

RESEARCH REPORT

COVID-19 Opinion Tracker

20TH NOVEMBER – 1ST DECEMBER 2020 | EDITION 6

Foreword

Business has faced a decade of profound uncertainty. Every new challenge – the financial crisis, the Eurozone debt crisis, Brexit, Sino-American geopolitical tensions – has been rightly described as ‘unprecedented’. But the unique dislocations caused by the 2020 coronavirus crisis were ones for which corporates and consumers in Europe, North America, Asia-Pacific and elsewhere were uniquely unprepared.

As the impact of the pandemic began to spread around the world, many business leaders (and their advisers) expected public, media, and political attitudes to business to follow the pattern of the Global Financial Crisis. It was reasonable to expect that business leaders would be quickly sorted between ‘heroes’ and ‘villains’, with many more of the latter.

But, as 2020 draws to a close, the relationship between business and the general public appears to have begun a process of renewal. During the Financial Crisis, the ties that bound leading corporates to the rest of society came under severe strain, and in many cases broke. But over the course of 2020, individual corporates and sectors that had hitherto been

unloved or the focus of severe criticism, have been at the heart of shared efforts to deal with the challenges of COVID-19.

In many markets, employees of food retail businesses are the recipients of the same praise as those serving in public healthcare systems. And their employers have been recognised for sustaining the integrity of the food supply chain and responding swiftly to the requirements of ‘at risk’ consumers. Cloud-based enterprise computing platforms – rarely the focus of affection prior to 2020 – have become ubiquitous features of everyday life, for good and for ill. Even tech businesses in the sharing and ‘gig’ economy, that have faced years of opprobrium from the media, politicians, and regulators, have had the opportunity to demonstrate the social utility of their strategies and platforms in response to profound public need. And, most notably of all, big pharma – the focus of such forceful criticism from many quarters – is now offering the only reliable pathway out of the crisis.

Of course, the strategic reputational challenges faced by established and emerging businesses in the developed world have not gone away. In many markets, the coronavirus crisis has further exposed the challenge of low productivity growth.

As technology platforms have become ever more ubiquitous over the course of the year, calls for regulatory and anti-trust intervention have grown. And the requirement for every value-creating corporate to fulfil their obligations to the shared effort to reduce carbon emissions remains a defining test of leadership and strategy.

Kekst CNC began its global COVID tracker project to ensure that the firm’s insights and advice through the crisis were based on clear evidence and a global viewpoint.

The six waves of polling have, of course, delivered this foundation for the support we have provided to clients around the world. But the project has also allowed the firm’s opinion research and insight team to chart these profound and immediate shifts in the relationship between business, politics and the public:

- **New ways of working have become established** – with the increase in home working and expectations of a better work-life balance, employers will need to adapt rapidly to new work patterns or face challenges in retaining their staff.

Foreword

- **Employees have altered expectations of their employers** – with so many businesses being praised for their active communication and support packages during the pandemic, employees will not want to see this stopping and will demand more, in particular around workplace culture and work from home support.
- **The concept of ESG, in particular the “S” for Social, and its implementation by corporations has become much more than a measure-stick to guide investments into or out of certain stocks.** It is no buzzword speaking of a license to operate when judging a corporation’s ESG track record as is the case increasingly also for DE&I.
- **The winners may well be expected to pay** – through our research we have seen business largely applauded for stepping up through the pandemic. The public is now in a position to identify which sectors have done well despite, and because of COVID-19. With large government borrowing to be repaid those who have done well are expected to have to pay more in taxes, whether they have actually benefited or not.

- **Governments may not get much credit**– even those governments that were seen to have handled the first wave of COVID-19 well have not been immune to criticism as the second wave has caught hold. Those who were seen to have handled the first wave badly have a very significant challenge to be seen to have performed well.
- **Local is top of mind** – with online and supermarket businesses seen as having prospered through the pandemic, the concern about the impact on local shops and businesses is now growing. How governments support the rebound in local communities through jobs and business support will grow in focus.

For a decade, leading corporates have been told that they face a crisis of trust and offered communications strategies as a response. But this crisis has shown how trust is established through a track record of competence in its contemporary form – strategic agility, operational resilience, and close relationships with customers.

2021 will, of course, present further challenges that could in many cases be more acute. The pandemic has not ended; public health experts are expecting an incredibly difficult start to the year. As economic support begins to unwind, and the focus shifts towards the sustainability of public finances, the balance sheets of many businesses will come under sustained scrutiny. And the challenges of Brexit have yet to be resolved.

Kekst CNC believes that those businesses with the clearest evidence of competent performance through a period of unique strain will be best placed to lead conversations with employees, consumers, customers, politicians and regulators. We look forward to working with our clients in what promises to be another ‘unprecedented’ year.

Kekst CNC

14 December 2020

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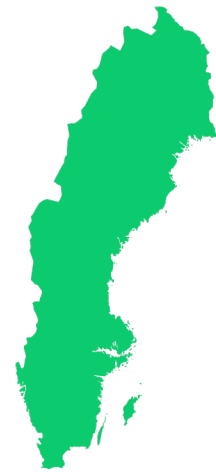
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Methodology

Polling conducted by KEKST CNC, nationally representative sample of:



1,000 adults
in the UK



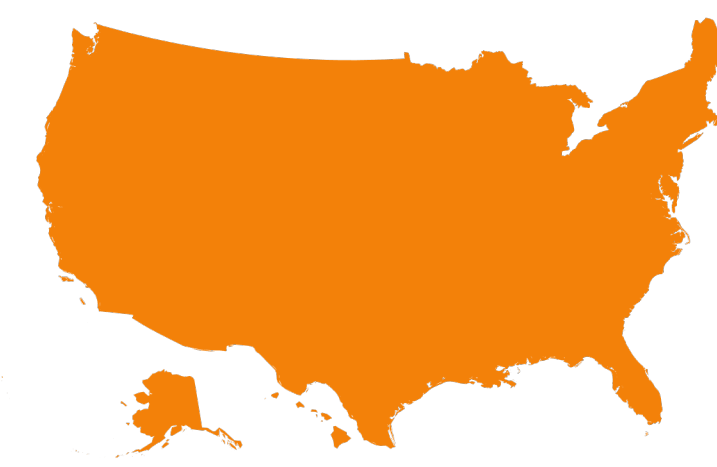
1,000 adults
in Sweden



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 6 took place on
20th November – 1st December 2020

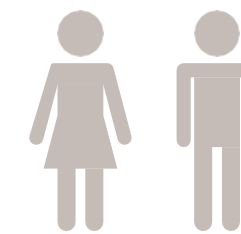
Fieldwork of wave 1 took place
on 30th March – 3rd April

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

Fieldwork of wave 3 took place
on

1st June – 5th June
Fieldwork of wave 4 took place
on 10th July – 15th July

Fieldwork of wave 5 took place on
16th September – 22nd September



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

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

Global findings - executive summary

1. **Snap back to reality:** As the impact of second waves are felt, more people want government to limit the spread of disease above all else
2. **Local business feels the strain:** Significant numbers of people are personally aware of businesses closing, and feel physical retail is being left at an unfair disadvantage by large, digital firms
3. **Hope on the horizon:** For the first time there has been a decline in how long people think the pandemic will last for
4. **Governments in the cold:** Despite positive vaccine news, national governments see no boost to their ratings, and faith in Sweden's approach has faltered both inside and out of the country
5. **Winners and losers:** Food, pharma and online retailers come out of the pandemic with the better reputation, while travel, banks and aviation suffer
6. **Vaccine on the up:** In four countries surveyed, likely vaccine uptake is on the rise – but uptake is lowest, and falling, in France
7. **Obstacles ahead:** Significant numbers of people have seen anti-vaccine material on social media, and there are concerns about the fairness of the rollout
8. **A new employee settlement:** Employees demand more working from home, a better work-life balance, and are ready to leave their employer if things do not change

Global key findings

1

Snap back to reality: As the impact of second waves are felt, more people want government to limit the spread of disease above all else

As countries feel the impact of resurgences of the virus, and with a vaccine on the horizon, this month people have become more likely to want their governments **to put limiting the spread of the virus above protecting the economy**. This is the case in the UK, Germany, Sweden and Japan, and particularly clear in France, reversing the trend seen in the autumn when France became the first country where its populace wanted the economy to be put to the forefront. In the U.S., the trend seen throughout the year has continued, with the **economy slowly becoming more important to the American public**.

2

Local business feels the strain: Significant numbers of people are personally aware of businesses closing, and feel physical retail is being left at an unfair disadvantage by large, digital firms

Concern about the impact of the virus is rising again, and particularly so in terms of the **impact of the virus on local businesses**. As economic effects of the pandemic truly begin to bite, this concern that local businesses are in trouble is becoming more prominent. Not only do substantial proportions of the population – as high as 54% in the U.S. – have personal knowledge of a business that is closing due to coronavirus restrictions, in all countries bar Sweden and Japan, people say that **big digital companies have had an unfair advantage over local and physical retail**. And people want to see government help, with a majority in all six countries surveyed saying they want to see more **financial support to help physical retail recover after the crisis is over**.

3

Hope on the horizon: For the first time there has been a decline in how long people think the pandemic will last for

While concern about the virus may be rising, there is hope on the horizon. For the first time in this tracking survey, **there has been a decline in how many people think the impacts of the pandemic will last for more than a year from now**. Likely linked to vaccine announcements, the starkest declines come in the UK, where the proportion of people expecting the impact of the virus on their own life to last more than a year has fallen from 74% in September to 58% now. Travel and tourism has some good news, with **sharp declines in the length of time people think the virus will impact travel and holidays**. Japan, however, is an exception, with the same optimism not being shared by the Japanese public.

Global key findings

4

Governments in the cold: Despite positive vaccine news, national governments see no boost to their ratings, and faith in Sweden's approach has faltered both inside and out of the country

In terms of their public approval during the pandemic, **national governments have seen no improvement in their ratings by their voters** – despite positive vaccine news. In the UK and the U.S., approval remains net negative, as it does in France; if there is any vaccine 'dividend' it is to public health agencies like Public Health England and the CDC. And in Sweden, though ratings continue to be positive, **there has been a sharp decline in approval of the Public Health Agency of Sweden and the Swedish Government**, as voters question the country's approach. And in terms of how the rest of the world sees the best and worst performing countries, Germany continues to top the table while the U.S. and the UK are at the very bottom – though Germany has taken a significant hit in approval compared to what it once was, including amongst its own population. World opinion of China is also improving compared to the early days of the pandemic.

5

Winners and losers: Food, pharma and online retailers come out of the pandemic with the better reputation, while travel, banks and aviation suffer; and voters expect higher taxes on firms that have done better

Asked which industries and sectors have come out with a better or worse reputation, **food and online retailers are seen as having come out well, alongside the pharmaceutical industry**. The 'losers' of the reputational battle include the **aviation industry, the travel industry, and – in Germany – the automotive industry**. When it comes to where voters want to see higher taxes as countries gear up to pay off debts, the picture is clear: **those who have been 'winners' of the pandemic should pay more in tax in the future**, especially online retailers, financial services, pharma, and technology companies. Pharma firms may have delivered a vaccine, and online retailers may have delivered goods direct to people's homes during the pandemic, but they are still expected to shoulder the upcoming burden of tax.

6

Vaccine on the up: In four countries surveyed, likely vaccine uptake is on the rise – but uptake is lowest, and falling, in France

As vaccines are approved and rolled out in some countries around the world, **projected uptake of the vaccine is on the increase**. In the UK, U.S., Germany and Sweden, the proportion of people who say they will definitely or will likely get a coronavirus vaccine when it becomes available has increased compared to in September. However, **in Japan and France uptake has declined**, and the French figures in particular are stark with 45% saying they would get the vaccine and 44% that they would not. Looking across all countries, **women, younger people, and the lowest income workers are those who are least likely to say they will get vaccinated against coronavirus**.

Global key findings

7

Obstacles ahead: Significant numbers of people have seen anti-vaccine material on social media, and there are concerns about the fairness of the rollout

All is not plain sailing with the vaccine. **Significant numbers – almost four in ten worldwide – say they have seen anti-vaccine material on social media in the last few weeks**, and this is **highest amongst those who say they would not get the jab**. There are also concerns about whether the vaccine will be distributed fairly, particularly in France and Japan.

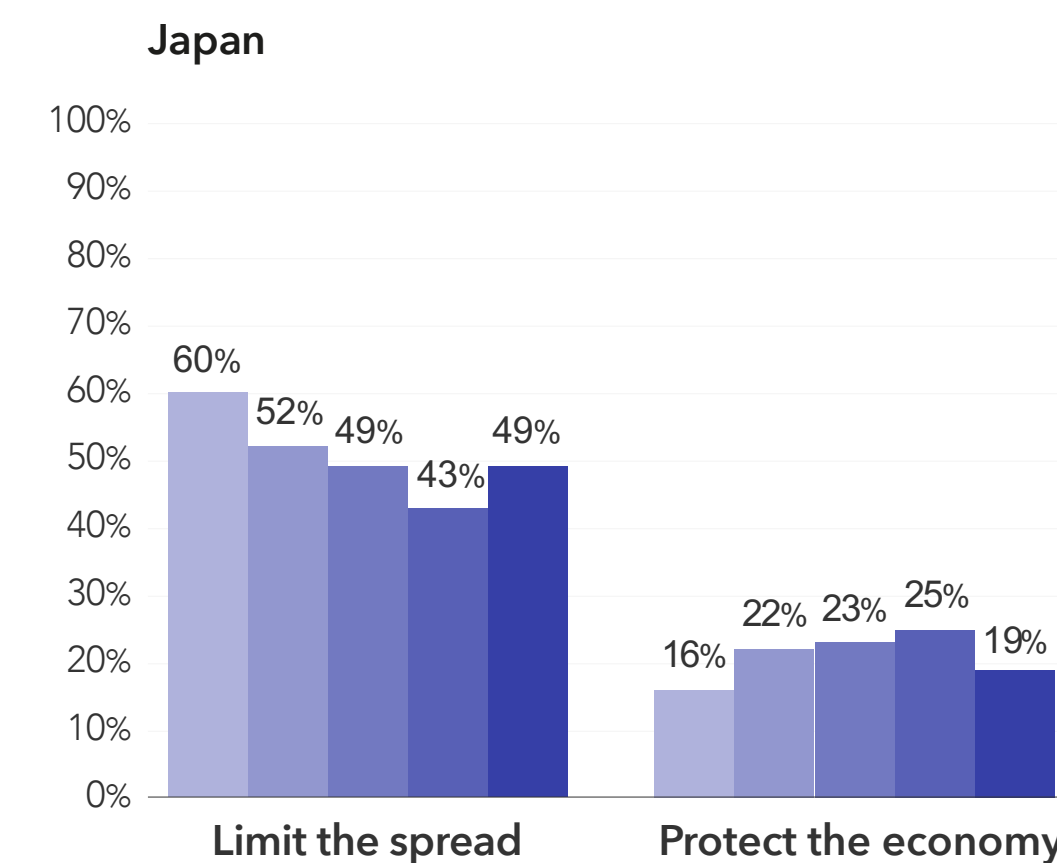
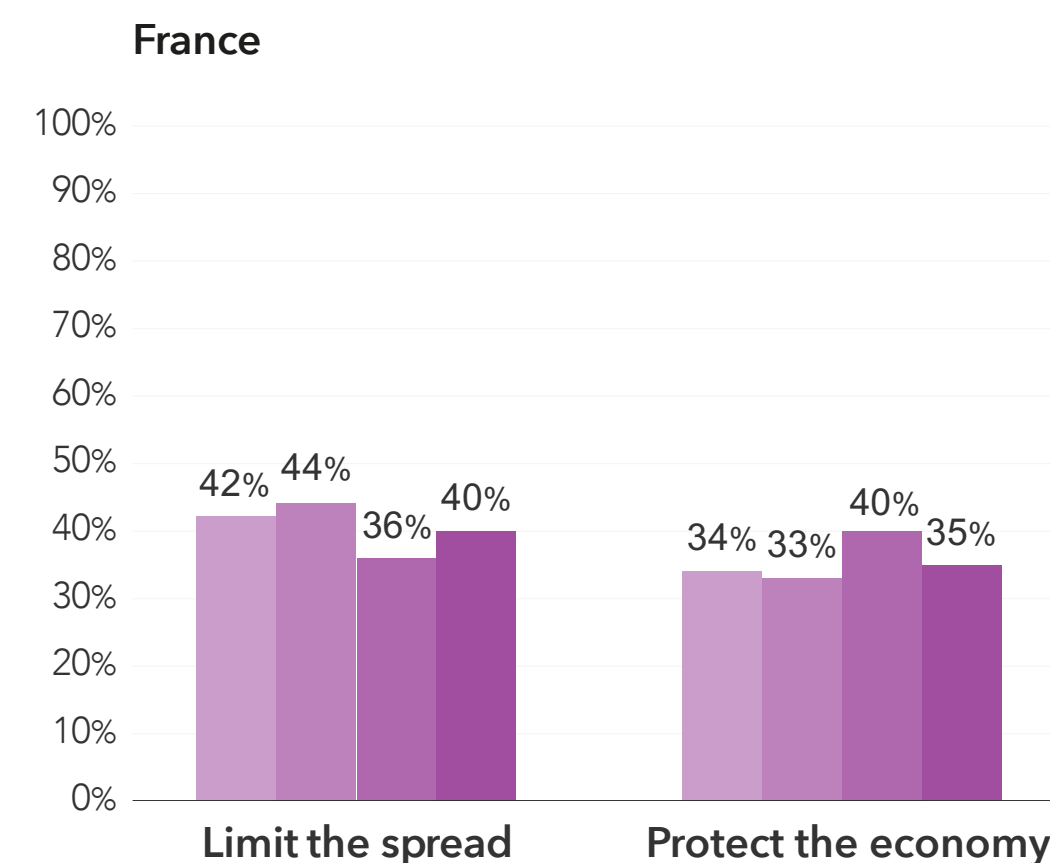
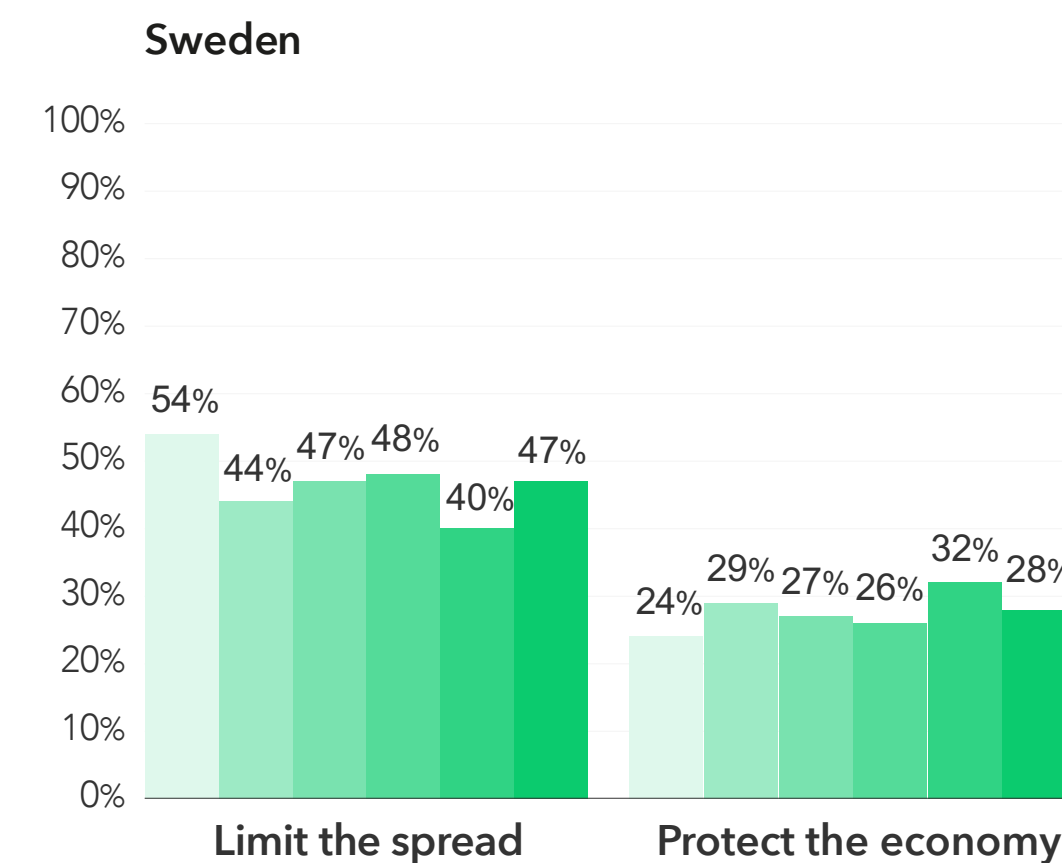
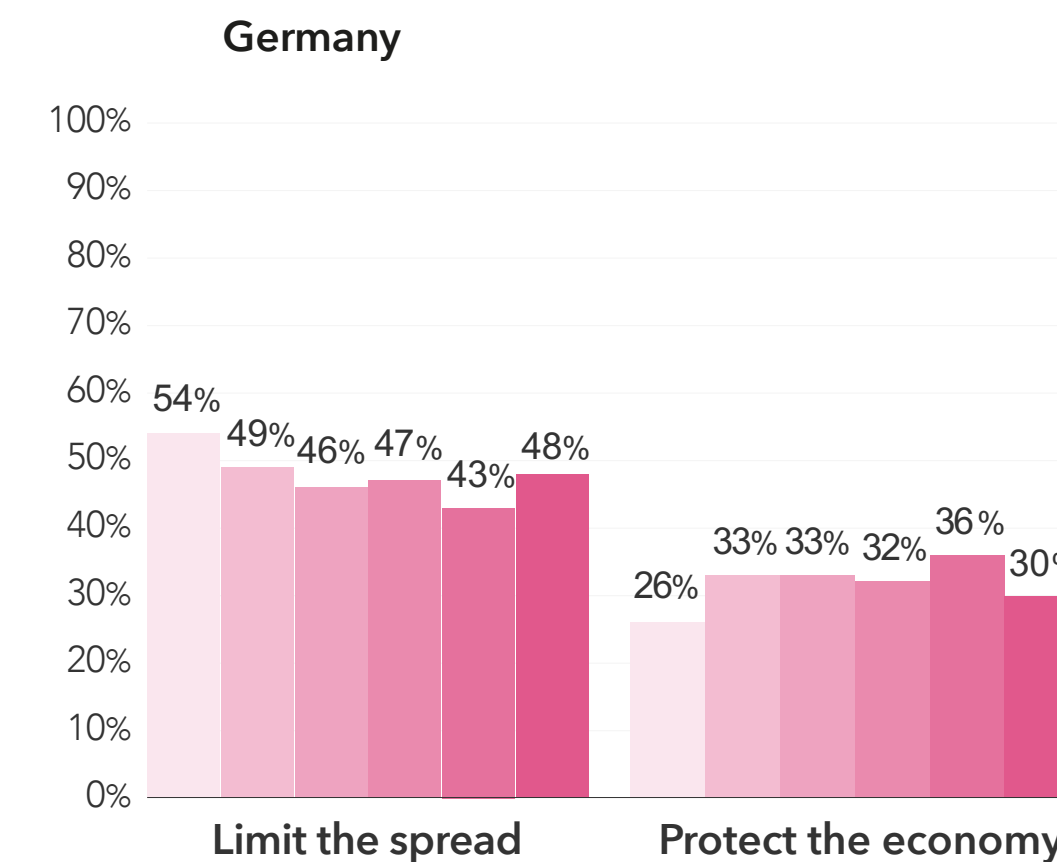
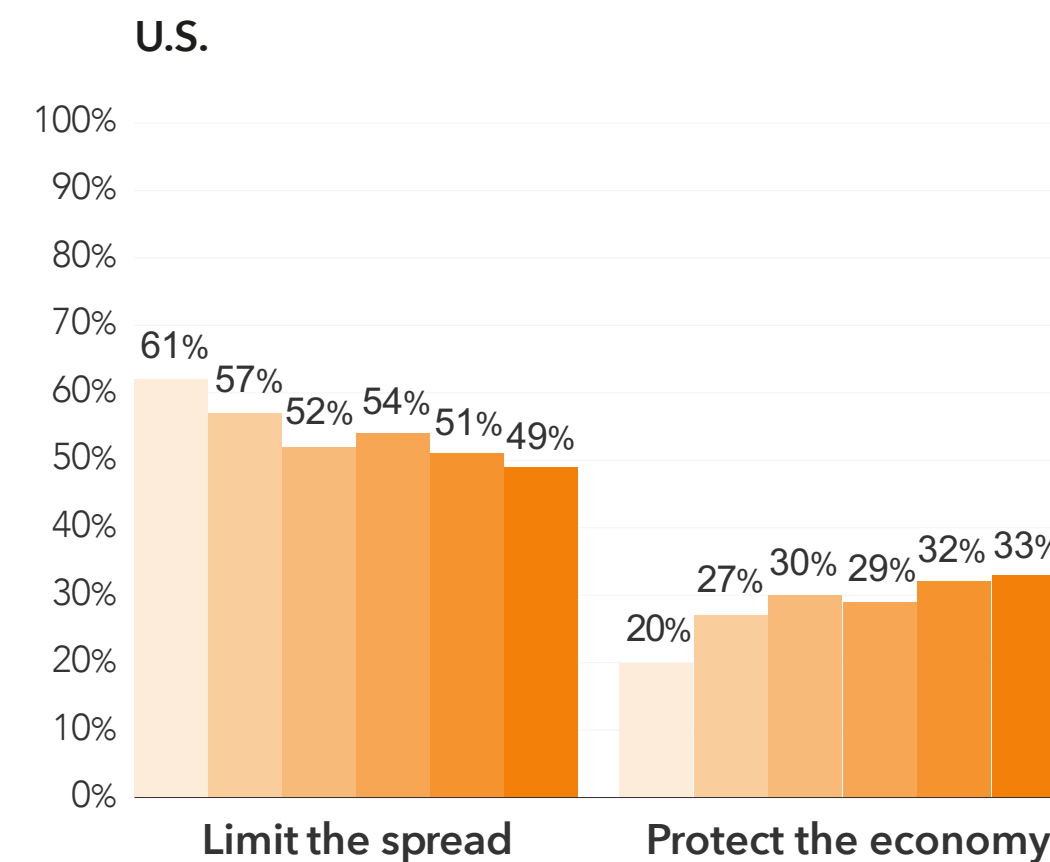
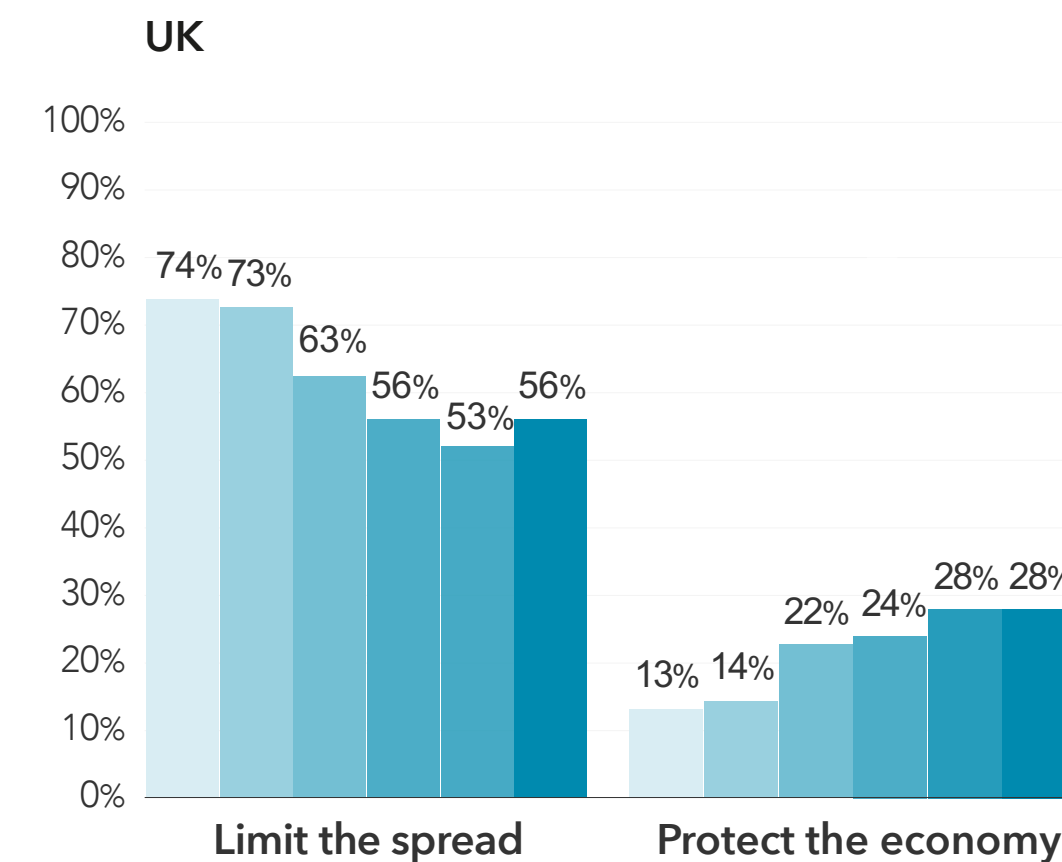
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A new employee settlement: Employees demand more working from home, a better work-life balance, and are ready to leave their employer if things do not change

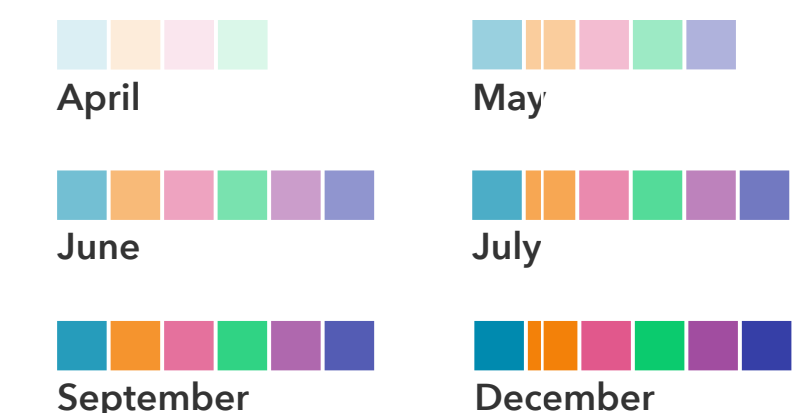
Ask them to look ahead to 2021, assuming a vaccine has been fully rolled out, and **employees expect a different settlement from their employers compared to before the pandemic**. Large majorities want to return to the office, but **people also want flexibility**, with around half of employees globally saying they want to work from home some of the time, and as many as seven in ten wanting to see a better work-life balance. These are not just empty aspirations – **employees are also ready to walk away** if they do not get their way, with employees saying they will likely look for new roles next year, and especially if their demands for flexible working are not met. **Employers should be mindful of this as they move into the new year and look to retain their best talent**.

1 Government decisions

With second waves biting, most countries have seen a winter increase in the proportion of people who want Government to limit the spread of the disease above all else



- 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

With second waves biting, most countries have seen a winter increase in the proportion of people who want Government to limit the spread of the disease above all else

- Over the last eight months, the public have moved gradually towards wanting to protect the economy. However, this month **this trend has been halted in most markets, with more people wanting to prioritise limiting the spread of the disease over the economy**. In the UK, for example 56% want the government to prioritise limiting the spread compared to 53% last month, in Germany 48% compared to 43%, and in Sweden 47% compared to 40%. This is likely linked to **resurgences of the disease having an impact in most countries, as well as the prospect of a vaccine**.
- This is particularly apparent in France, where **limiting the spread of the virus is now the main priority of the French people**, by a margin of 40% to 35%. This reverses the trend seen in the Autumn, when more people wanted the economy to be put first.
- The exception to this trend is the U.S. Here, the trend seen throughout the year has continued, with the **proportion of people who want the government to prioritise limiting the spread of the virus falling below 50% for the first time**. One-third of Americans want the economy put first – a gap of 16 points compared to 41 points in April.

56%

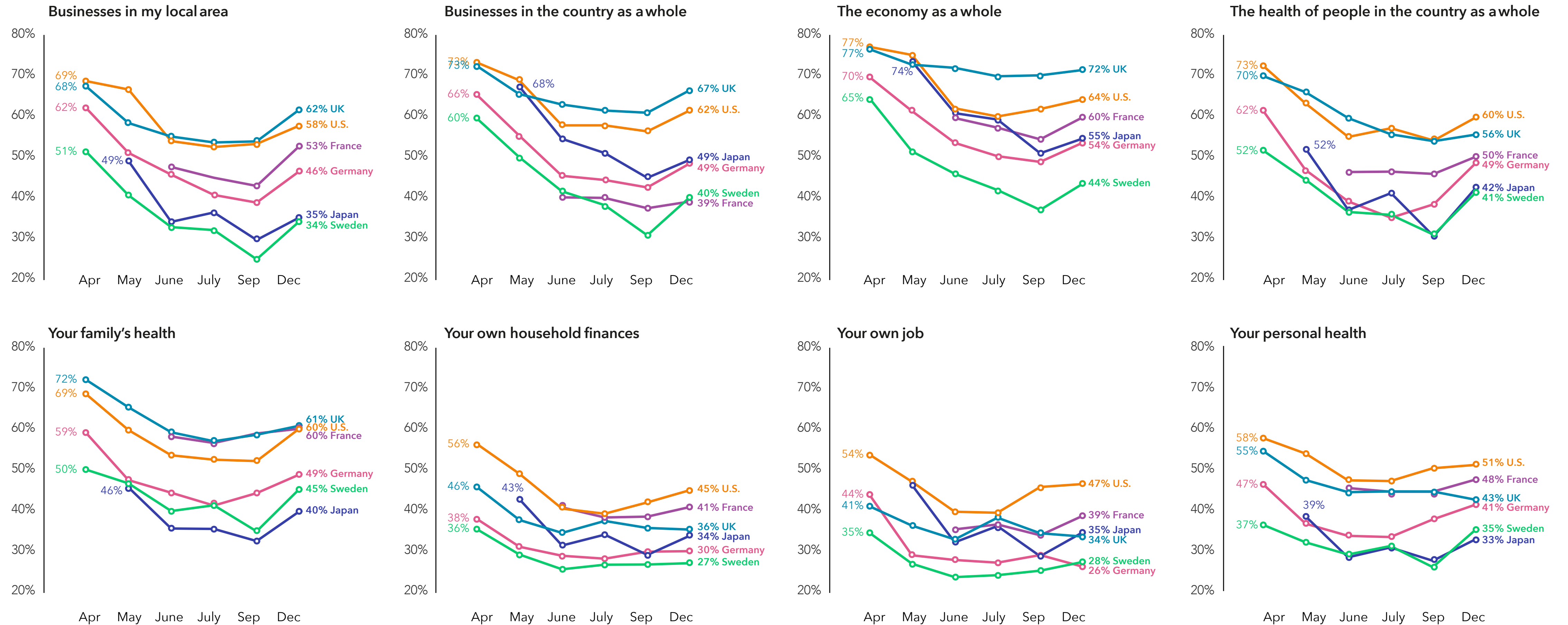
The proportion of British people who want to put saving lives above the economy, the largest of all markets surveyed

+7%

The increase in the proportion of Swedes who want the Government to put saving lives above the economy

2 Levels of concern

Concern about the impact of the virus is on the rise once more



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 on the rise once more

- **Concern about the virus is on the rise once more** – likely linked to resurgences of the virus in many countries, and the economic effects being felt. For example, the proportion of Americans "very concerned" about the impact of the virus on their family's health has increased from 52% in September to 60% now, and from 35% in Sweden to 45% now. There have also been very sharp increases amongst the least concerned nations, such as Germany, Japan and Sweden, in concern about the health of people in the country as a whole – up 10 points in Sweden, 11 points in Germany, and 12 points in Japan.
- Generally speaking, **the rise in concern is more marked for the economic impacts**. For example, 67% of Brits are very concerned about the impact on businesses in the country as a whole, up from 61% in the autumn. Similarly, in Japan, where concern about business has fallen month-on-month, in December this has increased from 45% to 49%.

- One of the largest increases in concern, which is seen in every country, is what people think the impact of the virus will be on **businesses in their local area**. Here, every country has seen an increase in the proportion of people very concerned, with an increase of 8 points in the UK, 5 points in the U.S., 10 points in France, 7 points in Germany, 9 points in Sweden and 6 points in Japan. This suggests **real tangible concern about local businesses' potential to survive during and beyond the crisis**, and ties into later findings on the large numbers of people who personally know of a business closure.

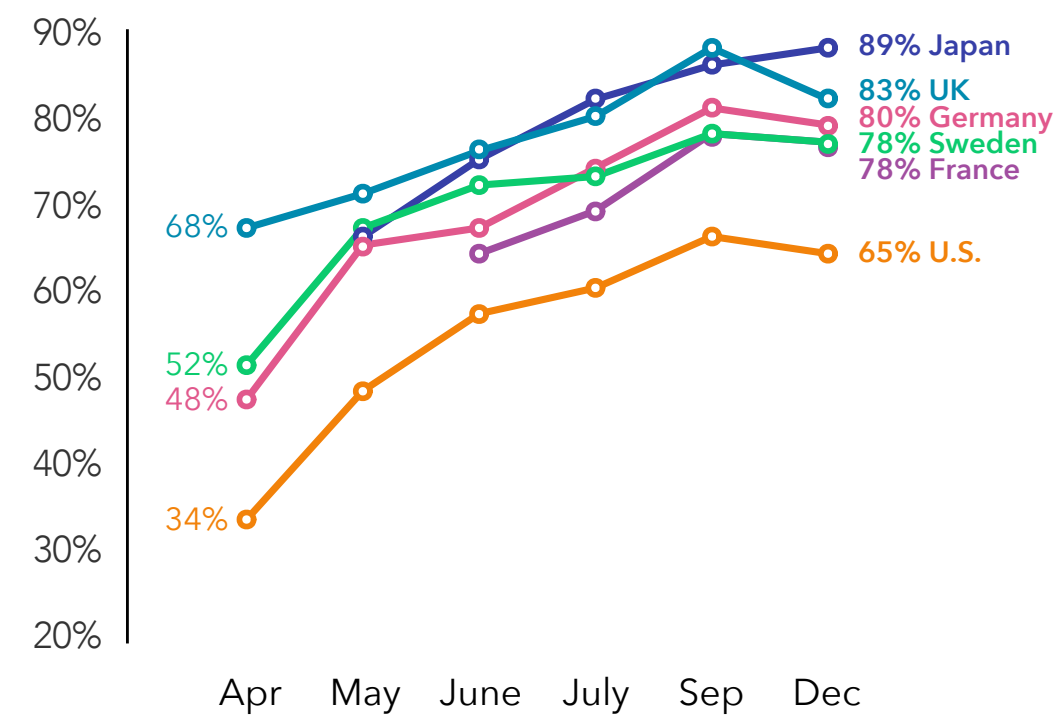
62%

The percentage of people in the UK very concerned about the impact of the virus on businesses in their local area

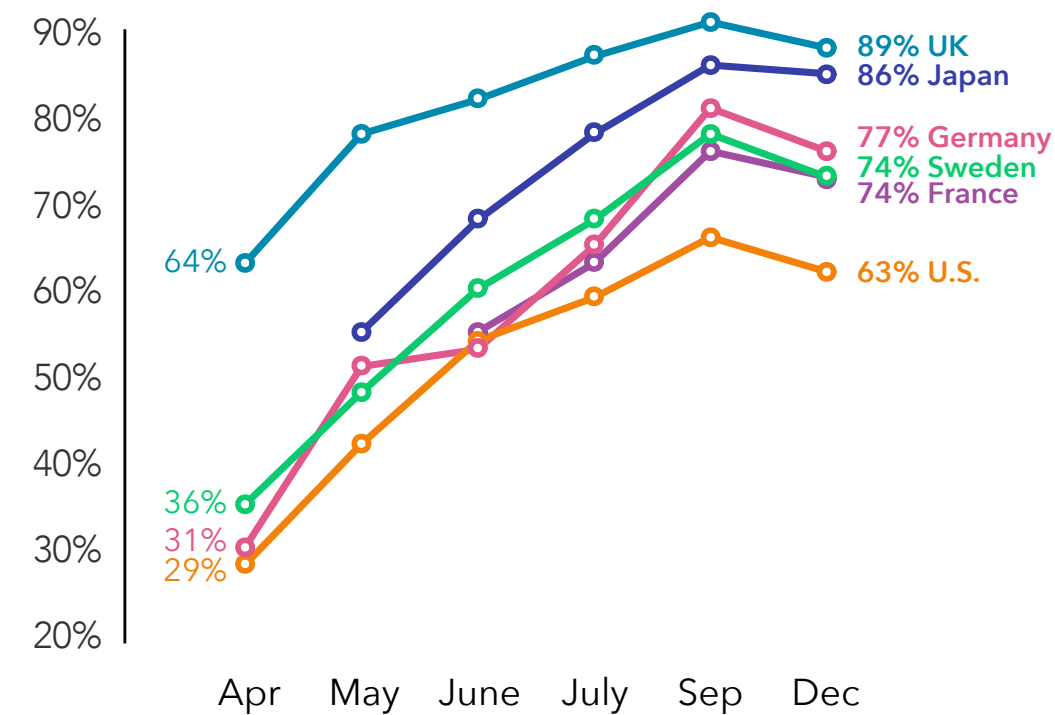
3 Expected duration

A fall in the length of time people expect the impacts of the virus to be felt for, for the first time in this survey

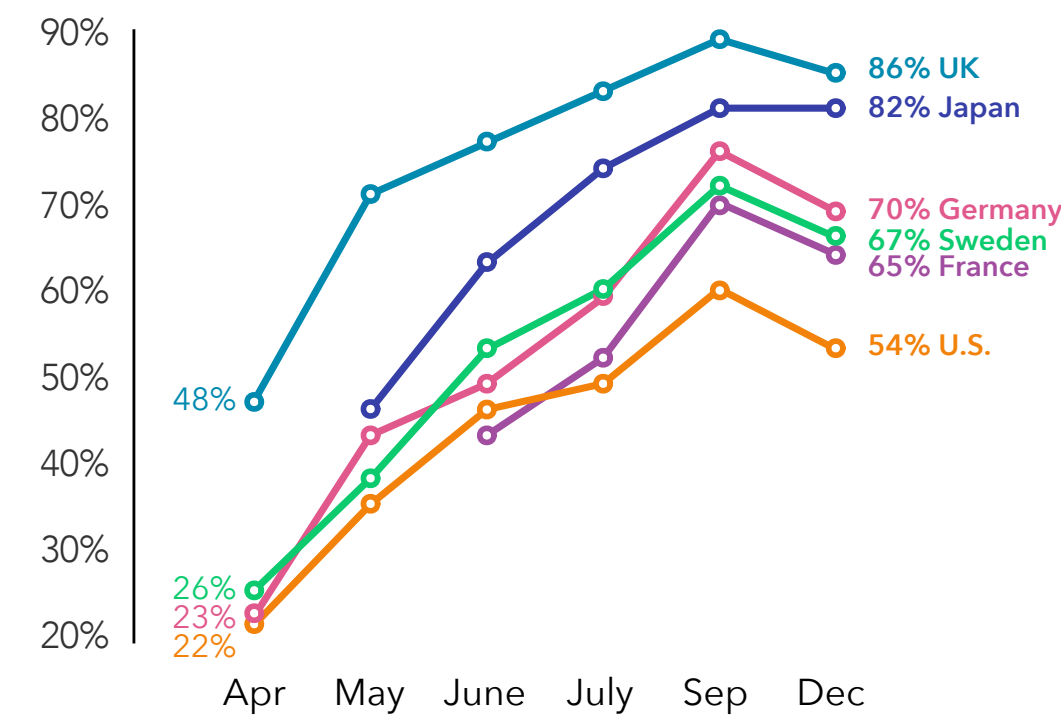
The impact on businesses and how they function



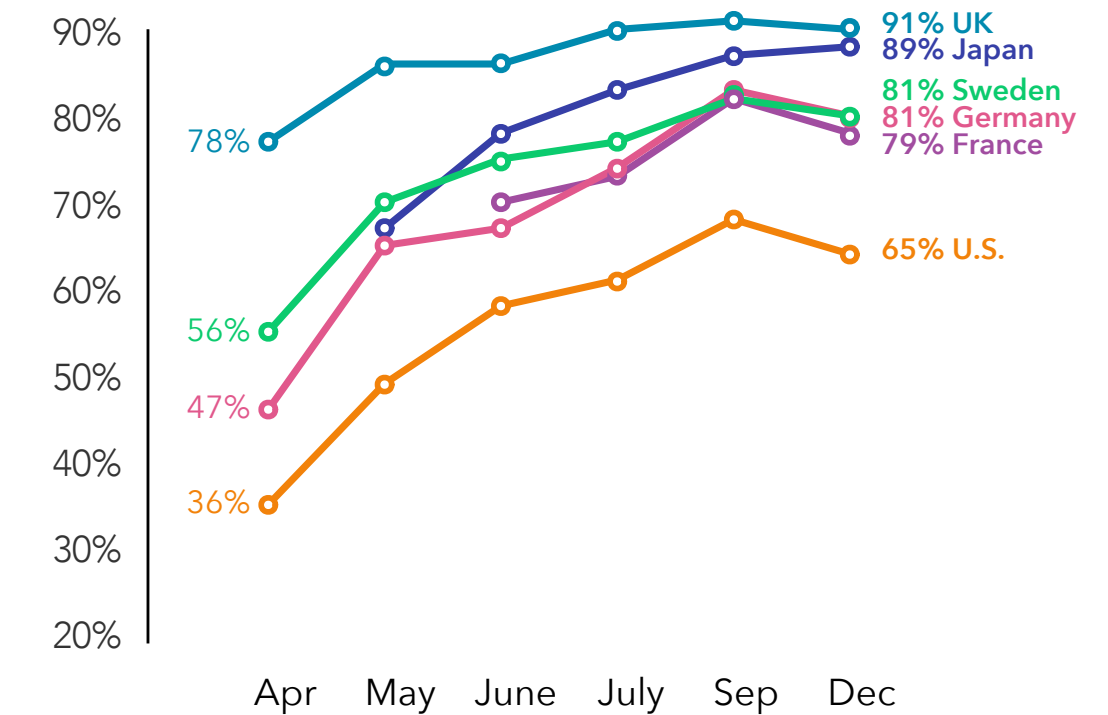
The impact on my country



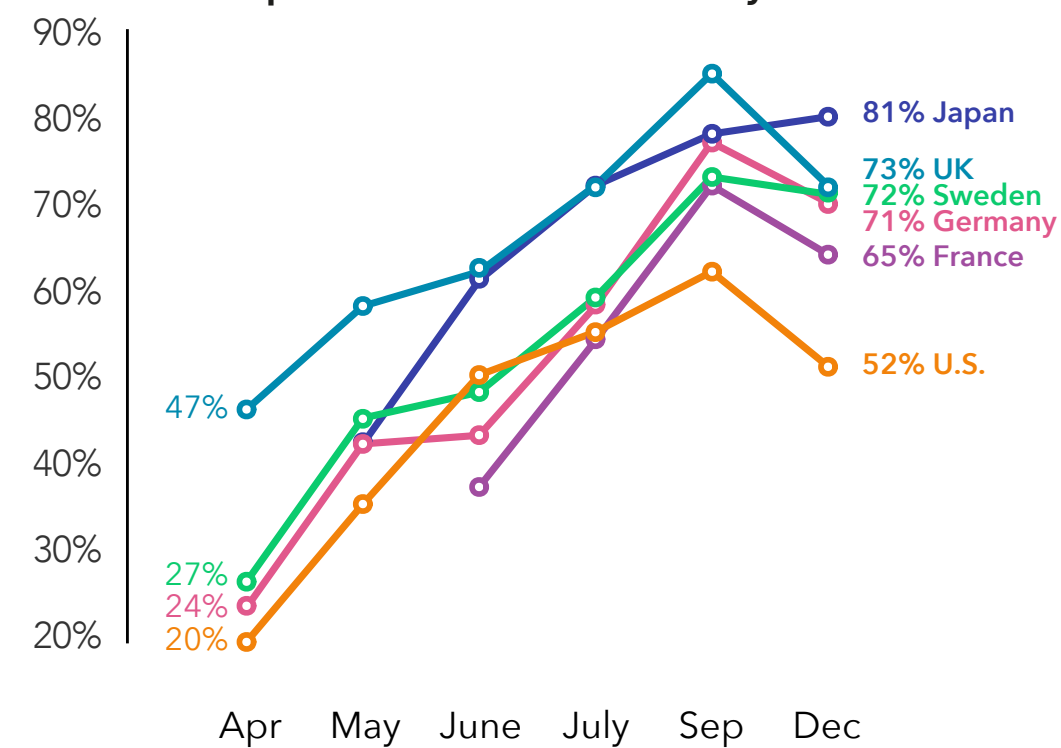
The impact on society overall



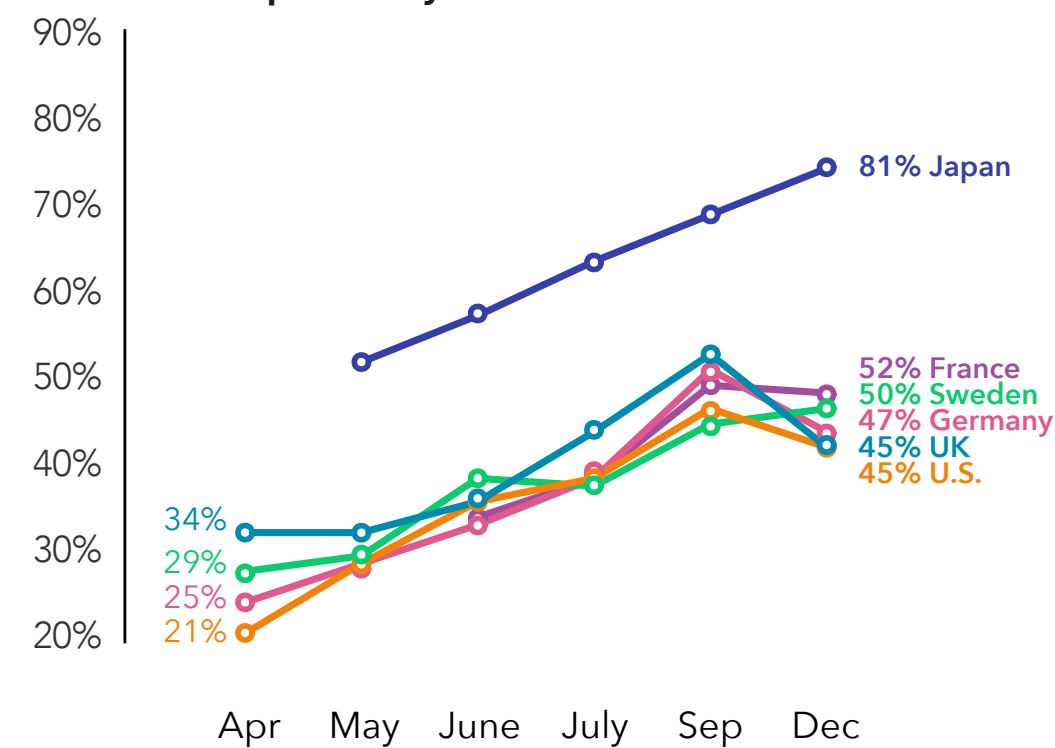
The impact on the economy



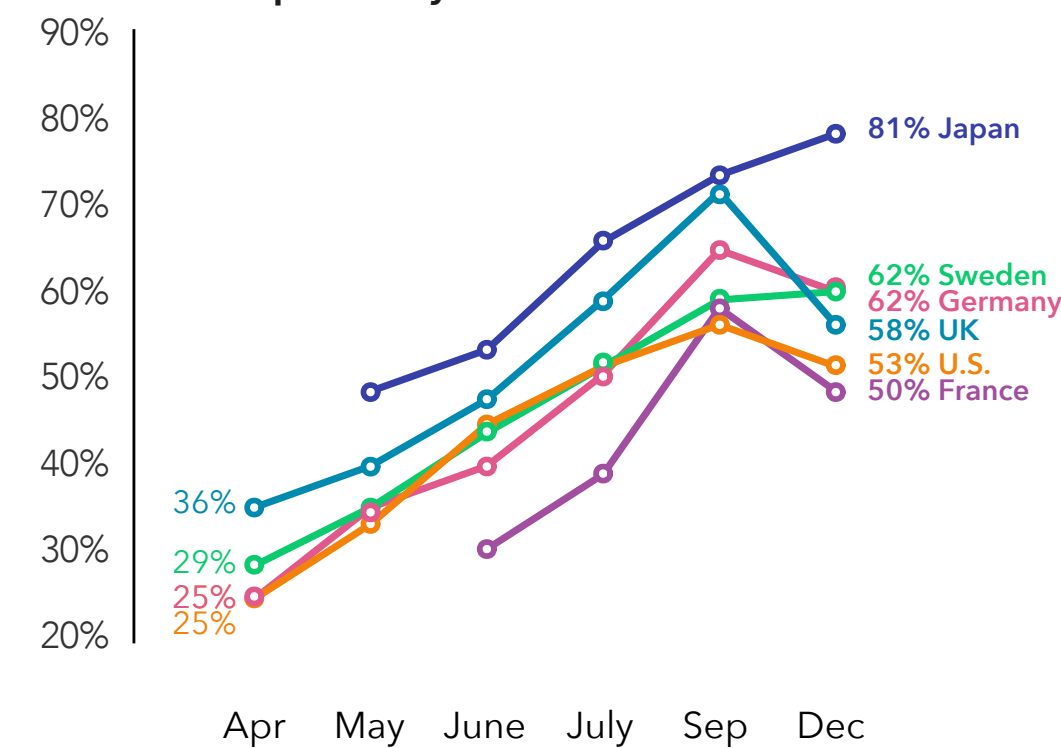
The impact on travel and holidays



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.



3 Expected duration

A fall in the length of time people expect the impacts of the virus to be felt for, for the first time in this survey

- For every month since April, the expected duration of the virus has increased. For all countries bar Japan, this steady increase has stopped for the first time this month, **with people now expecting the virus to last for a shorter period of time than they did in the autumn**. This is likely linked to coronavirus vaccines becoming approved or available and shows that, despite rising concern about the virus, people may be seeing light at the end of the tunnel.
- **The starkest declines come amongst people in the UK**, especially on how long people expect the virus to impact their own life. In the UK, the proportion of people expecting this to last for more than a year has fallen from three-quarters (74%) in September to just 58% now. Other countries also see declines, including the U.S., France and Germany, though Swedes are slightly more pessimistic.

16 POINTS

The decline in the proportion of Brits who expect the virus to impact on their life for more than a year

5

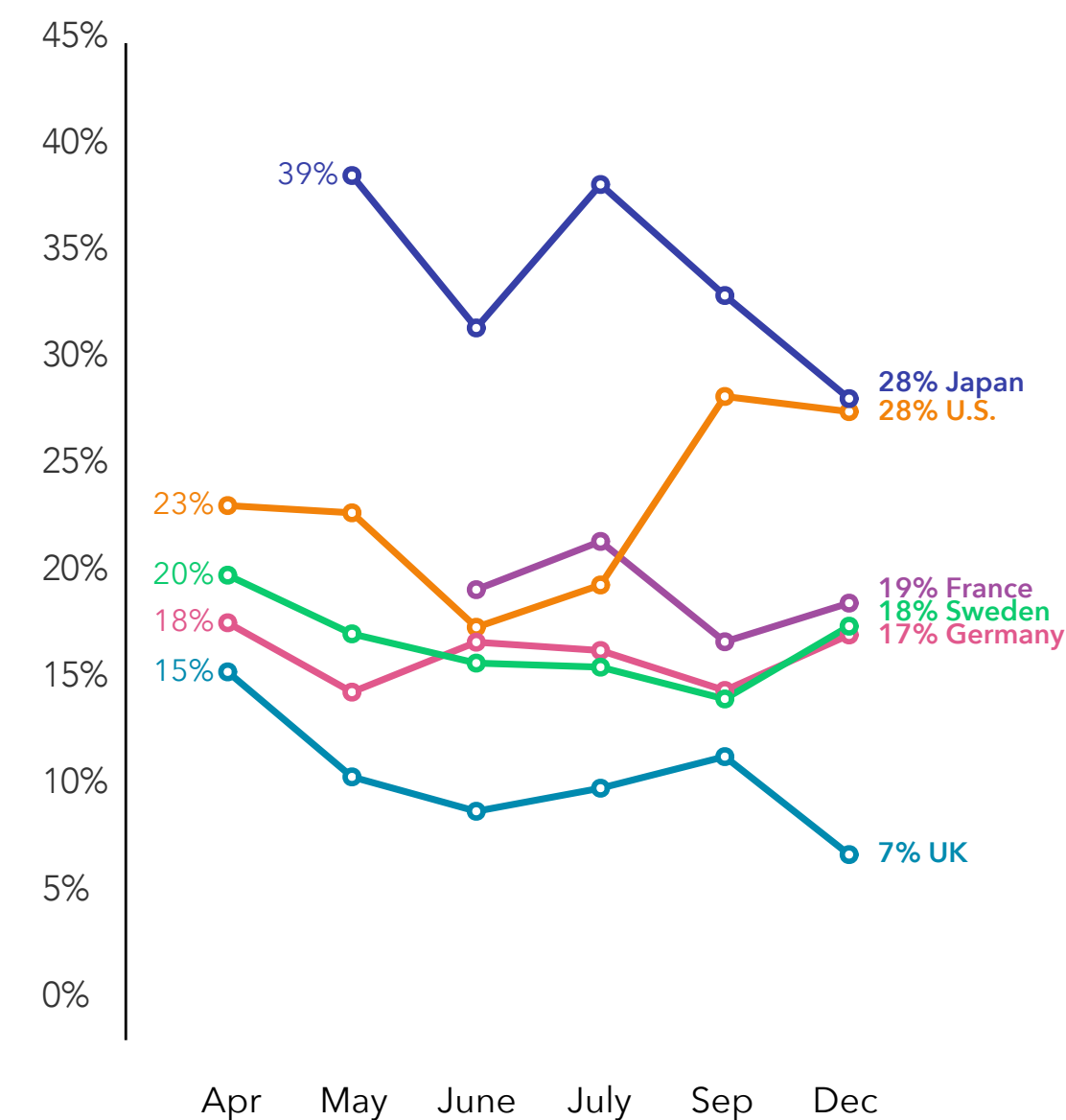
The number of months in a row that the number of people in Japan expecting the virus' impact on their household finances to last for more than a year has increased

- **The impact of the virus on travel and holidays is also expected to last for a shorter period of time than previously**. In September, 63% of Americans expected the impact on travel and holidays to last for more than a year; that is now down to 52%. Similar declines are evident in other countries, and though majorities in all countries still expect an impact right through to the end of 2021, this may be the first signs of positivity for the travel and tourism industry.
- In Japan, a decline in how long people will think the virus will last does not take place. Instead, similar numbers of people expect the impacts of the virus to be felt for more than a year than they did when last asked the question. There are **even some increases in how long people think the pandemic will be felt for**, for example when it comes to the impact on household finances (+6% on September) and the impact on one's own life (+5%). This suggests that, in a climate of questions over vaccine rollout, the Japanese public continue to be one of the most pessimistic nations when it comes to how long the virus will have an impact.

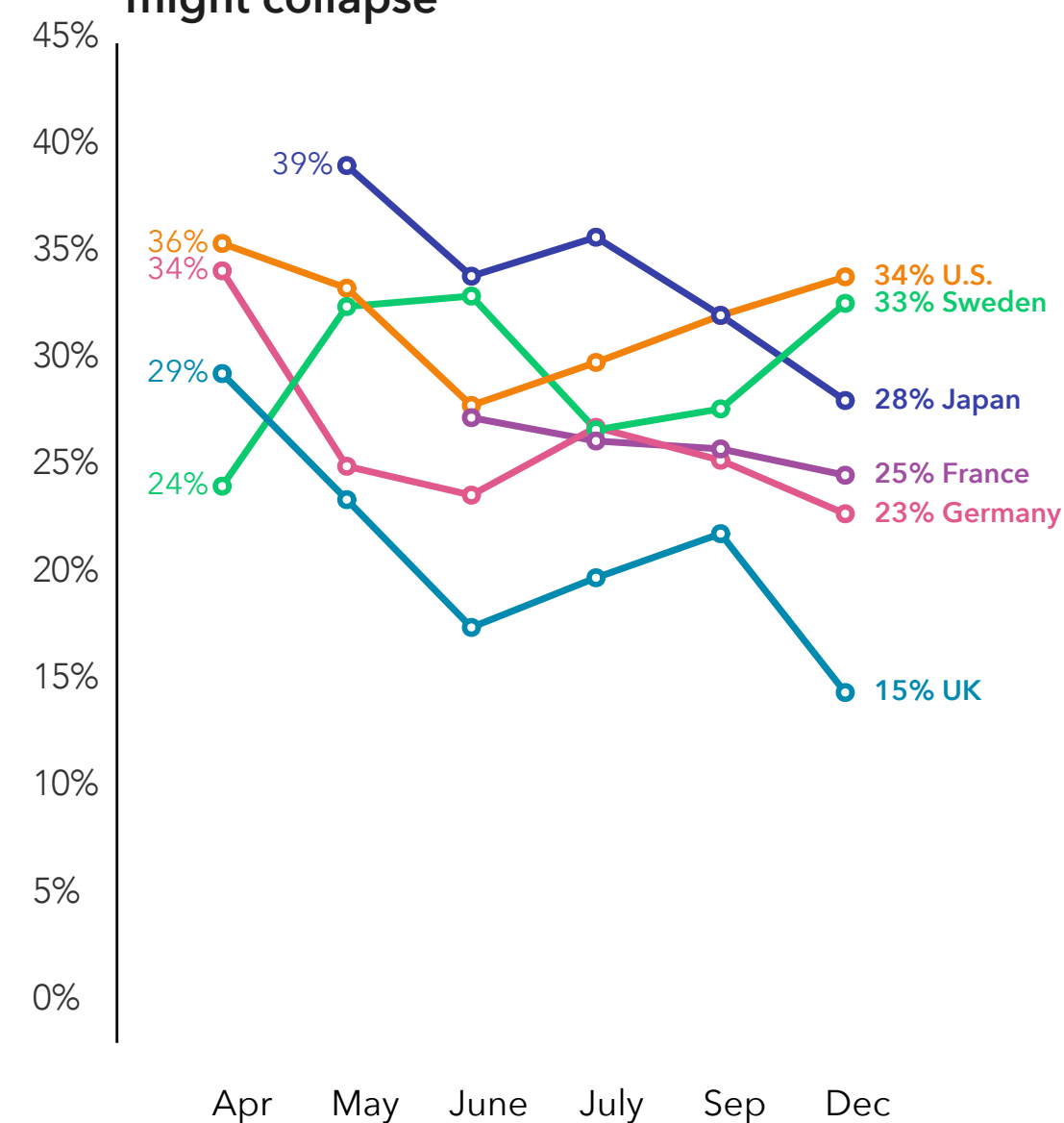
4 Local business

As economic effects continue, up to a third of people are concerned their company will collapse - and American workers are uniquely affected

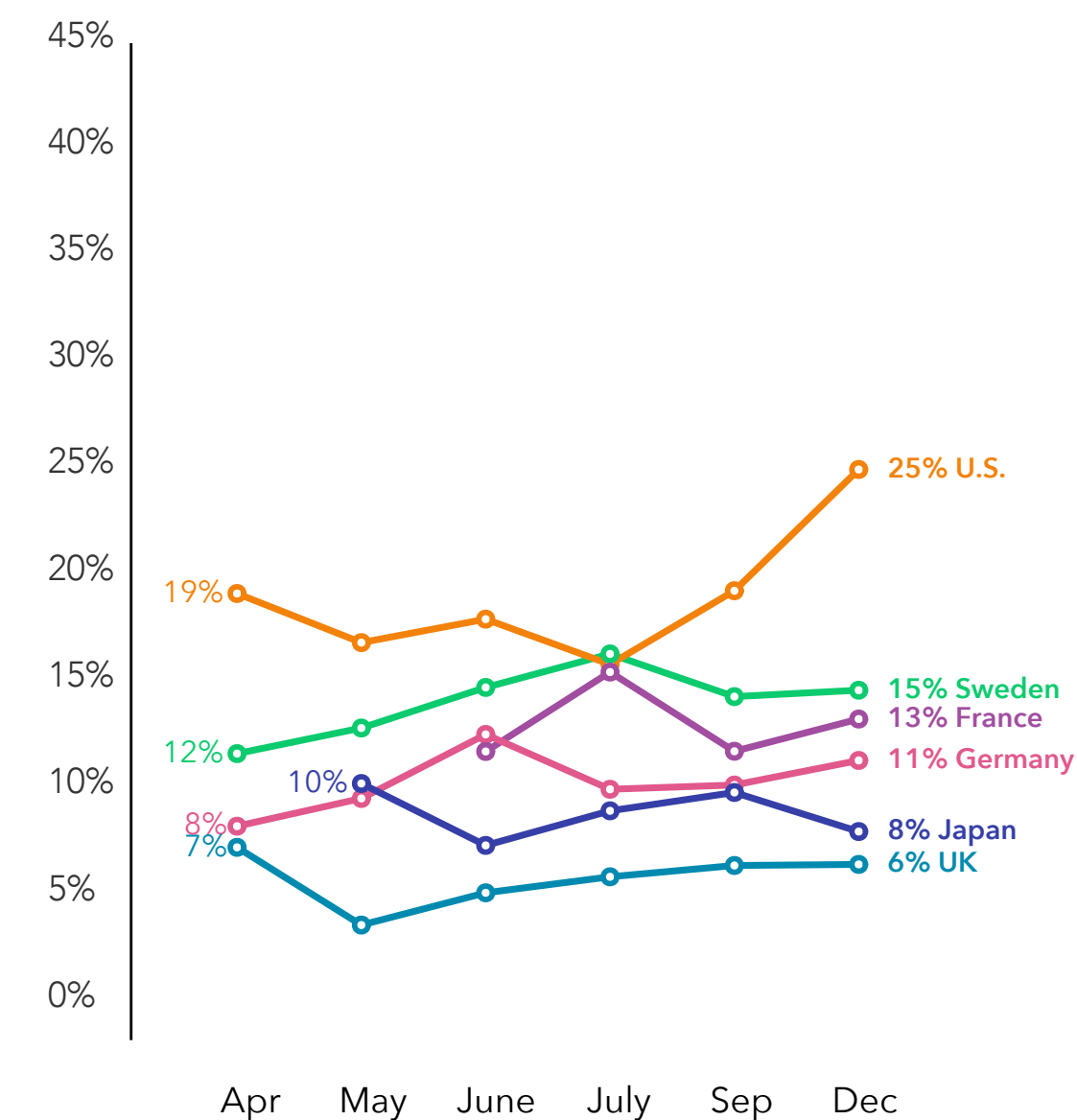
I expect to lose my job



I am worried that my company might collapse



I have already lost my job



- Though the proportion of people expecting to lose their job has remained stable in most markets, **the amount of people worried their company may collapse has slowly trended down in most countries - as has the risk of unemployment.**
- However, in the U.S., the picture is different. **Almost one in three American workers still expect to lose their job**, more than a third are worried their company might collapse and this is rising (this also applies to Sweden), and one quarter say they have already lost their job in some form. Conversely, **British workers are feeling the most optimistic**, with sharp declines in the number who expect to lose their job or are worried their company may collapse.

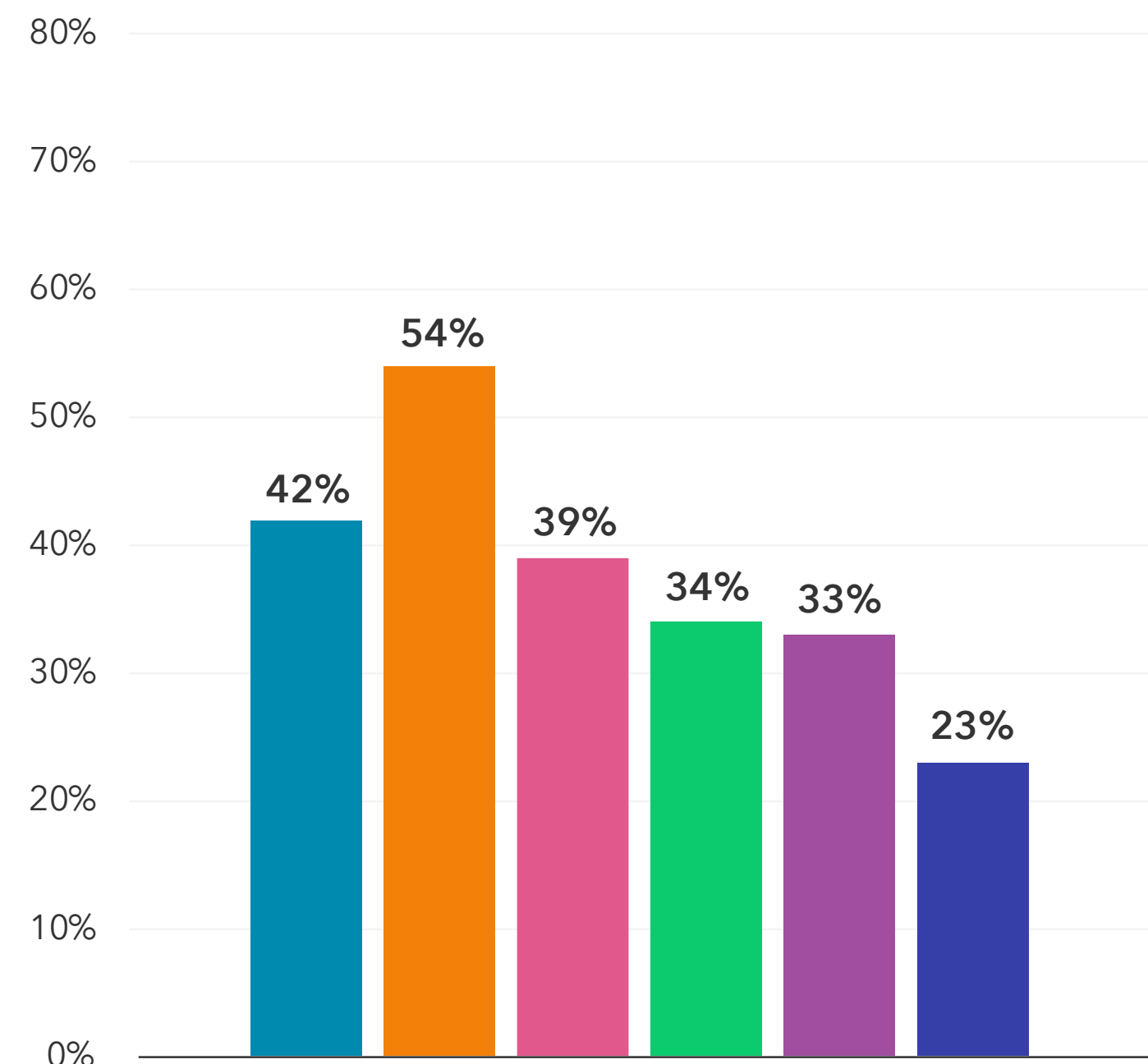


Respondents across all countries were asked whether they agreed or disagreed with a set of statements referring to their own employment and job. All statements here are filtered just by those who said they are working full-time or part-time, apart from "I have already lost my job" which is presented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

5 Local business

Significant numbers know personally of a business that is closing due to coronavirus restrictions, and people want local businesses to be prioritised over big, digital firms

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



Respondents across all countries were asked whether they agreed or disagreed with the statement "I am personally aware of a business that is closing due to coronavirus restrictions".

- **A majority of Americans - 54% - say they are personally aware of a business that is closing due to coronavirus restrictions.** This is highest in the West Coast of the country, where 57% agree, but is high in all parts of the U.S. Those who are **self-employed** are most likely to know one, with 63% agreeing.
- Numbers are also high in other countries, with four in ten British people agreeing (42%), four in ten Germans (39%), a third of Swedes (34%) and French (33%) and - though lower - one in four Japanese people (23%).
- This, coupled with increased concern about the impact of the virus on local businesses, suggests acute concern about local business and its capacity to survive. This also links to wider concerns about the **role of large, digital companies and small, physical retail firms**. Asked if "big digital companies have had an unfair advantage over the retail sector during the coronavirus crisis", majorities in the UK (75%), the U.S. (52%), Germany (59%) and France (61%) agreed. The picture is less clear in Sweden and Japan, where 38% and 27% respectively agree.

- But all countries are united in wanting **more Government action to financially support the physical retail sector**. This applies to seven in ten Brits (69%), two-thirds of Americans and French (65%), six in ten Germans (59%) and a majority of Swedes (53%) and Japanese (50%).

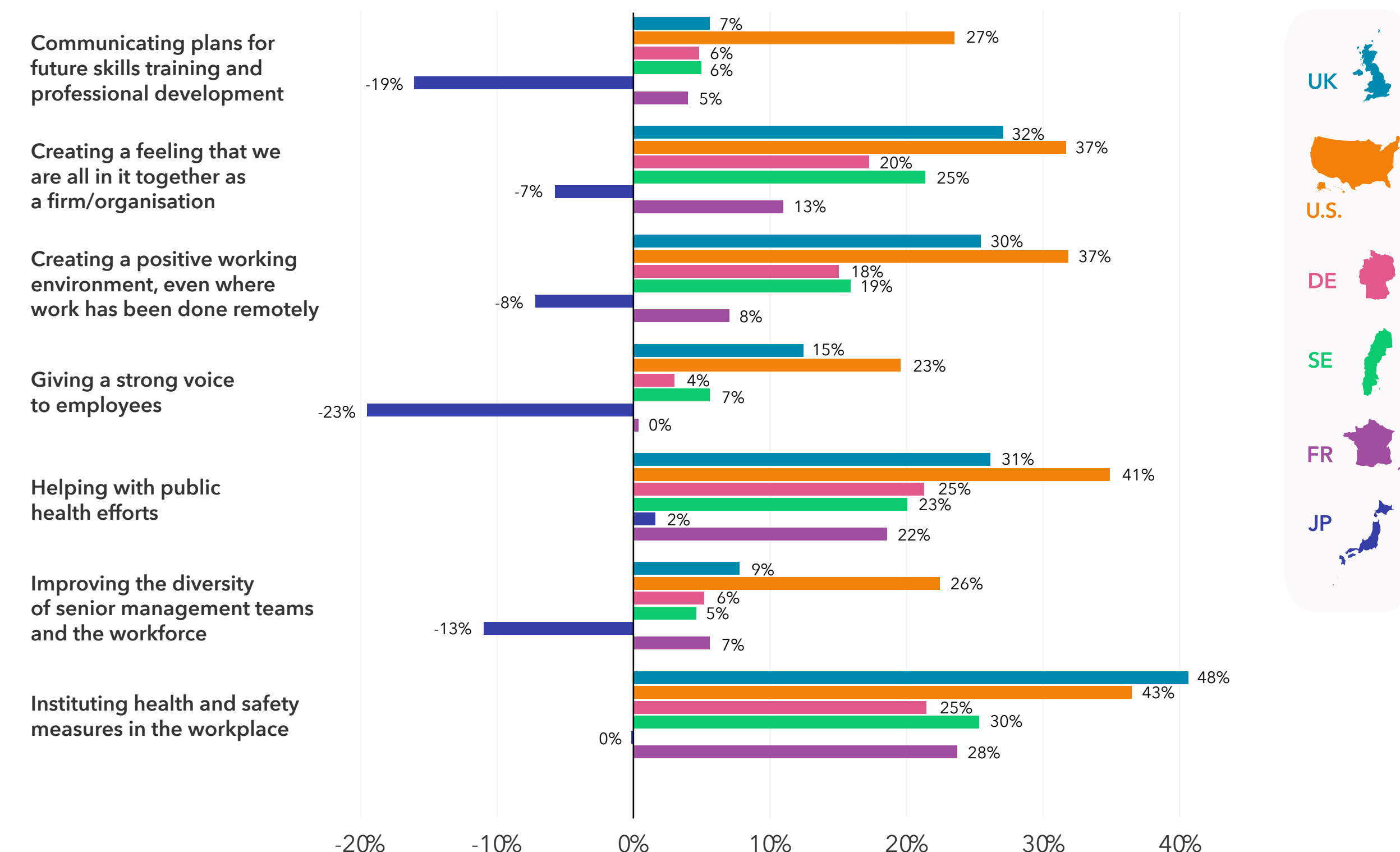
60%

The percentage of people in all countries who want more Government action to financially support the physical retail sector

6 Employer performance during the pandemic

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Positive ratings for employers on creating a positive working environment and an inclusive feel - but lower marks from employees on providing financial support, and help with mental health issues



+6%

The net score given by German and Swedish employees for their employers' record in communicating plans for future skills training

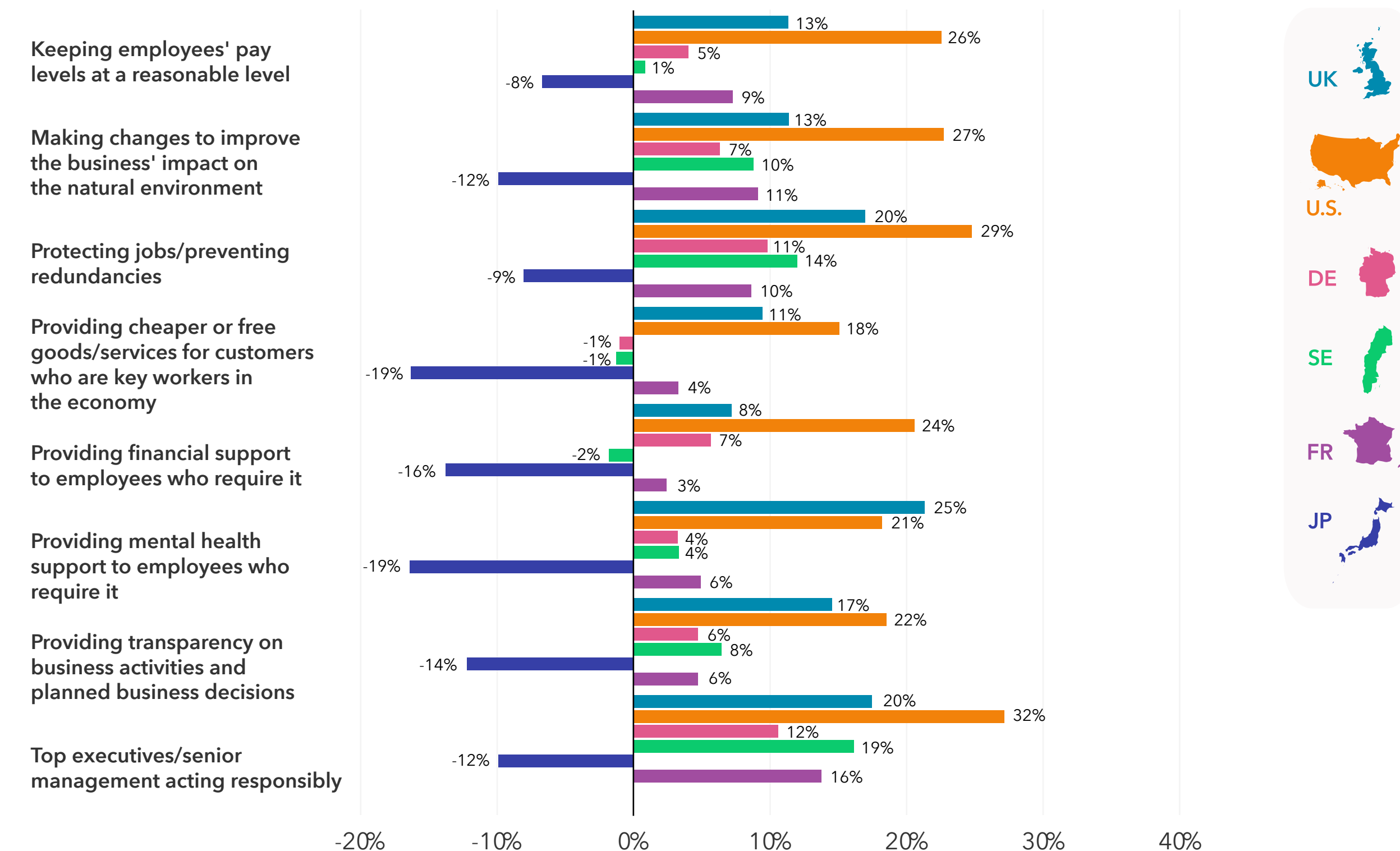
Respondents across all countries were asked whether they thought their employer had done better or worse than usual during the coronavirus pandemic to date. The net score is displayed.

- Generally employers scored best on "**helping with public health efforts**", "**instituting health and safety measures in the workplace**", as well as "**creating a feeling that we are all in it together as a firm/organisation**".
- In all countries bar Japan, positive ratings were also given on "creating a positive working environment".
- Employees were less positive about how well their employer has done at "**giving a strong voice to employees**", with particular criticism in Japan, Sweden and France.
- On whether employers were doing a good job at **communicating plans for future skills training and professional development**, American employees are positive (+27%), but British, German, Swedish and French employees are only slightly net positive, while Japanese workers feel their employer is doing a bad job on this metric.

6 Employer performance during the pandemic

COVID-19 OPINION TRACKER EDITION 6
14 DECEMBER 2020

Positive ratings for employers on creating a positive working environment and an inclusive feel – but lower marks from employees on providing financial support, and help with mental health issues



+29

The rating that US employees gave their employer on how well they are protecting jobs

Respondents across all countries were asked whether they thought their employer had done better or worse than usual during the coronavirus pandemic to date. The net score is displayed.

- On **mental health support**, employees are split across countries on how well their employer has done at providing it for employees who need it. In the UK and the U.S., employers are rated highly on +25% and +21% respectively. But Germany, Sweden and France they are only marginally positive, and this falls to -19% amongst Japanese employees.
- Similarly on provision of **financial support**, U.S. employers are rated highly, but only narrow margins think their employer has done well on this measure in other markets – and in Sweden and Japan, the view amongst employees is net negative. Swedish and German employees are also lukewarm about whether **pay levels are being kept at a reasonable level**.

7 Employee priorities for the next three months

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Pay remains the number one priority for employees, though staff also want more support when it comes to working from home

	UK	U.S.	DE	SE	FR	JP	AVERAGE
Keep employees' pay levels	28%	24%	21%	19%	24%	42%	26%
Support employees with working from home	21%	31%	28%	35%	19%	20%	26%
Institute health and safety measures in the workplace	27%	19%	25%	22%	23%	31%	25%
Build a feeling that we are all in this together as a firm/organisation	17%	28%	32%	27%	18%	14%	23%
Protect jobs/prevent redundancies	36%	13%	21%	23%	22%	17%	22%
Help with public health efforts	12%	24%	23%	20%	19%	18%	19%
Build a positive working environment, even where work has been done remotely	20%	21%	21%	21%	18%	12%	19%
Provide financial support to employees who require it	12%	21%	14%	15%	15%	23%	17%
Support employees with children	8%	22%	21%	12%	16%	12%	15%
Support employees with commuting to work	5%	22%	15%	17%	17%	13%	15%
Provide mental health support to employees who require it	25%	11%	10%	16%	10%	15%	15%
Ensure top executives/ senior management act responsibly	6%	9%	8%	15%	15%	20%	12%
Provide transparency on business activities and planned business decisions	10%	8%	6%	4%	5%	8%	7%
Give a strong voice to employees	9%	6%	7%	10%	6%	3%	7%
Provide cheaper or free goods/services for customers who are key workers in the economy	6%	7%	3%	4%	6%	3%	5%
Make changes to improve the business' impact on the natural environment	4%	4%	6%	5%	6%	1%	4%
Improve the diversity of senior management teams and the workforce	4%	3%	3%	2%	4%	5%	4%

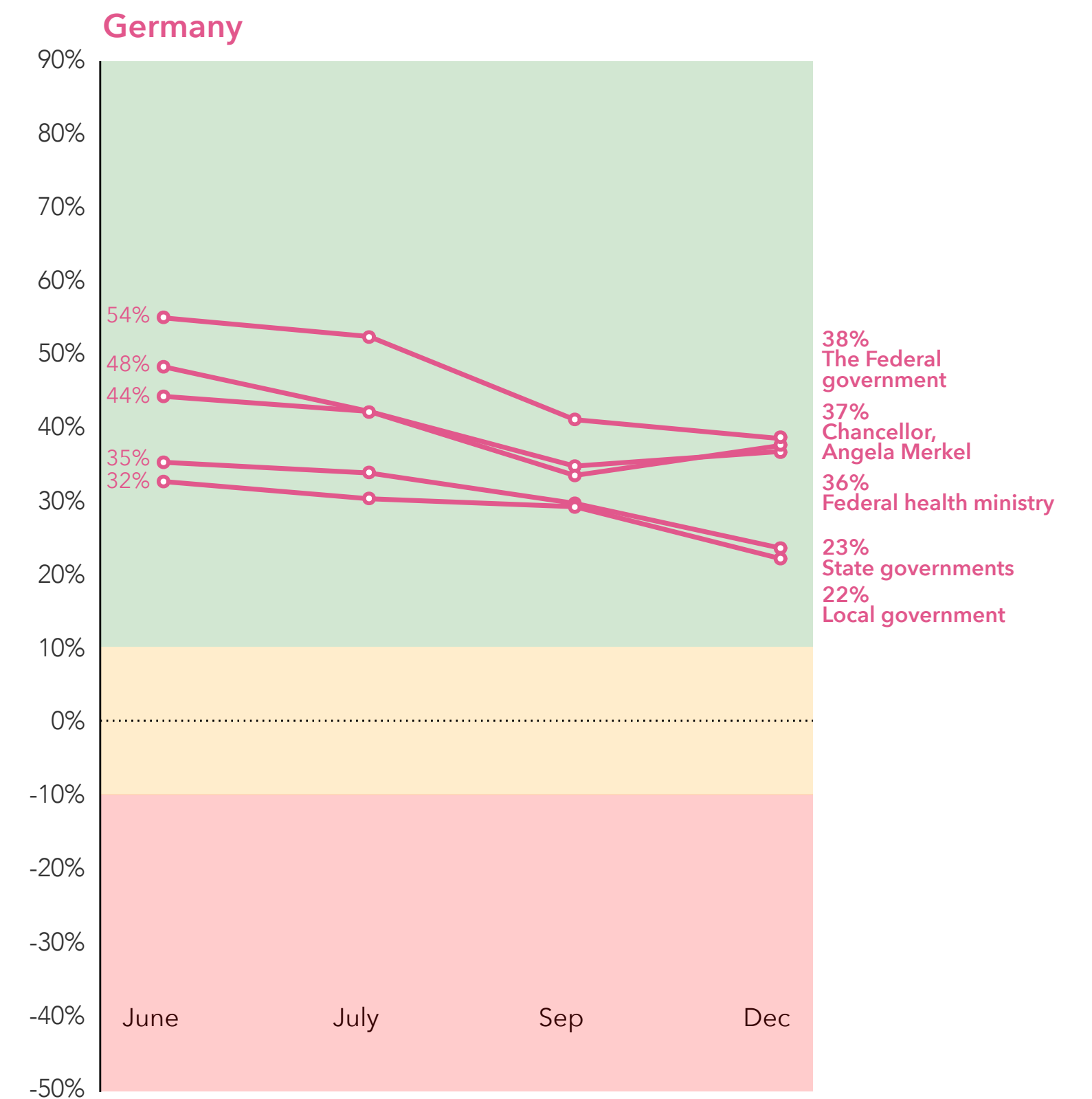
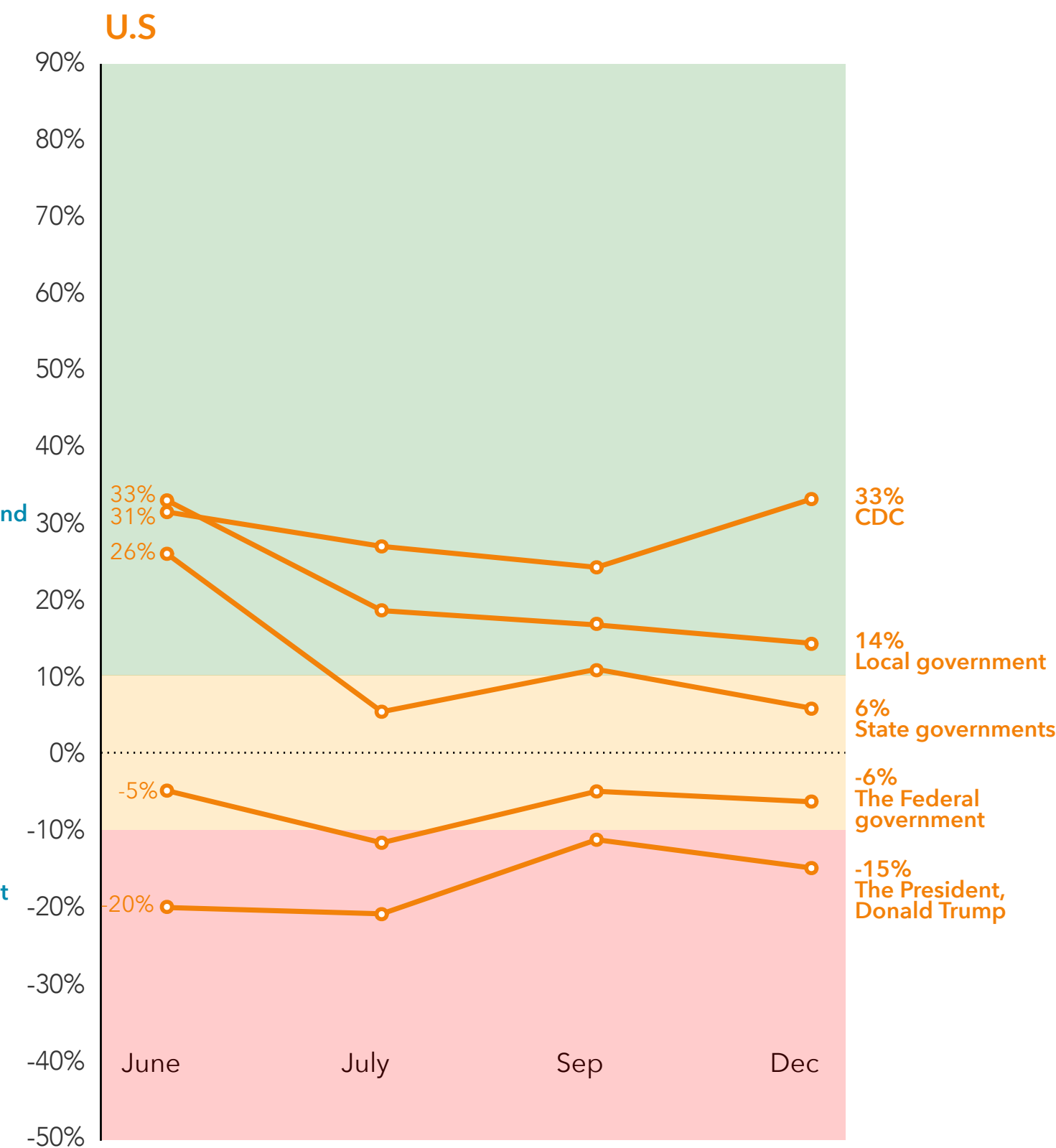
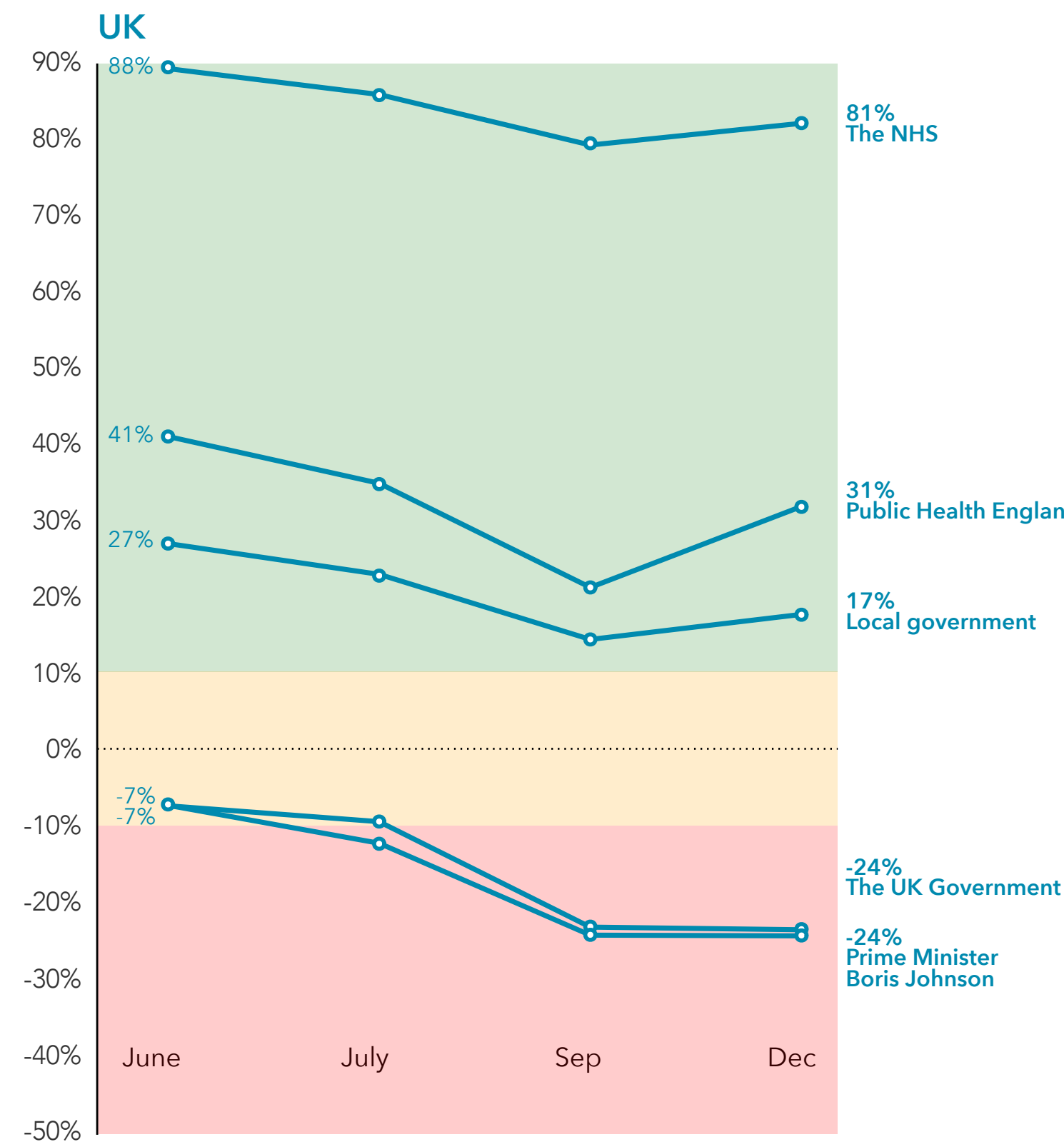
Respondents across all countries were asked what their employer should prioritise the most over the next three months. Displayed are the percentage of respondents in each markets who put each statement in their top three priorities.

- Employee priorities remain similar to where they were in September, with pay being kept at a reasonable level the top overall priority and the highest in Japan and France. There has been some element of change. In the UK, **providing mental health support to employees who require it** has increased in importance, from 17% to 25%. And across all countries, **providing support for employees who work from home** has increased in importance from the fourth-most important priority to the second. This is especially clear in Sweden, where it has increased from 30% to 35%, and is now the clear top priority for Swedish employee.
- As in September, German employees name their top demand as to **"Build a feeling that we are all in this together as a firm"**, and American employees prioritise wanting support with working from home. Significantly lower down the list of priorities for the next three months is to **improve diversity** or to **make changes to improve the business' impact on the natural environment**: when it comes to the next three months, employees' personal, working and financial situations are top of mind.



8 Performance of institutions

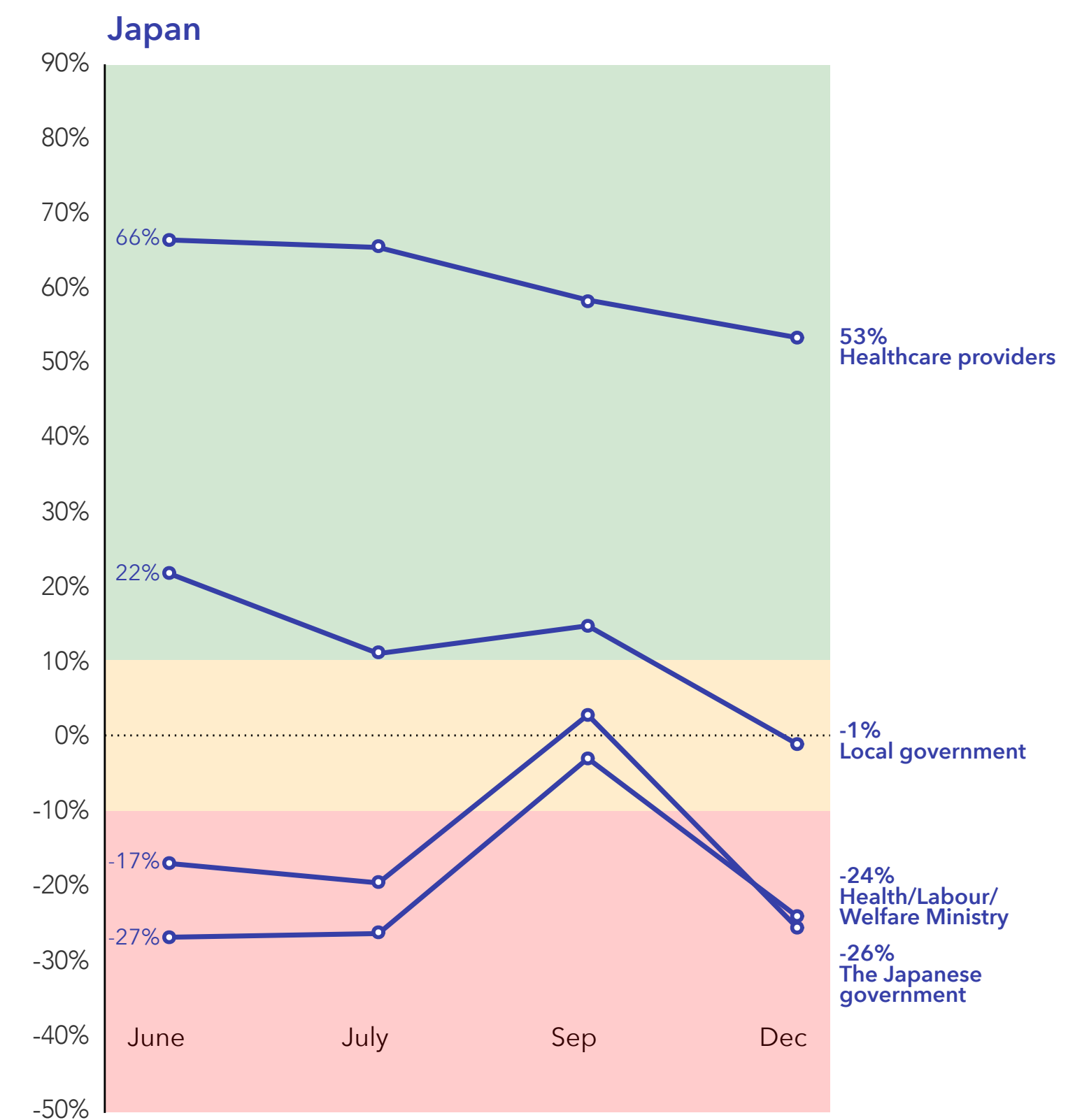
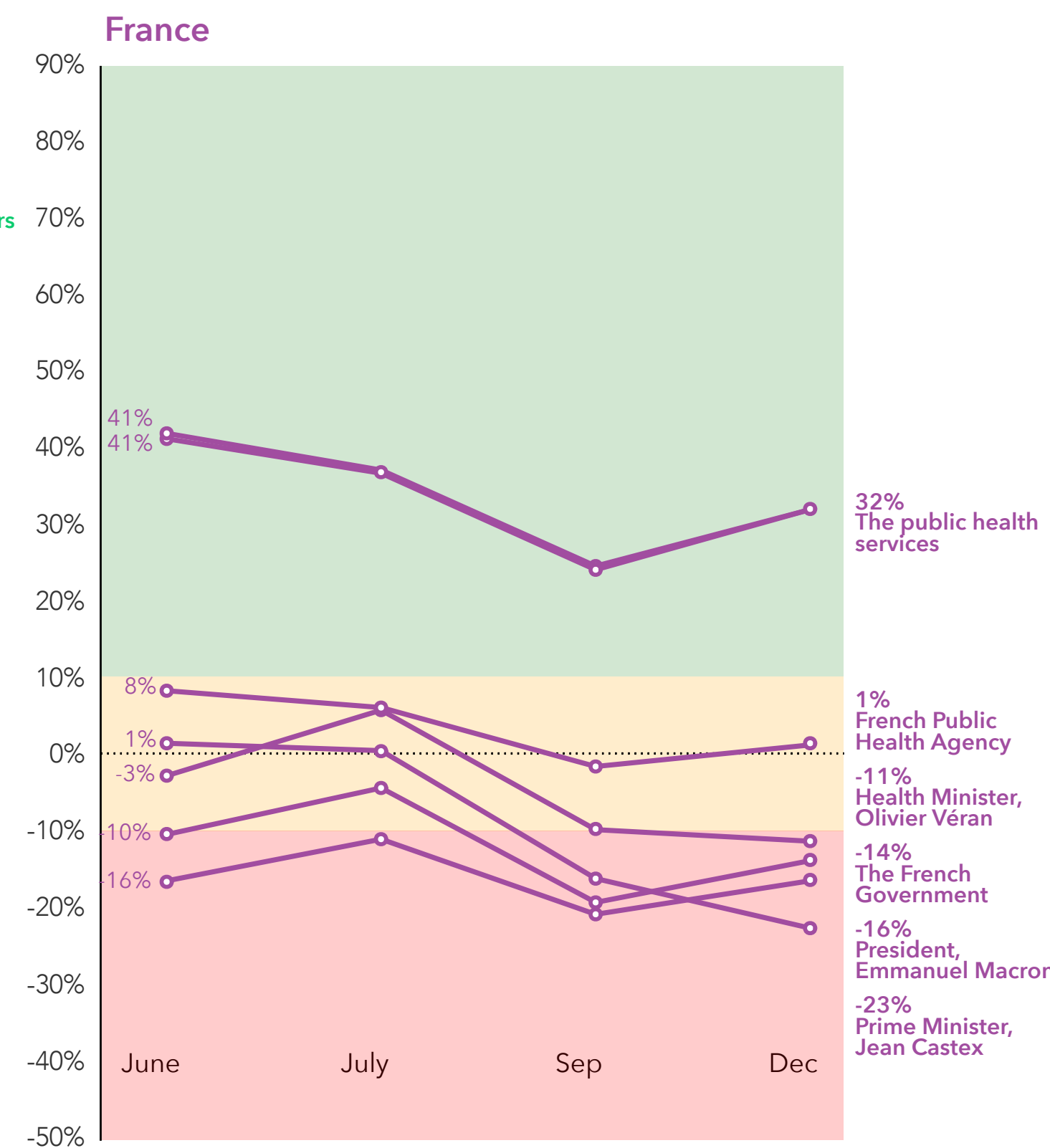
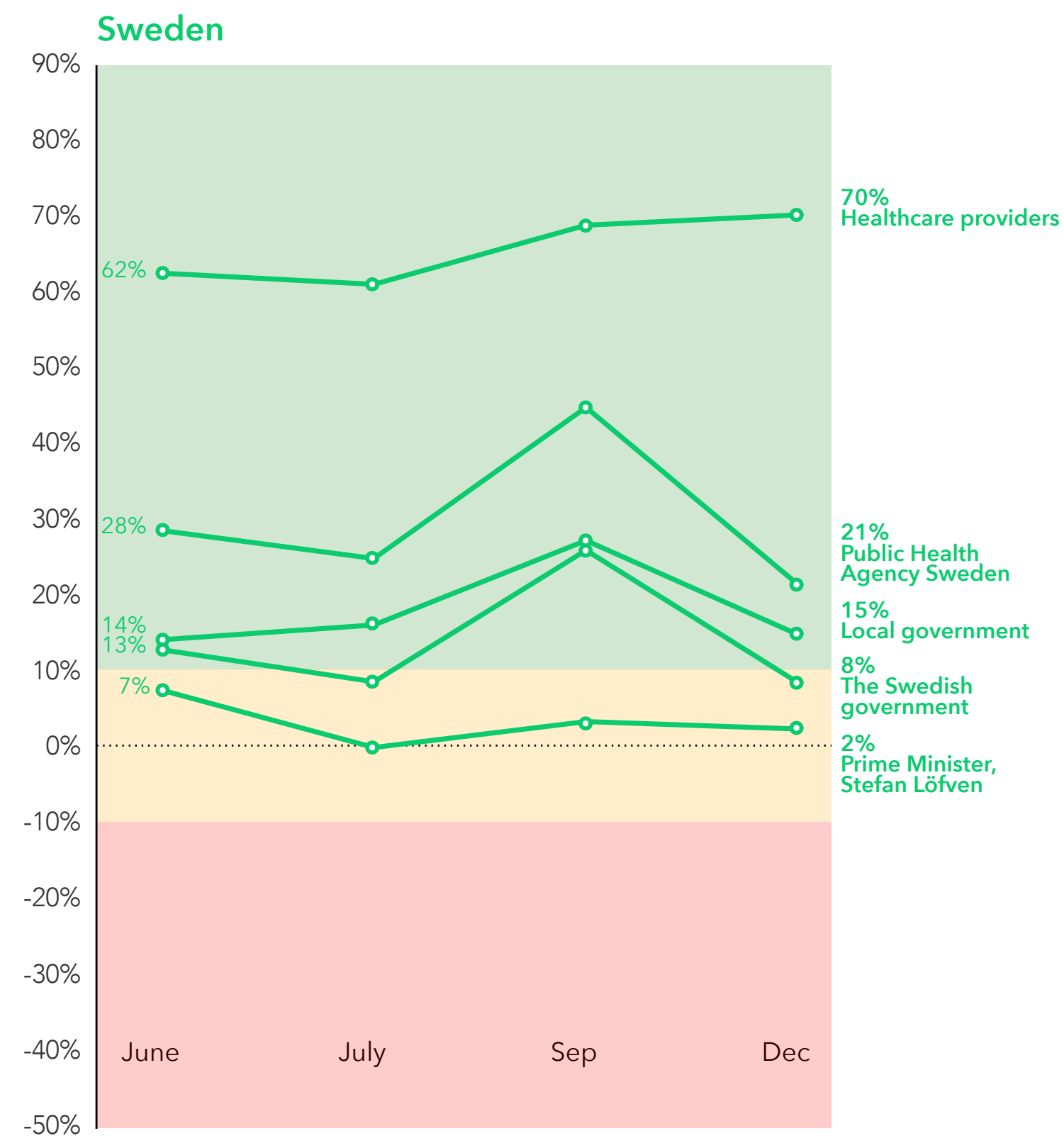
The British losing faith in their institutions; German support for institutions is on the decline but remains high



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.

8 Performance of institutions

Faith amongst Swedes in their public health agency and government is shaken, and no governments see a particular 'vaccine boost' to their popularity



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8 Performance of institutions

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- Overall this has been a period of inertia for leaders and political institutions in the U.S., France, Germany and the UK. **People have not fundamentally changed their assessments of those who lead them in light of good news on vaccines.** Only health agencies and pharmaceutical companies are getting a boost. Where ratings were favourable in Germany they have remained so and where they were lower in France, the UK, and the U.S. they have also remained so. In Japan there has been a **sharp decline in views of its political leadership.**
- **Sweden has seen a general decline in faith in the Government and a particularly sharp decline for the Public Health Agency of Sweden** since September and that carries over to both the local and national governments. Healthcare providers in Sweden have seen a continued increase in their rating and are now 8 points higher than where they stood in June at +70%. Elsewhere in Sweden the food and essential retail sector has seen a sizeable drop in assessments of its performance from +58 to +41. That is mirrored by a sharp uptick in assessments of the pharmaceutical industry (up from +36 to +42) whilst social media still receives a lukewarm reception for its performance with a rating of +13.
- **France has the least positive views of its leading institutions of the six markets surveyed.** Views of political institutions outside of the local mayors are still heavily negative. Jean Castex, despite his relative novelty, has a rating of -23 which puts him in line with other political figures in the form of Boris Johnson (-24) and Donald Trump (-15). Emanuel Macron continues to fare slightly better than his premiers (the public put him at -16, just lower than Trump). The response to the pandemic at the local level continues to receive higher marks. There has been barely any decline in the ratings for the mayors since June. The public health services continue to also perform well above other institutions at +32. A French public who have been more sceptical about the pharma industry than any other market have been moved by news of safe effective vaccines. Approval of the pharmaceutical industry has leapt from +2 to +18 between September and December, but is **still the lowest of any market to go along with the reluctance amongst a large part of the French public to take a vaccine if offered.**
- It appears too that a third wave, albeit smaller than European second waves has rocked faith in Japan too. A significant recovery in September for all the political institutions has now reverted giving the **Japanese government the worst ratings of any government.** This is despite the fact it has performed better on every coronavirus metric than any of the other markets we polled. This scepticism about political institutions does not, however, extend to other sectors in Japan. Essential retailers and online retailers continue to show the same positive patterns of approval that we see in other markets and **the automotive sector comes out highest of any of the six markets including Germany where average ratings are much higher.** Perceptions of the pharmaceutical industry in Japan have not jumped up on vaccine news as they have in other markets.

12 POINTS

The average increase in the ratings of the pharmaceutical industry before and after the announcement of the first successful vaccine

8 Performance of institutions

Faith amongst Swedes in their public health agency and government is shaken, and no governments see a particular 'vaccine boost' to their popularity

- In the U.S., the **Federal Government and President Donald Trump largely maintained the small improvement in how they are perceived to have handled the pandemic from September.** The Presidential election defeat and spiralling cases of Covid-19 have yet to send perceptions of his handling through the floor as polarisation continues to limit his losses. **Local and state governments continue to perform better** than the federal government in perceptions of their pandemic response. In light of the announcement of a safe effective vaccine from a US pharmaceutical, company. both the CDC and the pharmaceutical industry have seen a marked increase in public positivity. The CDC is up 7 points and the industry as a whole is up 10 points in the public's eyes. Social media companies continue to be underwater with the public (on -3) while online retailers continue to trend upwards - now at +59 and the highest rated sector.
- **In the UK the wide chasm between those perceived to have responded well and those who have not continues.** Boris Johnson's government is in the latter category of poor performers. It has stabilised declines from early in the summer at -24 for both the government and the PM personally. The NHS continues to lead the winners group with a rating of +81 - the highest rating for any institution in the

world. What is more surprising is that online retailers and brick and mortar essential retailers both rate almost as highly as the NHS for their response (both on +80). **As the UK begins its vaccine rollout, this survey shows the largest increase in the ratings of the pharma industry** in any market in the UK (up from +51 to +69). On the other hand the British public remain less convinced by the response of social media companies to the pandemic as they trail on -9, the joint lowest of any market with France.

+81 POINTS

The UK National Health Service has the highest rating of any institution in the world for its response to the pandemic

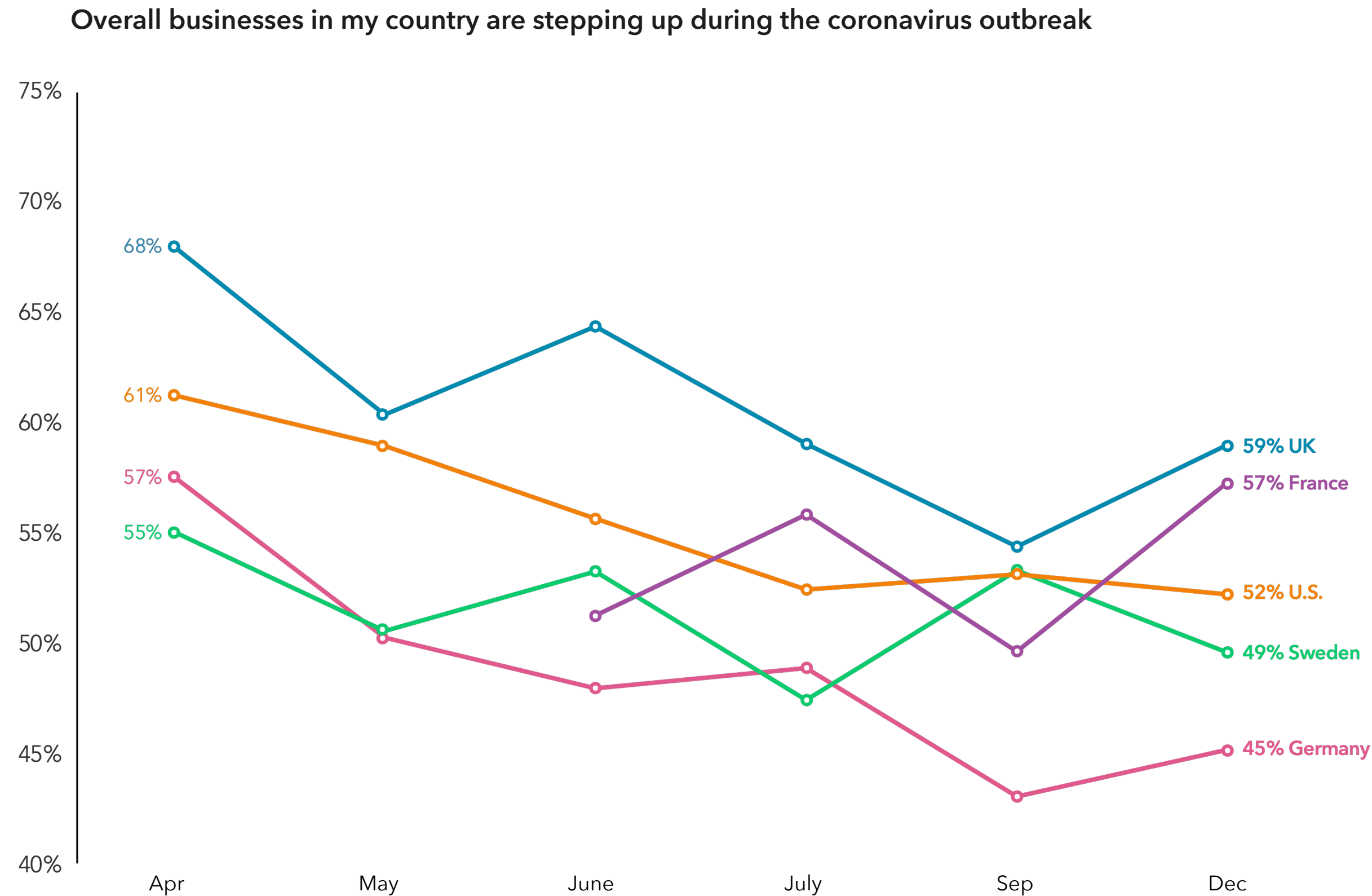
- **In Germany political institutions continue to suffer attrition in their approval that began in the summer, whilst there is a picture of complete stability for other sectors, with the exception of the pharmaceutical industry.** The Federal Health Ministry and Angela Merkel have seen modest increases in their ratings (+2 and +4) whilst the Lander (down 6) and local governments (down 7) continue to decline gradually. The Federal response is much more highly rated than local responses to the virus and in this regard Germany continues to buck the trend seen in other markets. However, overall the Federal government's approval is down 16 points since early summer. The large German contribution to the first vaccine is accompanied by a 15 point bounce in ratings for the pharmaceutical industry. In other respects perceptions of industries in Germany remain stable and high in global context.

+37 POINTS

Angela Merkel remains the most popular political figure in any of the six markets by 35 points

9 Business brands

Views of business rallies in the UK and France, but is falling in Sweden and the U.S.



12 POINTS

The decline in the proportion of Germans who feel business is stepping up during the pandemic since April

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 **up amongst the British and French public**, by 5 points in the UK and 8 points in France.
- The picture is flatter in other countries and in Sweden there has been a 4-point decline.

10 Country ratings

Germany still perceived as the best performing country during the pandemic, alongside Japan and South Korea - while the UK and U.S. are at the bottom of the table

Net % rating for each country for its pandemic response

Each country's assessment of...

...these countries

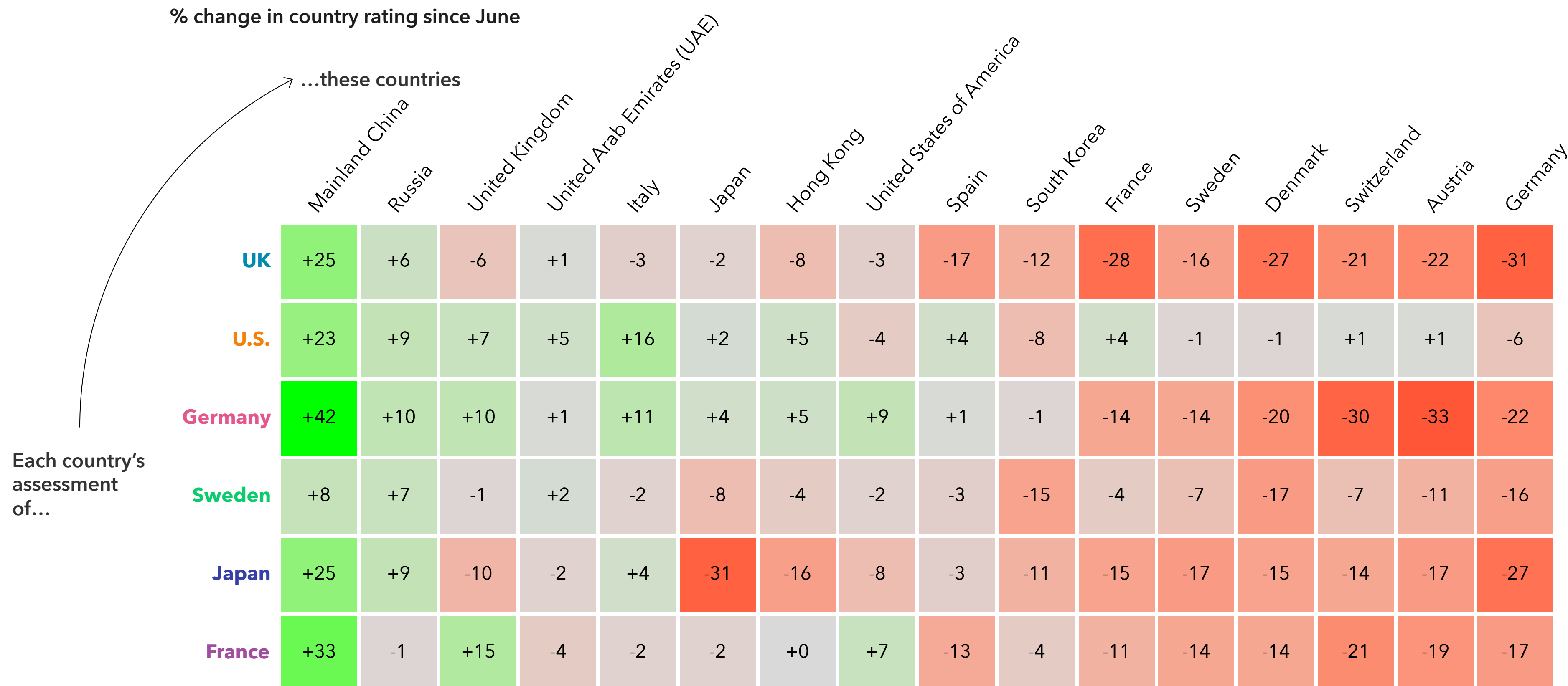
	Germany	Japan	South Korea	Denmark	Switzerland	Hong Kong	Austria	Mainland China	United Arab Emirates (UAE)	Sweden	France	Russia	Italy	Spain	United Kingdom	United States of America
UK	32	31	42	20	18	17	11	7	11	-1	-13	-15	-19	-21	-32	-76
U.S.	18	25	22	19	20	14	17	-3	9	10	7	-2	-1	-2	7	-19
Germany	39	22	25	17	10	10	6	17	-4	-17	-16	-33	-30	-29	-39	-64
Sweden	23	20	18	33	15	8	7	0	2	6	1	-15	-16	-12	-10	-51
Japan	-11	-19	0	-11	-8	-1	-8	-17	-18	-17	-37	-30	-40	-37	-33	-58
France	41	33	33	24	21	23	18	20	5	5	-18	-5	-18	-19	-27	-54

- Respondents across all countries were asked whether they thought a range of countries, including their own, had done well or badly at handling the coronavirus crisis overall. Displayed here is the net score given for each country in each of the markets surveyed.



10 Country ratings

China sees the biggest improvement to its rating since June, while Germany and Austria flounder - and France and Sweden take hits too

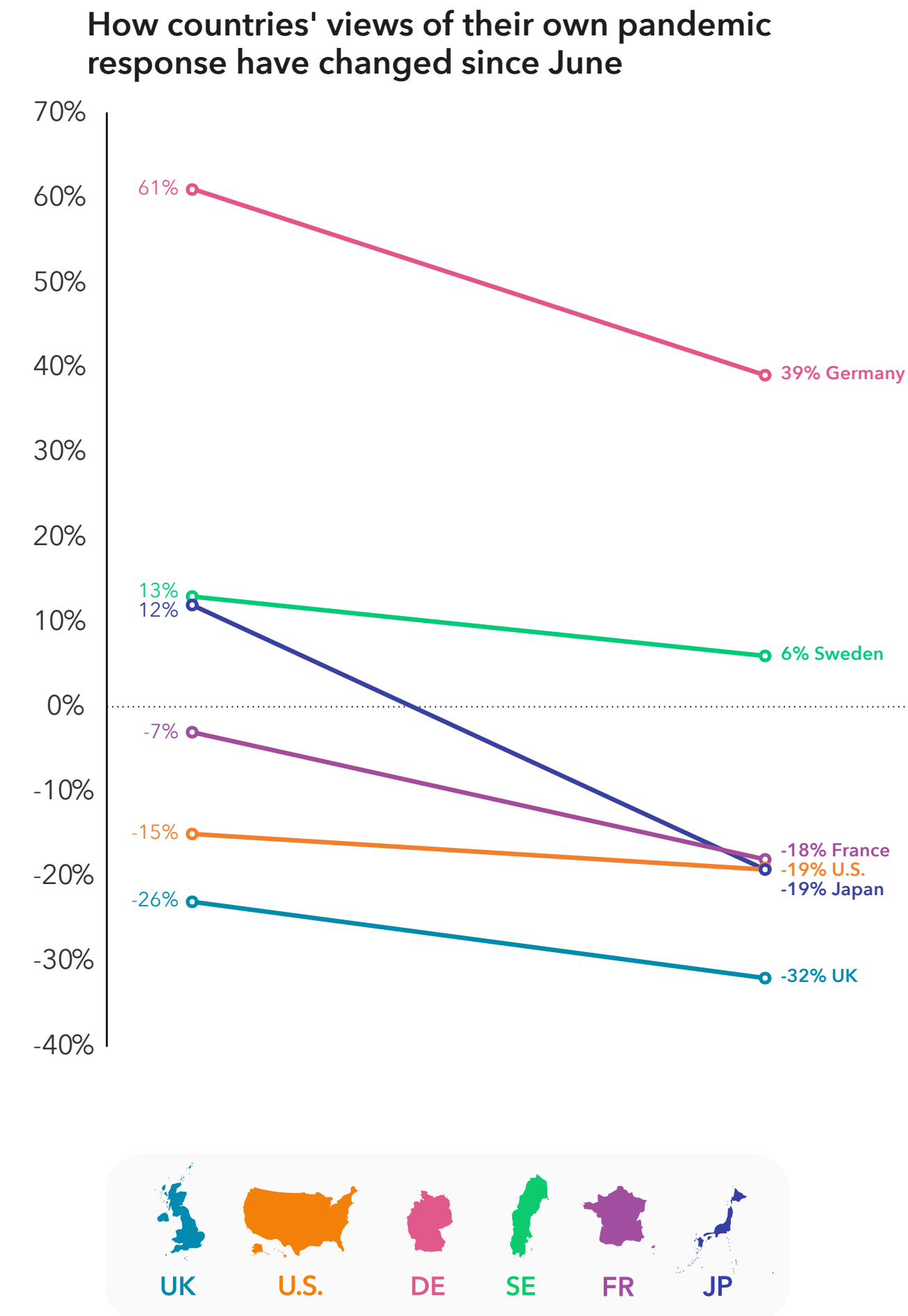


- Respondents across all countries were asked whether they thought a range of countries, including their own, had done well or badly at handling the coronavirus crisis overall. Displayed here is the change in net scores given between June and December.



10 Country ratings

All populations have become more critical of their own country's pandemic performance since June - with the sharpest declines in Germany and Japan

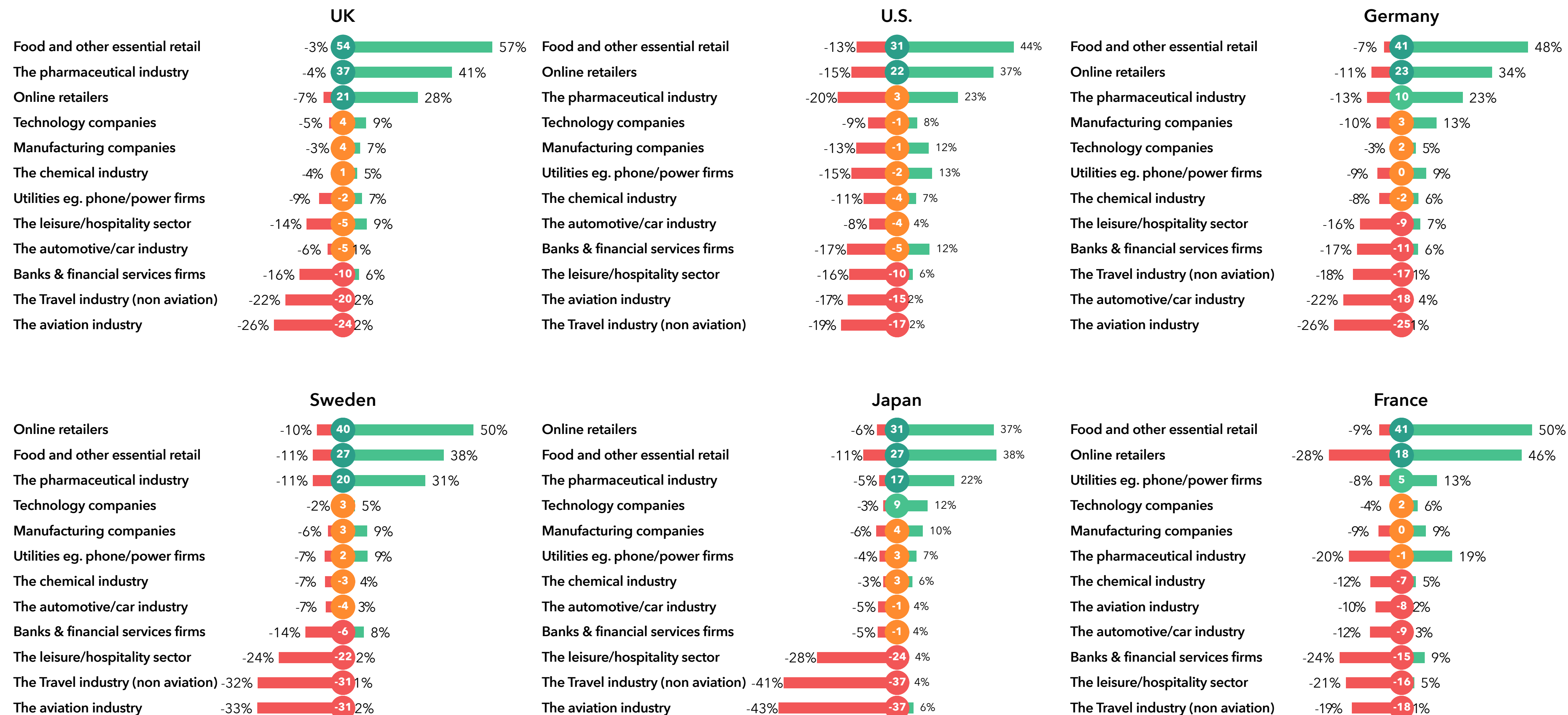


- Perceptions of how several European countries have handled the coronavirus crisis have **worsened considerably since June**. The decline is most marked in regards to **Germany**, where the opinion of our six countries has dropped by double digits since June - including amongst Germans themselves. **Austria, Switzerland, Denmark, Sweden and France have also suffered**.
- The UK has seen modest improvements, particularly amongst the German, French and American public. Russia has also seen an improvement, but the most dramatic movement since June is in how people see China having dealt with the pandemic. **China has seen significant double-digit increases in the perception of how well it has done**, particularly amongst Germans (+42) and the French (+33). However, when compared to all other countries it remains in close to neutral territory.
- Looking across the ranking as a whole, **Germany remains the country best-rated by global opinion for its response to the pandemic**, followed by Japan and South Korea. **The U.S. is the worst rated country globally**, followed by the UK.
- The Japanese public have become **sharply more critical** of how their own country has responded to the coronavirus pandemic compared to June, with a fall of 31 net points. This is despite Japan being rated as the second-best country overall by the rest of the countries surveyed.

11 Industry winners and losers

Food, pharma and online retailers come out of the pandemic with the better reputation – while travel, banks, and aviation suffer

Q. Of the following industries, which have you had the most positive/negative view of during the coronavirus crisis? Choose the top two



11 Industry winners and losers

Food, pharma and online retailers come out of the pandemic with the better reputation – while travel, banks, and aviation suffer

- In every market other than the UK, **food and other essential retail along with online retailers make up the top two winners** – those who the public feel most positively about during the pandemic. Online retailers attract little opprobrium. Whilst the policy debate swirls around the externalities of a retail sector dominated by online, resulting in job losses and depleted high streets, **only very small portions of the public say that they now have a more negative view of the sector**. France is the real exception to this trend where despite 46% of the public putting online retailers in their top two most positive, 28% put them in their top two most negative.
- Despite the best efforts of the leisure and hospitality sector to adapt to cope with coronavirus restrictions and the huge hit it has taken in all six markets, **consumers have seen the sector in a worse light**. In Japan 28% of people said that leisure and hospitality was in the top two most negative during the pandemic. The figure is 24% in Sweden and 16% in the US. Very few people in any of these markets said that their view of leisure and retail was the most positive.

- The pharmaceutical industry ranks consistently third in four of the five markets (US, Germany, Sweden and Japan) with **large numbers of the public saying that it was an industry in their top two most positive during the pandemic**. There are some exceptions and nuances – in France the scepticism towards the industry throughout this report is on display with more people ranking the industry in the two most negative than rank it in their two most positive (20% to 19%). In the U.S/ a fifth (20%) of people say that it is in their two most negative which is just below the 23% who rank it in their two most positive. In the UK the view is different – almost nobody in the UK placed pharmaceutical companies in the two most negative (just 4%), with 41% saying that it was in their two most positive. This makes it the second ranked winner in the UK after essential retail.
- **The travel and aviation sectors are consistently ranked as the losers reputationally from the pandemic**. Despite the scale of the impact on both industries and that they have largely been passive victims of the virus, the public say that they have had the most negative view of these two sectors. In Japan the effect is particularly marked with 41% placing travel in their two most negative and 43% saying the same for aviation. In Sweden the situation is almost as bad with 32% and 33% respectively. Around a fifth of people in all the remaining markets said the same and there is a great deal of consistency in this view. The question that this raises is whether this outlives the pandemic, and whether broader negative feelings about air travel have taken hold.

- **In France and Germany the automotive industry has taken a hit to its reputation during the pandemic**. In Germany 22% of the public had the sector in their two most negative and in France 12% said the same

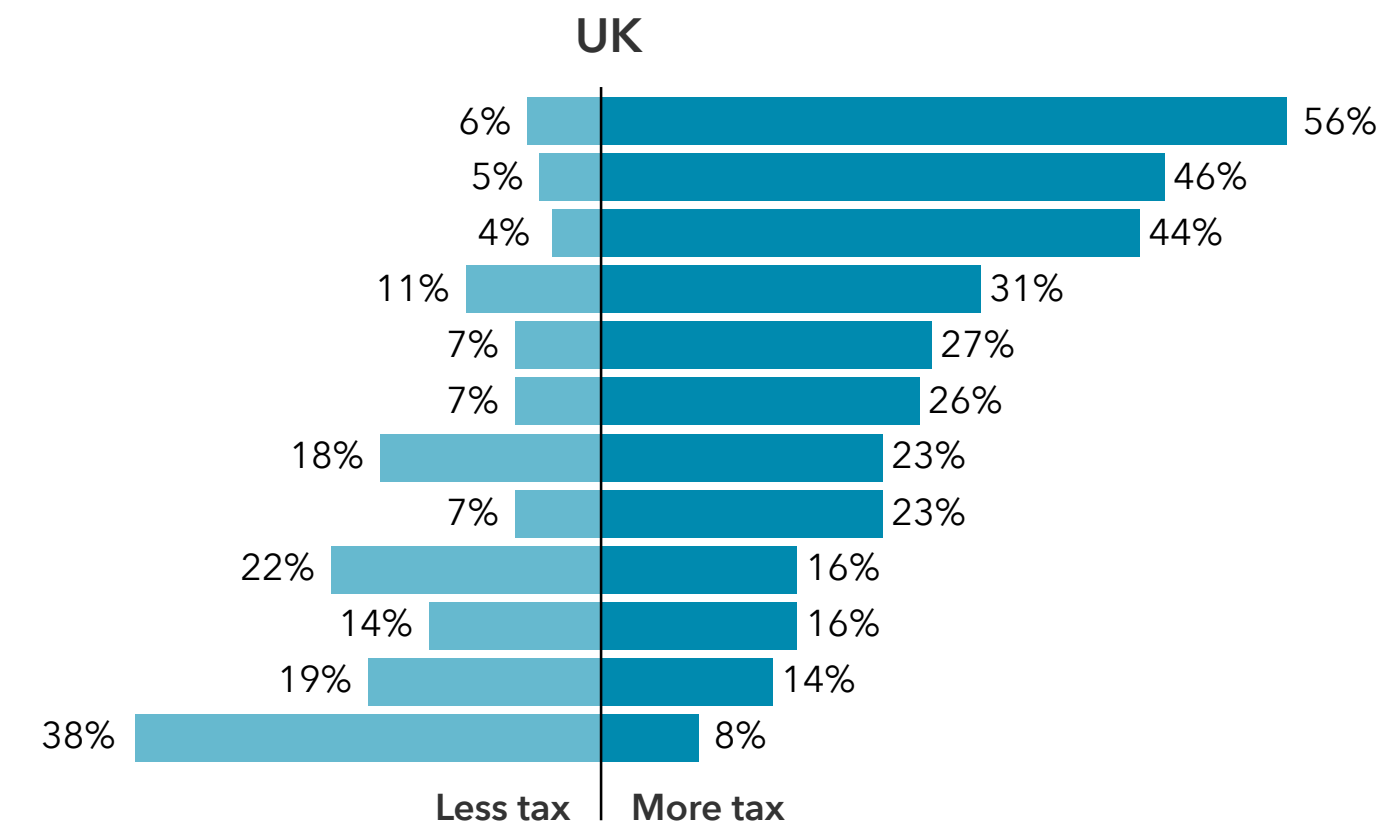
43%

in Japan say the aviation industry is one of the sectors they have the most negative view of

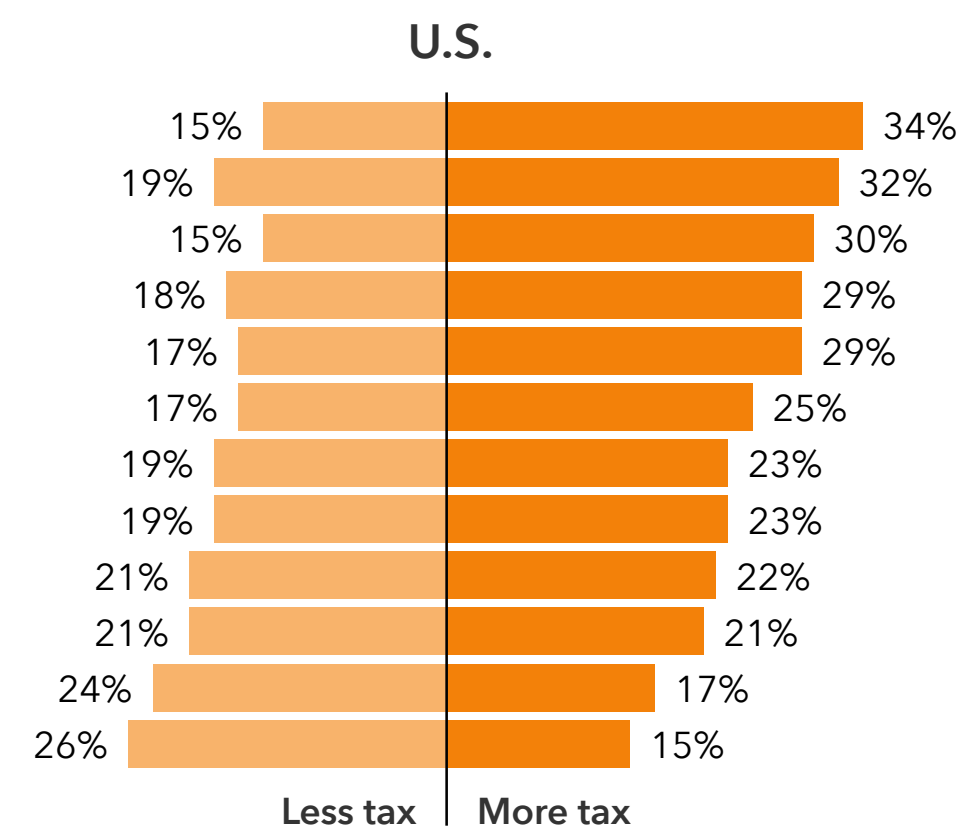
12 Where should the tax burden fall

Looking ahead to potential tax rises, people want online retailers, financial services, pharma, and technology companies to shoulder the tax burden

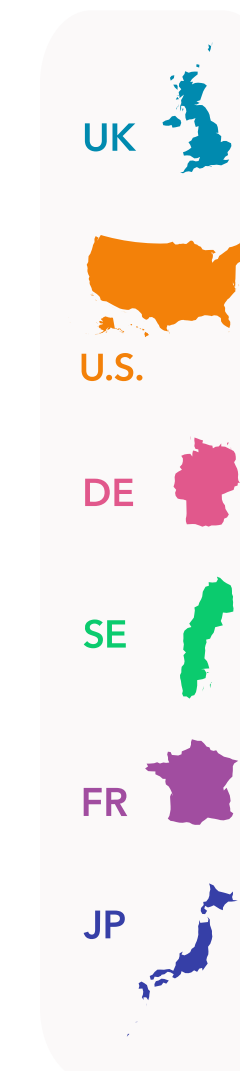
Online retailers
Financial services companies, including banks
Technology companies
The pharmaceutical industry
The chemical industry
Utilities, like telephone and power companies
The aviation industry
The automotive/car industry
The travel industry (not including aviation)
Manufacturing companies
Food, convenience and other essential retailers
The leisure/hospitality sector



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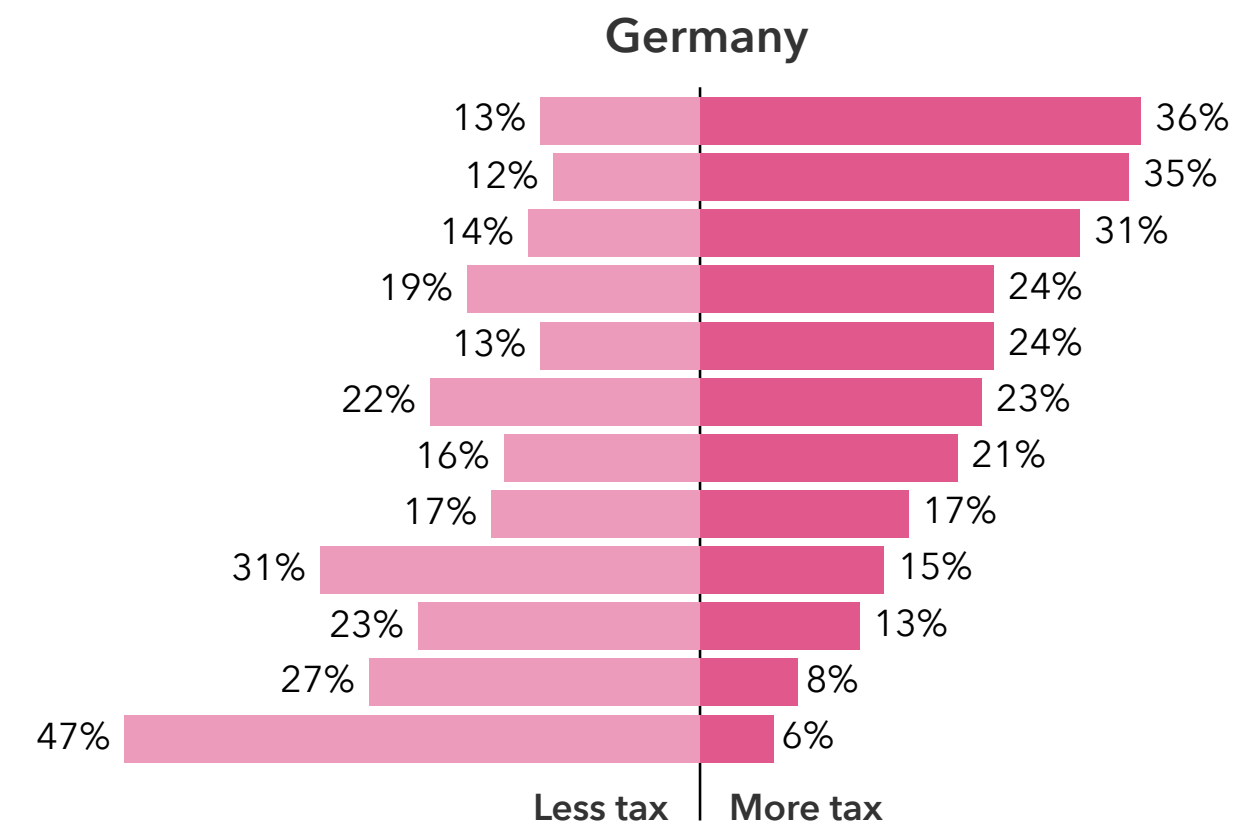
- Q. After the coronavirus pandemic is over, some have argued there should be an increase in taxation to pay off national debts. For each of the following industries, please indicate whether the following industries should pay more tax or less tax.



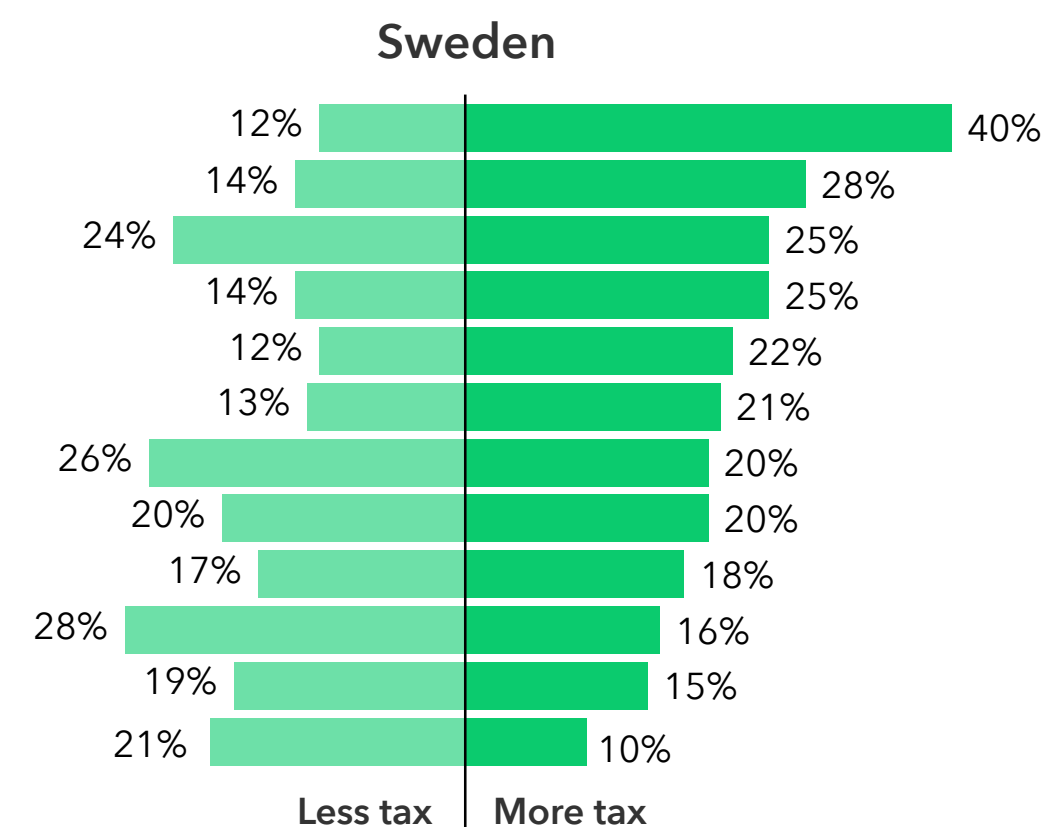
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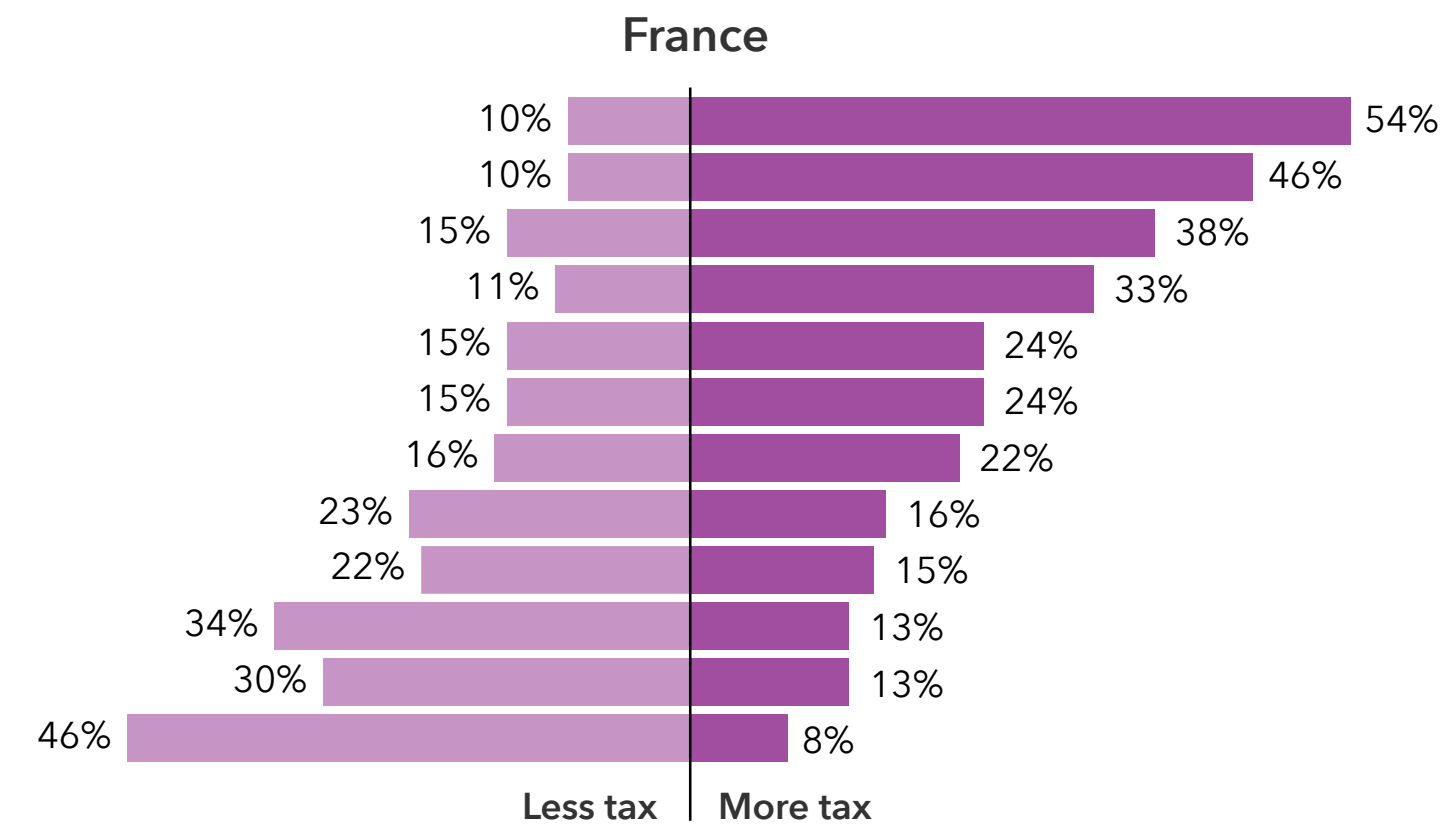
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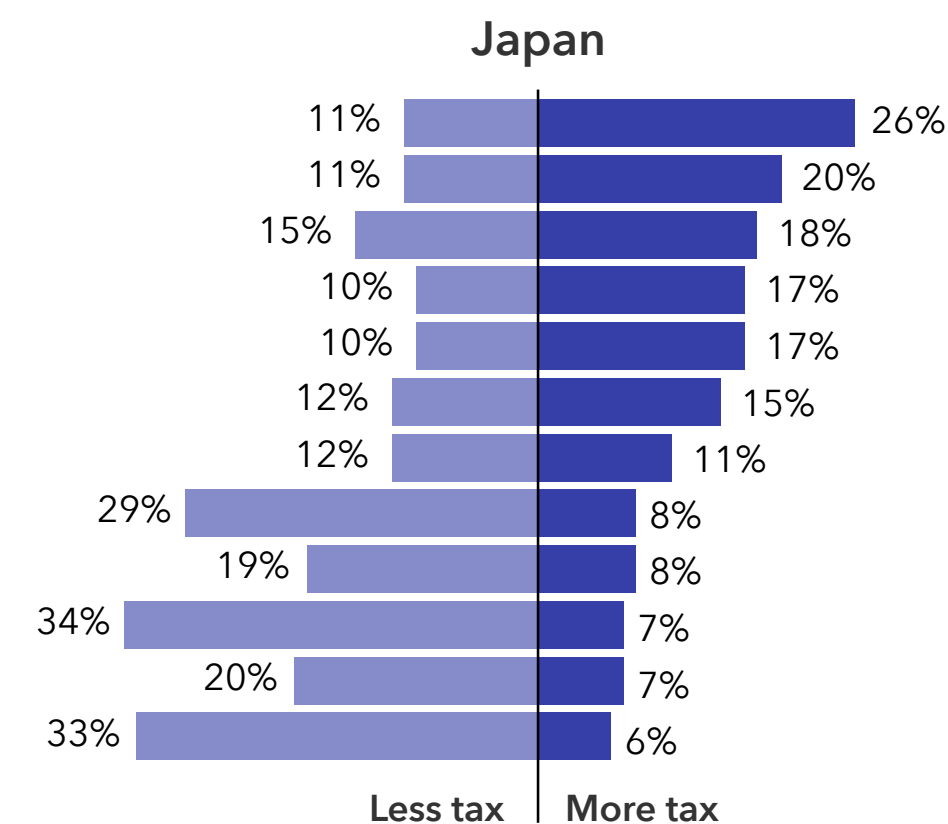
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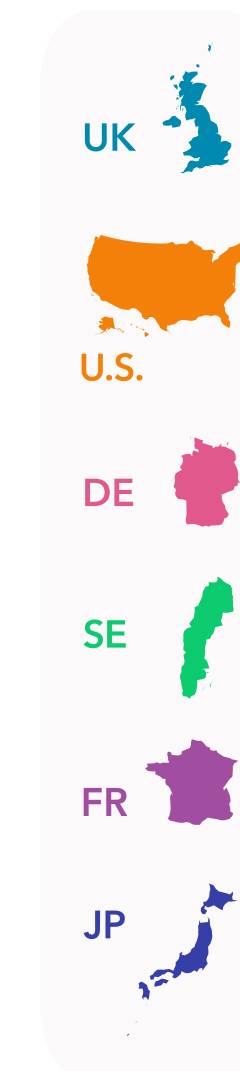
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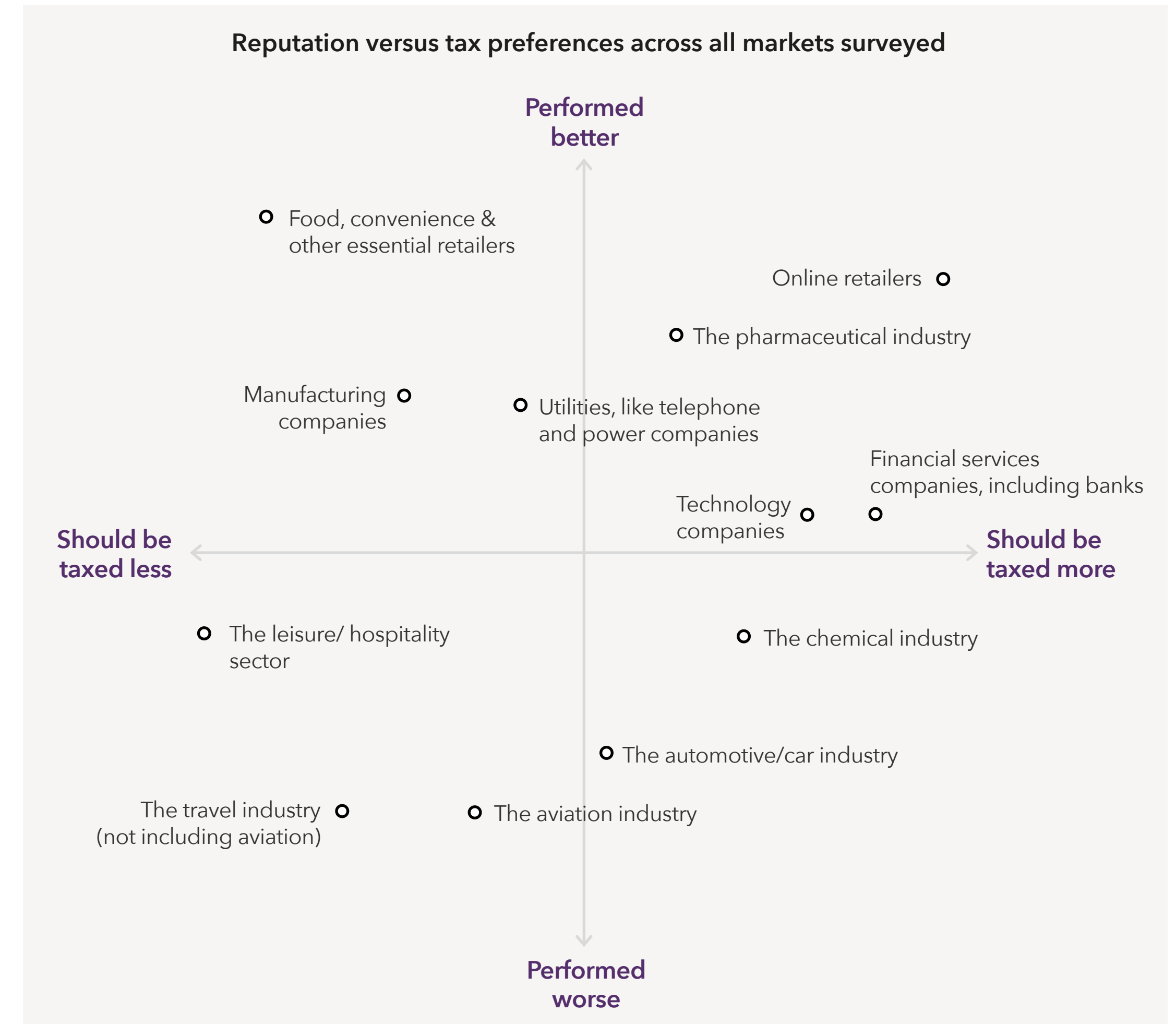
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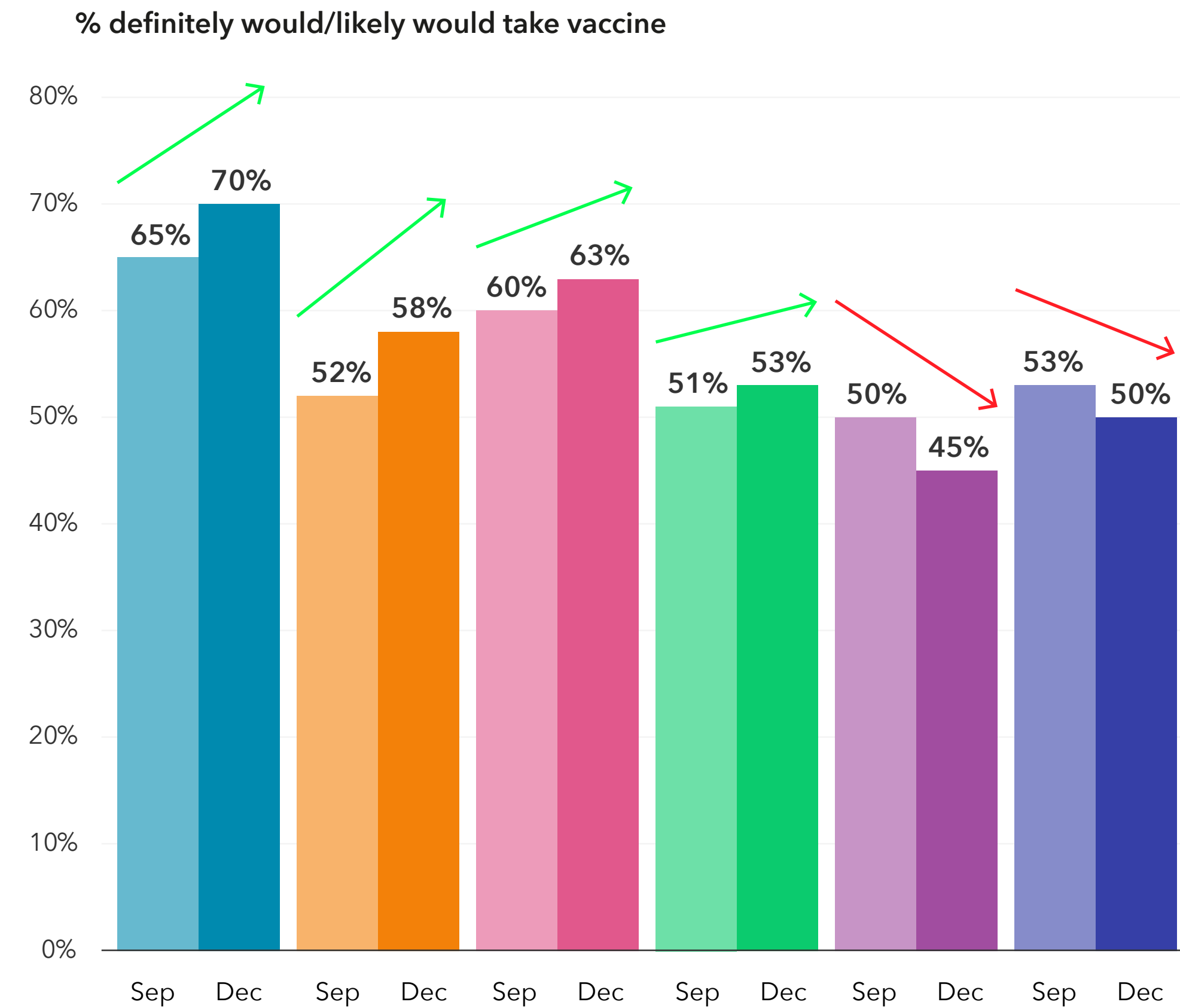
Across markets an industry's pandemic performance does not automatically match views of how its tax burden should change to pay for the recovery

- With debt burdens high and increased taxation on the agenda, respondents were asked whether they wanted a range of industries to pay more or less tax in the years ahead.
- Despite pharmaceutical companies having delivered the silver bullet to potentially end the pandemic, the public thinks that they **should share a bit more of the tax burden** in the rebuilding phase than they currently do.
- **Online retailers** - the undisputed winners in the public's eye so far - should face a far greater level of tax according to the public.
- **Technology companies** have had a middling performance according to the global audience surveyed, but should, they believe, also face a higher tax burden
- The sectors that should have their taxes reduced according to the public are split in two - one that they want to compensate and one they want to reward
- The public want to **compensate industries who have suffered through no fault of their own - leisure, travel, aviation and hospitality**. In particular the public demand tax breaks for the leisure and hospitality sectors. And they want to reward the essential brick and mortar retailers who have delivered the goods throughout the pandemic.
- In Germany, the public want to see **the automotive sector** face a greater tax burden in the years ahead, with three in ten saying it should pay more tax and only 14% saying less - despite its economic performance in the pandemic



13 Likelihood to take a vaccine

In the UK, U.S., Germany and Sweden, uptake of the vaccine has increased since September, but in Japan and France it has declined - to just 45% in France

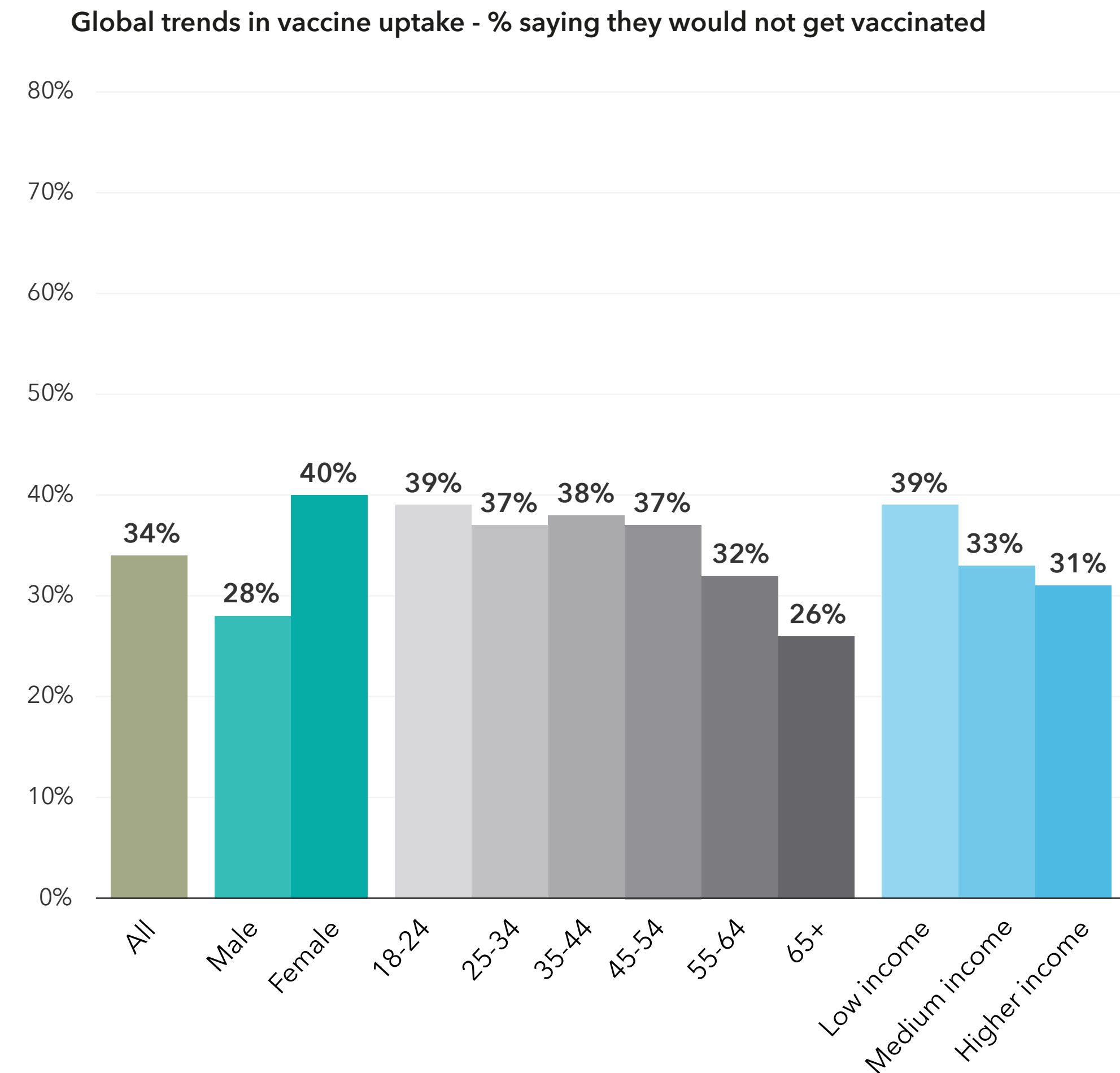


Respondents across all countries were asked whether they would definitely, likely, unlikely, or definitely not take a vaccine against coronavirus.

- The country with the **highest proportion of people who say they would definitely or likely take a vaccine is the UK**. Here, 70% say they would do so, with 23% saying they definitely or likely would not. This is an increased uptake on September, with an increase of five percentage points.
- **The U.S. has also seen an increase**, here of six percentage points, with 58% of Americans saying they definitely or likely would take a vaccine. Just under one in three (32%) say they would not, though this is a decrease from 39% in September.
- **Germany and Sweden have seen modest increases in projected vaccine uptake**, within the margin of error, with German uptake now at 63% (the second-highest overall) and Sweden at 53%
- Japan and France have seen a different trend. **Uptake in Japan is down** within the margin of error, on 50% from 53% two months ago, with 35% saying they definitely or likely would not get a vaccine.
- In France, the picture is stark. Not only is uptake down from 50% to 45%, **almost as many (44%) say they would definitely or likely not get the vaccine**. This means that, as in September, **projected uptake in France is the lowest of all markets surveyed**.

13 Likelihood to take a vaccine

Women, younger people, and low-income workers are the groups least likely to take a coronavirus vaccine

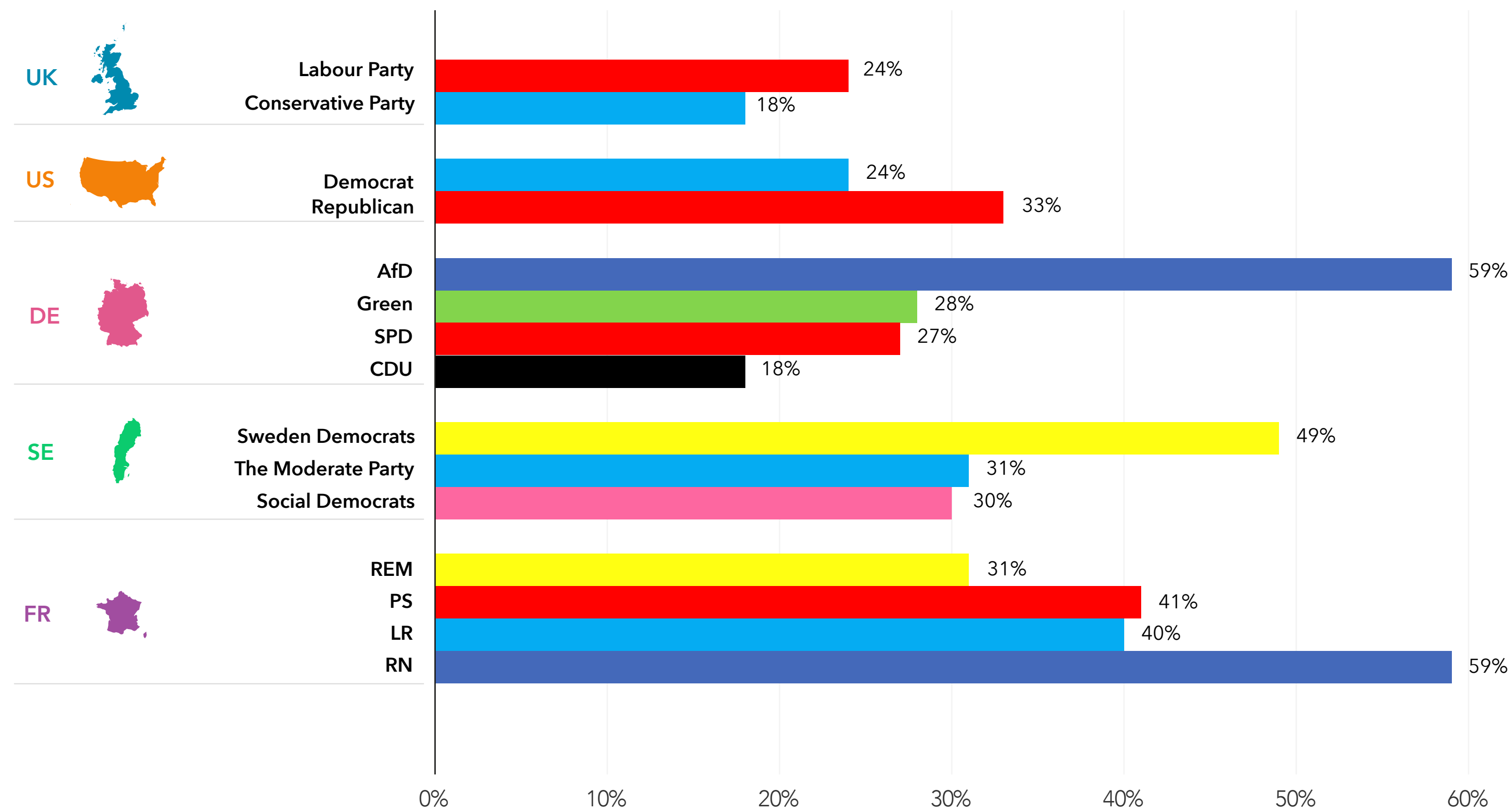


- **There is a substantial gender gap on vaccine uptake, with women less likely to say they will take a coronavirus vaccine.** This is starkest in Sweden (where 49% of women say they would definitely or likely not take a vaccine, compared to 31% of men) and the U.S (41% to 23%), but also the UK (29% to 18%), Germany (39% to 21%) and France (48% to 41%). There is no gender gap in Japan.
- **Younger people are also less likely to get the vaccine.** In the UK, 33% of the 18-44 age group say they would or would likely not, compared to 16% of over-45s. Similar trends are apparent in Germany (37% to 26%), Sweden (48% to 33%) and France (47% to 42%). The age groups least likely to get the vaccine are not the very youngest, but in the 34-44-year-old category. France does see one exception, with 45-54-year-olds the least likely group to get the vaccine, with only 40% saying they would definitely or likely take it. In Japan, the age picture is reversed, with **over-45s less likely to take the vaccine** - while in the U.S. there is no substantial age difference.
- Income does not play a significant role in the UK, USA, or Germany, but features in Sweden, France and Japan, where low-income people are significantly less likely to say they would get the vaccine. This is most marked in France, where **56% of low-income voters say they would not get the vaccine, compared to just 38% of high-income workers.**

13 Likelihood to take a vaccine

Which party someone supports plays a role in how likely someone is to say they would take a vaccine, with supporters of populist parties the least likely to be vaccinated

% who are definitely would not or likely would not take a coronavirus vaccine

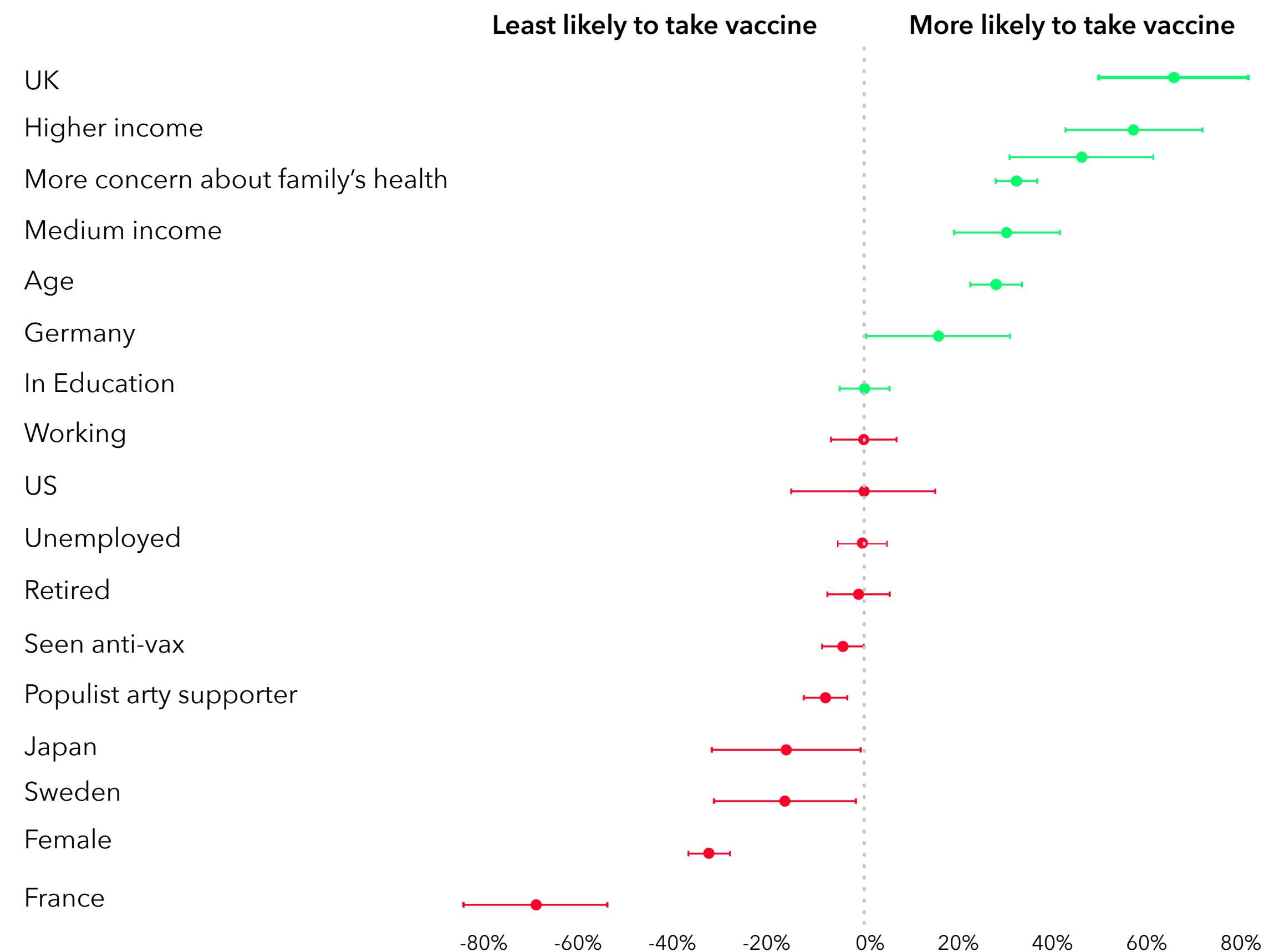


- Political party allegiance plays a role in some countries. In the UK, Labour voters are more likely to say they would not get the vaccine – 24% of them compared to the 18% of Conservative voters. In the U.S., **one third of Republicans say they would not be inoculated**, compared to 24% of Democrats. And in Germany and Sweden, **populism plays a role**, with 59% of AfD supporters saying they would not have the vaccine (compared to only 18% for CDU voters), and 49% of Swedish Democrats say they would not have the vaccine (compared to 30% for Social Democrat and Moderate voters).

13 Likelihood to take a vaccine

Using regression analysis, the main predictive characteristics on vaccine uptake are if someone is in the UK, earns more, is concerned about their family health, and is older

Modelled global predictors of vaccine uptake



Most likely to take a vaccine:

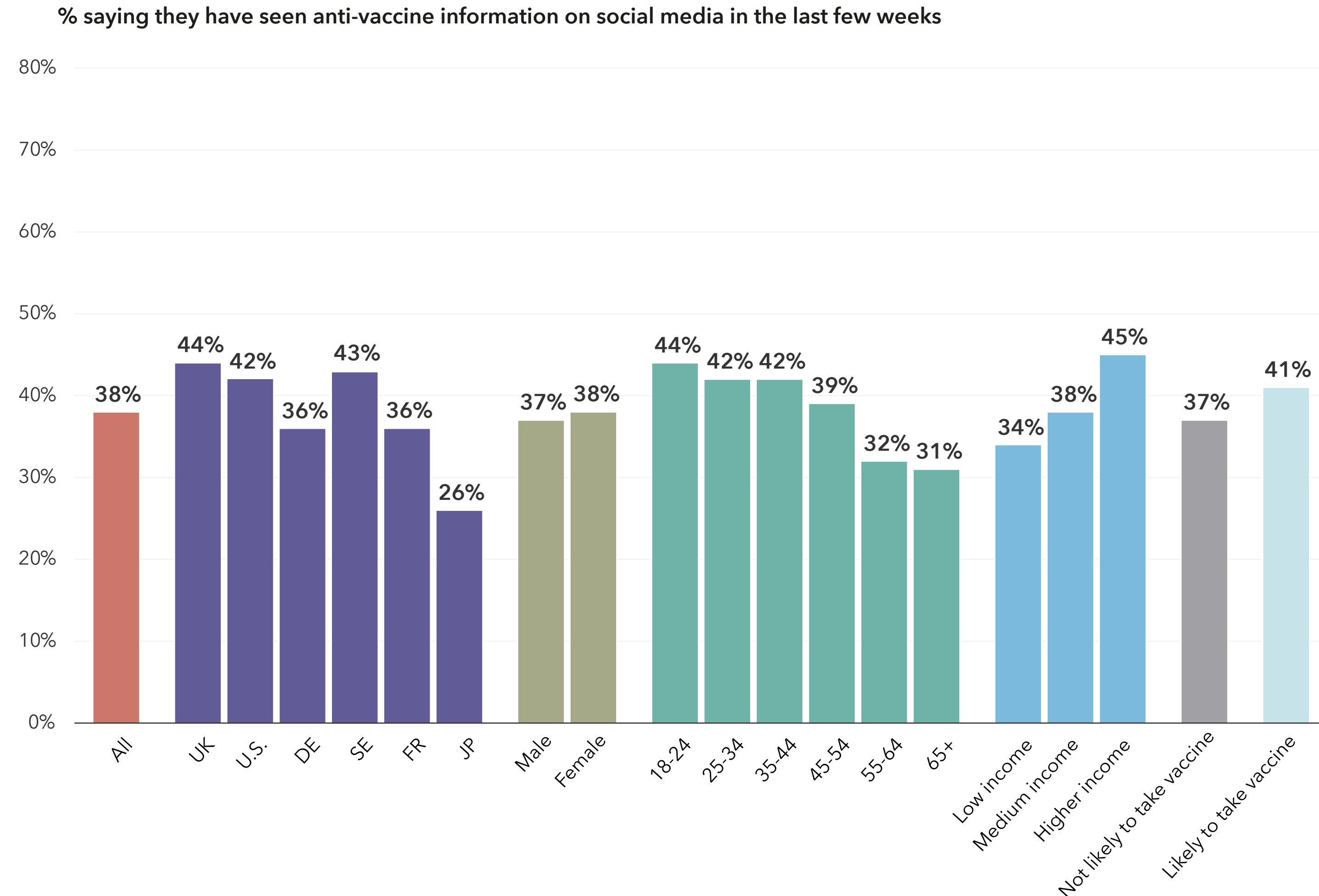
- An older man in the UK who is more concerned about his family's health. He has higher than average income and does not support a populist party and has not seen anti-vax content in the last fortnight.
- Average probability of taking a Covid-19 vaccine 94%.

Least likely to take a vaccine:

- A younger woman in France who is less concerned about her family's health. She has lower than average income and supports a populist party and is one of the 37% globally who have seen anti-vax content on social media in the last fortnight.
- Average probability of taking a Covid-19 vaccine 29%.

14 Vaccine disinformation and distribution

Four in ten globally have seen vaccine disinformation on social media in the last few weeks

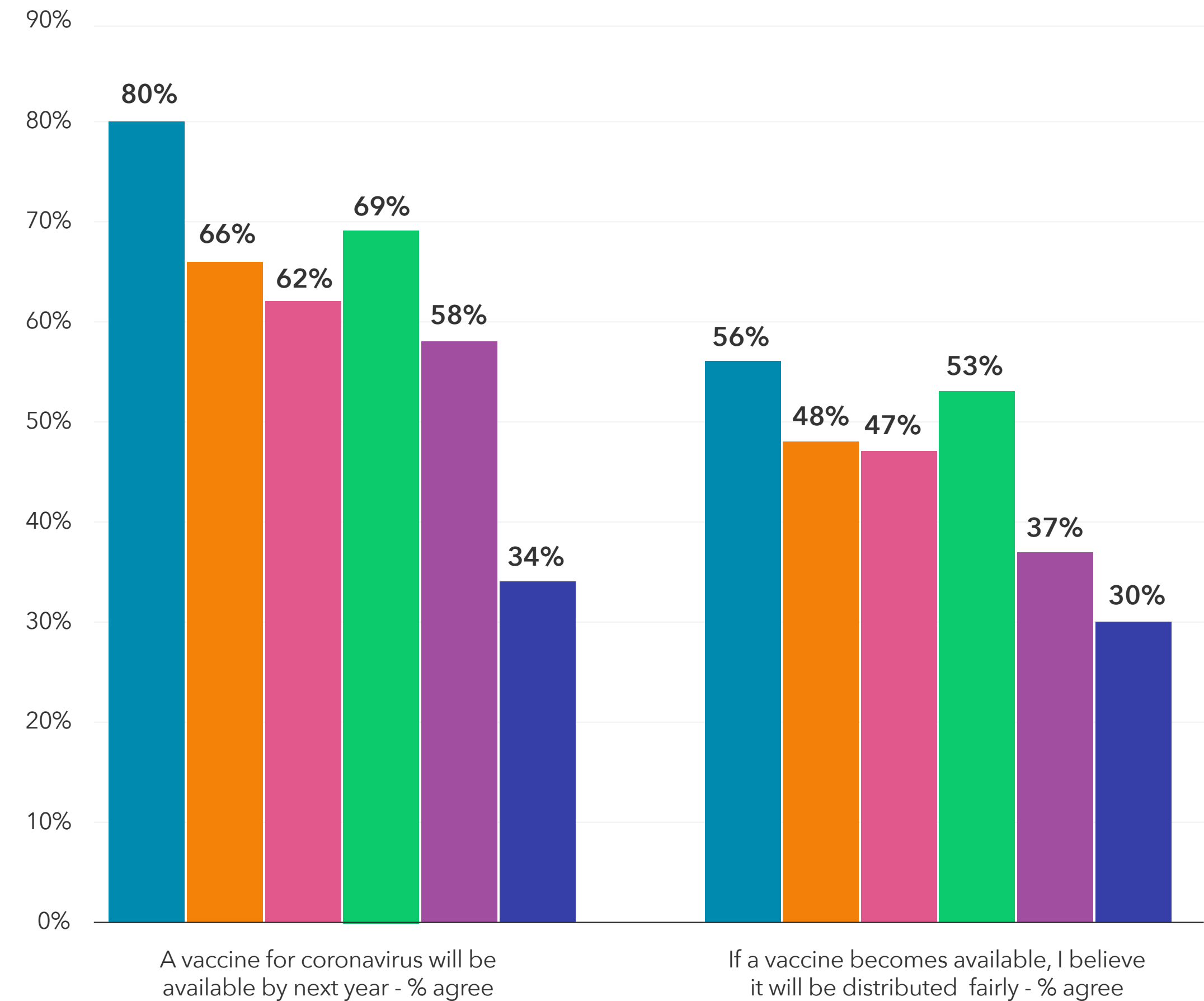


- In the context of significant proportions of the public saying they would not or would likely not get a coronavirus vaccine, **anti-vaccine campaigning looks to be playing a role**. Asked whether they had seen antivaccine information on social media in the last few weeks, significant proportions in each country said they did - as many as 44% in the UK.
- 43% of the Swedish public said they had seen anti-vaccine campaigns on social media, as well as 42% of people in the U.S, and more than a third (36%) in both Germany and France. One-quarter of the Japanese public said they had seen such information.
- **Younger people and those from higher incomes** are the most likely to have seen anti-vaccine information on social media. There is not a clear link between seeing disinformation and not taking the vaccine, **apart from in Germany where those unlikely to take the vaccine are more likely to have seen anti-vaccine material**.

14 Vaccine disinformation and distribution

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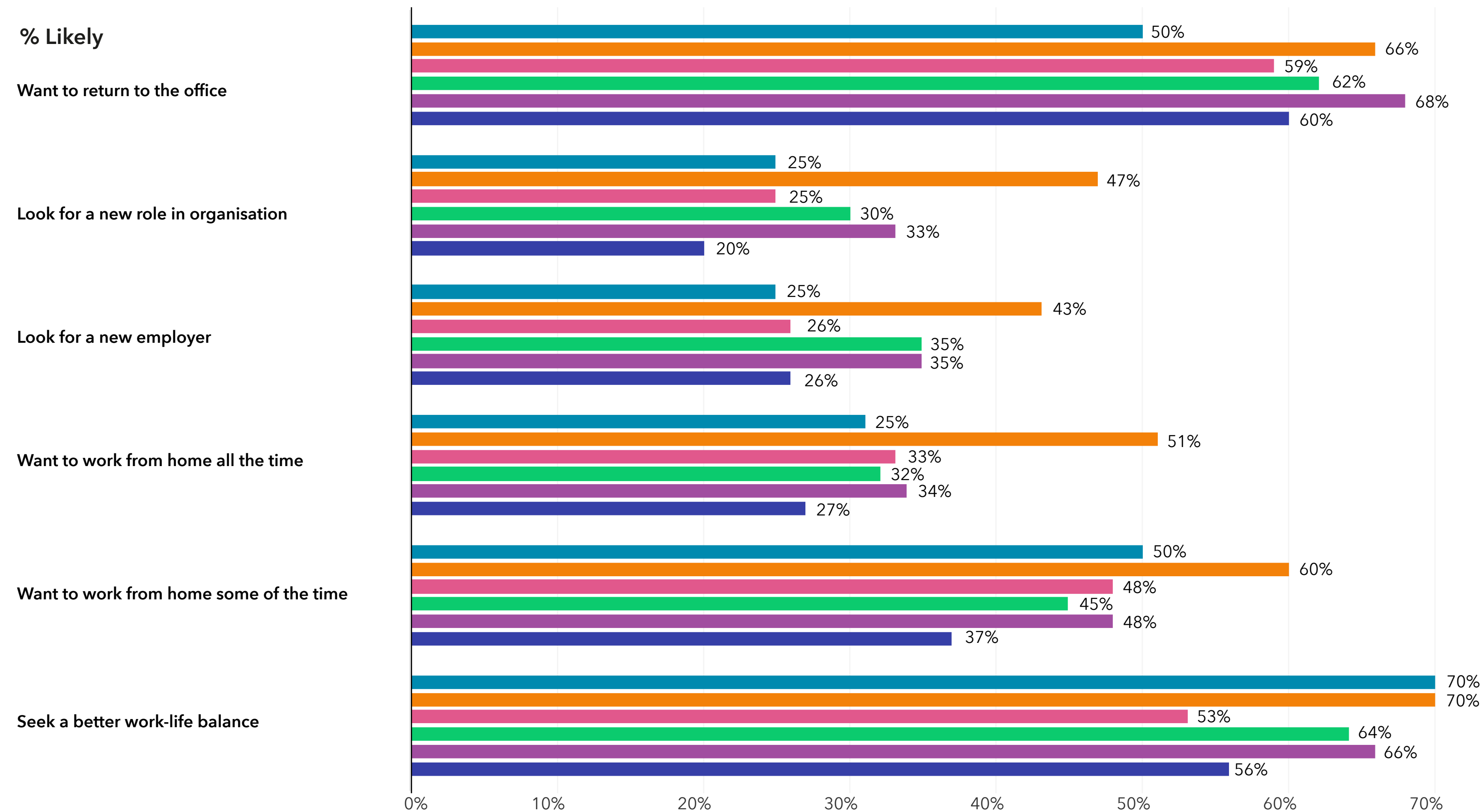
Hopes for a 2021 vaccine being available are high – apart from in Japan, where people also worry whether the vaccine will be distributed fairly



- Significant majorities in almost all countries believe there will be a vaccine available in 2021 – this is highest in the UK, with eight in ten people agreeing.
- The exception to this is Japan, where people are less confident. **Only one in three believe a coronavirus vaccine will be available next year.**
- Majorities in the UK and Sweden agree the vaccine will be distributed fairly in their country, as do 48% of Americans and 47% of Germans. There is more doubt in France, where 37% agree it will be distributed fairly.
- In Japan, people – on balance – think a vaccine **will not be distributed in a fair manner**. Only 30% – one in three – say it will be fair, with 32% disagreeing.

15 Employee plans post-vaccine

In a post-vaccine world, employees expect work-from-home flexibility and a better work-life balance
- and significant numbers are ready to move jobs if it means being able to have those benefits



- Respondents across all countries were asked whether they would be likely or unlikely to take a range of actions, after a vaccine has been fully rolled out in 2021.



15 Employee plans post-vaccine

**In a post-vaccine world, employees expect work-from-home flexibility and a better work-life balance
- and significant numbers are ready to move jobs if it means being able to have those benefits**

- Across all six countries, significant numbers want to return to the office – with this number reaching as much as seven in ten in France. Employees in the UK are the least likely to want to return to the office once the coronavirus crisis is over.
- **The demographic groups most likely to want to return to the office are:** men (66%), people most worried about their job (68%), in the public sector (70%), parents with children (67%), and those who have already returned in some capacity (68%). **The groups least likely to want to return to the office are:** those in small companies (61%), the self-employed (54%), and in companies with international HQs (60%).
- But despite this, there is **enthusiasm for continued home working** – whether some or all of the time. Asked to say how likely they were to want to work from home all of the time after the coronavirus crisis is over, around one in three workers in all countries – and 51% in the U.S. said they were. Asked separately about working from home some of the time, this attracted even larger proportions, with half of Brits, six in ten Americans, and between 37-48% in other countries surveyed saying they were likely to want to.
- **Those who are most likely to want to work from home all of the time are:** workers between the ages of 18-44 (40%), the self-employed (53%), and – in general – workers with higher income backgrounds.
- Large majorities in all markets say they will be **likely to seek a better work-life balance after a virus has been successfully rolled out**. This is highest in the UK and the U.S., with 70% of workers saying this. Put together, it is clear there is a **new employee settlement** expected after coronavirus has receded. Of those who intend to seek a better work-life balance, 62% want to work from home some of the time and in the office some of the time, and only 38% want to work full time in an office.
- There are also signs that workers will **vote with their feet if they do not get a more flexible work offer**. Asked if they would look for a change of employer if their firm insisted on a full-time return to the office, 45% of American workers said they would, with around a third in Germany, Sweden and France, and around a quarter in the UK and Japan.
- Quite aside from this, it also looks likely that firms may have to deal with a **high-level of employee turnover in a post-vaccine world**, as employees re-evaluate their careers. 43% of American workers say they would look for a new employer in a post-vaccine scenario, a quarter of workers say the same in the UK, Germany and Japan, and a third in Sweden and France. Employees are also open to new roles internally, **with similar proportions saying they would look for a new role in their own organisation**.
- **Those who are most likely to look for a new employer next year are:** workers between the ages of 18-44 (41%), those most worried about their job security (58%), those who work for medium-sized companies (39%), those who work for companies with international HQs (40%), workers with children (40%), and – in general – workers with lower-income backgrounds.

60%

The proportion of American workers who want to work from home some of the time once the pandemic is over

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