

RESEARCH REPORT

COVID-19 Opinion Tracker

10TH - 15TH JULY 2020 | EDITION 4

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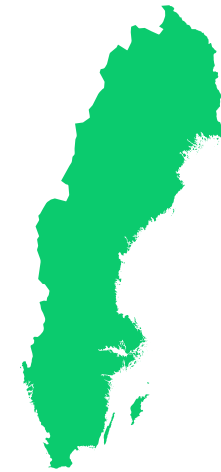


Methodology

Polling conducted by KEKST CNC, nationally representative sample of



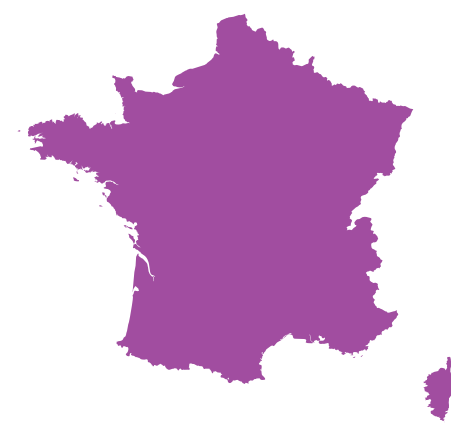
1,000 adults
in the UK



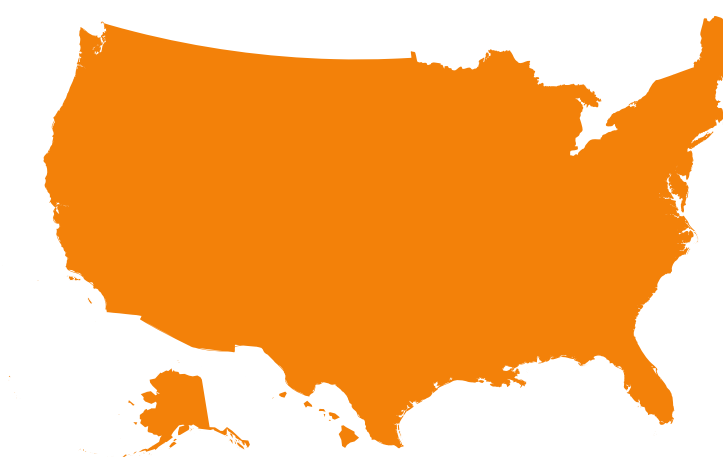
1,000 adults
in Sweden



1,000 adults
in Germany



1,000 adults
in France



1,000 adults
in the U.S.



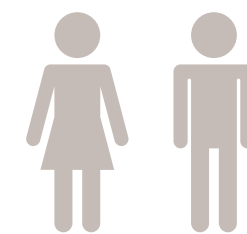
1,000 adults
in Japan

Fieldwork of wave 4 took place on
10th July - 15th July 2020

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

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

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



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

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



Main findings: executive summary

1. We are entering a new phase of the crisis, with people expecting to have to live with coronavirus for a long time to come
2. Returning to work has been a good experience for those employees back at the workplace
3. But fear of a second spike is growing and, as cases rise, the focus is swinging back to health in some countries
4. People think coronavirus is more widespread, and more deadly, than official figures show
5. Compulsory mask-wearing is popular in almost all countries, and political and corporate leadership on masks has a big impact
6. The public's view of business is showing signs of deteriorating – business brands are in a delicate position as the focus shifts to lay-offs and economic damage



Six key findings

1

A long haul: We are entering a new phase of the crisis, with people expecting to have to live with coronavirus for a long time to come

In the first wave of this tracker, in April, relatively few thought the effects would last for more than a year. That number is now increasing fast, and despite moving further into the pandemic, more people this month say they **expect the impacts of the pandemic to last for more than a year**. Coupled with stable but high levels of concern, **people are becoming resigned to living with coronavirus for the foreseeable future**, and looking to leaders and business to pave the way forward. We are out of the immediate crisis, and into a **more protracted period of managing the ongoing risks of coronavirus**.

2

It's good to be back: Returning to work has been a good experience for those employees back at the workplace

In many countries, significant numbers of people have returned to their normal and regular workplace. A concerning proposition for many, **the experience of those who have returned has been positive and will be welcome news to employers**. Employees who have returned across the globe say they had a better experience than expected, that it was more safe than expected, that they were more productive than they expected (though French and German workers are less likely to say this than in other nations), and **that they are now more likely to stay with their employer**. Employers will need to continue to provide leadership on this as more return to workplaces and offices.

3

Prepare for the worst: Fear of a second spike is growing and, as cases rise, the focus is swinging back to health in some countries

Despite a return to a form of normality for some, **people are acutely aware of the health risks ahead**. Large majorities now expect a **second wave of coronavirus within a year**, a higher number than when this question was asked a month ago. This is particularly marked in France and highest in the UK. It is in this context that policymakers and business leaders will have to navigate. And, as cases rise across the world, people in the U.S., France, Germany and Sweden are becoming **more keen on prioritising health over the economy compared to a month ago**. The exceptions are the UK and Japan, where the economy has edged up in importance over the last 30 days.



Six key findings

4

Out of proportion: People think coronavirus is more widespread, and more deadly, than official figures show

Closely connected to growing public health concerns is how rife people think the virus is. Despite relatively low incidence rates compared to earlier in the pandemic in most countries (with the exception of the U.S.), **people significantly over-estimate the spread and fatality rate of the disease**. In Sweden and the UK for example, the public think 6-7% of people have died from coronavirus – around one hundred times the actual death rate based on official figures. And across countries, people think 5-12% of **people currently have coronavirus**. Perception is reality when it comes to coronavirus, and such views will be impacting consumer behaviour and wider attitudes – **business leaders and governments will need to be conscious of this as they move to restart economies and transition into living with coronavirus for the medium to longer term**.

5

Mask up: Compulsory mask-wearing is popular in almost all countries, and political and corporate leadership on masks has a big impact

Mask-wearing rates are high across all countries for public transport and indoor public spaces **apart from in Sweden where mask-wearing rates are at around 15%. Large majorities agree that mask wearing should be made compulsory in indoor public spaces**, including in the UK and France where new laws on this have just been brought in. **There is great scope for leadership to set the initiative on mask-wearing**, with no in-built hostility to having to wear masks – even where take-up of masks is lower, there are significant numbers who want to see them made compulsory or want senior politicians to set an example.

6

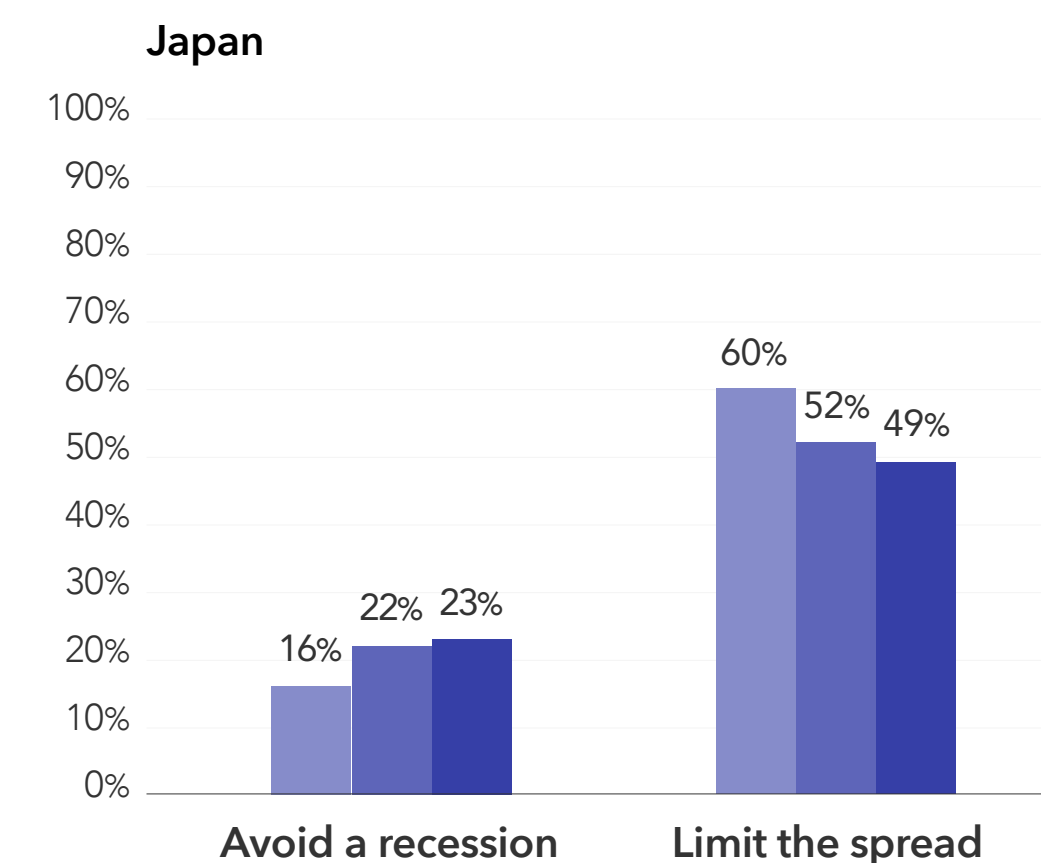
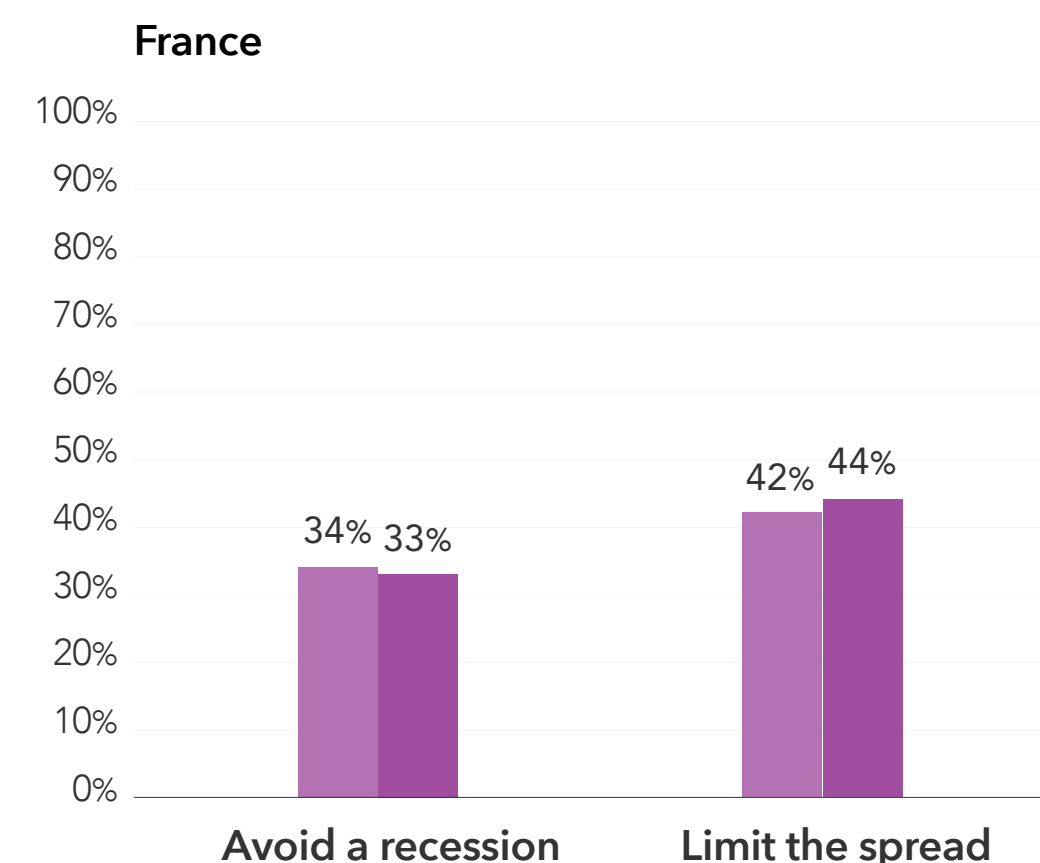
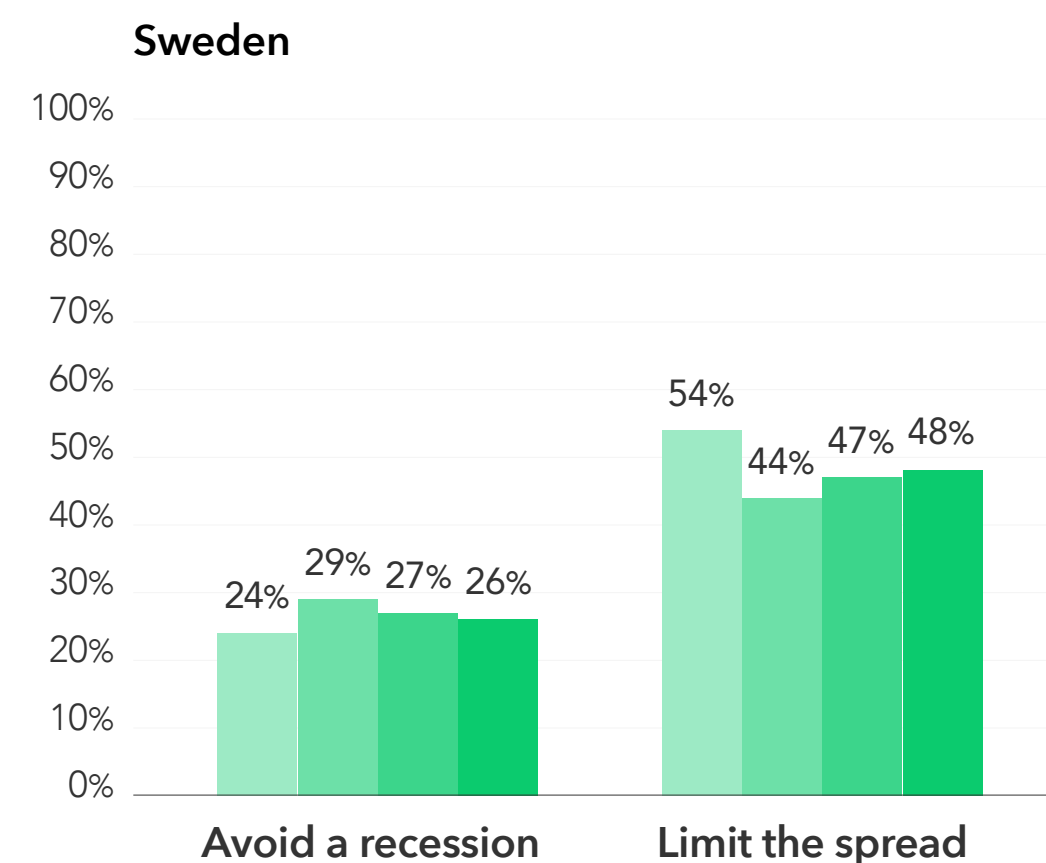
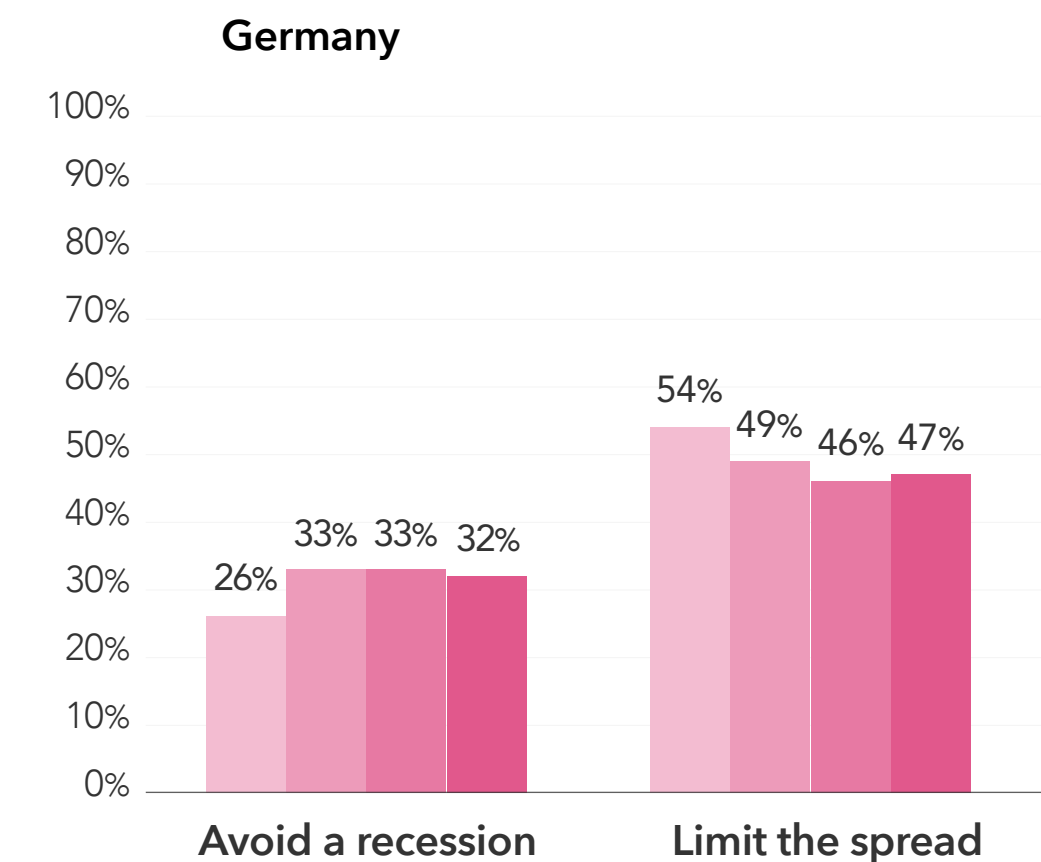
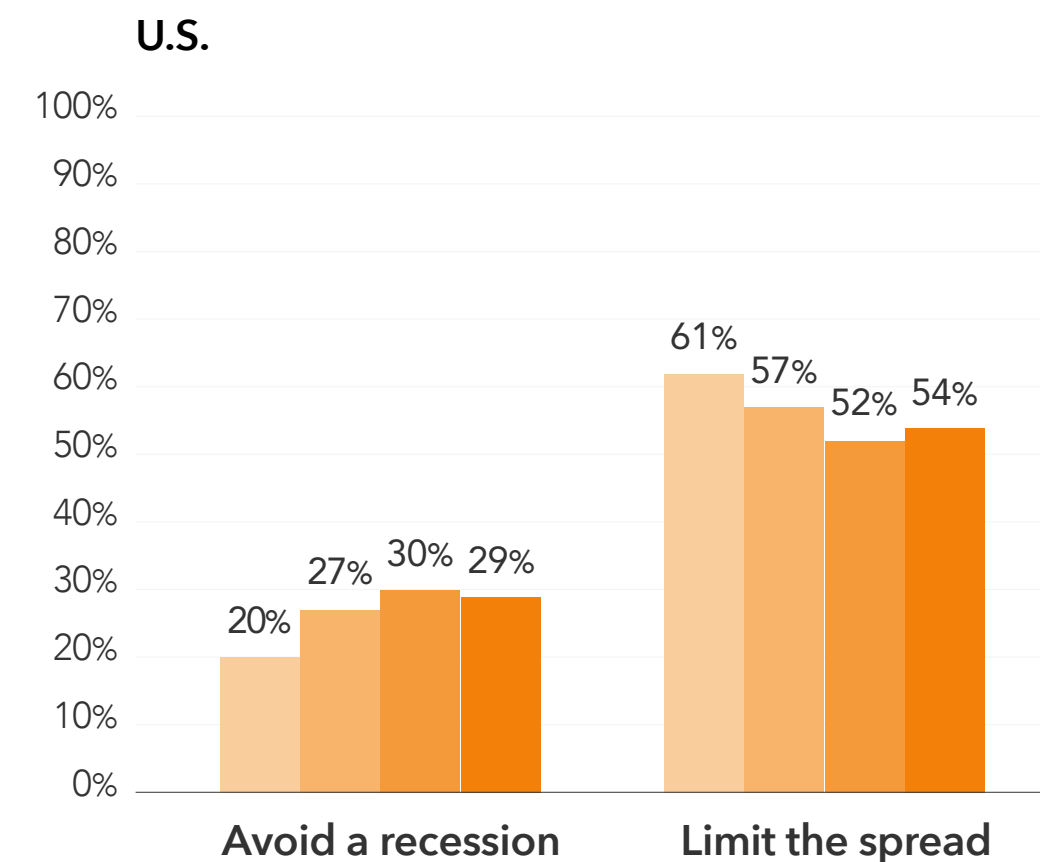
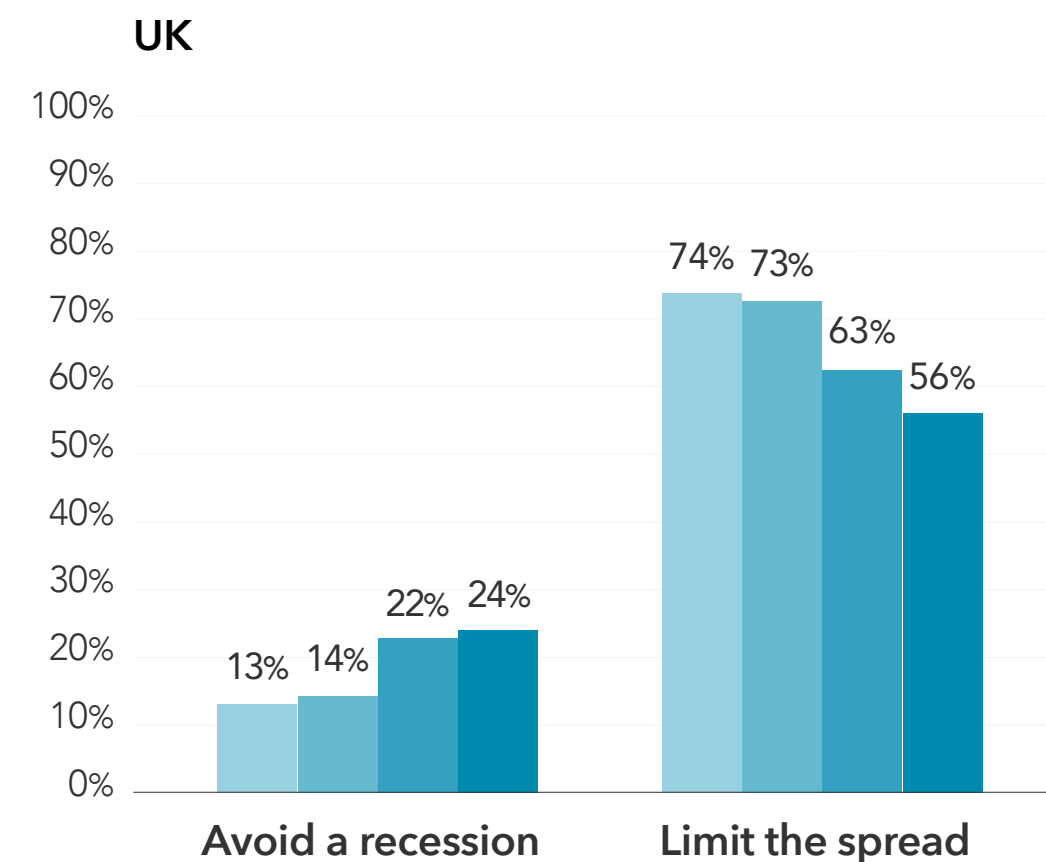
Tipping point: The public's view of business is showing signs of deteriorating – business brands are in a delicate position as the focus shifts to lay-offs and economic damage

Throughout the first three months of the Covid-19 Tracker, business has performed well in the public's eyes. It has been seen as stepping up during the crisis, and is perceived as having handled the pandemic well. Though this still stands, **people's view of business is now deteriorating** – both in terms of how they are managing the pandemic and the extent to which they are seen to be stepping up. As the narrative shifts to lay-offs and economic damage, **problems for business brands are likely to become more acute rather than less**.

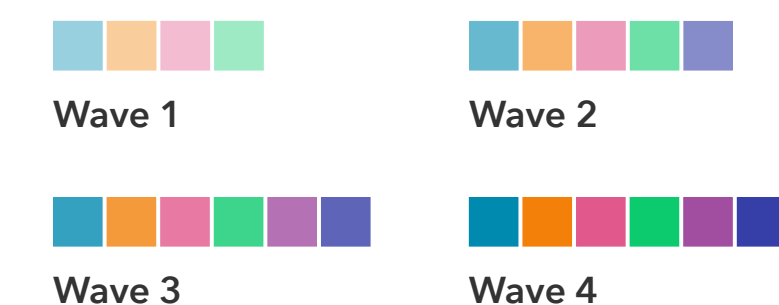
1 Government decisions



Most countries are becoming more focused on limiting the spread of the virus, but the UK and Japan move towards the economy



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" or rather "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".

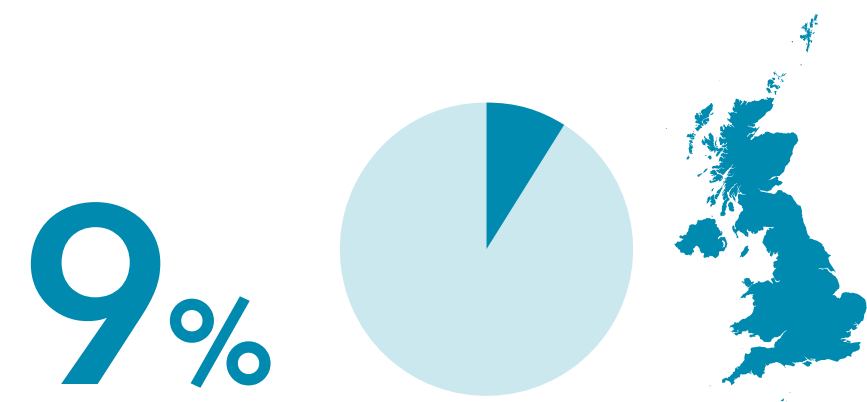




1 Government decisions

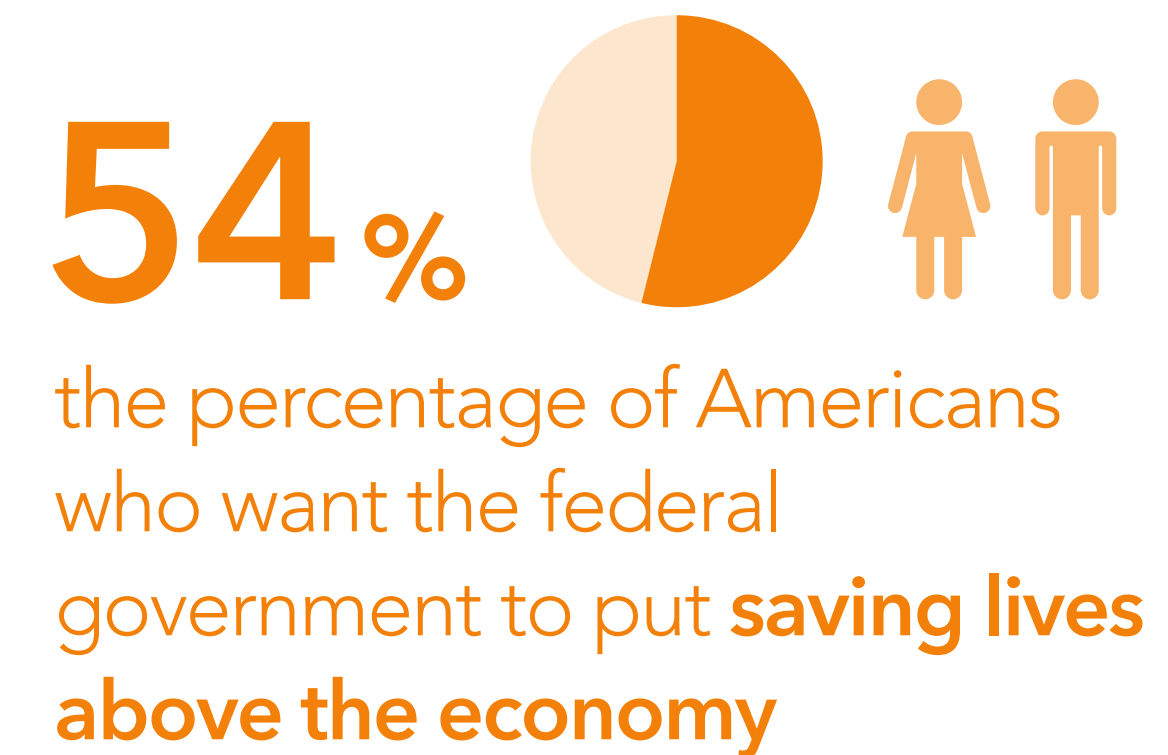
Most countries are becoming more focused on limiting the spread of the virus, but the UK and Japan move towards the economy

- As cases rise again in some countries, **people are becoming more focused on wanting their governments to prioritise limiting the spread of the virus even if the economy suffers.** In the U.S., 54% want the Government to prioritise limiting the spread of the virus over protecting the economy, with the gap between the two increasing from 22% to 25% this month.



the amount the **gap between the economy and health has closed** in the UK in the last month

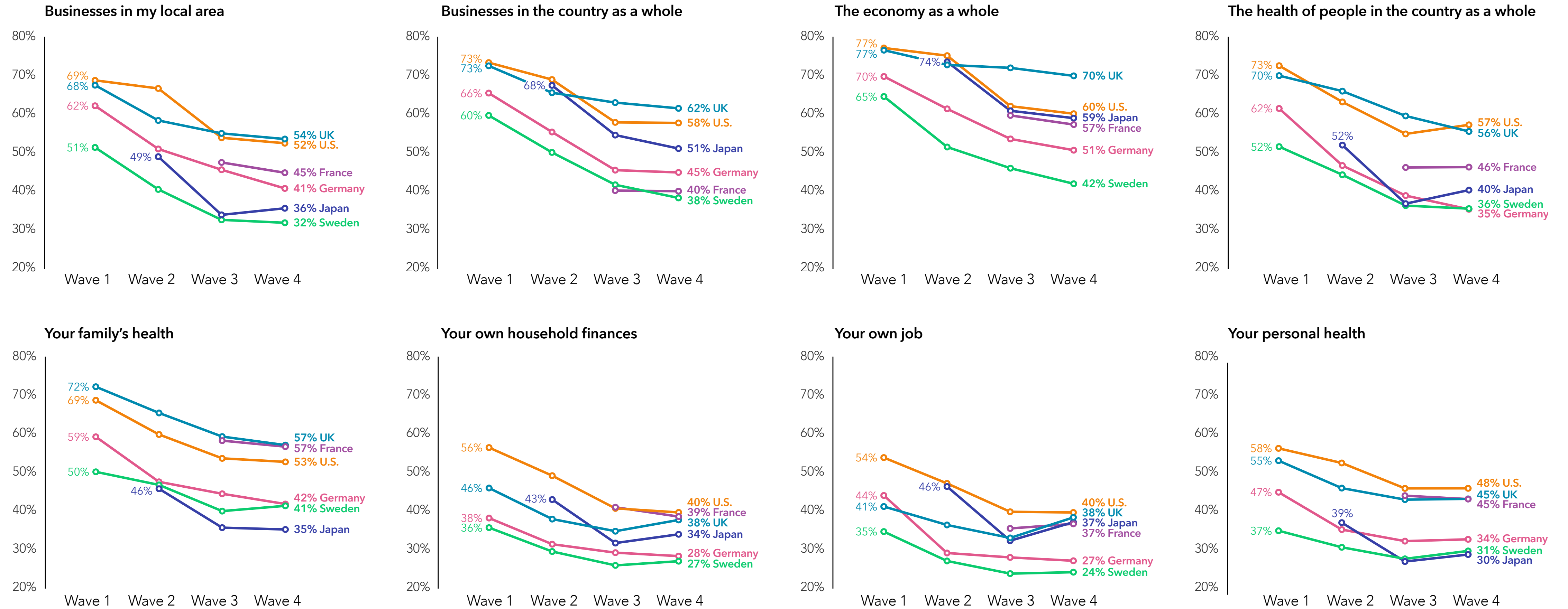
- Albeit from a smaller base, similar shifts are being seen in Germany (a 13% gap to a 15% gap), Sweden (20% to 21%), and France (8% to 11%).
- There is a different story in Japan and the UK, where **protecting the economy has become more of a priority for people**, though health remains the overall priority. In Japan, the gap between the two has shrunk from 30% to 27%, and in the UK this is most dramatic with a change from 41% to 32%.



2 Levels of concern



Concern about the impact of the virus is stabilising



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.



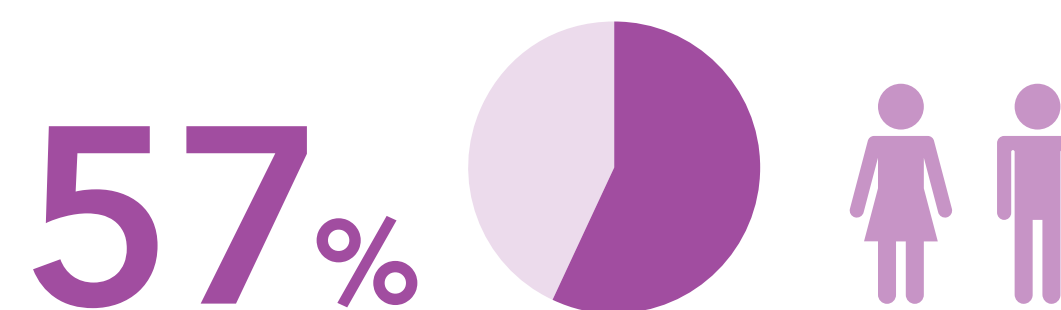
2 Levels of concern

Concern about the impact of the virus is stabilising, but remains high

- After three months of decline, concern about the impact of coronavirus is **mostly stabilising across the globe** and across the different parts of people's lives that the virus is impacting. People are living with the virus and settling down to the new normal and establishing their baseline of concern about the virus and its broader consequences. This baseline level of concern that has now been established is **highest in the UK and the U.S.** where around half the public are very concerned about the health of people in those countries as a whole, and **lowest in Germany and Sweden** where the figures are just above a third of people. The U.S. has actually ticked up in concern on this metric since June.
- Despite overall decline there is no getting away from the fact that **large proportions of the public in most markets remains very concerned about the virus.** Despite some commentary to the contrary, there is no evidence in this data that people are in any way underestimating the impact of the virus even with outbreaks being significantly reduced in five of the six countries surveyed. This heightened level of concern is best illustrated by concern about 'your family's health' – in France, where the number of deaths whilst the survey was in the field was extremely low, 57% of French adults, 30 million people, are **still very concerned about**

the impact of the virus on their family's health.

In the UK the figure is comparable at 57% and in the U.S. the 53% figure amounts to 150 million very concerned adults. Policy makers and business leaders need to be cognisant of this underlying and continued concern in terms of public policy, return to work and efforts to return demand to normal levels.



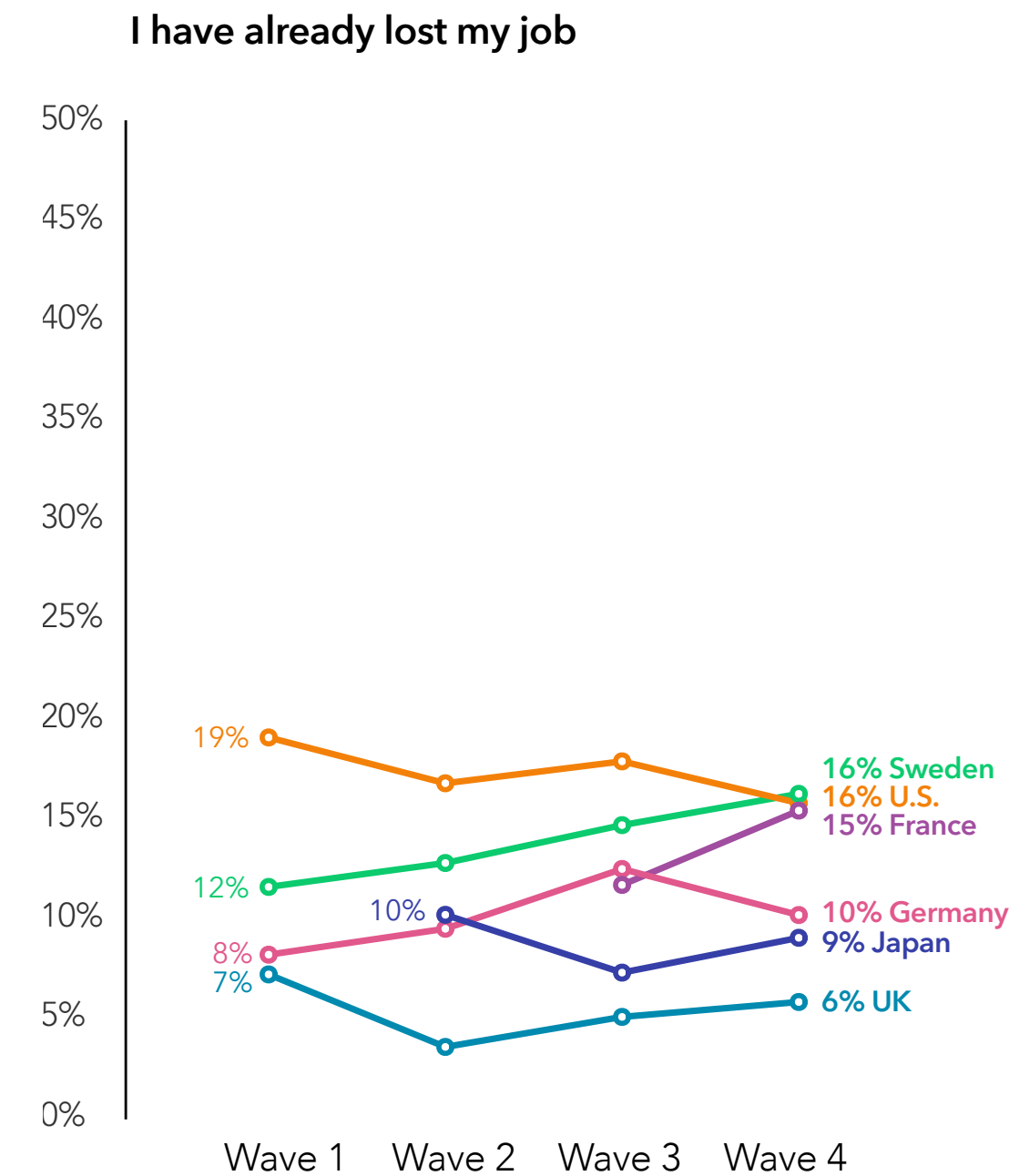
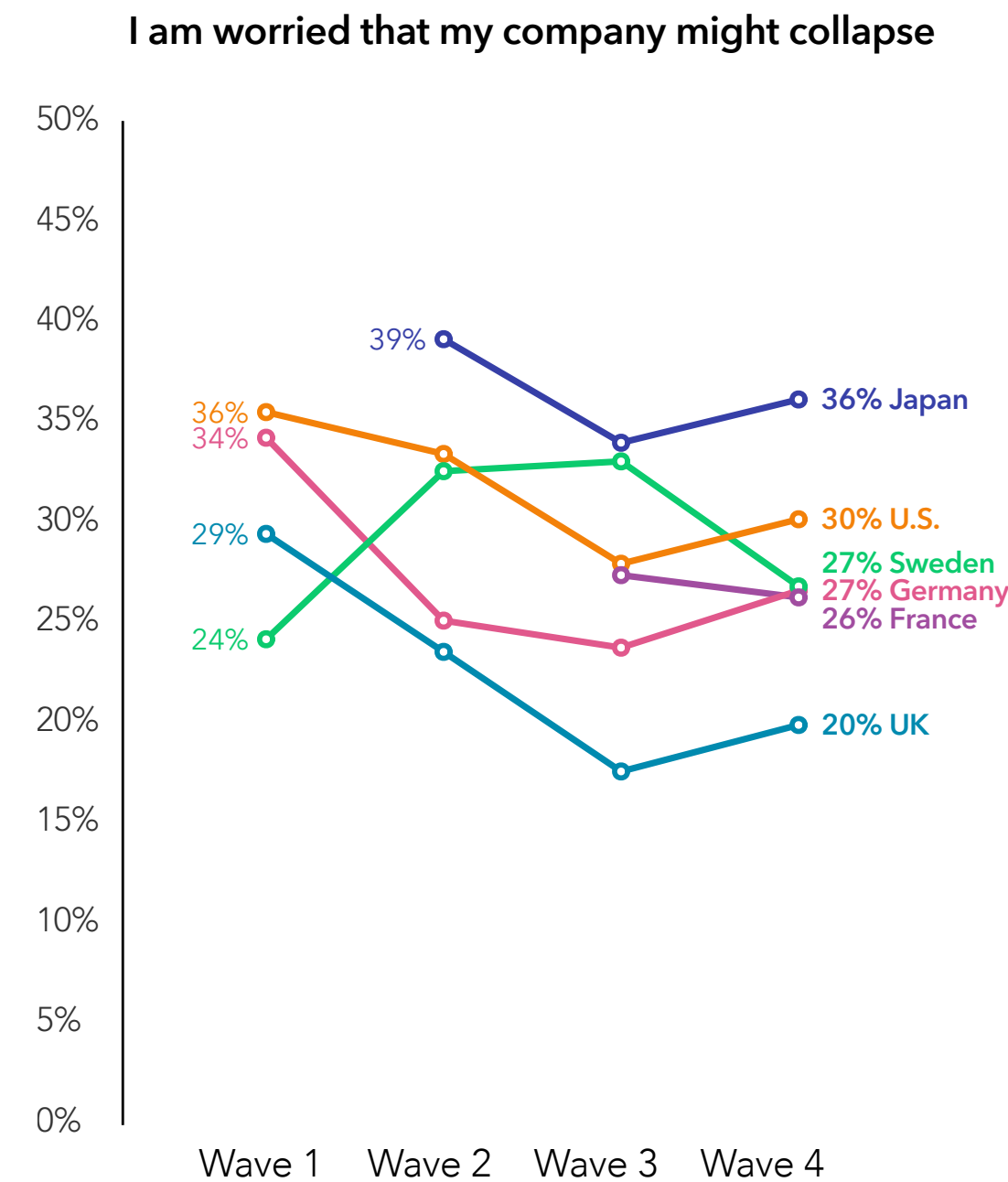
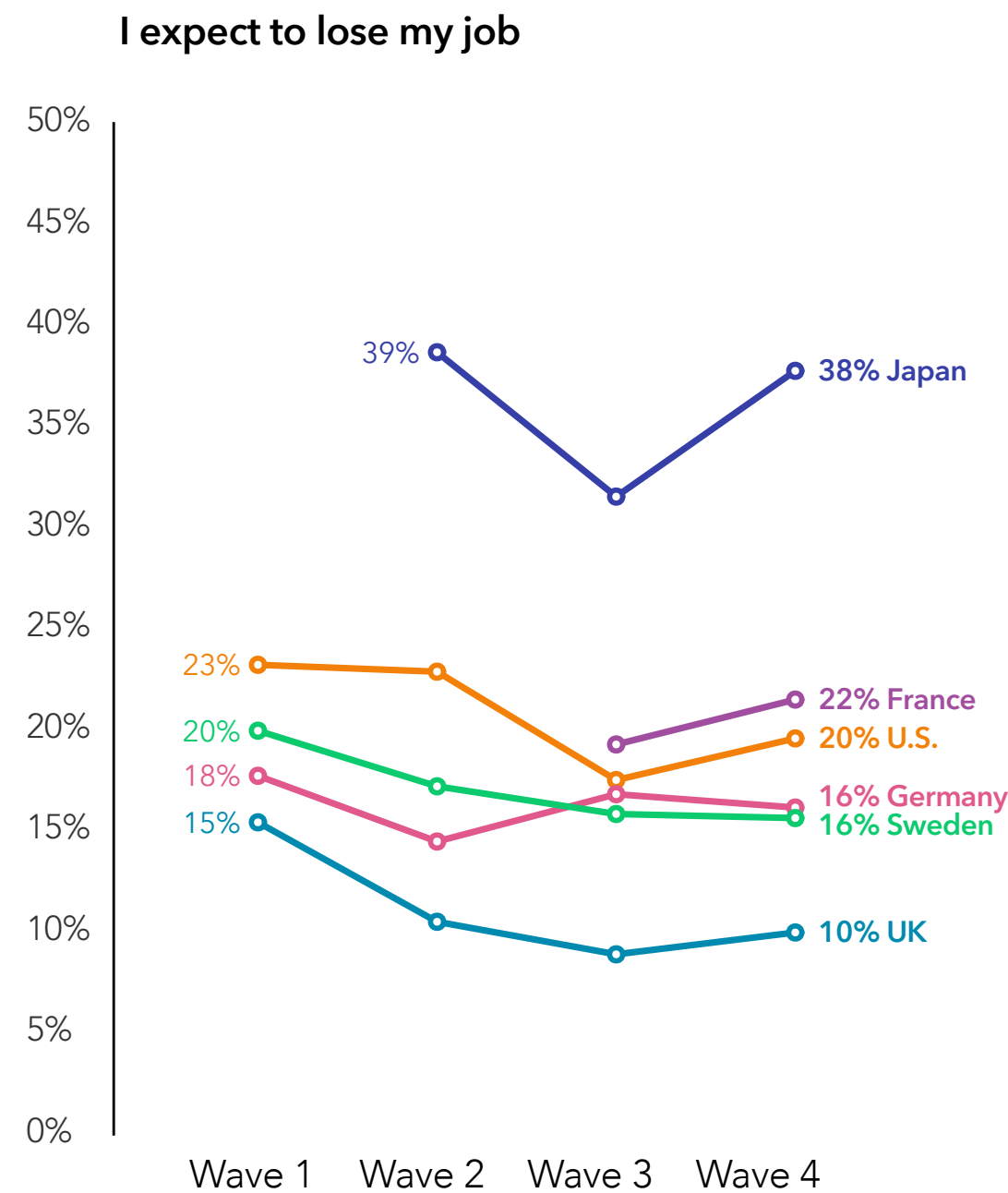
the percentage of people in the UK and France who are **very concerned about the impact of the virus on their family's health**

- **Japan has shown upticks in concern across five of the eight metrics measured.** The sharpest rise was on health (from 37% to 41%) but also in terms of jobs and household finances. There has also been a rise in the number of Japanese who are concerned about their job (36% from 32%), the only country where this is the case other than the UK (up to 38% from 33%).
- **Concerns about the economy as a whole and concerns about the fate of businesses continue to be the highest** despite falls over the first two waves. Concern about the economy in the UK has barely moved from the level in April when the initial shock of the virus led 77% of the public to say they were very concerned about the economy as a whole.

3 The labour market during the crisis



As economic effects bite, up to a third of people are concerned their company will collapse – British employees remain the most optimistic despite one of the most negative economic forecasts



- Workers' personal economic concerns have remained stable over the last month, with between 15-20% in most markets expecting to lose their job, and 20-30% in most markets worried their company might collapse.
- Japanese workers remain the most concerned about their economic livelihoods – and British remain the least, with one in ten – still a substantial amount – expecting to lose their job.

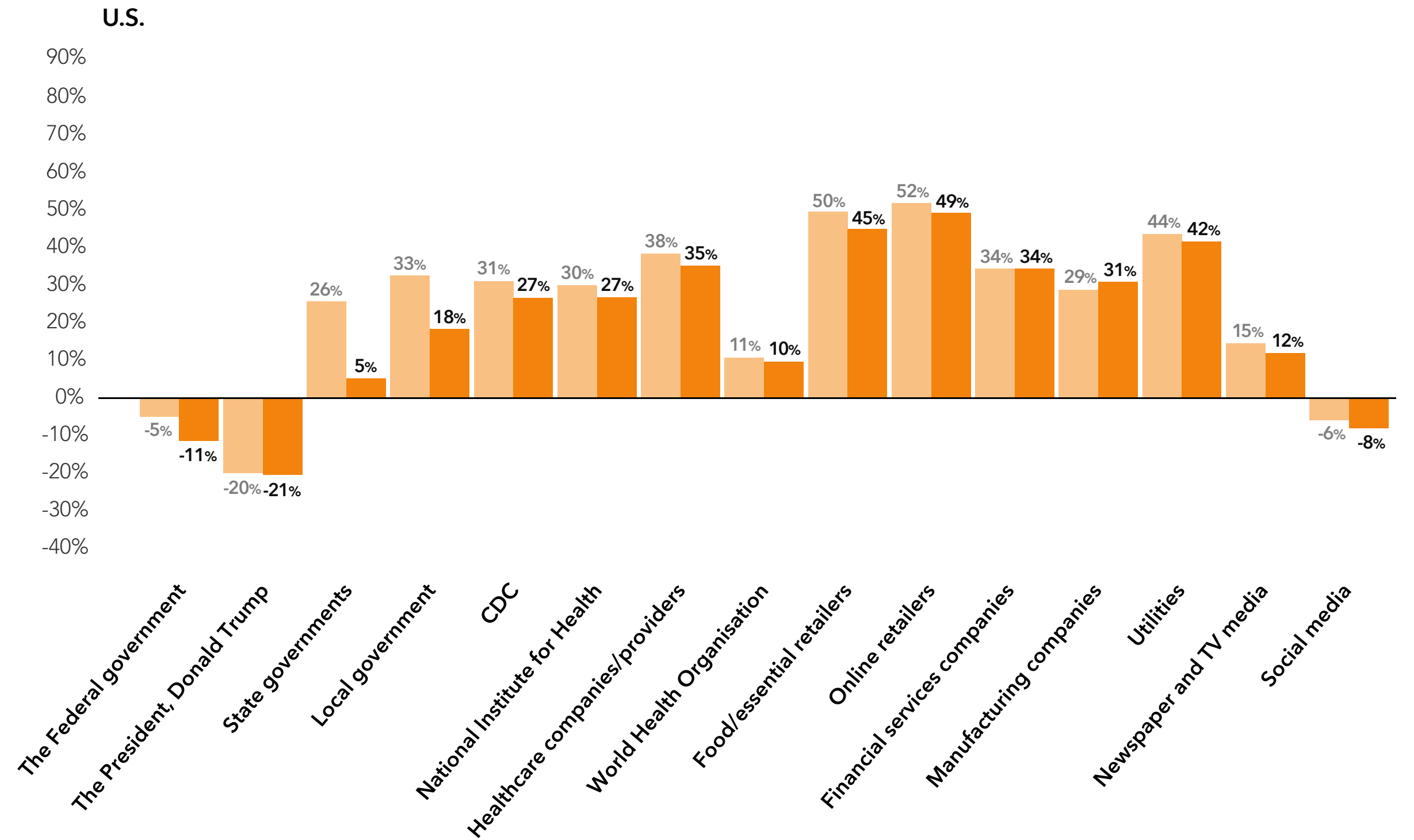
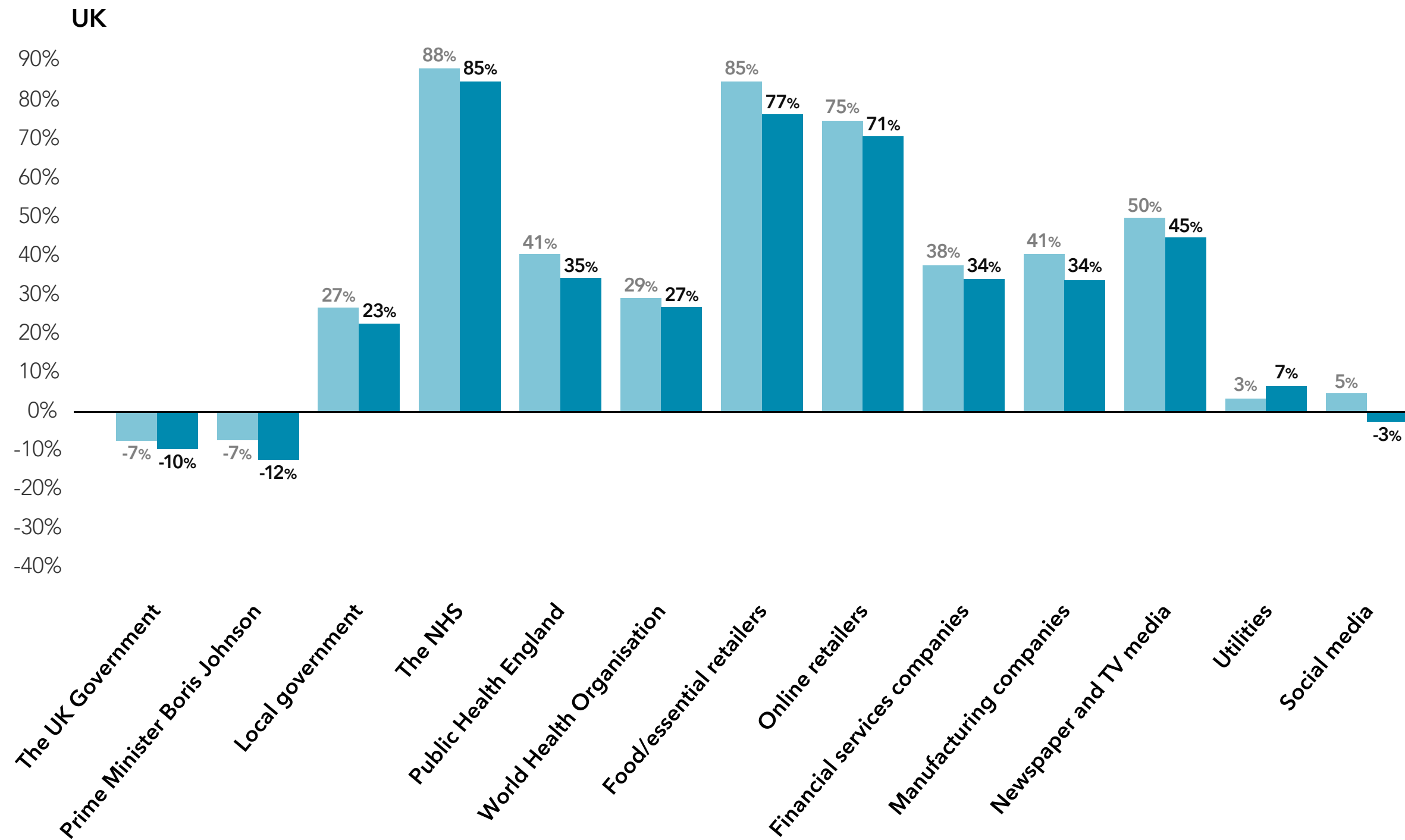


Respondents across all countries were asked whether they agreed or disagreed with a set of statements referring to their own employment and job. All statements here are filtered just by those who said they are working full-time or part-time, apart from "I have already lost my job" which is presented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

4 Performance of institutions



Local governments start to lose popularity, and businesses see small declines in views of their performance - while the French Government is the only national government to see an improvement



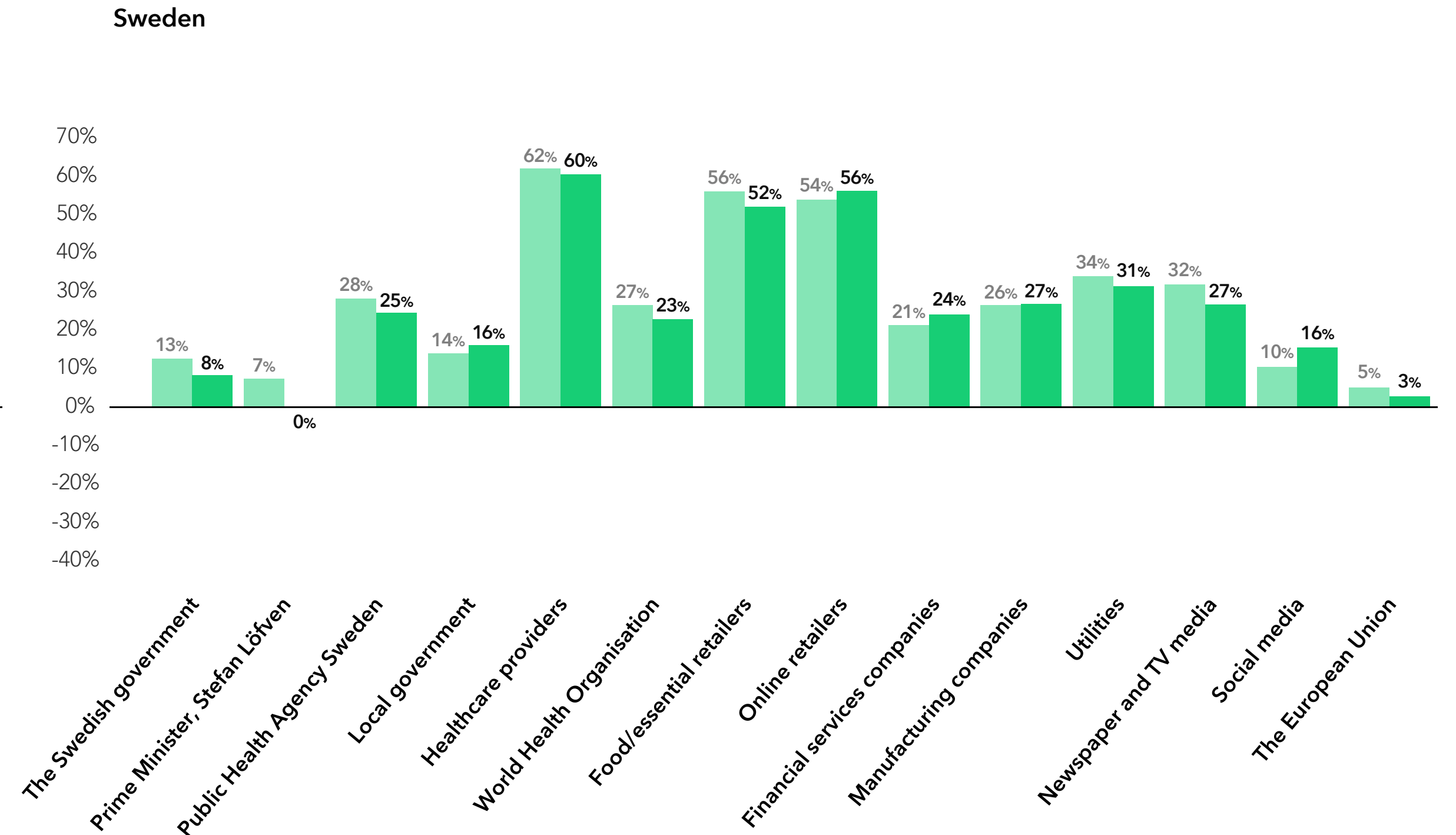
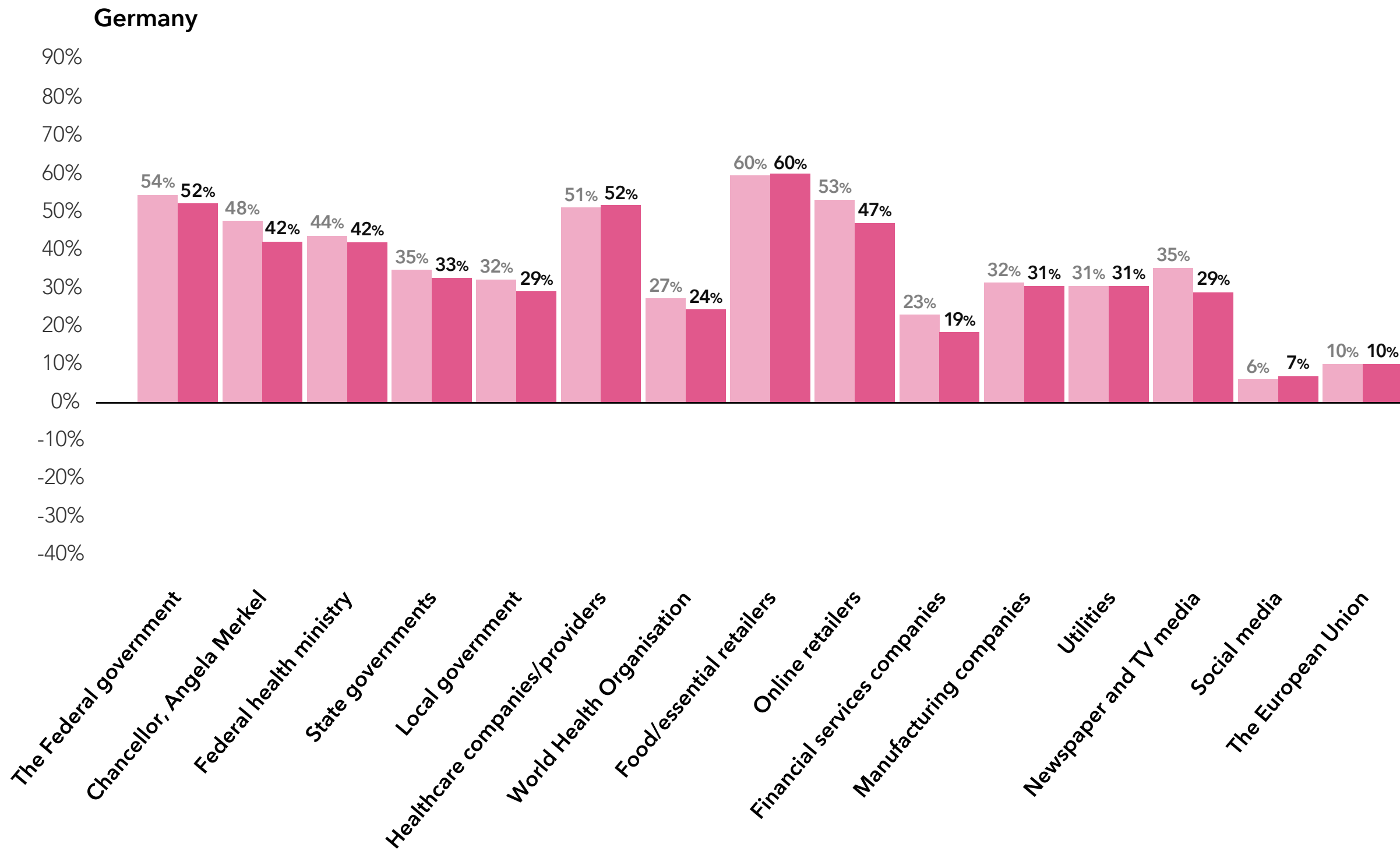
Respondents across all countries were asked whether they thought a number of institutions had done well or badly in responding to the coronavirus. Displayed is the net 'well' score in each country.



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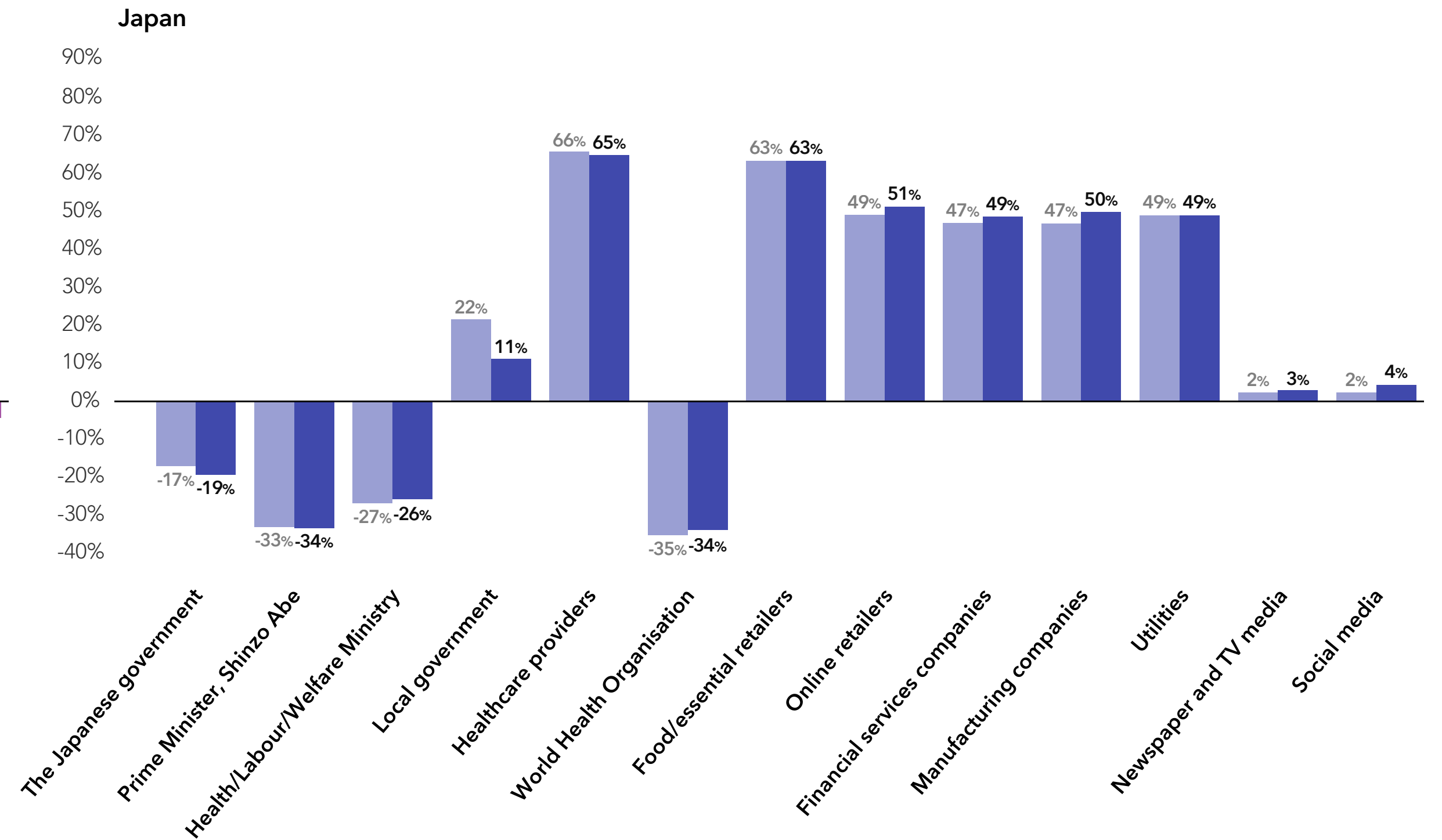
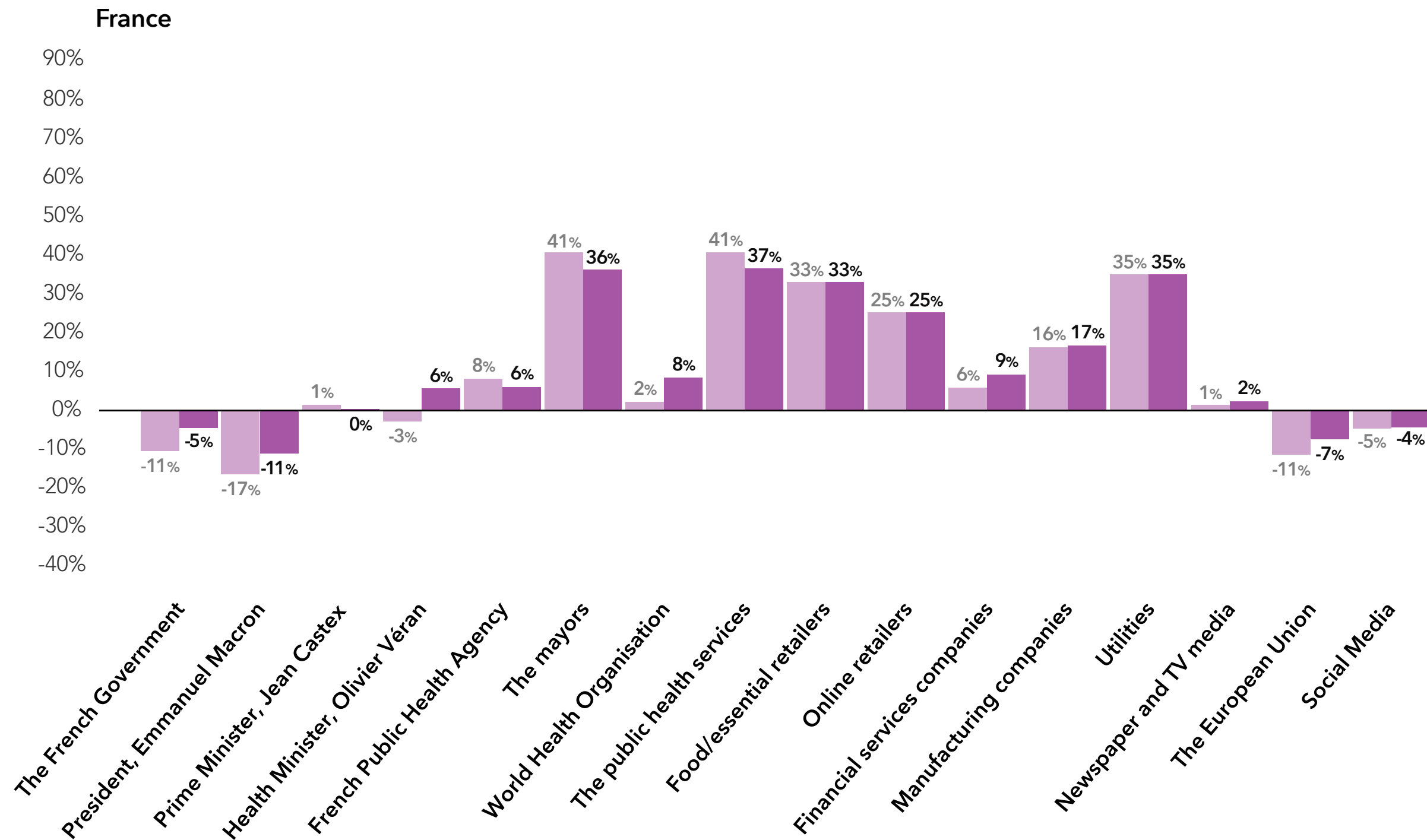
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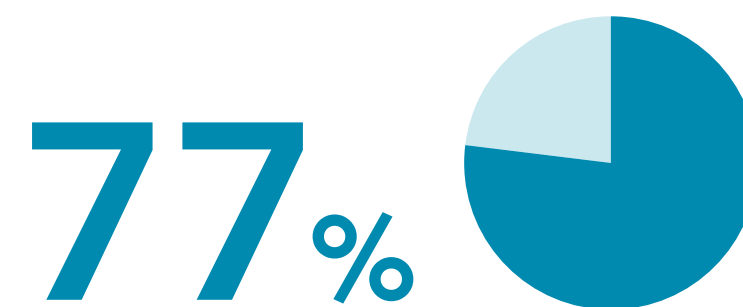


Local governments start to lose popularity, and businesses see small declines in views of their performance - while the French Government is the only national government to see an improvement

- Across the globe, **state and local governments are becoming less popular after initially positive appraisals on how they had handled the pandemic.** In Japan, local government's approval has halved from net +22% to net +11%, and in the UK from +27% to +23%. The most striking difference however is in the U.S., where as the spread of the virus has increased, state governments have lost significant amounts of trust from the public - from +33% net in June to +18% now.
- In most countries this month, **support for national governments is falling.** The UK Government, for example, has slipped further into negative territory, from -7% to -10%. The U.S. Federal Government has declined from net -5% to net -12%. And in Sweden though the Government is still viewed positively, the Prime Minister's approval rating has shrunk from +7 to a completely neutral rating.

+6 POINTS

The improvement in the **French Government's approval rating** over the last month



The net approval rating for **how supermarkets have handled the pandemic in the UK**

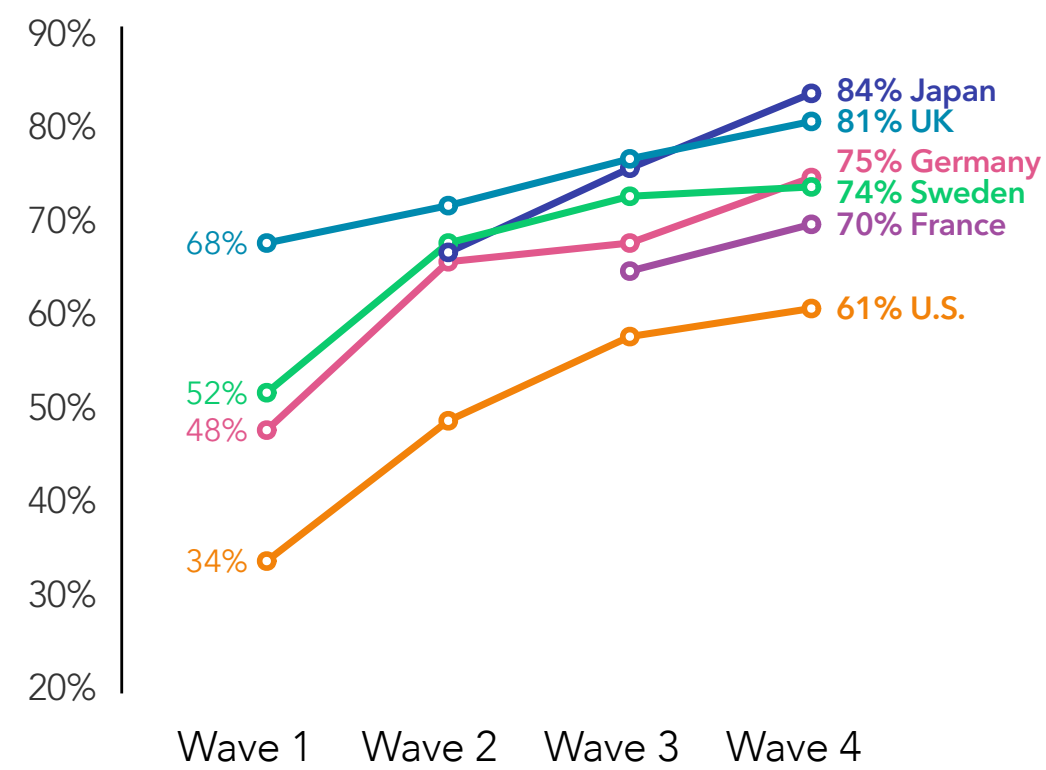
- The exception to this pattern is France, where people are taking a **slightly more positive view of how the government and President are handling the pandemic** - from -11% last month to -5% now.
- Business is also potentially losing support. Though the changes are small, and the situation is overall net positive, businesses are being seen to have handled the pandemic less well than they were last month in the UK, the U.S. and Germany. In the latter, for example, approval of online retailers has gone from +53 to +46, and financial services companies from +23 to +18. This suggests the **peak of how business is perceived in the first phase of the pandemic may now be coming to a close.**

5 Expected duration

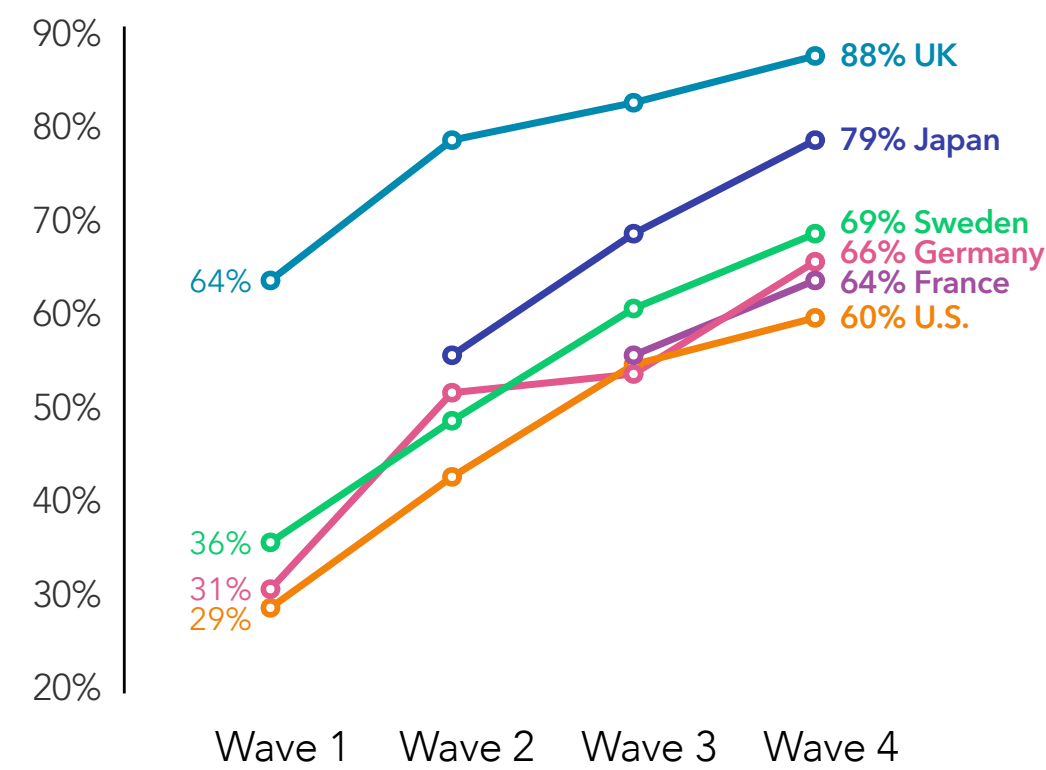


People expect the impact of the virus to last for much longer than they previously thought

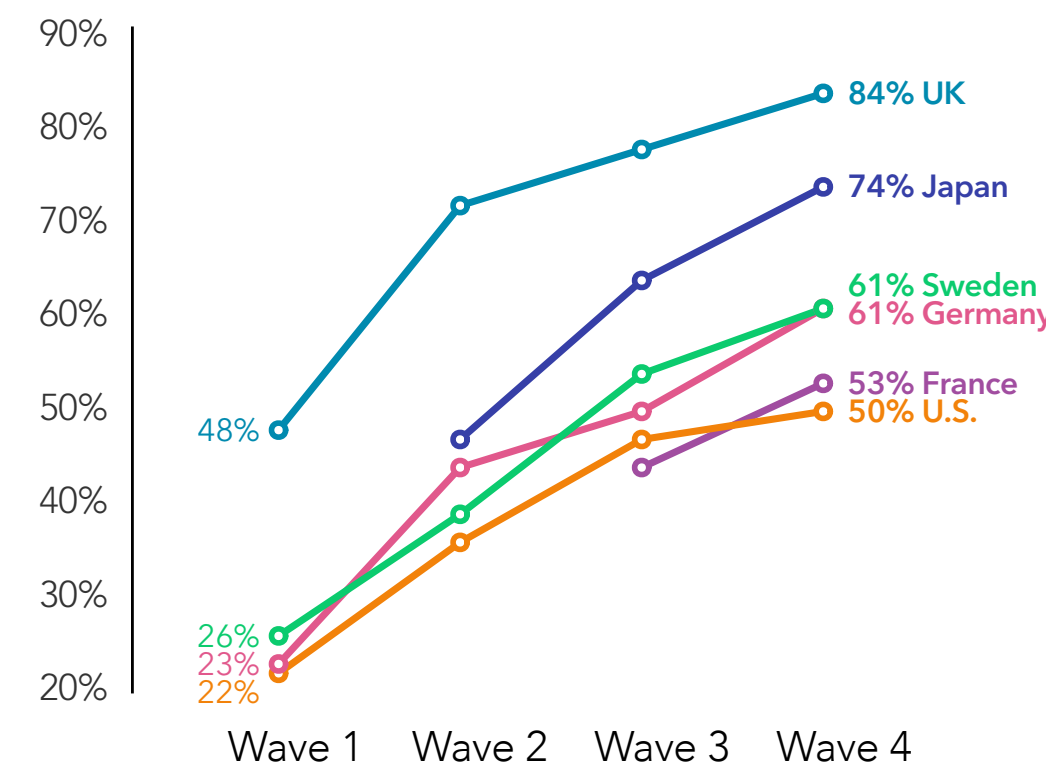
The impact on businesses and how they function



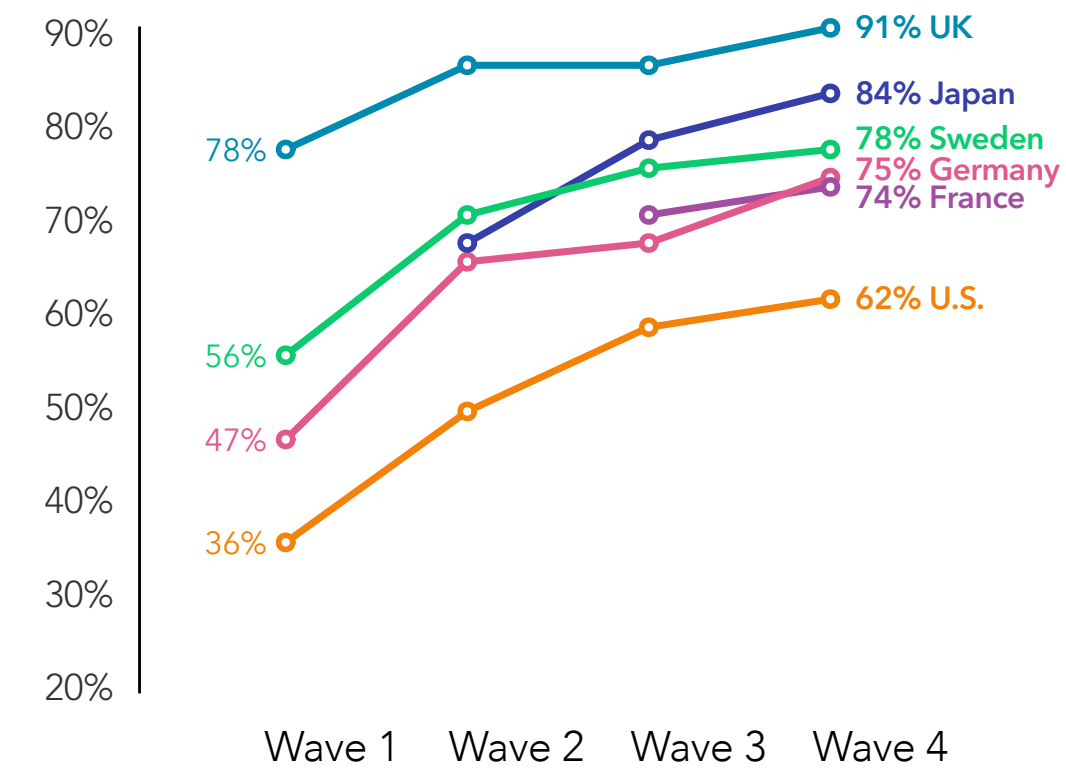
The impact on my country



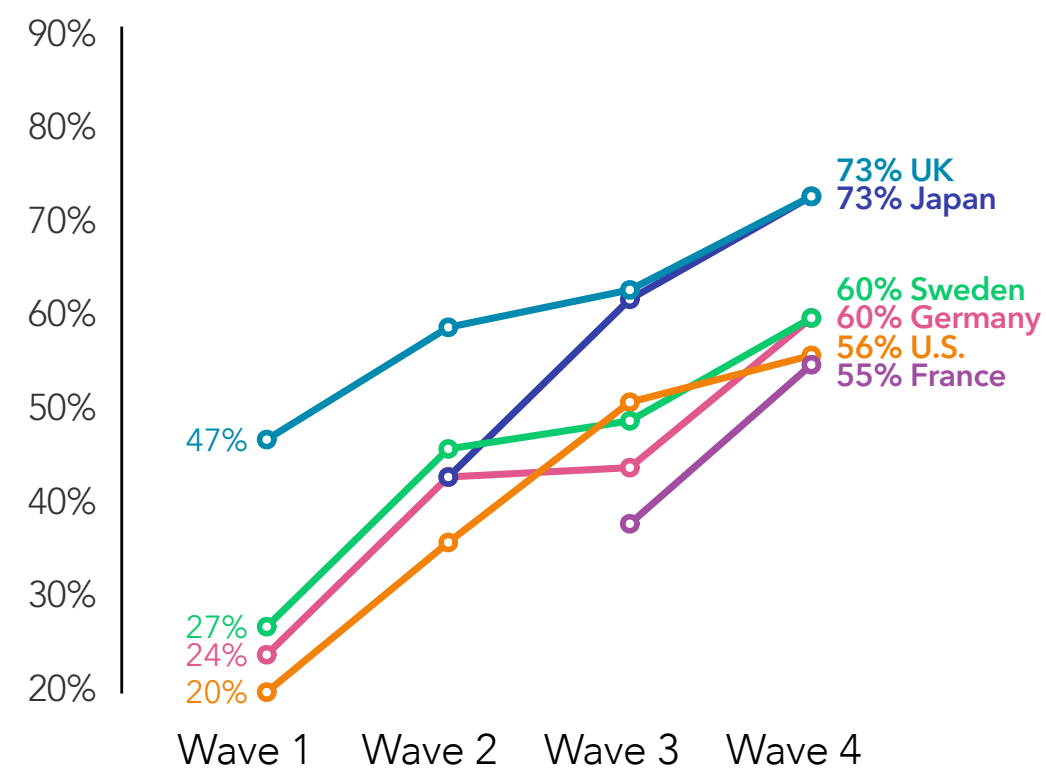
The impact on society overall



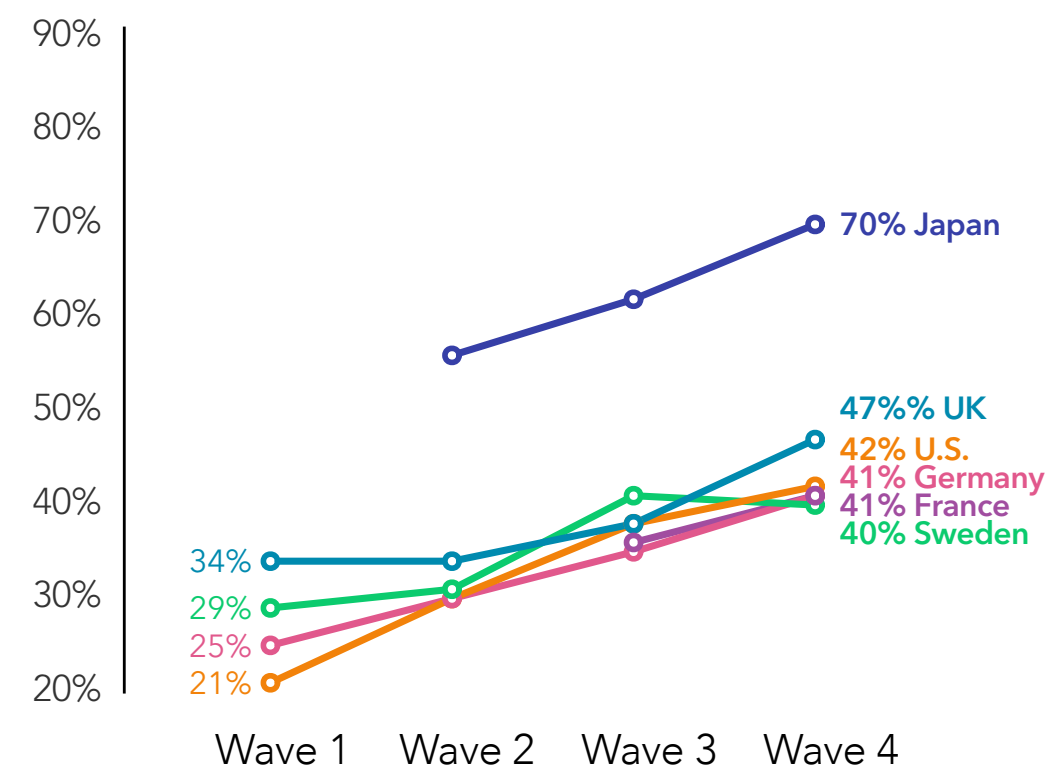
The impact on the economy



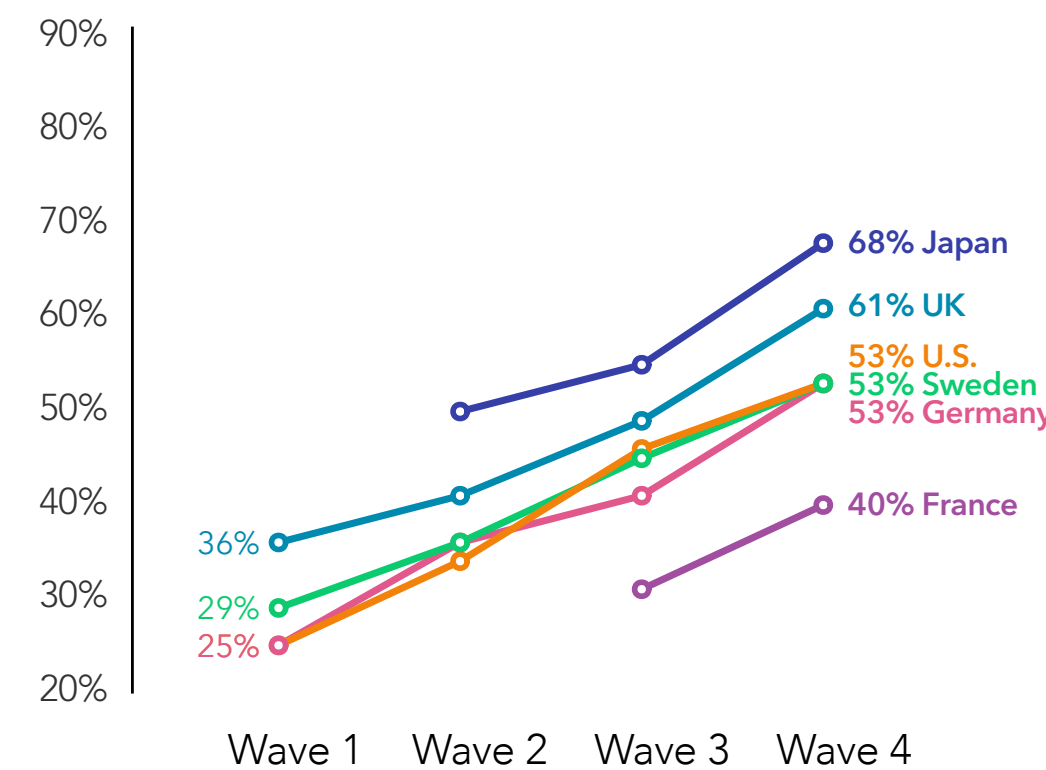
The impact on travel and holidays



The impact on your own household finances

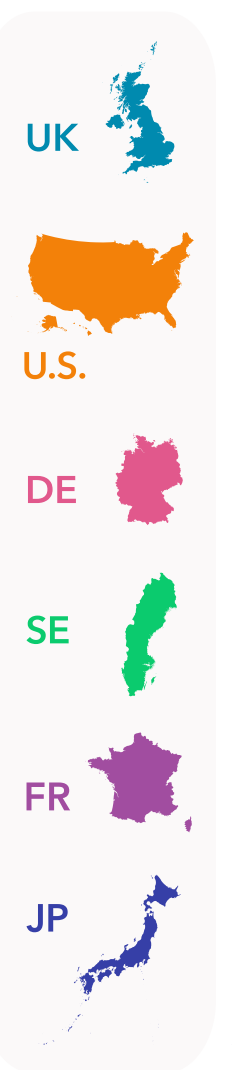


The impact on your own life



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

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



5 Expected duration



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

- **The public continue to revise their expectations about the duration of the crisis upwards.** This pattern of upward revisions seen month after month has not slowed with regard to any aspect of the virus this month and has accelerated in relation to travel and holidays and the 'impact on your own life'. **Majorities in all nations still expect coronavirus to impact their country for more than a year,** with this rising to 60% in the U.S. (the lowest) and 88% in the UK (the highest). This is as levels of concern continue to flatten off.
- These expectations about duration seem to be running counter to the spread of the virus in all of these markets (bar the U.S.) as the data was being collected. In Germany, Sweden, France, the UK and Japan case numbers are lower than they were earlier in the year and yet **expectations about the duration of the impact continue to rise.** This suggests the public have a sophisticated understanding of the virus and can extrapolate its impact with or without large numbers of cases in the future. We have seen again this month that people are extremely willing to price in a second wave of cases into their calculation. This pandemic has made epidemiologists of large swathes of people around the world.

- **People in the UK and Japan are the most likely to think the impacts of coronavirus will last for a long time, particularly on the economy.** There are now very few members of the UK public who do not think that the impact on the economy will last longer than a year (91% do).

23% ↑

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



70%

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

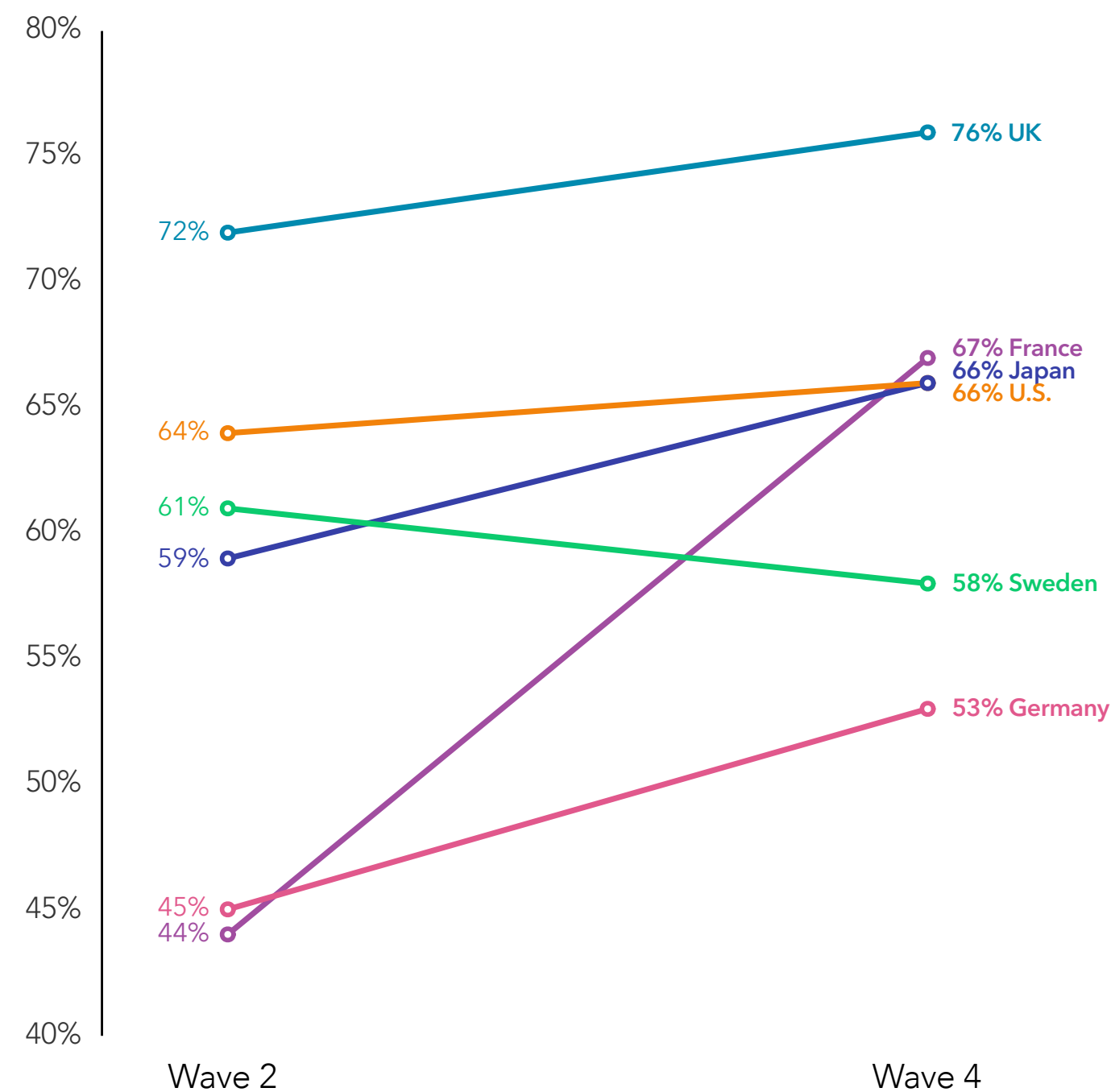
- The U.S. continues to be overall the most bullish market as far as the duration of coronavirus on the economy is concerned; even despite the fact that as this research was in the field some **U.S. states were in the midst of their first wave of the virus. And yet on the economy (62%), and the impact on business (61%) the U.S. public is more positive about the duration of the pandemic's effects** with no other country within 10 points on those two metrics.
- There has been particularly large growth this month in the number of people who **say that the impact on travel and holidays will last longer than a year.** This trend that had slowed in Germany, Sweden and the UK as we approached the peak summer season has accelerated again as the reality of limited flying hits home more fully. Only in the U.S., where the majority of summer vacations are taken by road, has this grown more slowly (53% to 56%).

6 Second wave expectations



Many more people expect second waves of coronavirus in their countries than a month ago

I expect there will be a second wave of the coronavirus in my country in the next year or so



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 statement.

- **Expectations of a second wave are increasing** – this is particularly the case in France where last month 44% expected a second wave, and now 67% do, **the biggest increase of any country surveyed.**
- **The UK remains the nation most concerned about a second wave**, with three-quarters (76%) expecting one in the next year or so.
- Sweden is the only country this month to **be less likely to expect a second wave than they were in June.**



+23 POINTS ↑

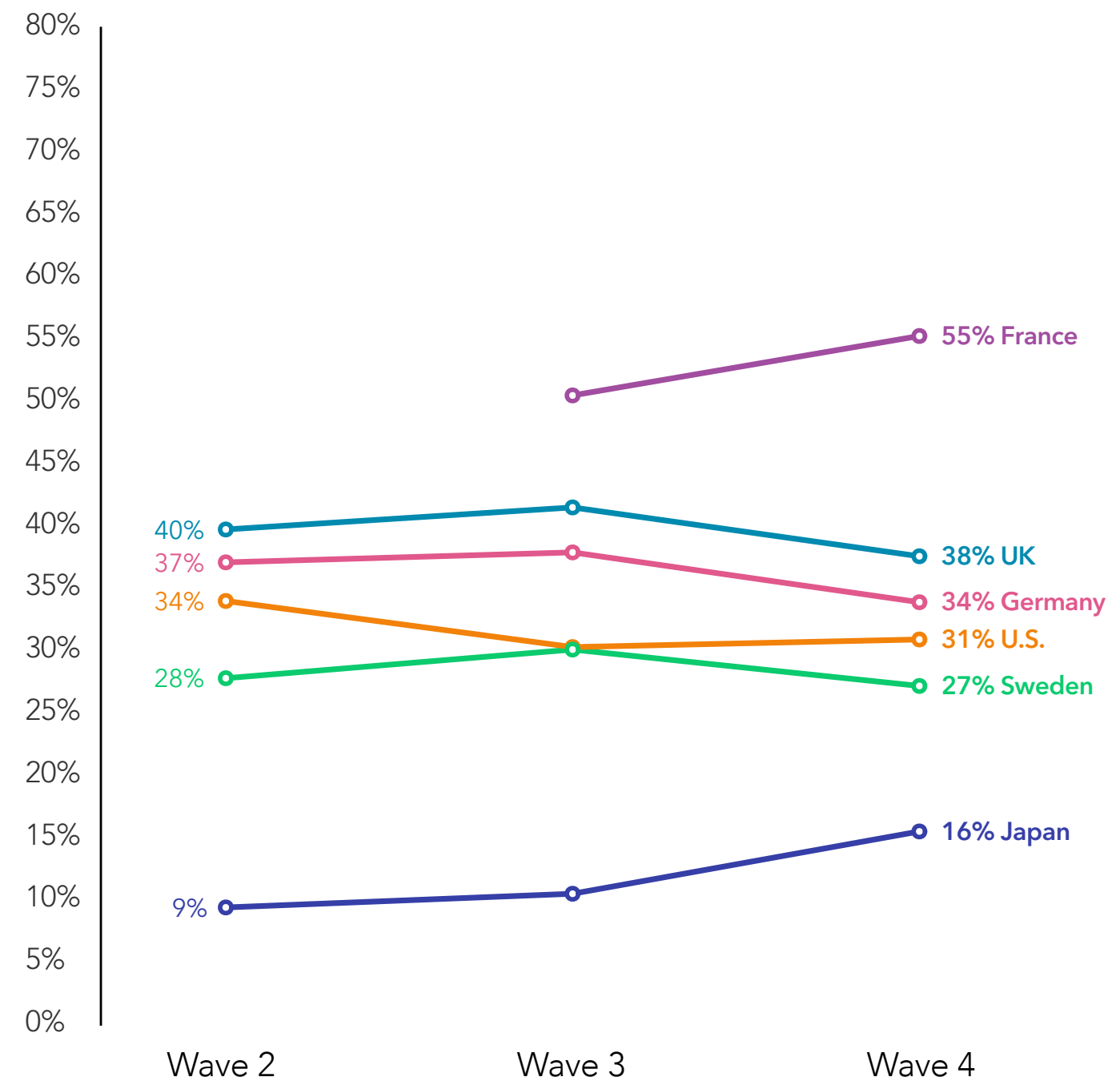
The growth over the last month in the amount of **French people saying they expect a second wave in the next year**

7 Views of business support

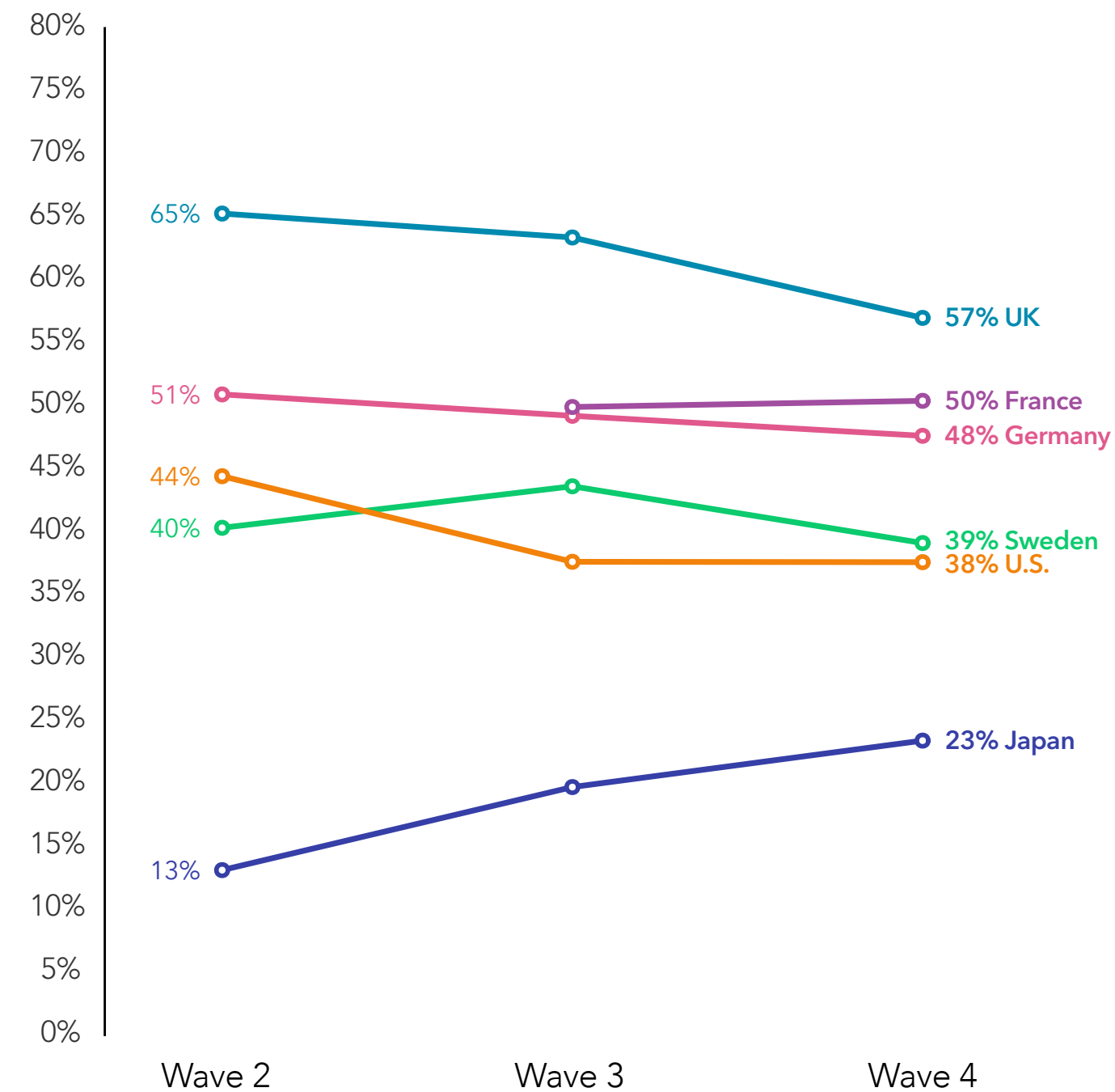


People continue to think their governments are giving business the support it needs - but the Japanese public are sharply critical

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.

57%

A majority of the British public think the government is giving businesses the support they need during this crisis

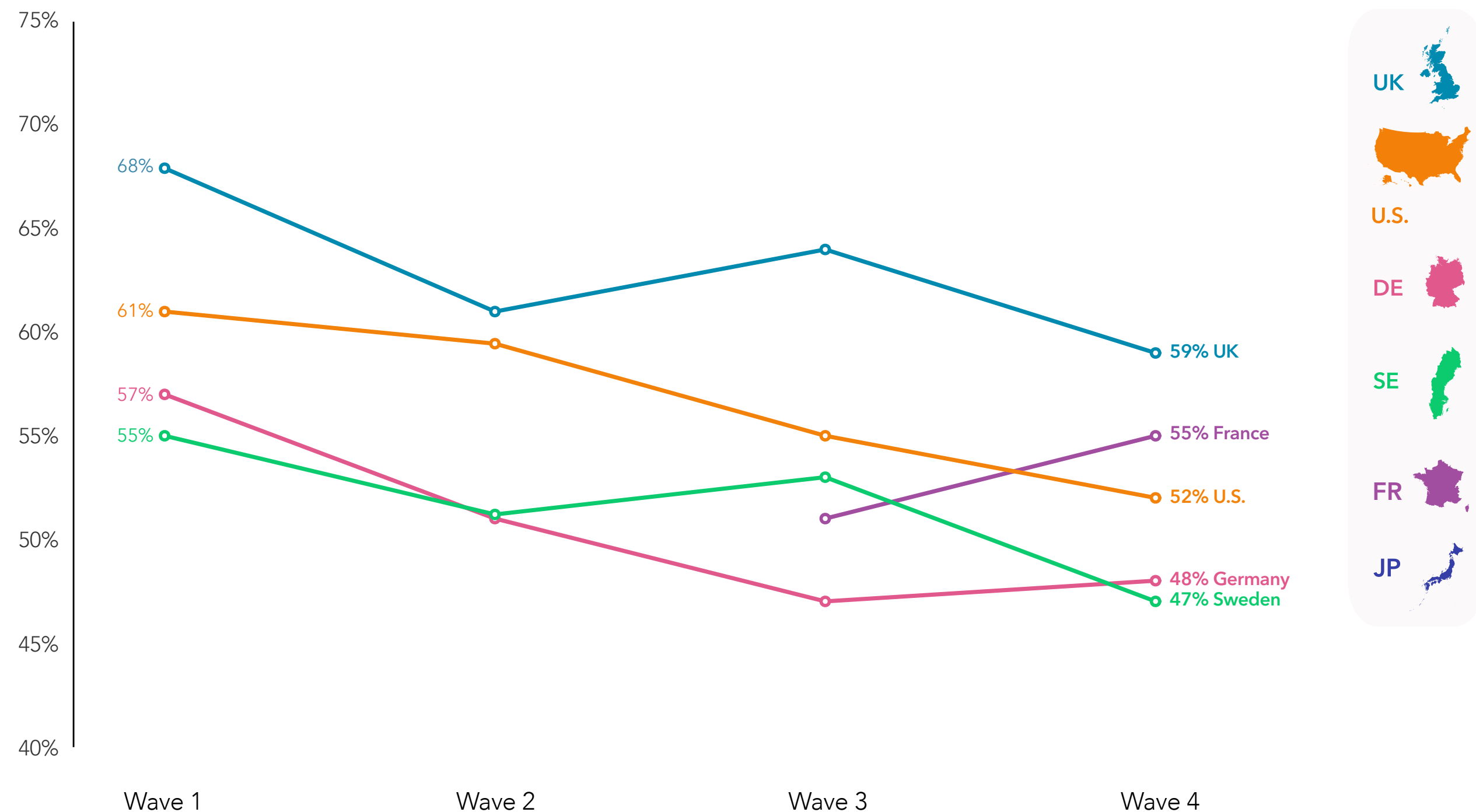
- There has not been significant change this month in views towards governments and how they are supporting businesses. **The UK remains the country most positive about the support their government is giving to business**, with 57% saying the government is giving the business the support it needs during 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 just over 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 55% say this business support is getting to where it is really needed, **the highest of all countries surveyed.**

8 Business brands



The honeymoon for how businesses are perceived may be fading, especially in the UK, Sweden and the U.S.

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.

- The proportion of people who say that business is stepping up in their country is **down in the UK (by 5 points) and Sweden (by 6 points) on last month**. In the United States the decline is smaller (3 points) and the picture is stable. Only France sees a significant increase, of 5 points.
- As we move into the next phase of the crisis, challenges for business brands **may be becoming more acute rather than less**.

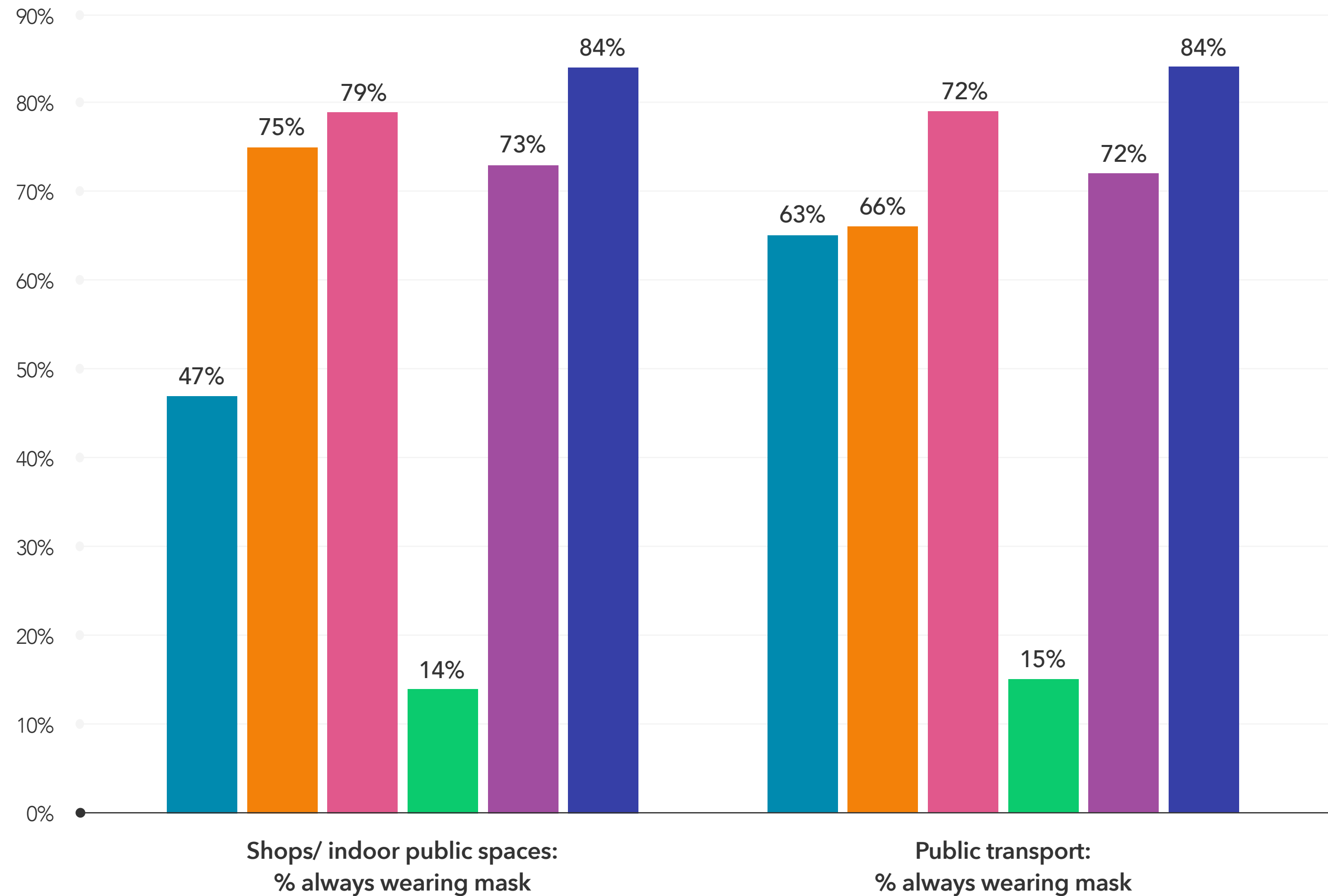
-9 POINTS ↓

The decline in the percentage of **Germans saying that business is stepping up** since April

9 Prevalence of mask-wearing



Mask wearing is high in the U.S., Germany, Japan and France; lower in the UK and at its lowest in Sweden



Respondents across all countries were asked whether they agreed or disagreed with statements about the extent to which they wore masks in indoor public spaces/shops and public transport. Please note that in the UK, fieldwork took place before the implementation of the compulsory masks in shops rule.

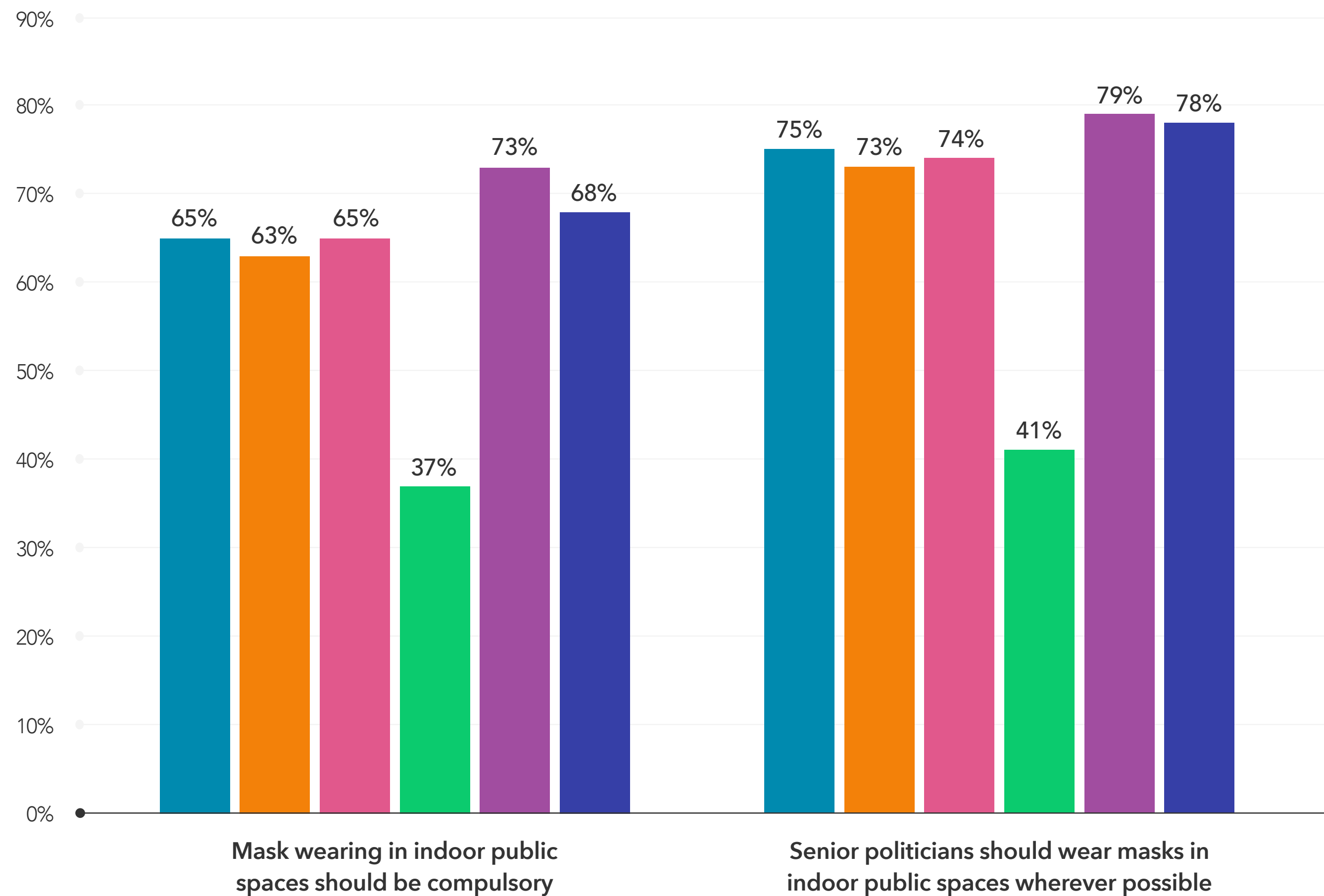
- Mask wearing is highest in **Japan**, and also very high in the U.S., Germany and France. Though a significant number of people are wearing masks on public transport in the UK, this is lower for indoors public spaces but this is likely to increase with this being made mandatory in shops.
- In Sweden, where public health advice on mask-wearing is different, the **wearing of masks is very low** both in indoor public spaces and on public transport.



10 Attitudes towards mask-wearing



Regardless of whether they wear masks themselves, people support compulsory mask-wearing in indoor places, and think senior figures should wear masks too, though Sweden remains the exception



Respondents across all countries were asked whether they agreed or disagreed with statements about mask-wearing.

- Significant numbers of people think mask wearing in indoor public spaces should be compulsory. These attitudes are often above actual reported behaviour – for example in the UK, 65% support making mask-wearing compulsory despite fewer than half wearing them inside. **This suggests a permission amongst the public for compulsory mask-wearing as well as how leadership can change minds on this issue** – in Sweden, more than a third agree they should be compulsory – twice as many who are wearing them already.
- People also want to see **senior politicians** wearing masks. Again this is higher than the proportion of people actually wearing masks in most countries (with the exception of Japan).

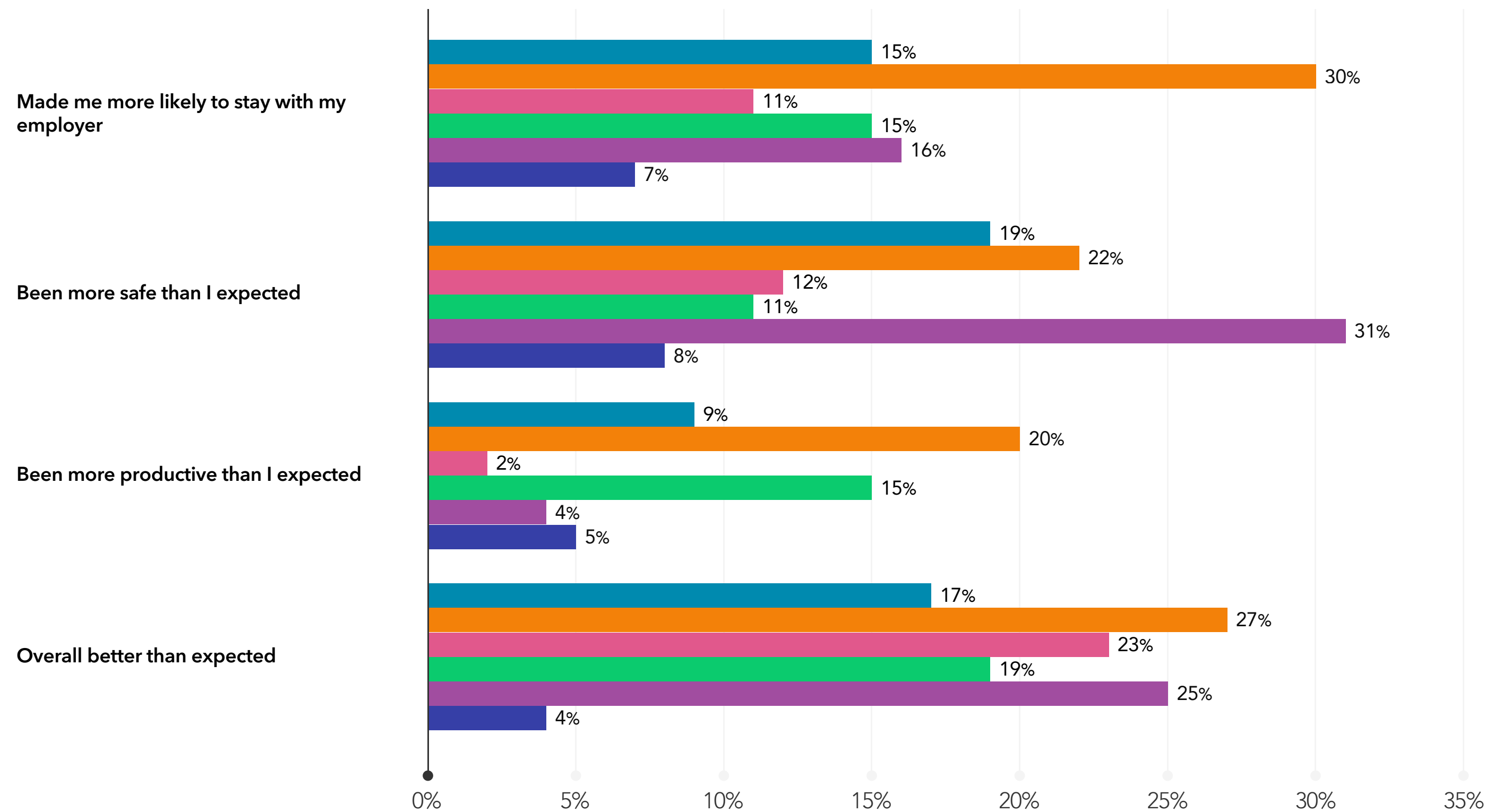


11 Returning to the workplace



Employees who have returned to their normal workplace are more positive than negative about the experience so far, with more saying it was more safe and more productive than expected

Experience of returning to work: net % score



Respondents who were working from their normal workplace were asked whether it had been better or worse, more productive or less, more safe or less safe than expected. They were also asked if it made them more likely to stay with their employer or less. Displayed is the net score, the difference between those who say it is better and those who say it is worse.

- **No country's employees** are more likely to say the experience has been negative than positive; the overall experience of returning has been better than people expected.
- **German and French workers, as well as Japanese workers are the least likely** to say they have been more productive than they expected since they returned to the workplace. **Japanese workers** are the least likely to feel better about returning to work overall, but are still net positive about the experience.





12 Perception vs reality – the impact of Covid-19

People think coronavirus is much more prevalent than it is - and that many more have died than in reality

How many people in your country have had coronavirus?

22% 4x modelled cases (ONS)

20% 20x confirmed cases (CDC)

11% 46x confirmed cases (RKI)

16% 20x confirmed cases (PHS)

12% 46x confirmed cases (SPF)

How many people in your country have died from coronavirus?

7% 100x confirmed deaths (PHE)

9% 225x confirmed deaths (CDC)

3% 300x confirmed deaths (RKI)

6% 100x confirmed deaths (PHS)

5% 100x confirmed deaths (SPF)

Respondents across all countries were asked to enter a % for each category. The mean percentage is shown for each. Comparisons are shown on confirmed cases/deaths or, in the case of the UK, best modelled estimates of total COVID cases.



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