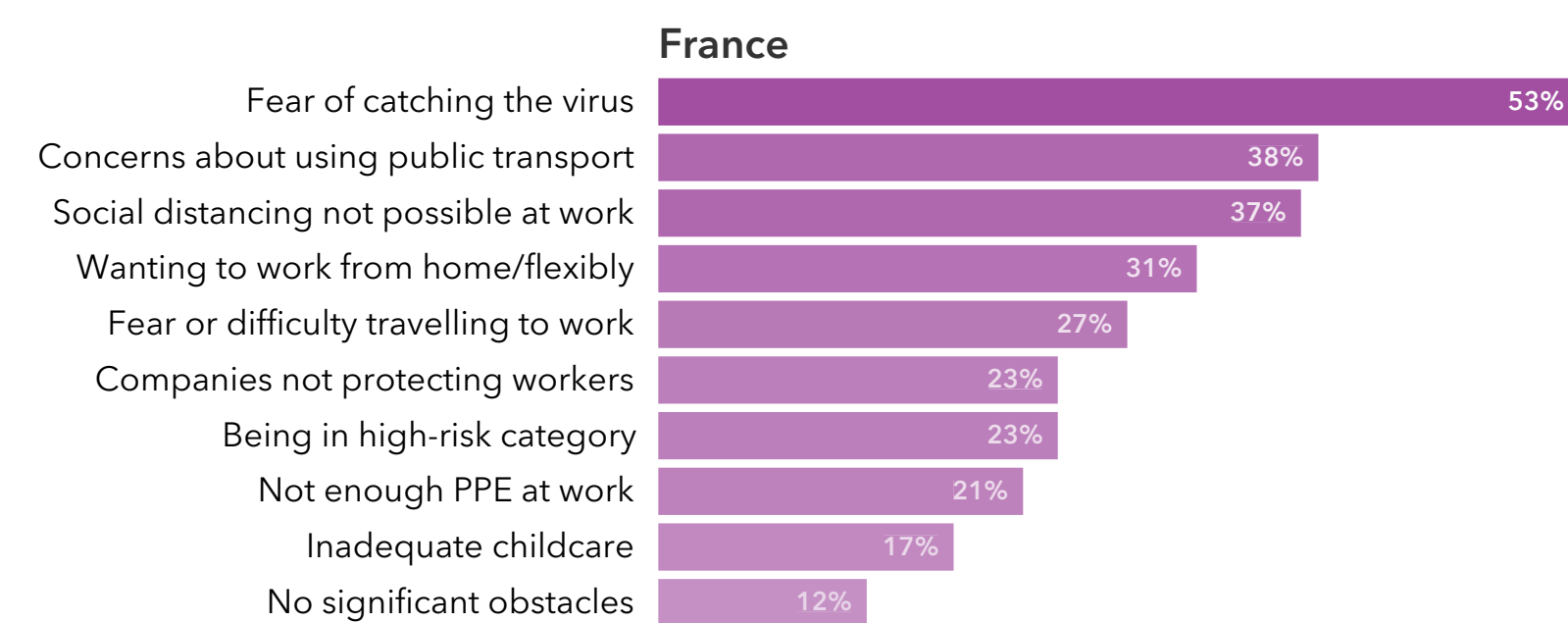
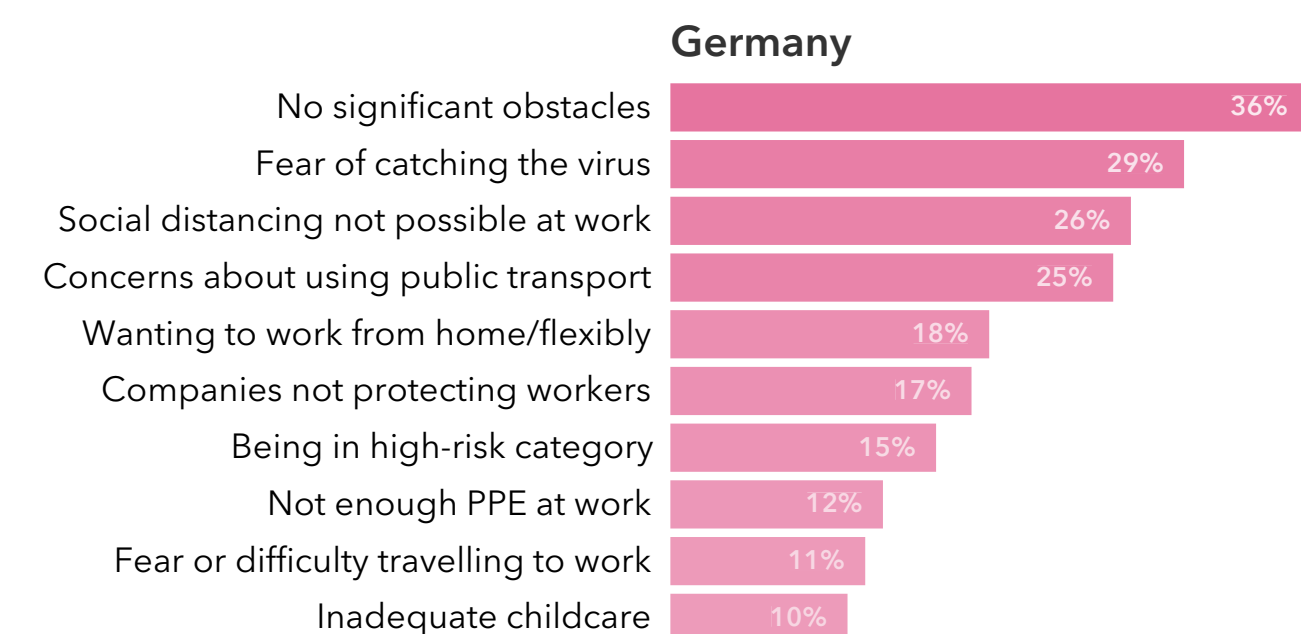
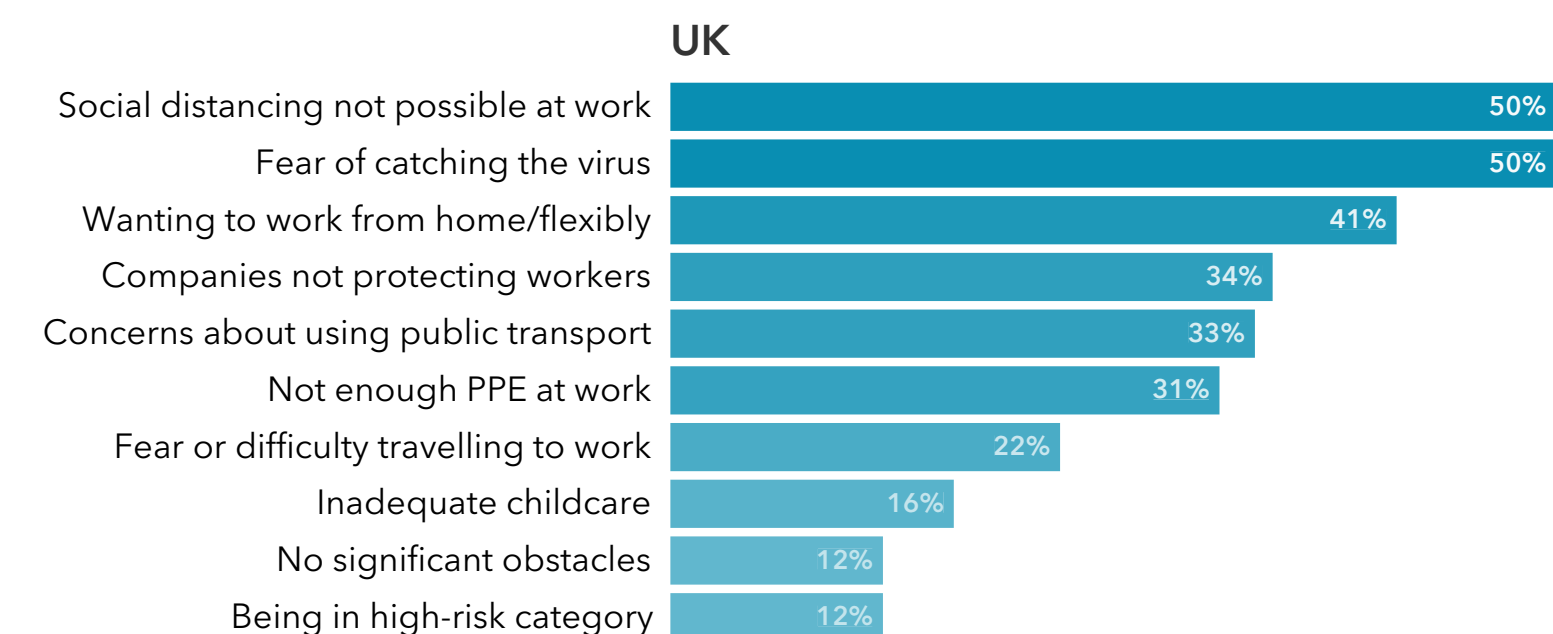
- Though more people say the impact on their own life and household finances will last for longer than a year, **this is still significantly lower than those expecting a long macro-economic impact**. Low in any case, only 38% in the UK, 41% in Sweden, 38% in the U.S., 35% in Germany and 36% in France think the impact on their own household finances will last this long. The French are particularly unlikely to think the virus will impact their own life for more than a year, with only 31% saying this. This global 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**. 62% of the Japanese public think the impact on household finances will last beyond a year, as do 55% when asked about the impact on their own life.



8 Barriers to office workers returning



Fear of catching the virus and social distancing measures are the main barriers to returning to work – though German workers tend to see no significant barriers to returning



- Office workers across all countries were asked what they felt were the main barriers to them returning to work.



8 Barriers to office workers returning



Fear of catching the virus and social distancing measures are the main barriers to returning to work – though German workers tend to see no significant barriers to returning

- **Across countries, office workers see consistent barriers to returning to work**, with fear of catching the virus, concerns that social distancing is not possible at work, and concerns about using public transport featuring at the top of the obstacles that people identify. Concerns about using public transport are particularly resonant in France, Sweden and Japan.

52% 

of office workers across markets outside of Germany say that fear of catching the virus is a barrier to returning to work

- The exception to this pattern is Germany. German office workers are the only nationality to be most likely to say there are **no significant obstacles to returning to work**. This is likely linked to their view of the virus as less dangerous than other countries, as well as their country's success at tackling the pandemic. However there are still barriers for German workers – again largely focused around fear of the virus, social distancing, and public transport.

36% 

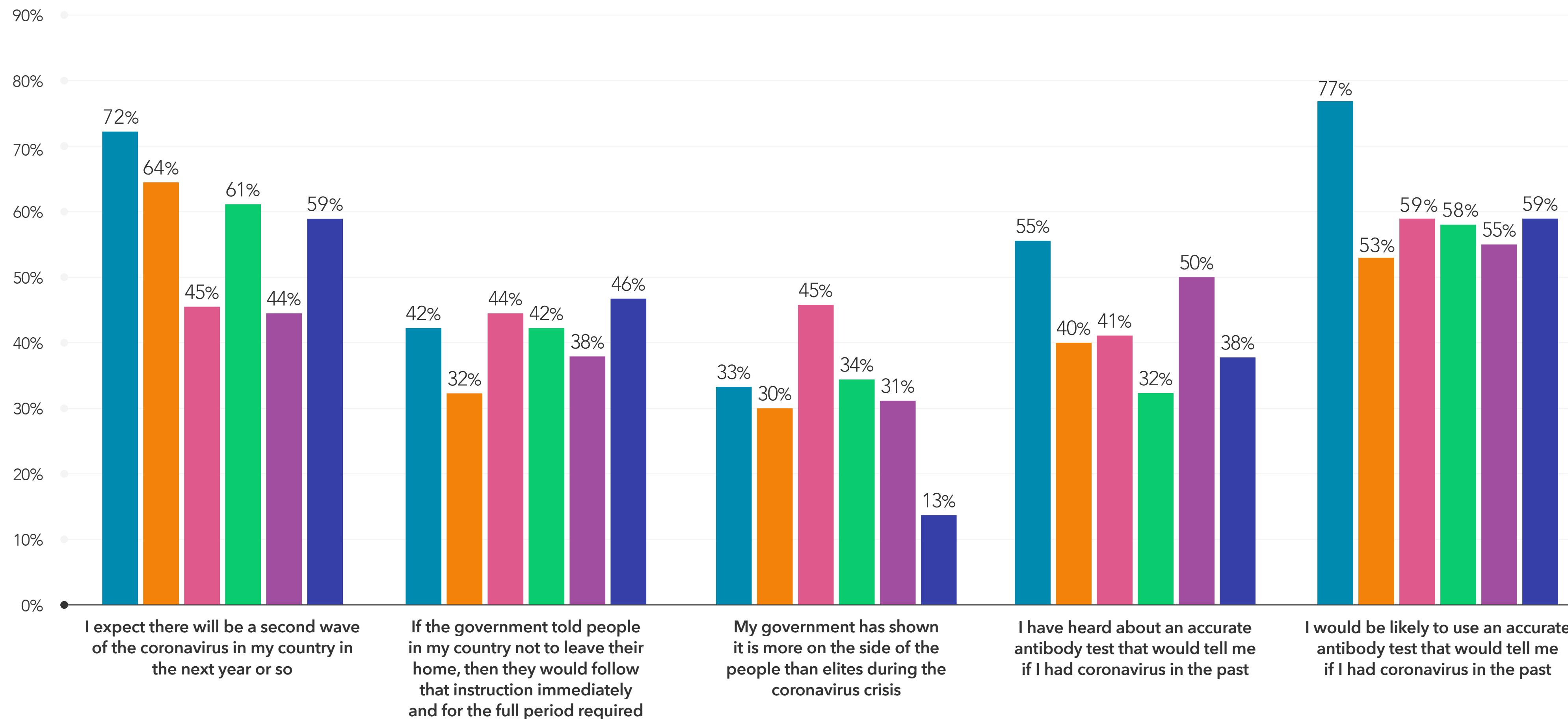
of office workers in Germany say there are no significant obstacles to returning to work

- **Companies not protecting their workers is seen as a barrier in the UK**, with 34% of British office workers citing this as an issue. This is relatively high in the U.S., with 31% referencing this, but lower in other countries – particularly Germany and Sweden.

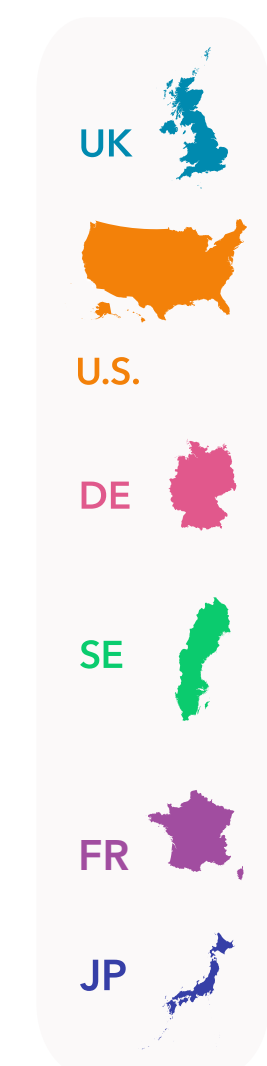
9 Views on public health, antibody tests, and a second wave



With the exception of Germany and France, populations expect a second wave of coronavirus



- Respondents across all countries were asked to agree or disagree with a number of statements related to public health. Displayed below is the % of people in each country who agreed with the given statements.

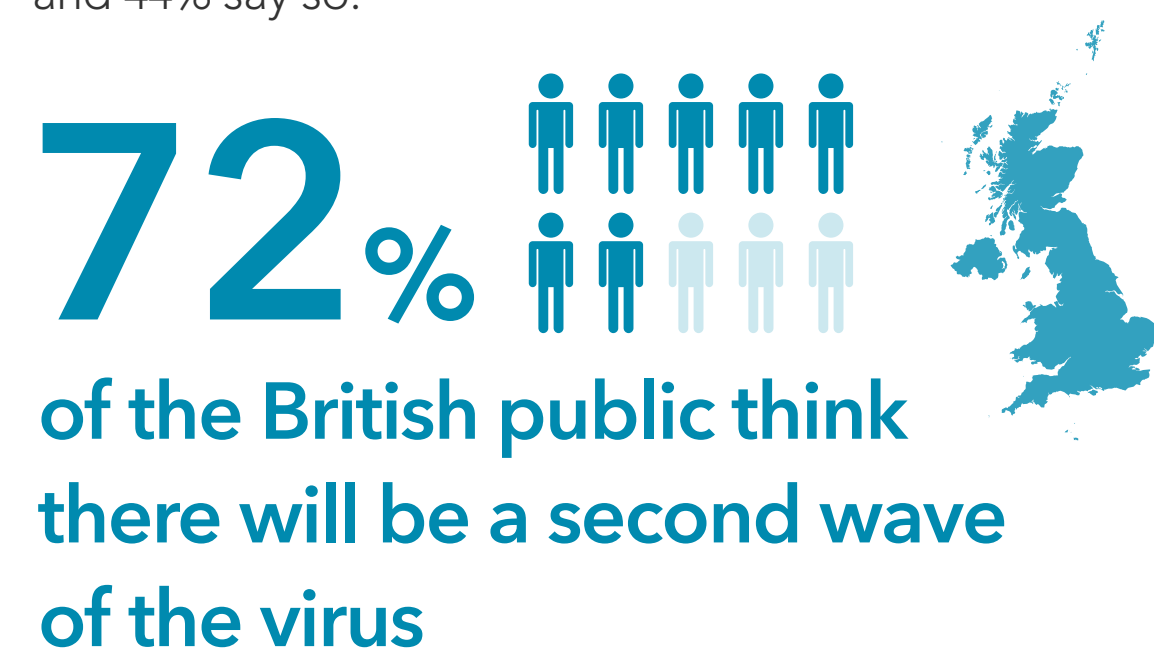




9 Views on public health, antibody tests, and a second wave

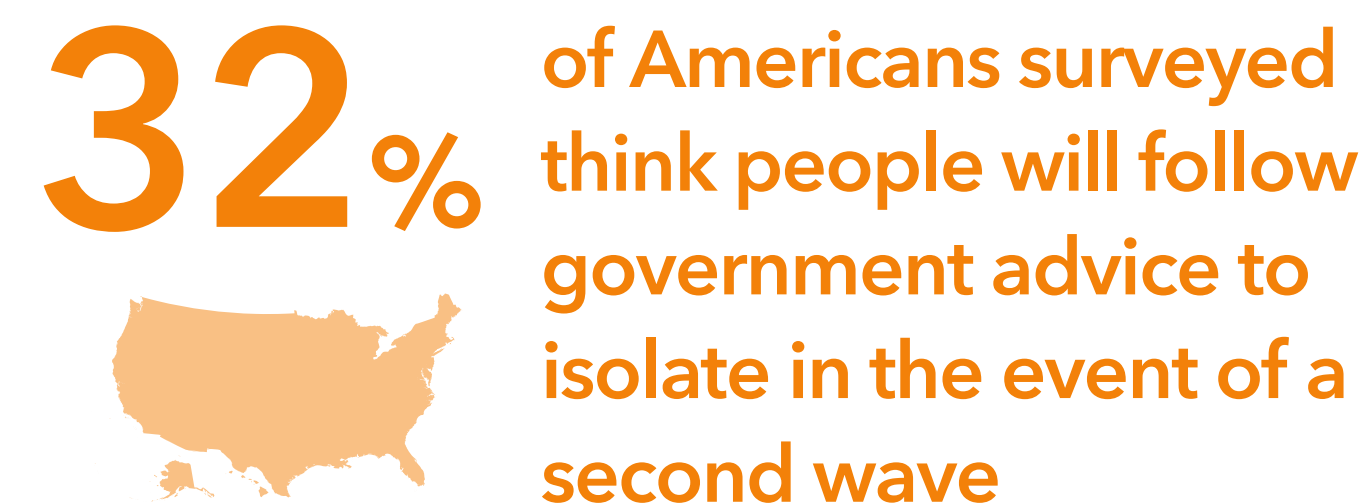
With the exception of Germany and France, populations expect a second wave of coronavirus

- Majorities expect a second wave of coronavirus in the next year or so in the UK, the U.S., Sweden and Japan. This is highest in the UK, where almost three-quarters of people expect a second wave. **Expectations of a second wave are lower in Germany and France**, where only 45% and 44% say so.



- There is not particularly strong faith amongst populations that people will follow government instructions to self-isolate, with fewer than half saying that if the government told people not to leave the house they would do so immediately and for the full period required. This is lowest in the U.S., where only 32% say this, and in France, where only 38% agree.

- Nor is there much of a feeling that governments have acted on the side of the people over elites. Only a third of people in the UK say this, and similar proportions say so in other countries. The two exceptions, on both extremes, are Japan – where only 13% agree with this, in line with other negative views in Japan towards government – and Germany – where almost half of people do say this is the case, in line with the very high approval ratings for the German Federal Government and Angela Merkel.



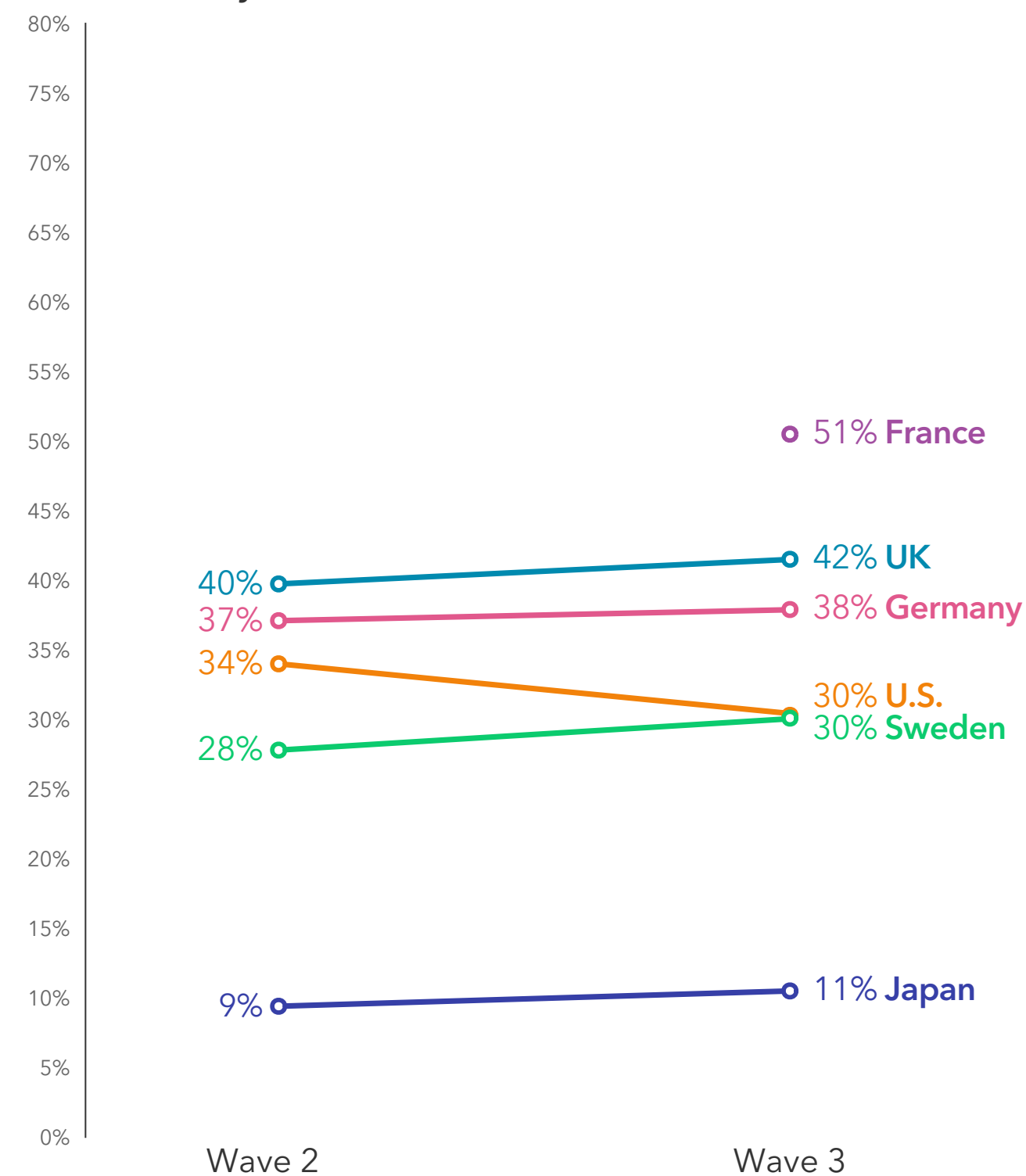
- Half or more in France and the UK have heard about accurate antibody tests, while this figure is lower in other countries – particularly Sweden where only 32% say they are aware of this. **But potential take-up is high, with majorities in all countries saying they would be likely to use it to see if they had coronavirus in the past.** This is especially high in the UK, where 77% say they would use it.

10 Views of business support

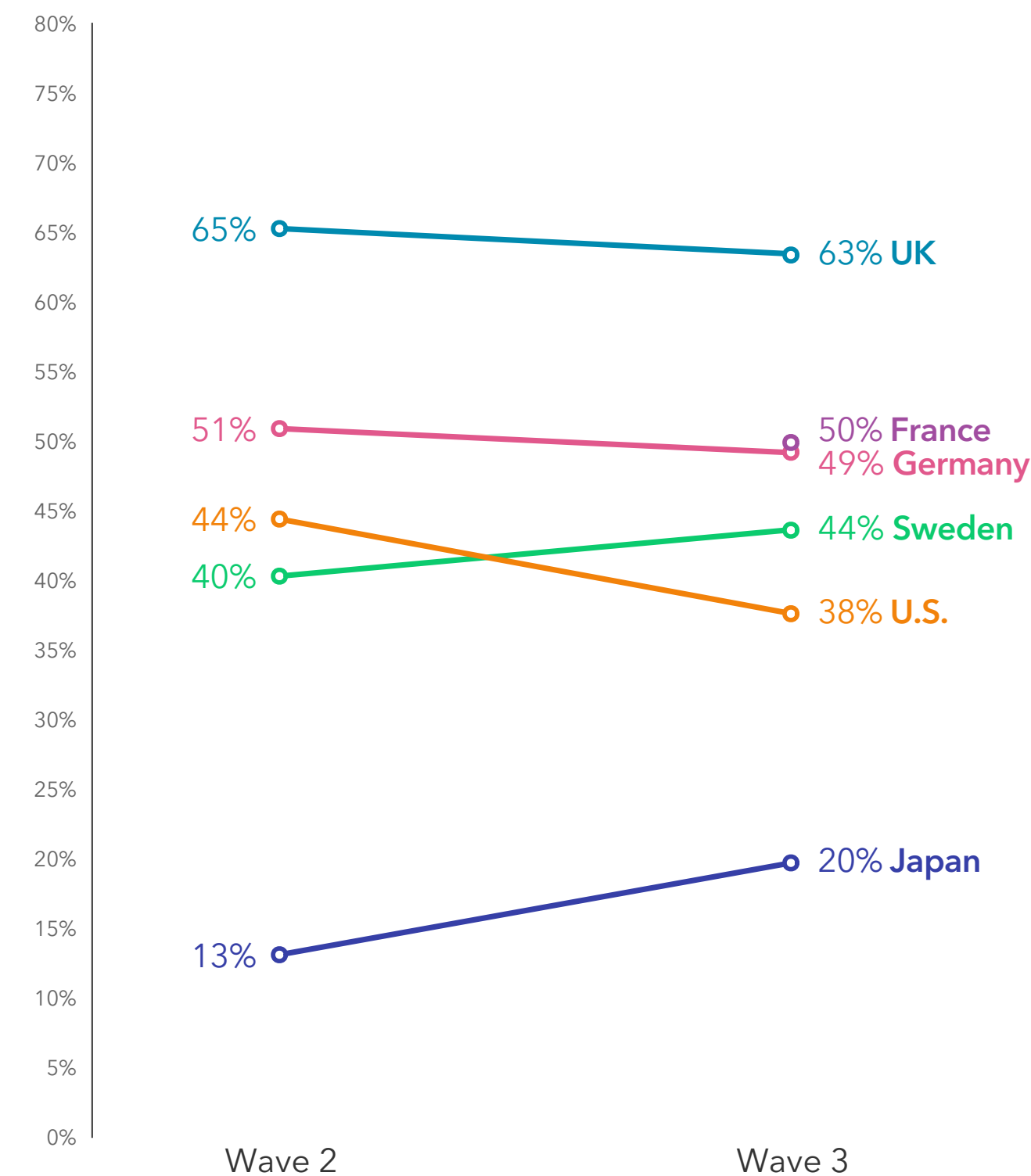


People think their governments are giving business the support it needs but are less sure it is going to the right businesses – and the Japanese public are sharply critical

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



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



- 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.

51%

A majority of the French public think that business support is getting through to companies that really need it

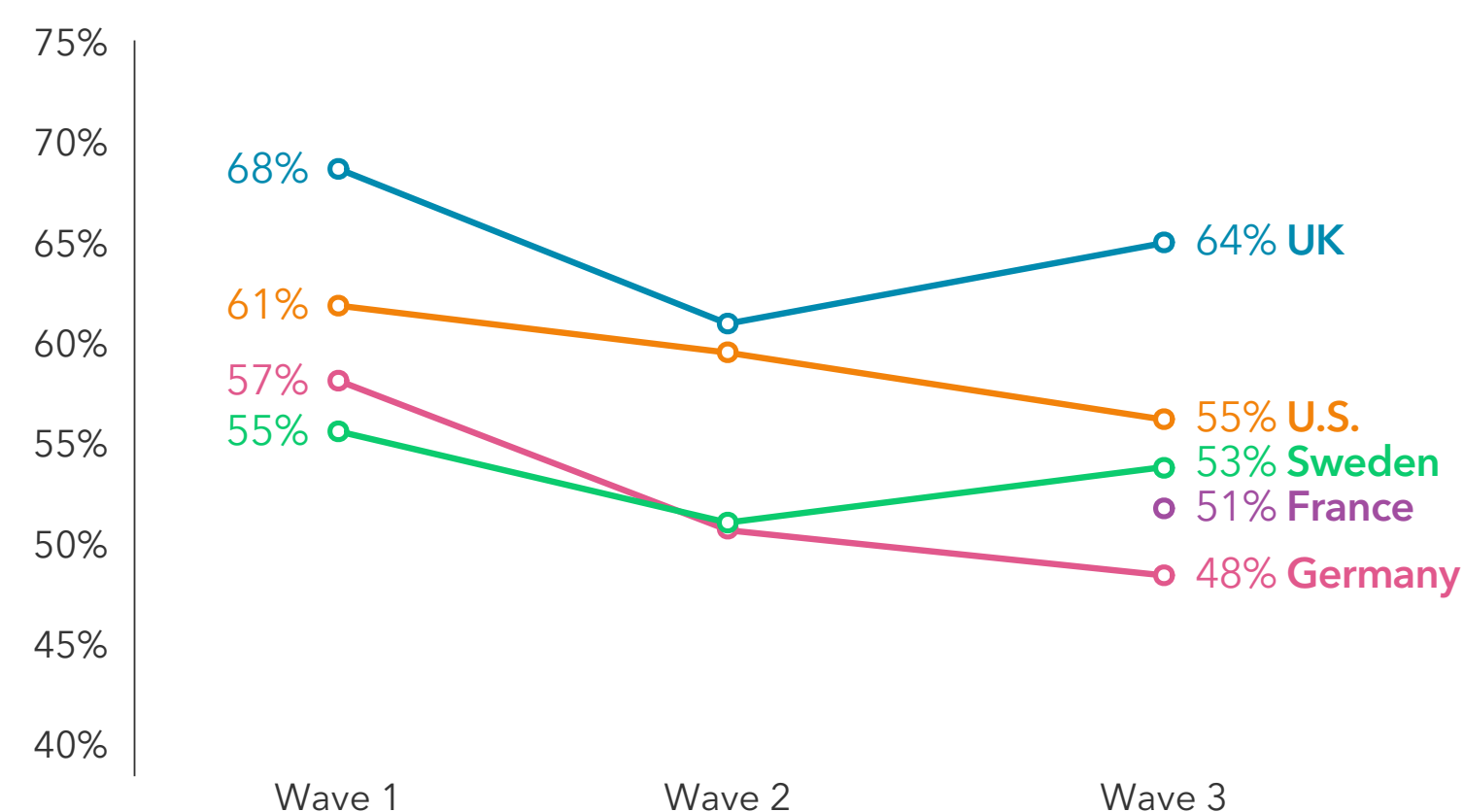
- There has not been significant change this month in views towards governments and how they are supporting businesses. **The UK remains the country most positive about the support their government is giving to business**, with 63% saying the government is giving the business the support it needs during this crisis. This may explain why people in the UK feel that the personal impact of the crisis may affect them less. Japan remains the most critical, with only one-fifth saying the government is giving business the support it needs.
- Half of the French public say their government is giving business the support it needs, the second-highest, and 51% say this business support is getting to where it is really needed, the highest of all countries surveyed.

11 Business brands



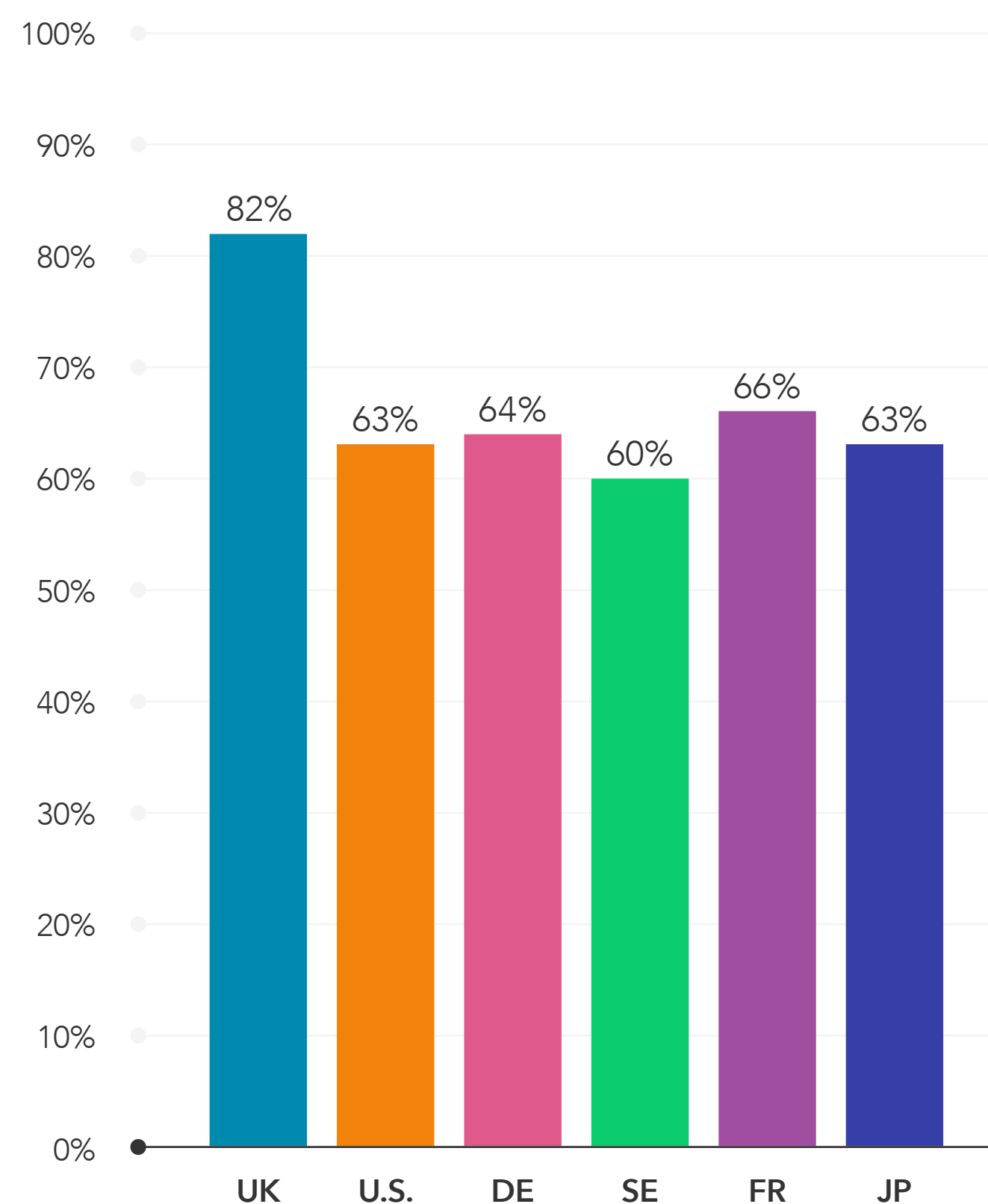
The U.S. and German public less sure businesses are stepping up; and a call for CEOs to show restraint when it comes to media

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.
- In Germany and the U.S., people have become **marginally less sure that business is stepping up in their country during the outbreak**. In Germany this has tipped below 50% for the first time. But in Sweden and the UK this trend has gone the other way, with **more saying business has stepped up than they did last month**. Just over half of the French public think business has performed well.

CEOs of major companies should focus on what they can do as a business to help in the crisis, rather than being prominent in national media



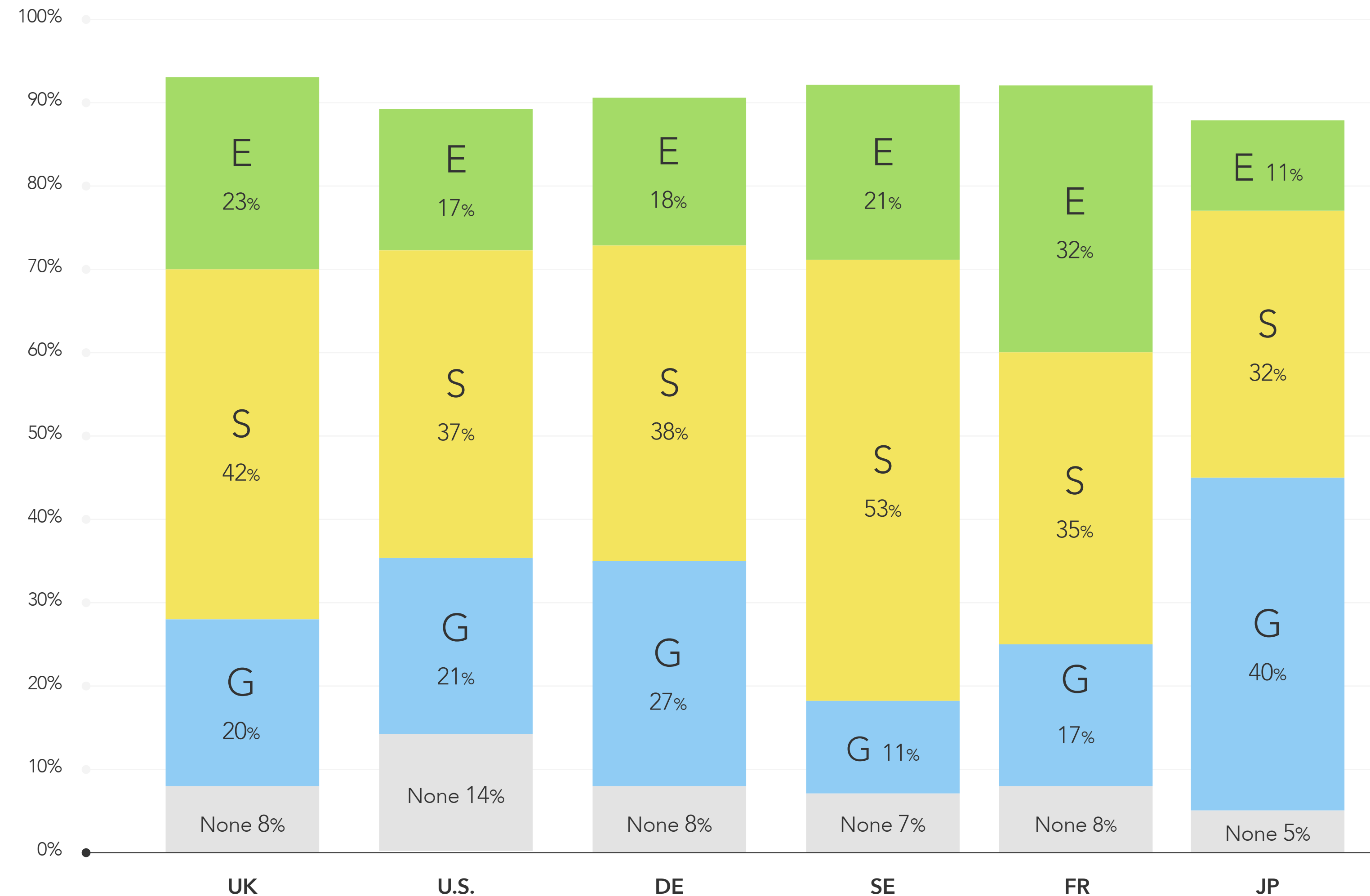
- Though people want CEOs to be active in helping out with national efforts, **the public do not want CEOs to be overly prominent on national media** – particularly in the UK where 82% say this. The expectation of business is to help out, to be active in helping employees, but not to have too loud a role in decision-making or on national media channels.



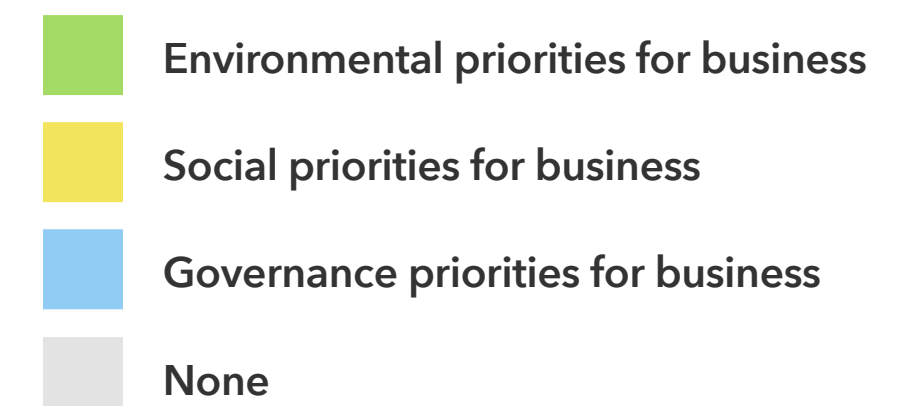
12 ESG priorities



People most want to see businesses focusing on the measures to help society and people – there has been a shift to the ‘S’ of ESG



- Respondents across all countries were asked to choose which was most important for businesses to focus on after coronavirus, out of measures to help society and people (Social, S), measures to help the environment and climate (Environmental, E), and measures to ensure good governance and the way they conduct themselves (Governance, G). They were also given the option to say that none of these apply and businesses should carry on as before.



Percentages shown do not include 'Do not know'.

12 ESG priorities



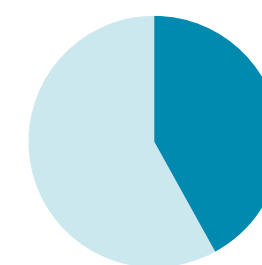
People most want to see businesses focusing on the measures to help society and people – there has been a shift to the ‘S’ of ESG

- When it comes to the general public’s view, all countries bar Japan **want to see businesses focus most on measures to help society and people.** This is most acute in Sweden (53%) and the UK (42%). Though a third of people in Japan do choose ‘Social’ actions for business, the frontrunner there is measures to ensure good governance and the way they conduct themselves (40%).
- **In the U.S. and Germany, ‘Governance’ is the next area that people want businesses to focus on,** with measures to help the environment and climate being opted for by only 17% and 18% respectively in these two nations. **In the UK, Sweden, and France ‘Environmental’ concerns are more pressing,** with 32% saying this should be business’ main focus in France.
- This suggests that, though all three areas are seen as laudable, the impact of coronavirus has meant the public at large is focused most on **the ‘Social’ component of ESG when it comes to what business should prioritise.**

- The interest in the environment differs across age groups, with younger people saying business should focus on the environment and climate protection more than older people do. For example, in Germany this is chosen by 22% of 18-44 year olds but only 16% of over-45s. However, the interest in social measures does not change by age and stays stable, meaning that **even amongst the youngest age groups ‘Social’ concerns are still dominant.** The exception to this is in France, where 18-34 year olds’ top demand for business is to focus on the environment.

In the UK

42%



of the public want to prioritise the ‘Social’ in ESG

0

The number of countries surveyed in which ‘Environmental’ concerns are prioritised over ‘Social’ elements.

- Very few countries say they want to see no change at all and for businesses to just return to normal – with this answer attracting less than 10% support bar the U.S., where 14% agreed.

12 Environmental priorities for business



People want to see businesses running their activities in an environmentally-friendly way, sustainable waste management policies and focus on renewable energy sources – but priorities differ by country

	UK Rank	U.S. Rank	DE Rank	SE Rank	FR Rank	JP Rank
Environmentally-friendly day-to-day activities	1st	1st	2nd	1st	1st	1st
Sustainable waste management policies	2nd	2nd	6th	5th	2nd	3rd
Reducing single-use plastics	3rd	5th	4th	6th	4th	5th
Use renewable energy/materials	4th	3rd	1st	2nd	3rd	2nd
Reduce CO2 emissions	5th	4th	3rd	4th	5th	4th
Habitat and wildlife conservation	6th	6th	5th	3rd	6th	6th

- Respondents across all countries were asked to rank which environmental areas businesses should focus on after coronavirus, in order of importance. Displayed is the rank in each country, looking at the top three areas chosen.
- Generally, when it comes to what businesses should do in relation to the environment, **the priority is on ensuring day to day business activities are environmentally friendly**. Also high up is sustainable waste management policies, though this is less pressing in Germany and Sweden.
- **Use of renewable energies and materials is the top priority in Germany**, and the second priority in Sweden and Japan but resonates less in the UK, U.S., and France.
- **Habitat and wildlife conservation is generally seen as a lower priority for business**, as well as a general reduction of CO2.

12 Social priorities for business



Health and safety measures to protect employees is the main ask from the public, with mental health also featuring strongly - the importance of diversity of staff varies by country

	UK Rank	U.S. Rank	DE Rank	SE Rank	FR Rank	JP Rank
Health and safety measures for employees	1st	1st	1st	1st	1st	1st
Mental health support for employees	2nd	2nd	4th	2nd	2nd	2nd
Values of suppliers match their own	3rd	5th	2nd	3rd	3rd	5th
Diversity of staff and bosses	4th	3rd	3rd	6th	6th	2nd
Strong presence in local community	5th	4th	5th	4th	4th	4th
Supporting most vulnerable in other countries	6th	6th	6th	5th	5th	6th

- Respondents across all countries were asked to rank which societal areas businesses should focus on after coronavirus, in order of importance. Displayed is the rank in each country, looking at the top three areas chosen.
- **People across countries want businesses to put their employees first** the top two concerns in most countries are around employees, with calls for health and safety measures to protect employees in the workplace, as well as mental health support for employees. This comes above issues related to values, diversity or presence in the local community. Only Germany puts mental health support for employees lower, with the German public instead focusing on ensuring the values of the businesses in their supply chain match their own.
- In the spotlight at the moment, and potentially amplified by fieldwork taking place during the first wave of protests after the events in Minneapolis, **diversity of staff and bosses is a mid-tier concern in most countries**, and is highest in the U.S., Japan and Germany. It is least important to people in Sweden and France.
- International support and aid to the most vulnerable in other countries that businesses operate in is at the bottom of the public's ask of business.

12 Governance priorities for business



Transparency, a strong voice for employees and data protection amongst people's top priorities for business related to governance - with results on executive pay varying by country and employee share ownership not top of agendas

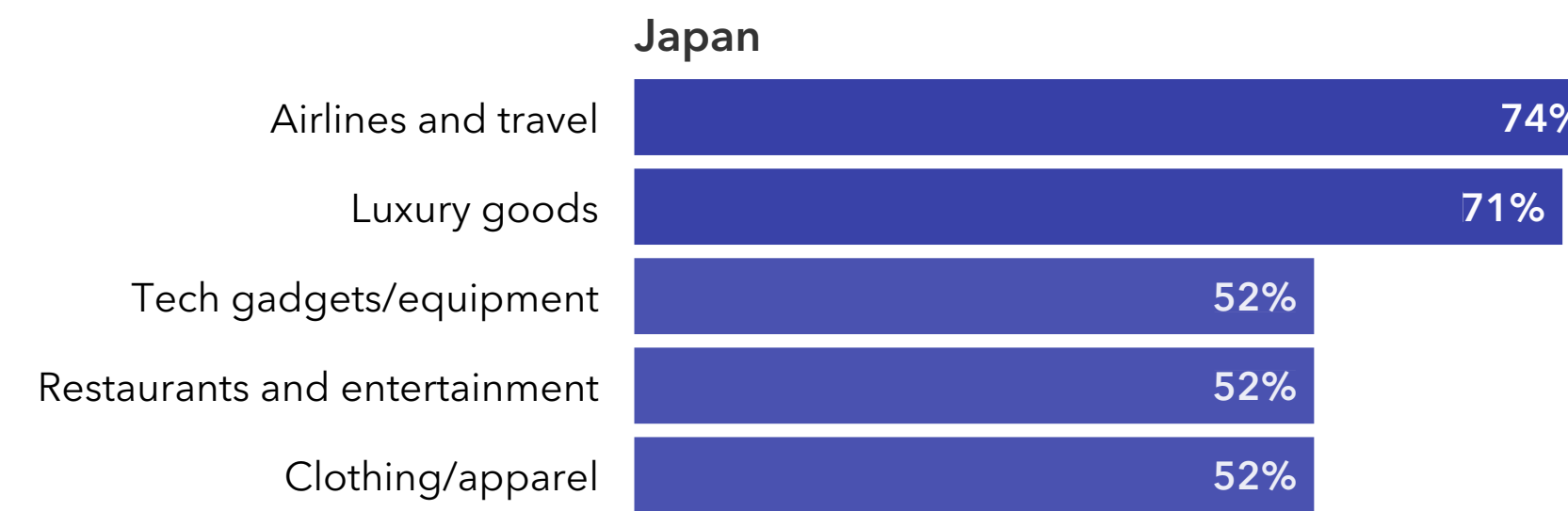
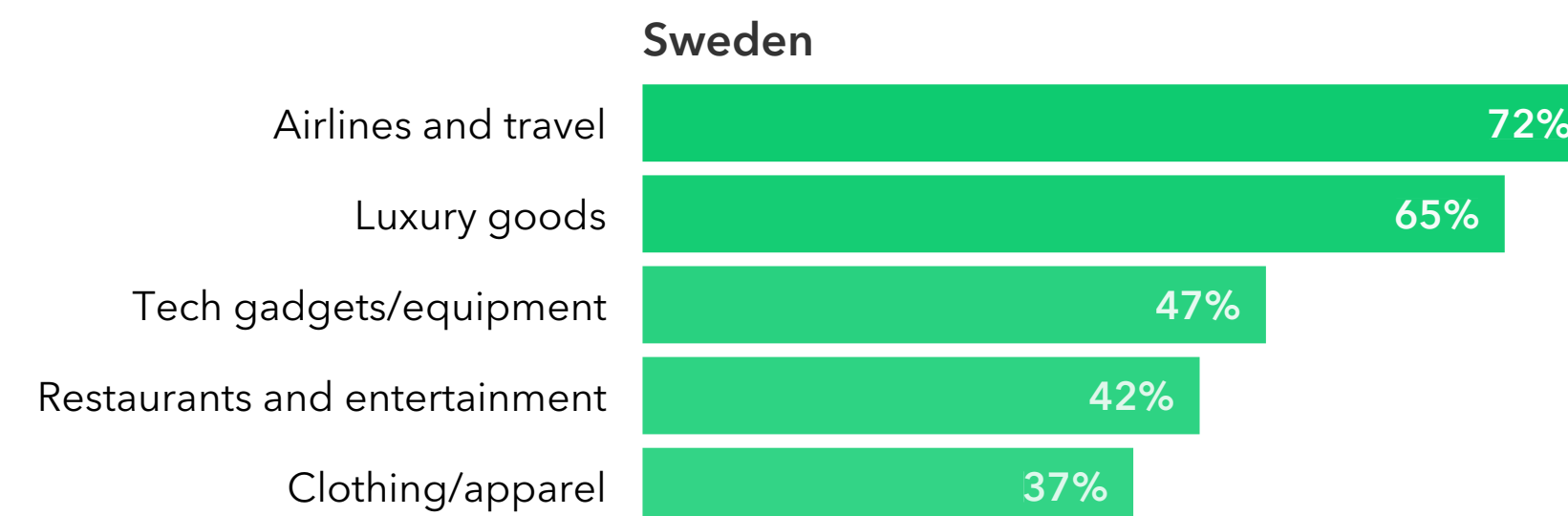
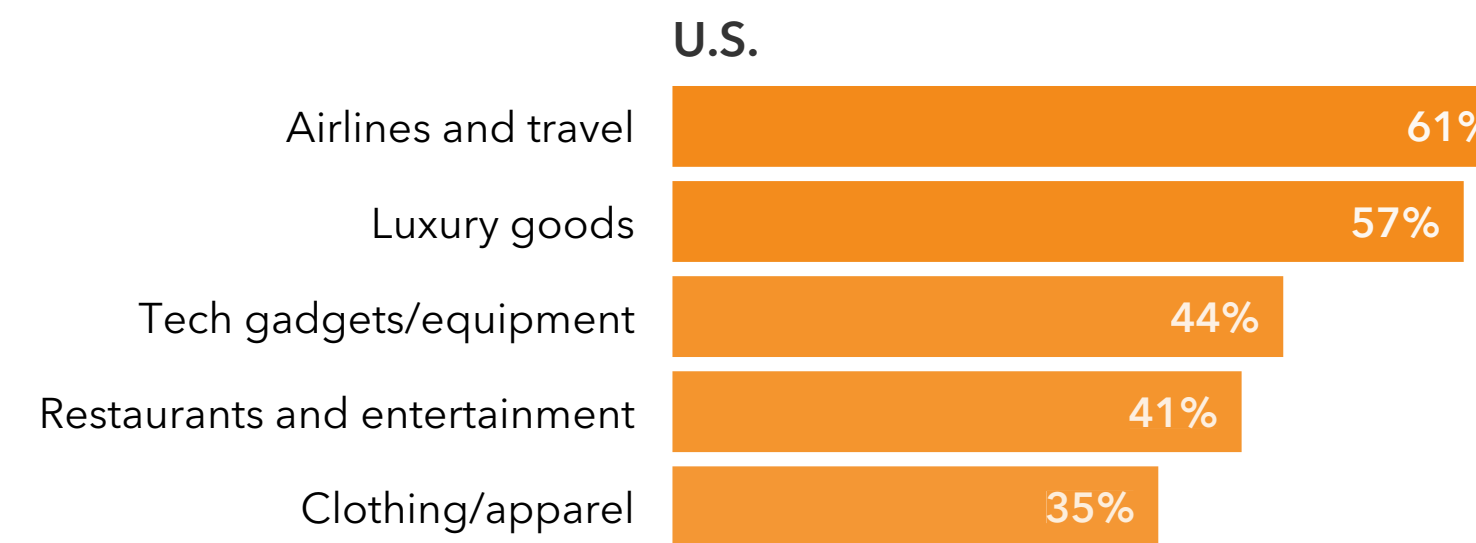
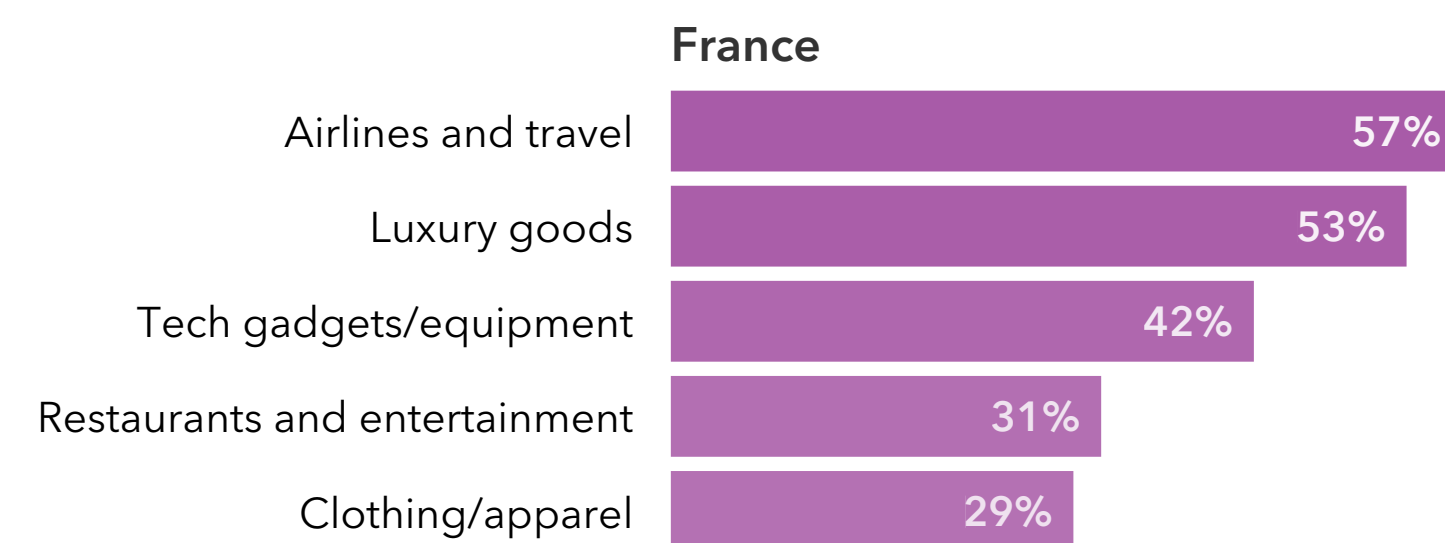
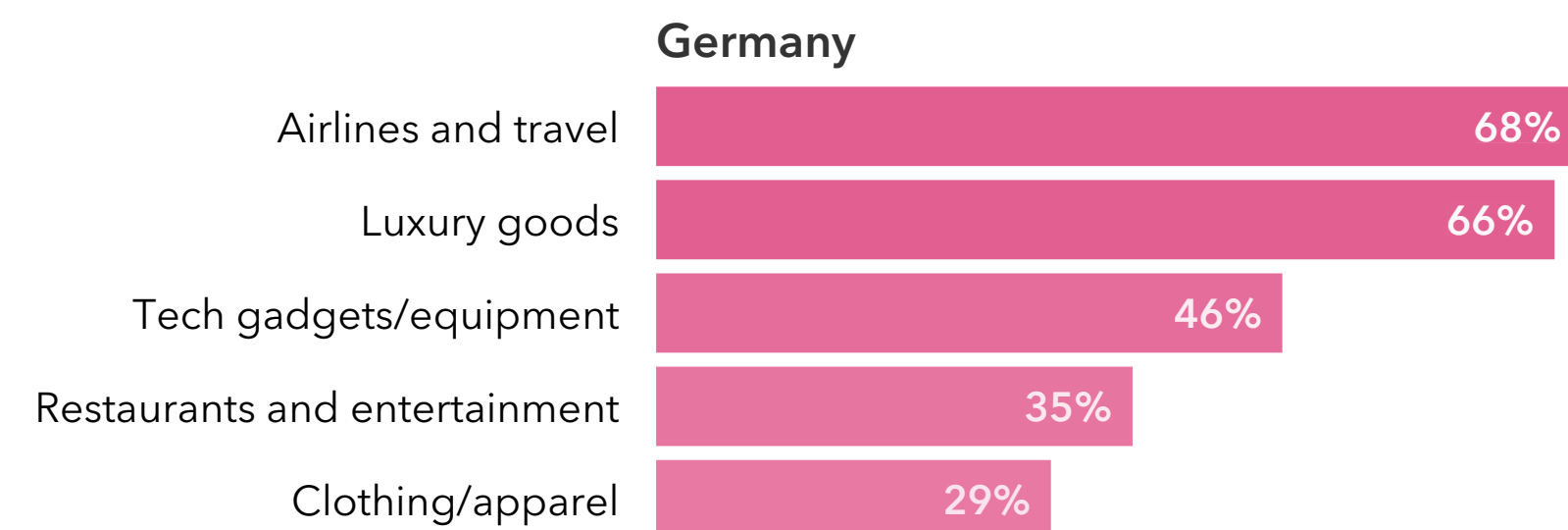
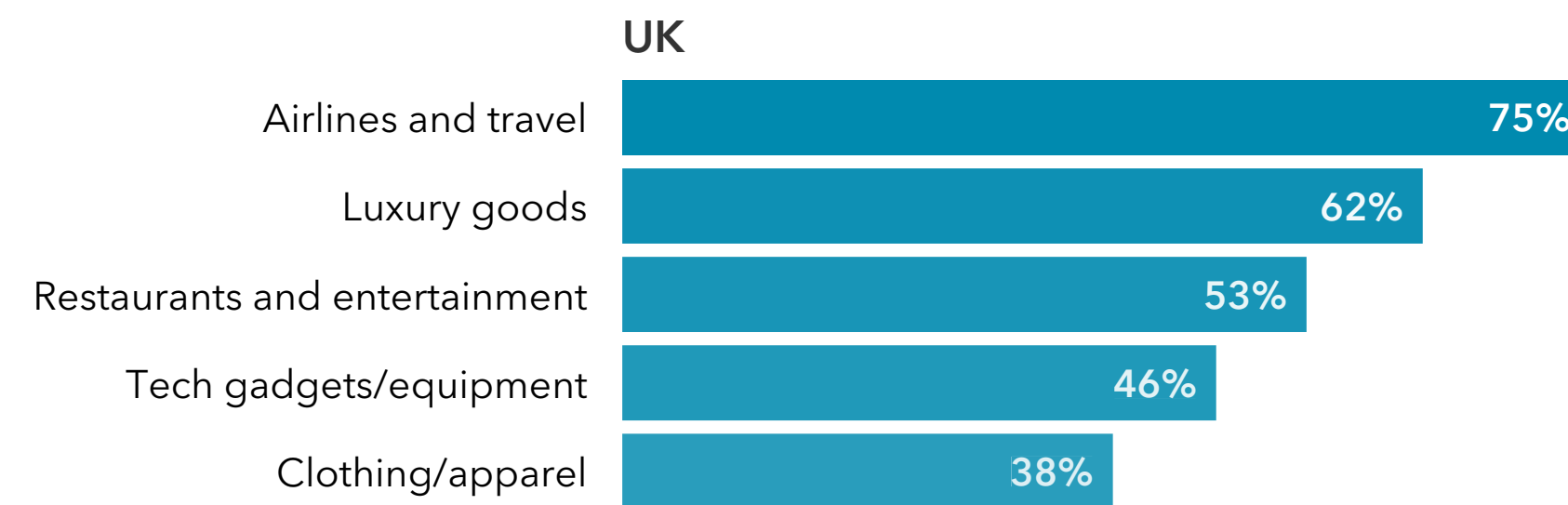
	UK Rank	U.S. Rank	DE Rank	SE Rank	FR Rank	JP Rank
Transparency in business activities	1st	1st	1st	4th	1st	1st
Strong voice for employees	2nd	3rd	4th	1st	5th	2nd
Regulate executive pay	3rd	5th	5th	3rd	2nd	5th
Data protection for consumers and employees	4th	2nd	2nd	5th	3rd	3rd
Ensure no conflicts of interest/corruption	5th	4th	3rd	2nd	4th	4th
Employee share ownership	6th	6th	6th	6th	6th	6th

- Respondents across all countries were asked to rank which governance areas businesses should focus on after coronavirus, in order of importance. Displayed is the rank in each country, looking at the top three areas chosen
- **Transparency is the top ask of business when it comes to issues related to governance.** This applies in all countries apart from Sweden, where the public put a strong voice for employees as their top priority this is second in the UK and Japan.
- **Regulation of executive pay is a mid tier concern in most countries**, though this is particularly resonant in France where it is ranked second. Data protection is most important in the U.S. and Germany, where it is ranked second.
- **Employee share ownership is less resonant for the public**, coming bottom in the list of priorities for all countries.

13 Spending habits

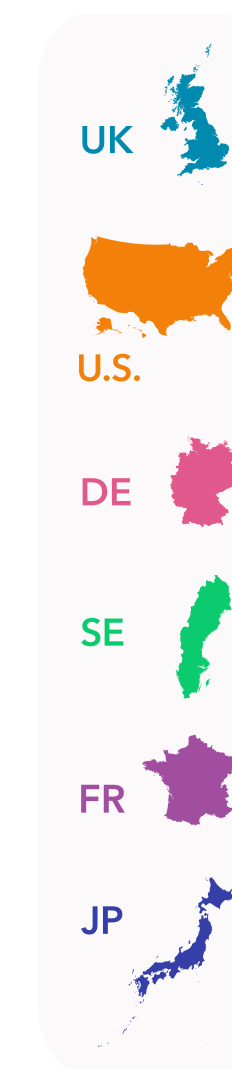


Globally consumers say they are not going to be ready to return to normal levels of spend on travel and luxury goods until at least 2021



- Respondents across all countries were asked to say how long it would be for their spending on various goods and services to return to normal levels or higher.

Displayed are the % in each country that say it would take until at least 2021 for them to do so.



UK: Main findings



1. More people are likely to put the economy first than in April or May, the first time this has moved in this tracking.

2. But the UK also remains the nation the most concerned about the health impacts of the virus, opposes lifting of the lockdown, and is the most likely to expect a second wave.

3. Brits view the virus as more dangerous than any other country, with more than a third saying it is "extremely dangerous".

4. Despite strong economic concerns, British workers are the least likely to expect the impacts to hit them personally and are the least worried about their job going or company closing.

5. Party politics is affecting how people want governments to respond to the virus for the first time, with Labour voters more likely to prioritise saving lives over the economy than Conservative voters.

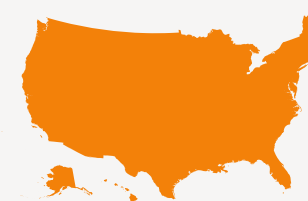
6. The UK, alongside the U.S., is viewed by other nations - as well as Brits - as having done the worst job at handling the pandemic.

7. The UK Government and the Prime Minister are in net negative territory with voters, including with traditionally pro-Conservative audiences like over-45s.

8. UK business is amongst the best-rated in the world for how they have responded to the crisis.

9. The British public want business to focus on helping society, employees and people more than the environment or improving governance.

U.S.: Main findings



1. The U.S., alongside the UK, is viewed by other nations as having done the worst job at handling the pandemic; Americans do not agree, and rate Italy and China below their own country.

2. Negative attitudes towards how China has performed is bipartisan, with Democrats and Republicans both critical of China's handling of the pandemic.

3. Americans are becoming more focused on prioritising the economy over saving lives, with a 30-point gap between the two narrowing to a 22-point gap this month.

4. Over-65s and Republicans are swinging most towards prioritising the economy, and Republicans now put the economy ahead of limiting the spread for the first time.

5. Almost one in four (23%) U.S. workers say they have not heard everything they need from their employer to feel safe to return to work.

6. The U.S. is expecting the impacts of the pandemic to last longer, though is the country least likely to think the economic impacts will be felt for more than a year.

7. U.S. institutions and businesses have performed well during the crisis – the exception to this is the Federal Government, with President Trump the leader with the lowest approval score in Western countries surveyed.

8. Nearly two-thirds of Americans expect a second wave of the virus – the second-highest globally; yet concern about the virus is also falling.

9. Americans think business has performed well during the crisis, and wants business to focus on helping society, people and employees more than the environment or improving governance.

10. In the aftermath of the murder of George Floyd, the U.S. public is the most likely to want diversity of staff and leadership teams to be a priority for business.



Germany: Main findings



1. Germany is seen globally as the country which has handled the coronavirus the best, with an overall net +44% saying it has handled the pandemic well.

2. The German public are the most positive about their institutions, with business and government alike seen as having responded well.

3. This is also true for Chancellor Angela Merkel, who has a net positive approval rating with every age group and region – near unprecedented for a Western leader.

4. Germans are the least concerned about the virus, and view the virus as less dangerous than other nations do.

5. Just under half (45%) of Germans expect a second wave of the virus, compared to 72% in the UK and 61% in Sweden.

6. But Germans do expect the impacts of the virus to last longer than they did at the start of the pandemic, though this increase is more gradual than in other countries.

7. German office-workers are the only ones surveyed who feel there are no significant obstacles to returning to work. Where they do, fear of catching the virus and the practicality of social distancing are the most commonly referenced barriers.

8. The German public want business to focus on helping society, employees, and people more than the environment or improving governance.

9. The German public remain nervous about international travel, with a majority of Germans saying that no neighbouring countries would be safe to travel to this summer or winter.

Sweden: Main findings



1. Sweden is the only country where the gap between wanting to save lives and protect the economy is widening, rather than narrowing – from 15 points last month to 20 points in June.

2. Six in ten expect a second wave of coronavirus in Sweden in the next year.

3. Despite this, Swedes are becoming less concerned about the virus overall – with some of the lowest levels of concern globally.

4. Swedish institutions have fared well from the crisis, with business and government alike rated positively for how they have responded.

5. With the exception of Germany, Sweden is rated positively by other nations for how it has handled the virus. Swedes themselves also think they have done well, though view Denmark as having done the best globally.

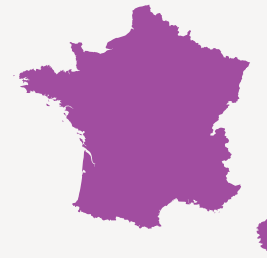
6. The Swedish public think the impacts of the virus will last longer than a month ago – particularly on the economy.

7. Fear of the virus is the main barrier for Swedish office workers to return – as well as concerns about using public transport and the feasibility of social distancing.

8. While workers in other countries have become less worried, one-third of Swedish workers still worry that their company overall may fold.

9. The Swedish public want business to focus on helping society, employees, and people more than the environment or improving governance – with a strong voice for employees their top priority.

France: Main findings



1. France is the country most likely to prioritise protecting the economy over limiting the spread – the margin for the latter is only 8 points, the smallest globally.

2. Unlike in other countries, the 18-24 year olds in France are the keenest that the government saves lives rather than protects the economy, where the gap between the two is 23 points.

3. French institutions have not fared as well as in other countries, with the Government and Emmanuel Macron seen as having done badly rather than well. The EU is also rated negatively.

4. Business is seen to have performed well and 51% of French people say that business has stepped up during the crisis.

5. Despite low levels of support within the country, France is seen as having done relatively well by other countries – particularly the UK, US, and Sweden.

6. The French are amongst the least likely to think the effects of the pandemic will be felt for more than a year – with only 31% saying they expect the impact on their own life to last beyond the end of 2020.

7. The French public are also amongst the least likely to think there will be a second wave of coronavirus within a year.

8. And, despite negative views of the government's performance, the French are willing to give the government credit on support for businesses – where more than half think the business support the government is providing is getting through to those who need it, the highest of any nation surveyed.

9. The French public wants business to focus on helping society and people, as well as focusing on the environment and climate protection. It is the nation that puts climate protection highest on its agenda, and this is particularly true for 18-34 year olds.



Japan: Main findings



1. Japan is the only country ranked lower than Germany by the international community for its crisis handling but it faces a very critical audience at home. Only 13% agree that its government is more on the side of the people than elites during the coronavirus crisis.

2. Japanese rate their central institutions and Prime Minister Shinzo Abe by far the worst among all countries with respect to having handled the crisis so far.

3. Business support measures by the Japanese government are approved by only 20% of the respondents and thus by far less than in any other country.

4. 59% of Japanese respondents expect a second wave of the coronavirus in the next year, which is in line with other countries. But the Japanese show the biggest economic concerns of all countries.

5. A staggering figure of 32% currently in work are expecting to lose their jobs, and 34% are worried that their company will collapse; both values are record highs by international comparison.

6. Fear of the virus is the main barrier for Japanese office workers to return - as well as concerns about using public transport and the feasibility of social distancing.

7. 43% of Japanese believe the overall economic impact will last longer than two years and another 36% at least another year. 55% and 62% expect the impact on their own life and household finances to last at least one year, higher figures than in any other country.

8. Outside of Japan, an average of about half of respondents in all countries think the Tokyo Olympics should only be held if a vaccine is widely available. Within Japan, the share of sceptical people goes up to 56%.

9. 46% of Japanese are in favour of cancelling the Olympic Games regardless of any precautionary measures taken unless the coronavirus has been fully eradicated.

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