

RESEARCH REPORT

# COVID-19 Opinion Tracker

MARCH 2021 | EDITION 7



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# Methodology

COVID-19 OPINION TRACKER EDITION 7

1 MARCH 2021

Polling conducted by KEKST CNC, nationally representative sample of:



1,000 adults  
in UK



1,000 adults  
in U.S.



1,000 adults  
In Germany



1,000 adults  
in Sweden



1,000 adults  
In France



1,000 adults  
in Japan

Fieldwork of wave 7 took place on  
**11th-21st February 2021**

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

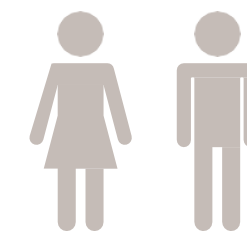
Fieldwork of wave 2 took place on  
27th April – 1st May

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

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



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. **Rollout reckoning:** People in all countries apart from the UK think their vaccine rollout is too slow, and reputations hinge on success or failure.
2. **Faith in Europe rocked:** Approval of the EU's performance falls as Europeans blame the bloc for vaccine bungles.
3. **Shaky support for vaccine passports:** People are nervous about the idea of vaccinated people facing different restrictions to unvaccinated people - with consequences for business.
4. **Caution first:** People are very cautious about re-opening society, with many not wanting to see COVID restrictions entirely lift in even the best-case scenarios.
5. **No to Tokyo:** No population surveyed thinks the Tokyo Olympics should go ahead this summer.
6. **Business under pressure:** People have lost faith in whether their governments are doing enough to help business, especially in Germany.
7. **Mental health weak spot for employers:** Employees' mental health has worsened, and one in five have not approached their employer as they are worried about their response.

# Global key findings

1

**Rollout reckoning: People in all countries apart from the UK think their vaccine rollout is too slow, and reputations hinge on success or failure**

People in all countries apart from the UK say **their vaccine rollout is too slow**: particularly in Germany, France, and Sweden where a majority say so. These countries, alongside the U.S. and Japan, are also critical of their own country's vaccine performance, and look to Israel and the UK as success stories. Meanwhile, **the British public are extremely positive**, with 77% saying their government has done well and only 14% saying the British program is too slow. In a sign of how much reputation rests on rollout, the **UK Government and Prime Minister get a reputational boost, while the German and Swedish governments plummet in popularity** – meaning the Swedish Prime Minister is now the least popular leader of all countries surveyed bar Japan.

2

**Faith in Europe rocked: Approval of the EU's performance falls as Europeans blame the bloc for vaccine bungles**

Amongst criticism of the vaccine rollout, **Europeans are pointing the finger of blame at the EU** – especially in Germany, where more than half of people say the European Union has handled the vaccine rollout badly. Approval of the EU's performance in the pandemic has also fallen, and in Germany more people now disapprove of the EU than approve of its pandemic response for the first time. The pharmaceutical industry has also taken a hit to its performance in Europe, though this is less marked than for the EU, **suggesting responsibility is landing on politicians rather than business**. In the UK, the pharmaceutical industry has reaped the reputational rewards of a successful rollout and is **now one of the best-rated industries in Britain**.

3

**Shaky support for vaccine passports: Despite top-line support, the public are nervous about the idea of vaccinated people facing different restrictions to the unvaccinated – with consequences for business**

People are supportive of vaccine passports in principle, with majority support in the UK, U.S., and Sweden. But pry under the surface and there is a warning sign for government and business keen to bring in differentiation on vaccination status. **No more than four in ten agree that restrictions should be lifted more quickly for vaccinated people than non-vaccinated people**, with resistance to the idea particularly acute in the UK and Germany. Despite many months of coronavirus restrictions being met with general support, **business and government should not assume that permission is quite there yet for discrimination on vaccine status to be implemented across society**.



# Global key findings

4

**Caution first: People are very cautious about re-opening society, with many not wanting to see COVID restrictions entirely lift in even the best-case scenarios**

Despite people becoming more optimistic about when the pandemic might end, **the public remain extremely cautious about unlocking society.** People struggle to say they want to see all COVID restrictions lifted even in the best-case scenarios, with people preferring some restrictions to remain in place rather than return to pre-COVID levels. Though this may change if governments lead their countries out of the pandemic, this speaks to nervousness of additional waves or more full lockdowns, continued concern about the virus, and **a feeling that their own countries came out of restrictions too quickly last year.** Sweden is now the most cautious country of them all when it comes to lifting restrictions, and there is no major re-calibration of the trade-off between prioritizing public health and the economy in almost all countries – **'safety first' is still the public's adage.**

5

**No to Tokyo: No population surveyed thinks the Tokyo Olympics should go ahead this summer**

In this atmosphere of caution, **there is little support for the Olympics going ahead.** No country sees more people agree that it should go ahead than disagree, and the **most significant opposition comes from the Japanese public themselves** with a majority of Japanese people against the Olympics being held.

6

**Business under pressure: People have lost faith in whether their governments are doing enough to help business, especially in Germany**

While European governments have suffered reputationally amidst vaccine rollouts, **people are also increasingly questioning whether business support measures that governments are putting in place are sufficient.** The proportion of people who think it is sufficient in the UK, for example, has fallen by twenty percentage points since May last year. But it is in Germany that the change is most stark. In December, 41% agreed it was sufficient, with only 23% disagreeing. Now, only 27% agree the government is giving business the support it needs, with 43% disagreeing – **a clear reversal of opinion and a call to government for more aid for businesses.**

7

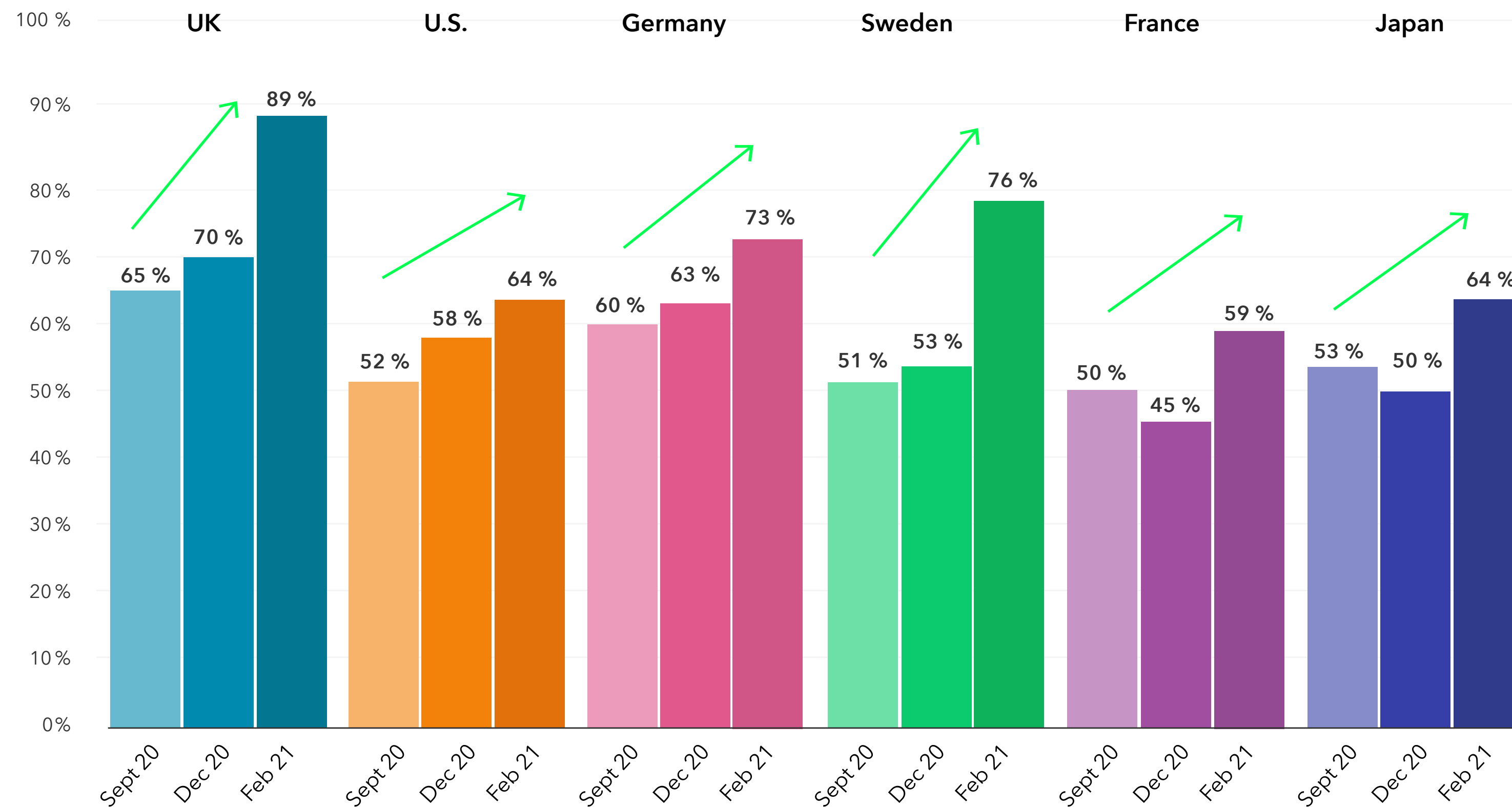
**Mental health weak spot for employers: Employees' mental health has worsened, and one in five have not approached their employer as they are worried about their response**

Across countries, **employees feel like their levels of stress at work, and their anxiety levels have worsened over the last year** and, in the UK, Germany, Japan and France, people's happiness with their work has also declined. This is despite people's job performance being relatively unharmed by the pandemic, suggesting a **hidden mental health problem for employees who might be working to a high standard, but are struggling.** And, in a clear wake-up call for employers, a significant number of employees feel uncomfortable going to their employers: around one in five who have experienced worse mental health say **they have not approached their employer because they are worried about their response.**

# 01 Likelihood to take the vaccine

As vaccine rollouts commence, higher numbers of people in all countries say they would take the vaccine - reaching almost 90% in the UK

How likely or unlikely are you to choose to have a coronavirus vaccine?  
% "I would definitely do so" + "Likely" + "I have already received a coronavirus vaccine"



- Likely uptake of the vaccine is up in all countries surveyed, with the biggest increases in the UK (+19) and Sweden (+16).
- Likely uptake in the UK is now at 89% - the highest of all countries surveyed and more than 25 percentage points higher than in September. Around three-quarters of people now say they would take the vaccine in Germany and Sweden.
- The increase in vaccine uptake is more muted in the U.S., but now stands at almost two-thirds. France is the country least likely to want to get vaccinated, but this is significantly higher than it was in December, with almost six in ten adults saying they would get a coronavirus vaccine.

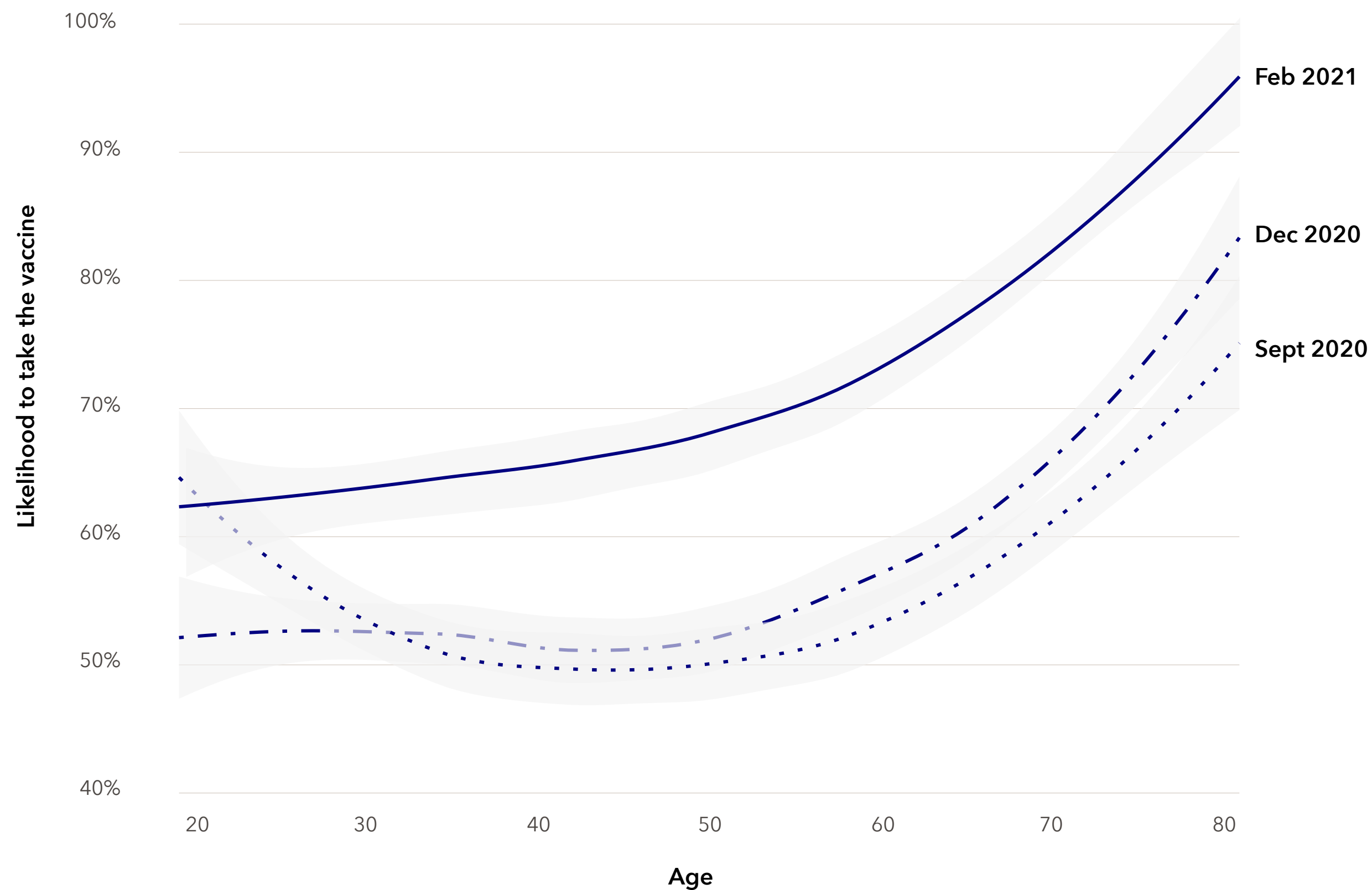
## 1/3

The amount that French vaccine uptake has increased by since December

# 01 Likelihood to take the vaccine

Increases in likely uptake are highest amongst older populations and the middle-aged

Global likelihood to take a vaccine is higher in older groups



## 68%

The % of men worldwide who say they would take the vaccine

- The biggest increases in likely vaccine uptake since September is **amongst older and middle-aged people**.
- The very youngest are no more likely to want to take the vaccine than in September, but this mirrors government messaging on vaccine targeting.

- The main drivers of vaccine uptake are **income** (with higher and medium income people most likely to take the vaccine), those **most concerned about their family's health, and age**.
- **Women are still significantly less likely to take the vaccine than men**, and being a supporter of a populist party in Europe also reduces someone's chance of being comfortable with having the vaccine.

## 55%

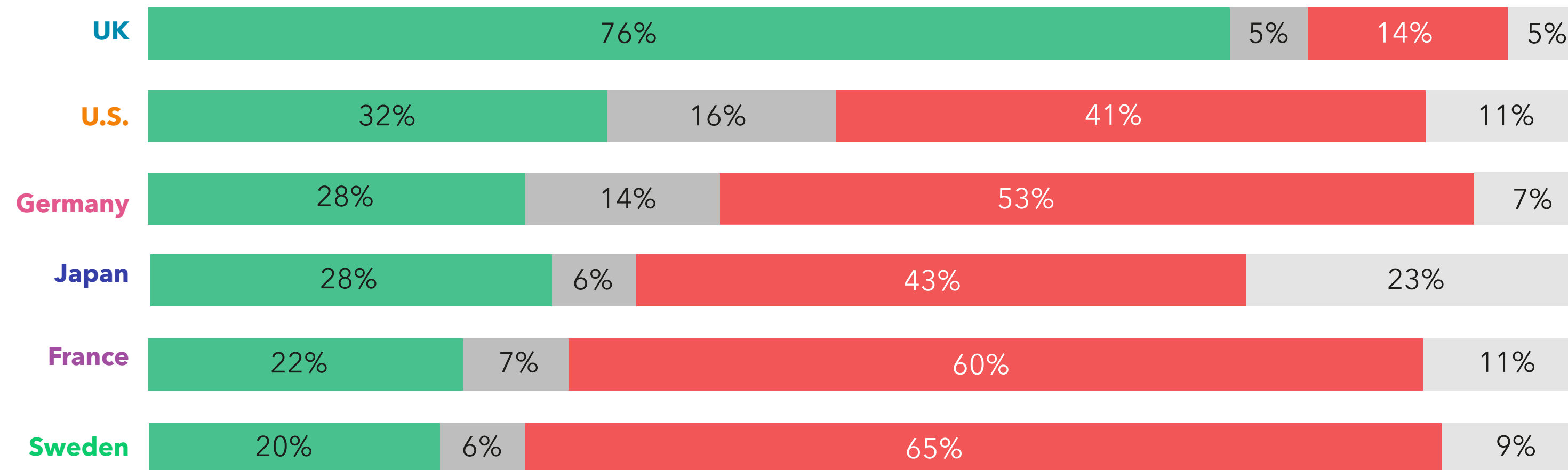
The % of women worldwide who say they would take the vaccine



# 02 Speed of the vaccine rollout

With the exception of the UK, people feel their countries' vaccine rollouts are too slow

Do you feel the speed of the rollout of coronavirus vaccines in your country is...



Key:



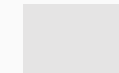
About right



Too fast



Too slow



Don't know



## 3 in 4

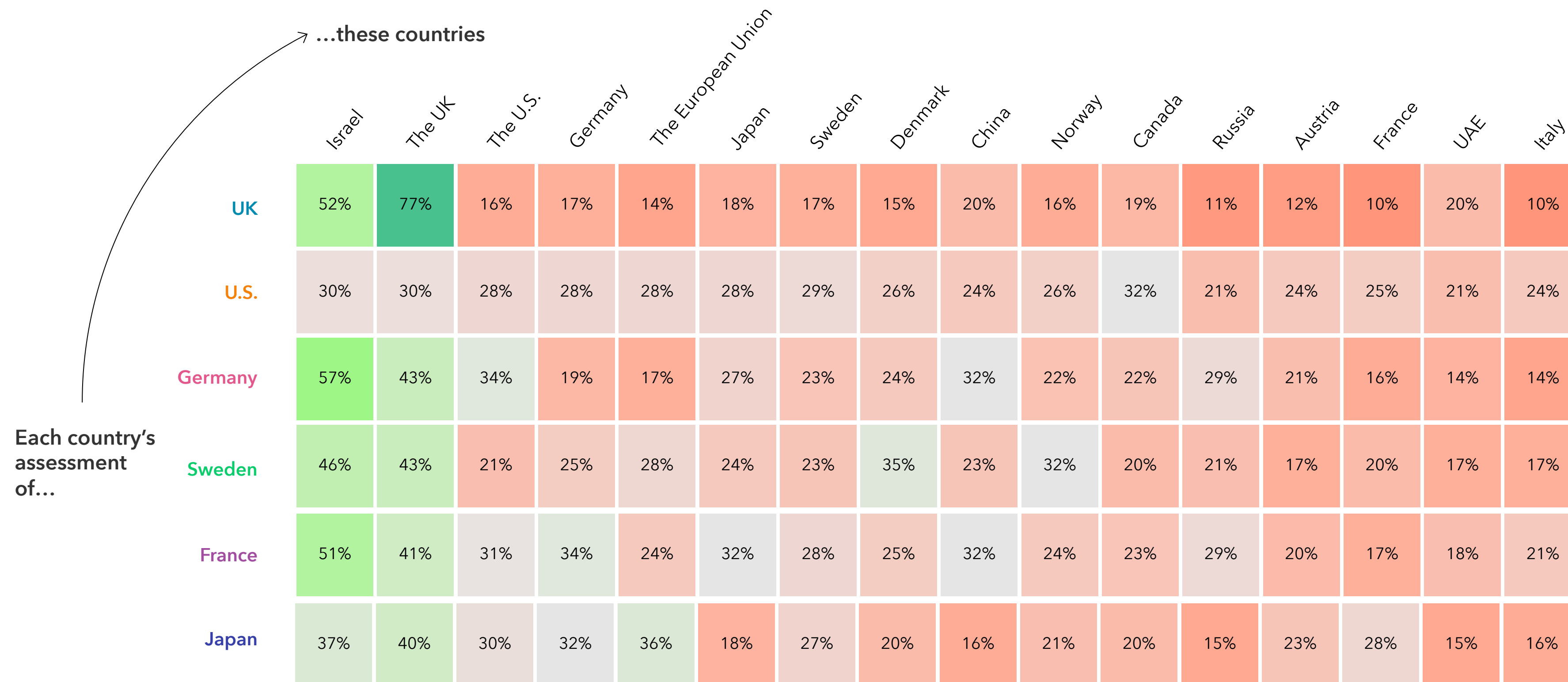
The proportion of Brits who say the vaccine rollout is about right, the highest of all markets surveyed

- Majorities in Sweden (65%), France (60%) and Germany (53%) say their vaccine rollouts are too slow, **while four in ten say the same in the U.S. and Japan. The only country where people think the speed of their rollout is about right is the UK**, where three in four people say this and only 14% say it is too slow.
- There is a **strong level of political consensus** on this question. For example, in the U.S. 40% of Republicans say the rollout is going too slow, and 43% of Democrats also say so. In Germany, majorities of CDU, SPD, and Green voters alike say the rollout has been too slow (though this only applies to 36% of AfD voters). And in the UK, high numbers of Conservative and Labour voters say the rollout speed is about right.

# 03 Vaccine performance

Israel and the UK are seen as the countries that have handled the vaccine rollout the best so far; with European countries performing less well

How do you feel the following have handled the rollout of coronavirus vaccines so far? % Well



- The UK and Israel are seen as the countries that have performed best with their vaccine rollouts – and the UK marks itself significantly higher than Israel.
- Other countries are largely seen as **having done a bad job with their vaccine rollout**, though France is more favourable to Germany, Japan to the European Union, and Sweden to Denmark.
- Some of the countries that are doing well have not got the credit for doing so. Despite the UAE having the second highest number of complete vaccinations per capita, it is seen as the **second-worst country for performance of its vaccine rollout** due to a high level of people saying they did not know or were unaware.
- The U.S. are reluctant to rate any other countries' vaccine rollout significantly above their own; Canada is marginally seen as the best-performing nation by Americans (32% say its rollout has gone well).





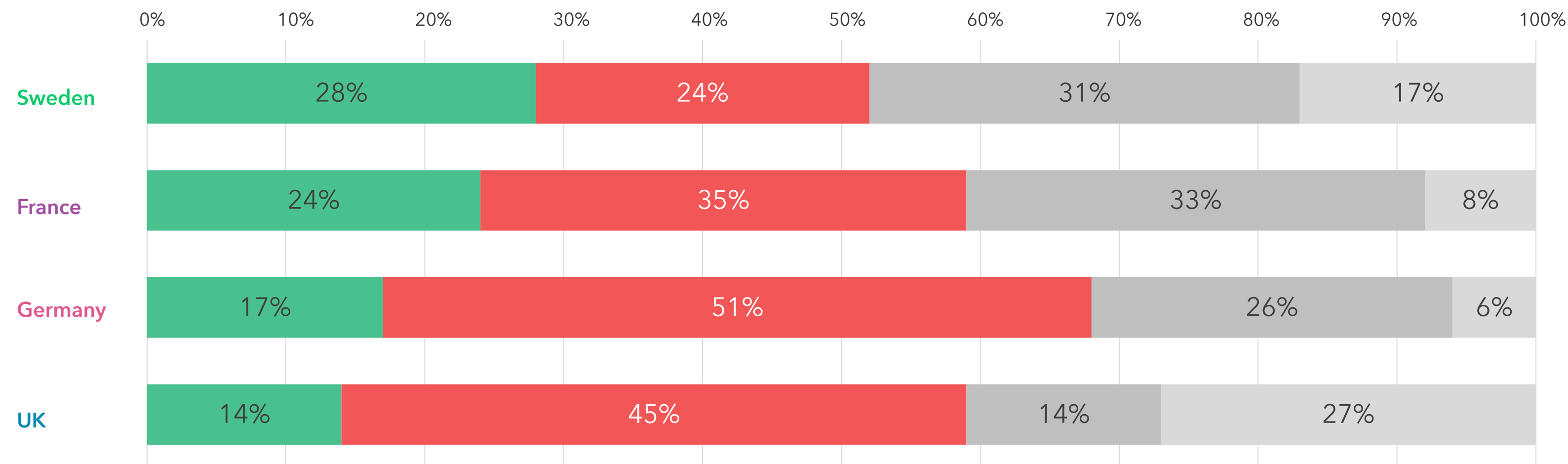
# 03 Vaccine performance - the European Union

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1 MARCH 2021

Faith in the European Union's handling of the vaccine rollout is low, with a majority of Germans saying it has done badly

How do you feel the following have handled the rollout of coronavirus vaccines so far?: The European Union



Key:

Well

Badly

Neither well nor badly

Don't know



- The European Union is seen by most European countries as having done badly in handling the vaccine rollout so far. This is particularly acute in **Germany**, where 51% of people say the EU has done badly, and only 17% that it has done well.
- There is also a plurality of people in France who say it has done badly, and though Sweden narrowly supports the EU's rollout so far, only 28% - fewer than three in ten - say it has done well.

# 51%

The proportion of Germans who say the EU has done badly in the vaccine rollout

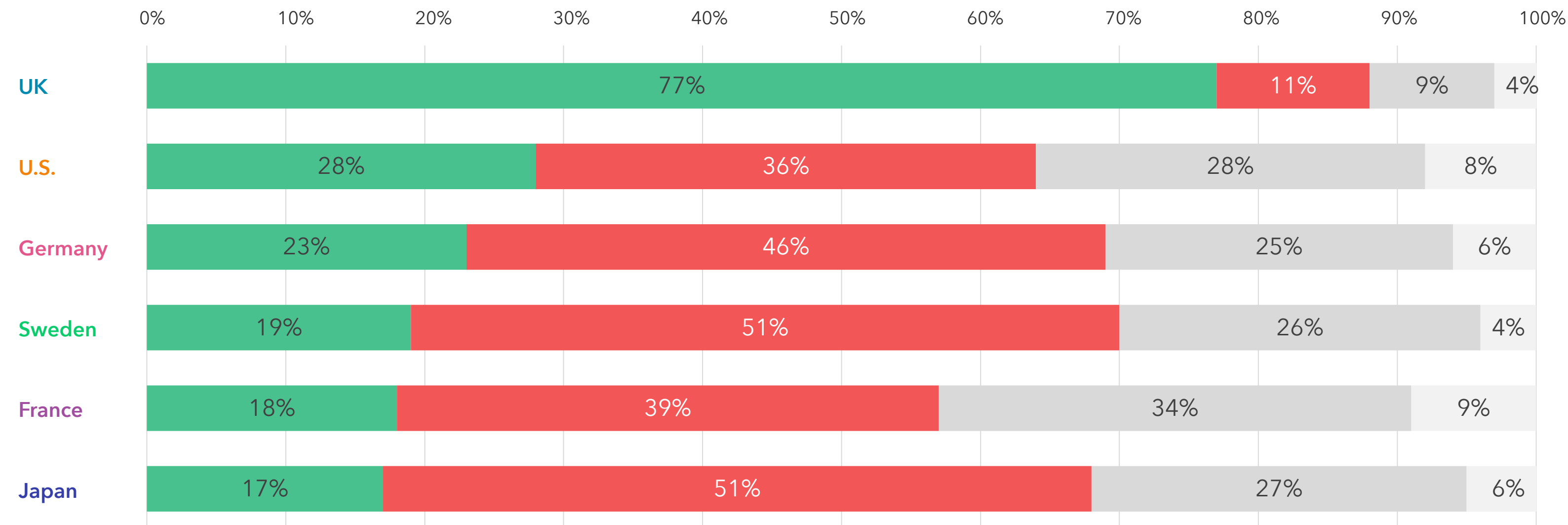
# 03 Vaccine performance – judgements of own country

COVID-19 OPINION TRACKER EDITION 7

1 MARCH 2021

All countries apart from the UK judge their own country poorly, especially in Germany and France

How do you feel the following have handled the rollout of coronavirus vaccines so far?: Own country



Key:



## 18%

The proportion of French people who say their vaccine rollout has gone well

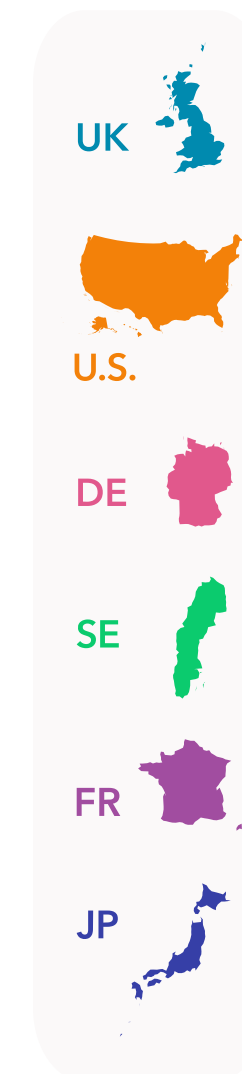
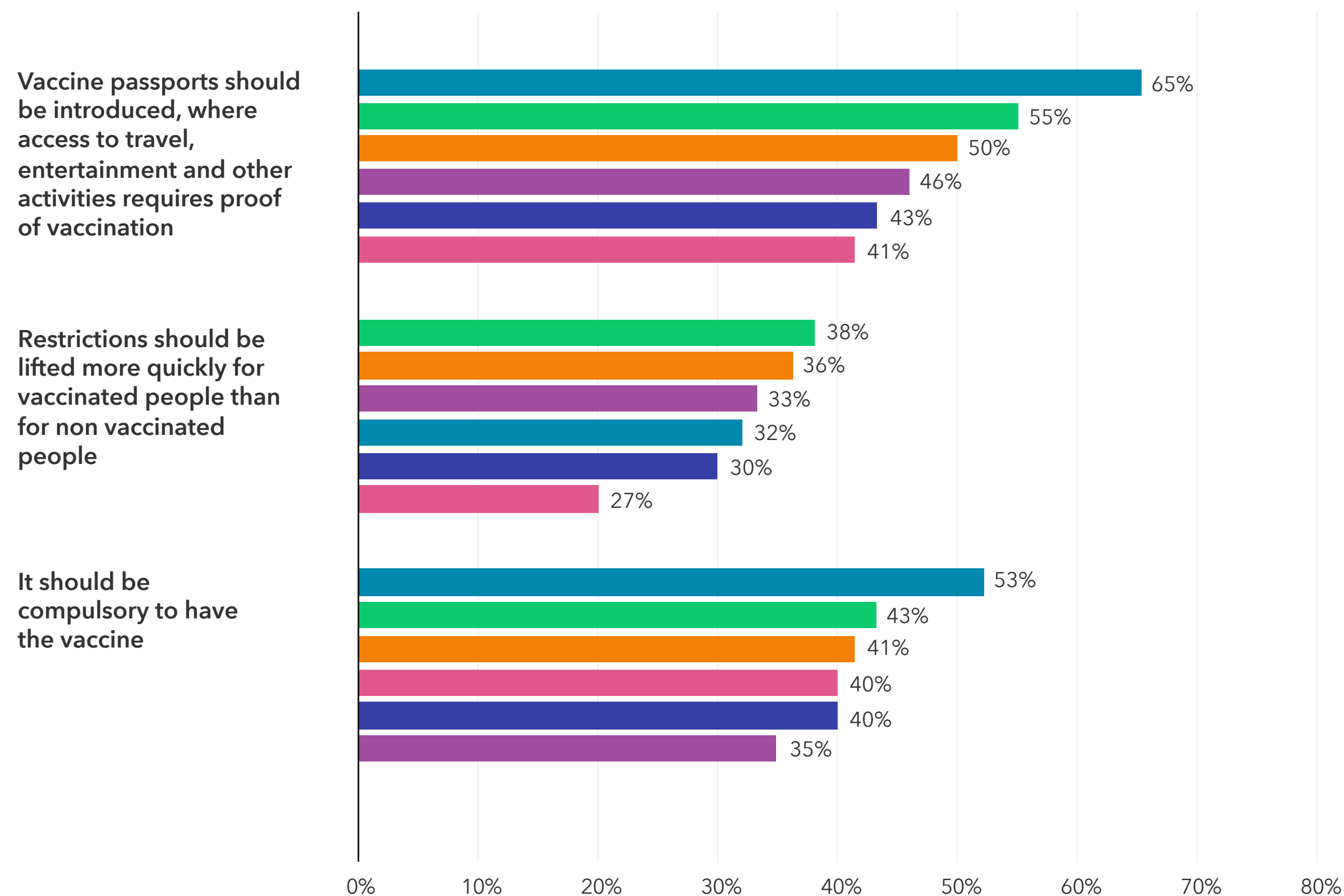
- In line with their view of vaccine rollouts, **people rate their own country poorly** for how it has handled the vaccination program. People in Germany and France are the most critical, with 51% saying their nation has done badly. More feel their country has done badly than well in Sweden, the U.S., and Japan also.
- The UK again is the exception, where **77% think it has handled its rollout well** and only one in ten badly.



# 04 Vaccine passports

Despite topline support, the public are nervous about the idea of vaccinated people facing different restrictions to the unvaccinated - with consequences for business

% Agree



- Posed with the straightforward question of whether they support the idea of vaccine passports - where certification is needed to access travel, entertainment and other activities - **people generally agree**. Majorities do so in the UK (65%), Sweden (55%), and the U.S. (50%).
- However, when more detail is given, support wavers. **Asked if they support restrictions being lifted more quickly for the vaccinated over the unvaccinated, people around the world are less supportive**. In Britain and Germany, this turns into net opposition, with the British disagreeing by a margin of 45% to 32%, and the Germans disagreeing by a margin of 46% to 27%.
- The principle still attracts narrow support in the U.S., Sweden, and Japan, but the French public are split down the middle. **This is a warning sign for government and business considering vaccine certification for policies** - despite high levels of support for coronavirus restrictions throughout the pandemic, people are not yet convinced that vaccine passports are the best or fairest way to come out of the pandemic.

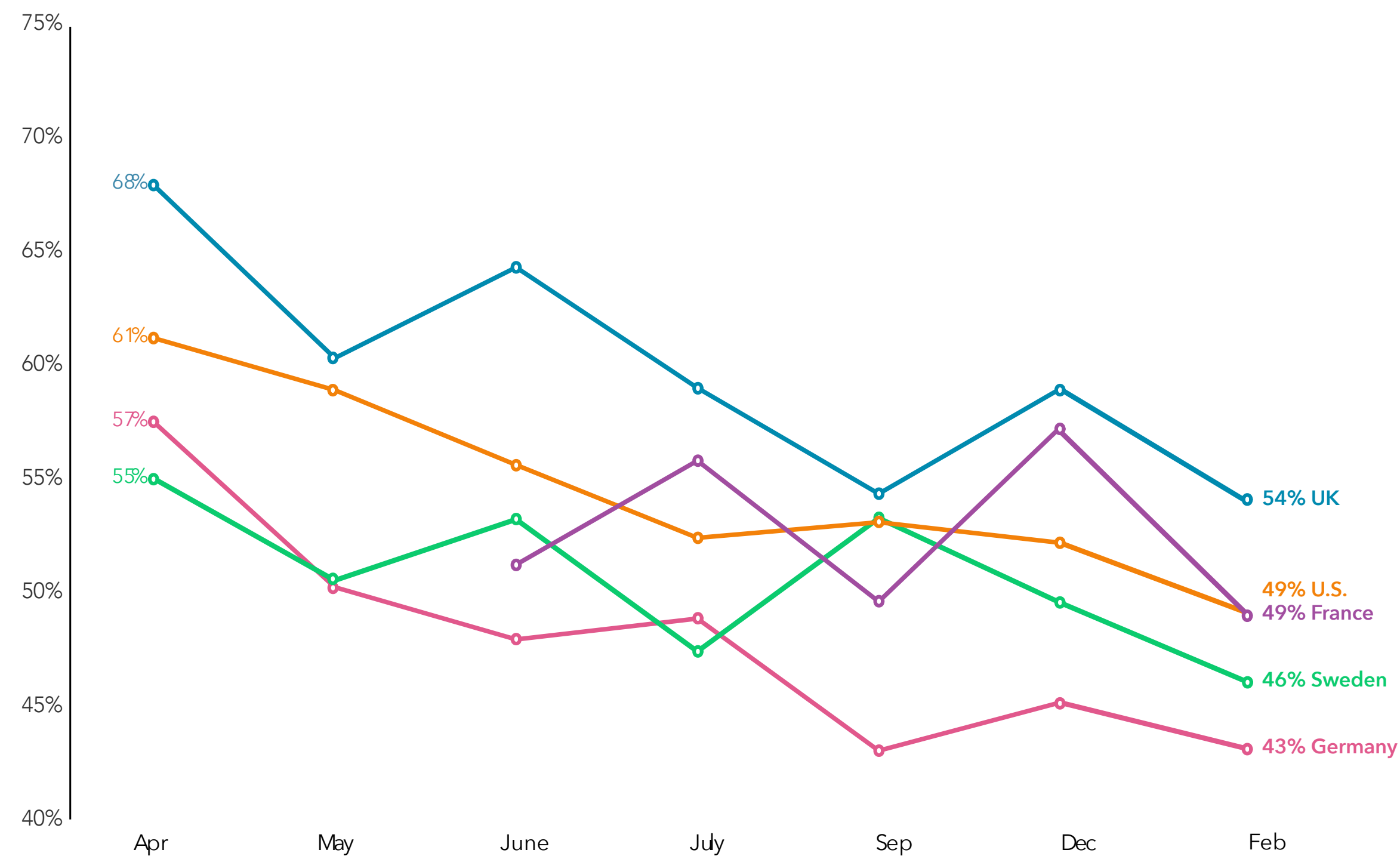
## 45%

The proportion of British people who oppose lifting restrictions based on vaccination status

# 05 Business brands

Business brands are losing their protective shields from the start of the pandemic

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



## 12 POINTS

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

## 8 POINTS

The decline since December in the proportion of French people who feel business is stepping up during the pandemic

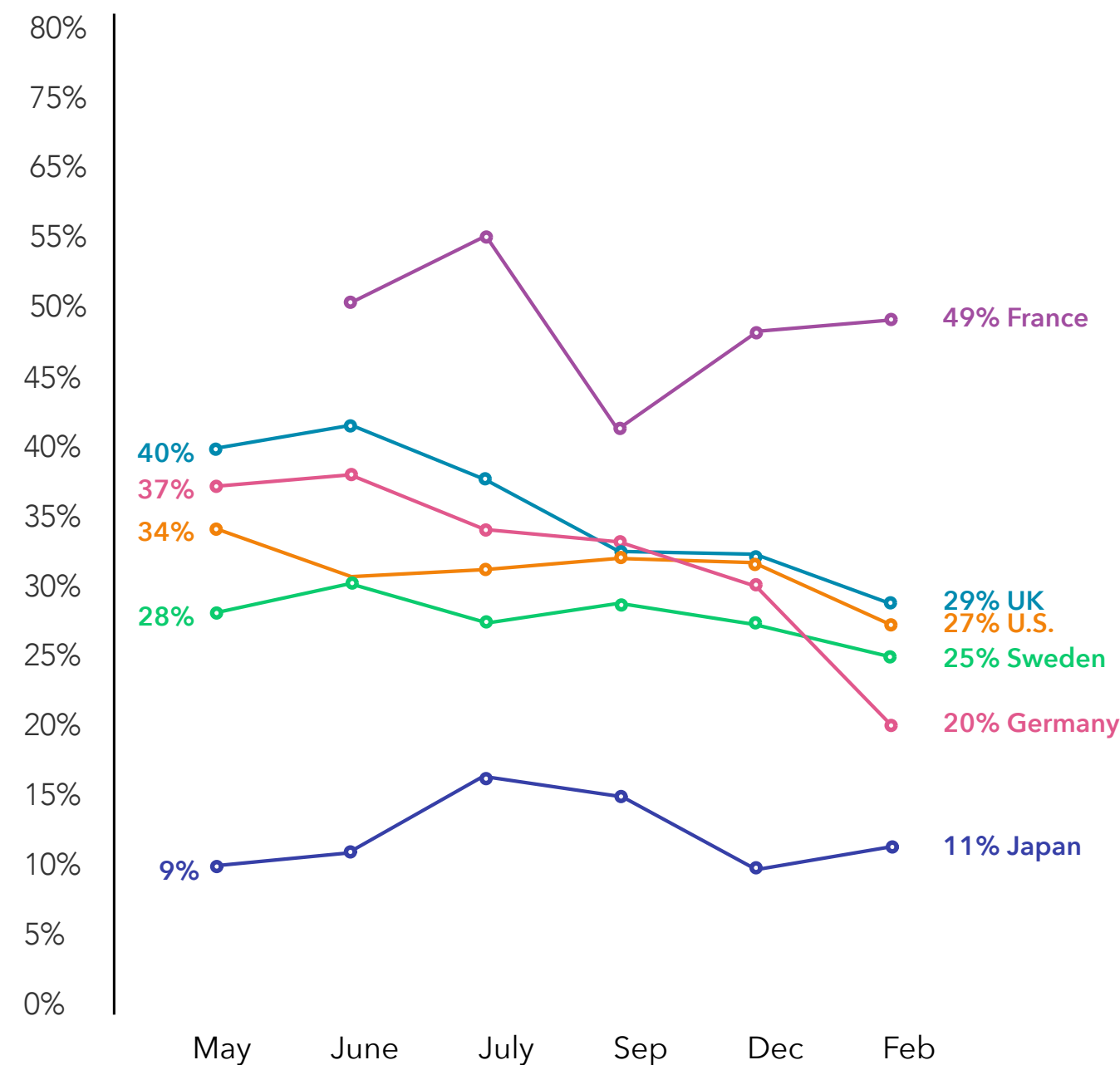
- The proportion of people who say that business is stepping up in their country has **fallen across all countries surveyed and** is now under half in all countries apart from the UK.
- This reflects a **slow decline since the start of the pandemic**. Some of this may be inevitable, as people ask other things of business. But it does underline that the protective shield to business reputation seen at the start of the pandemic no longer applies – and that on issues like vaccine policy, unemployment, and handling of employee issues, business' reputation cannot be taken as a given.



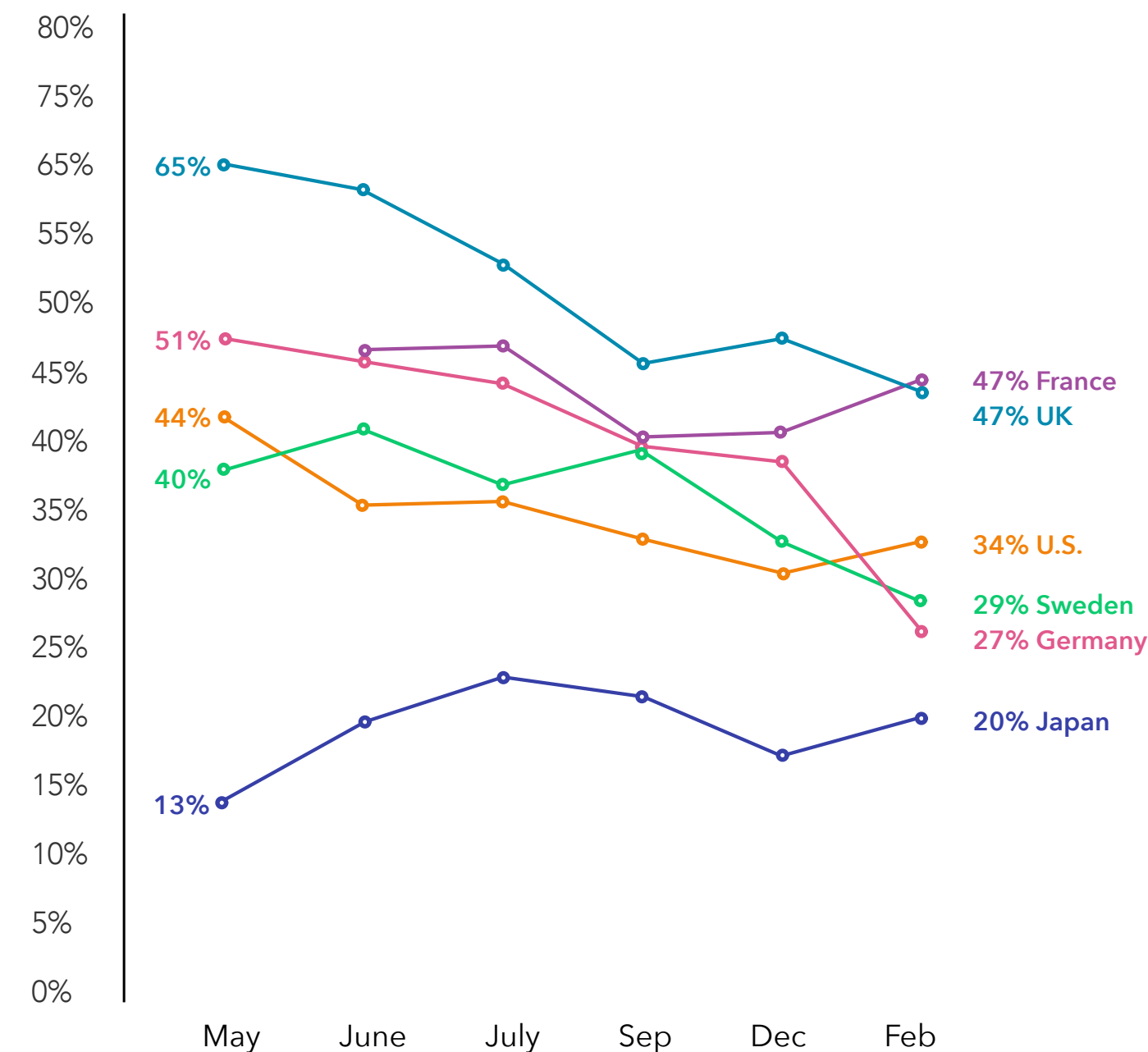
# 06 Business support measures

People are questioning whether their governments are doing enough to support business

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



- There has been a gradual decline in the number of people who think their governments are giving businesses the support it needs during the crisis. In the UK, for example, this has fallen from 65% to 47% since May last year, and from 44% to 34% in the U.S. as pressure for a new stimulus bill increases.
- The starkest fall is in Germany. In December, 41% of Germans agreed the government was doing enough to support business, with only 23% disagreeing. **That picture has now reversed, with only 27% agreeing it is and 43% disagreeing.** Swedes are also more likely to think their government is not giving support, with only 29% saying it is while 34% say it is not.

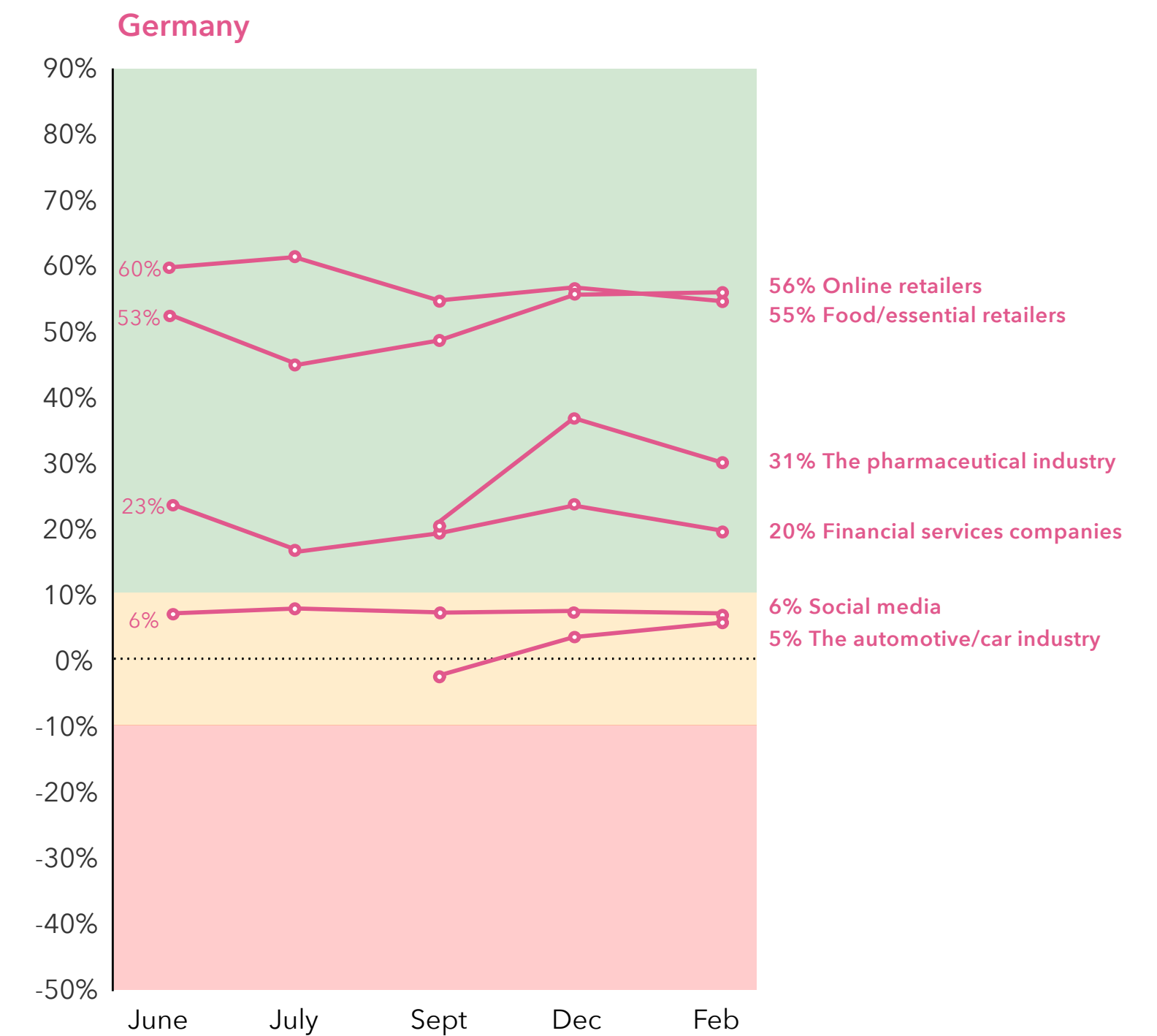
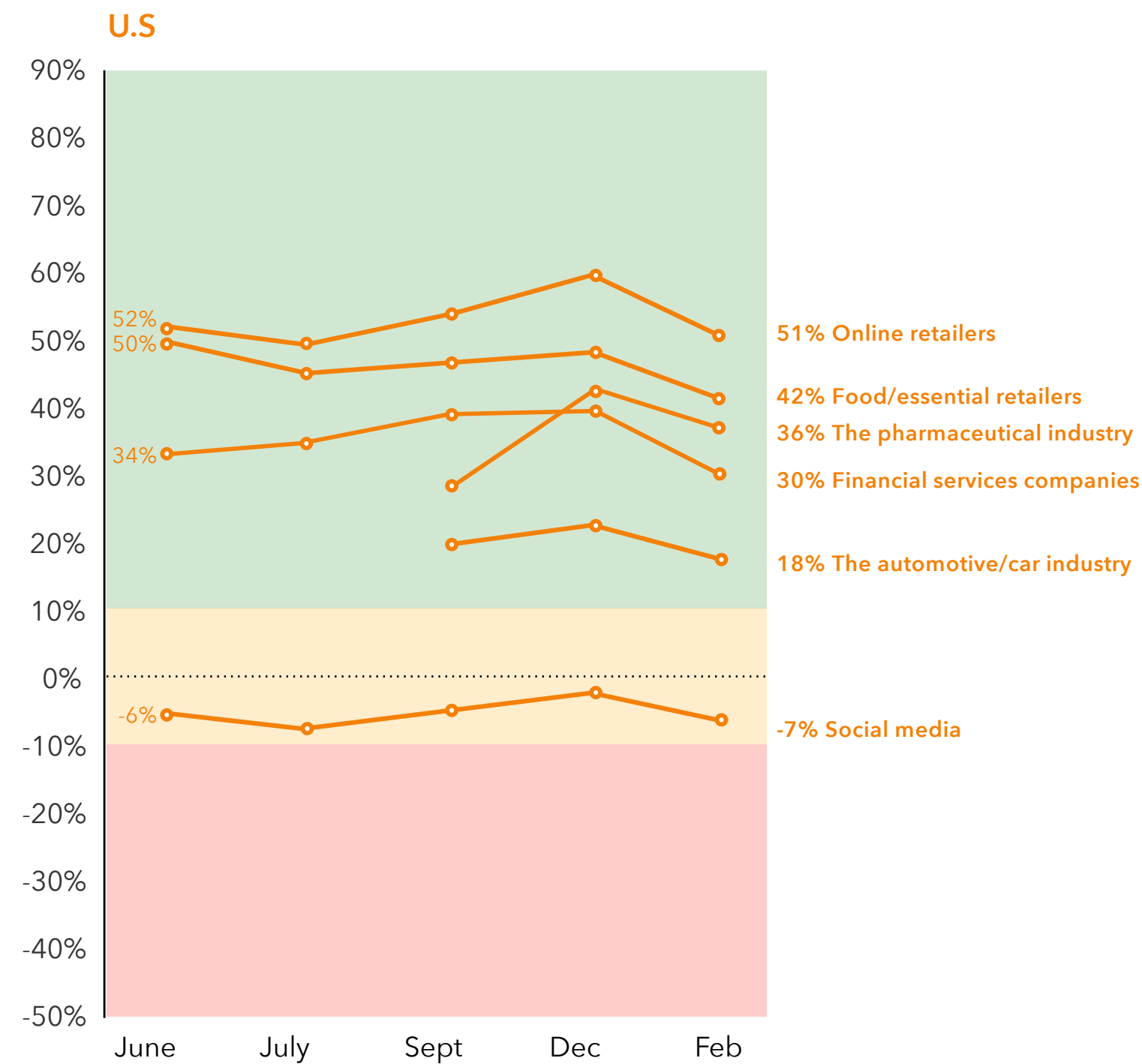
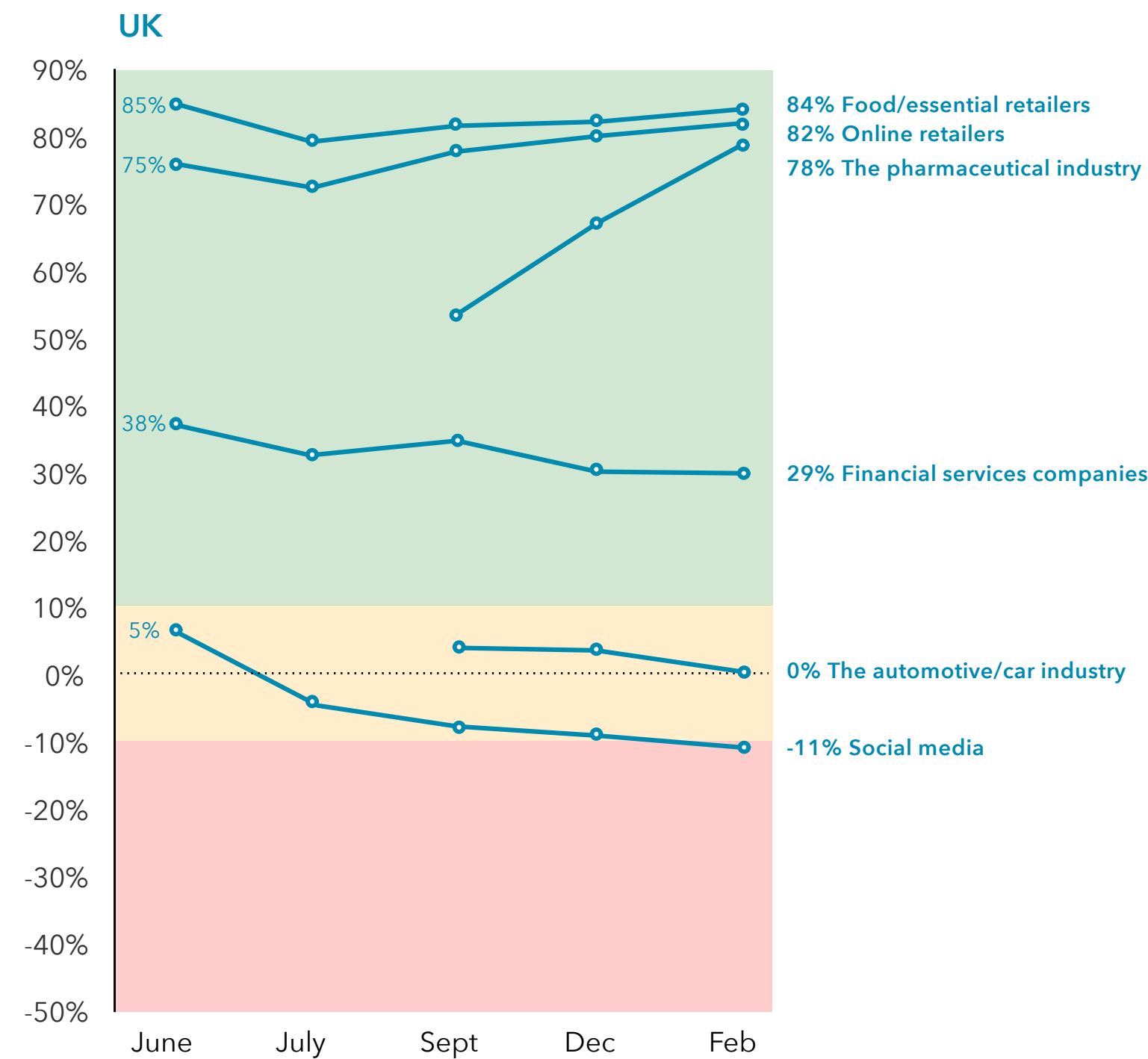
## 14 POINTS

The decline in the proportion of Germans since December who think the government is giving business the support it needs



# 07 Performance of industry

In the UK, the pharmaceutical industry gets a boost, but it's reputation is dented in Europe



A M June July Sep Dec Feb



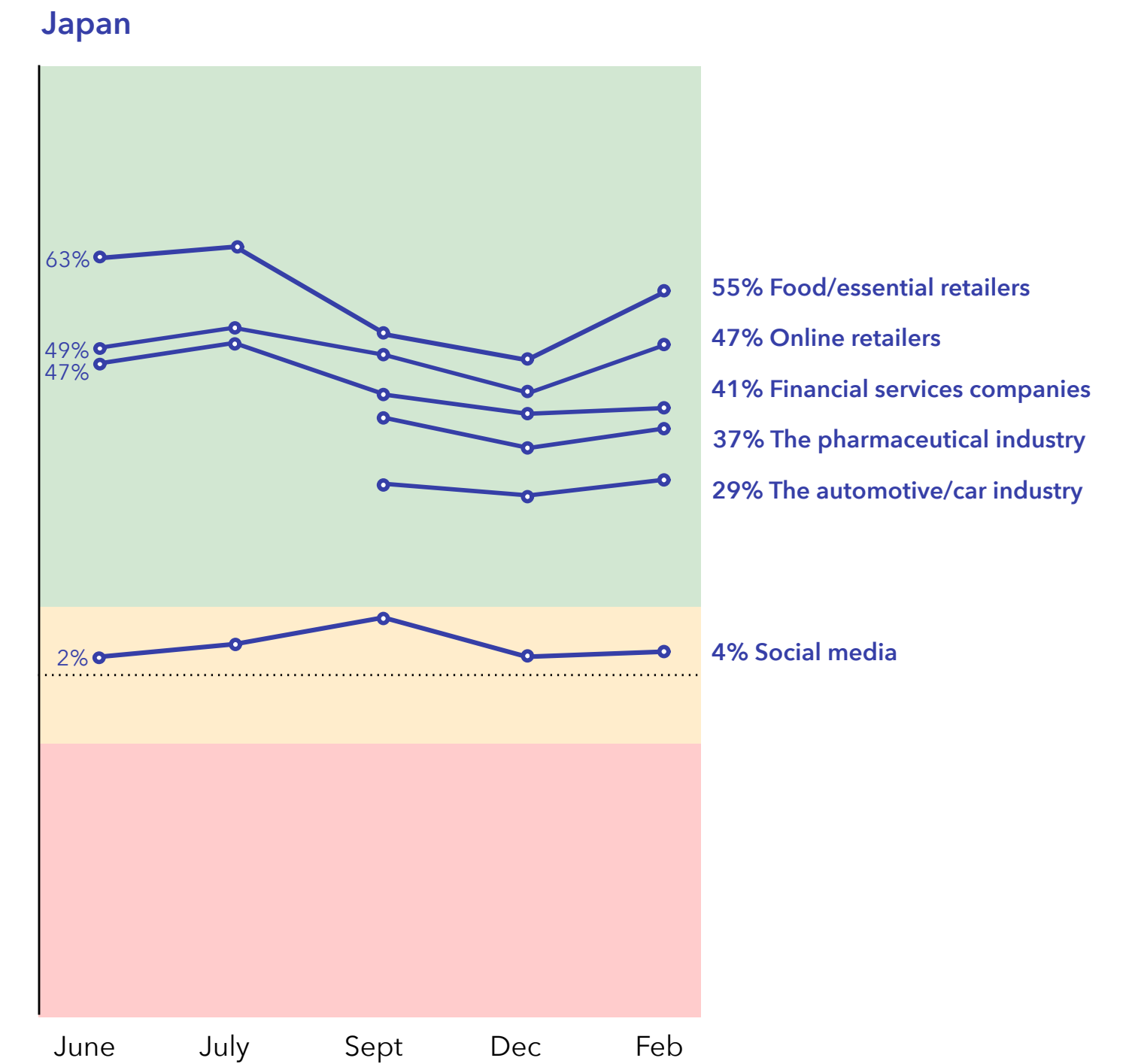
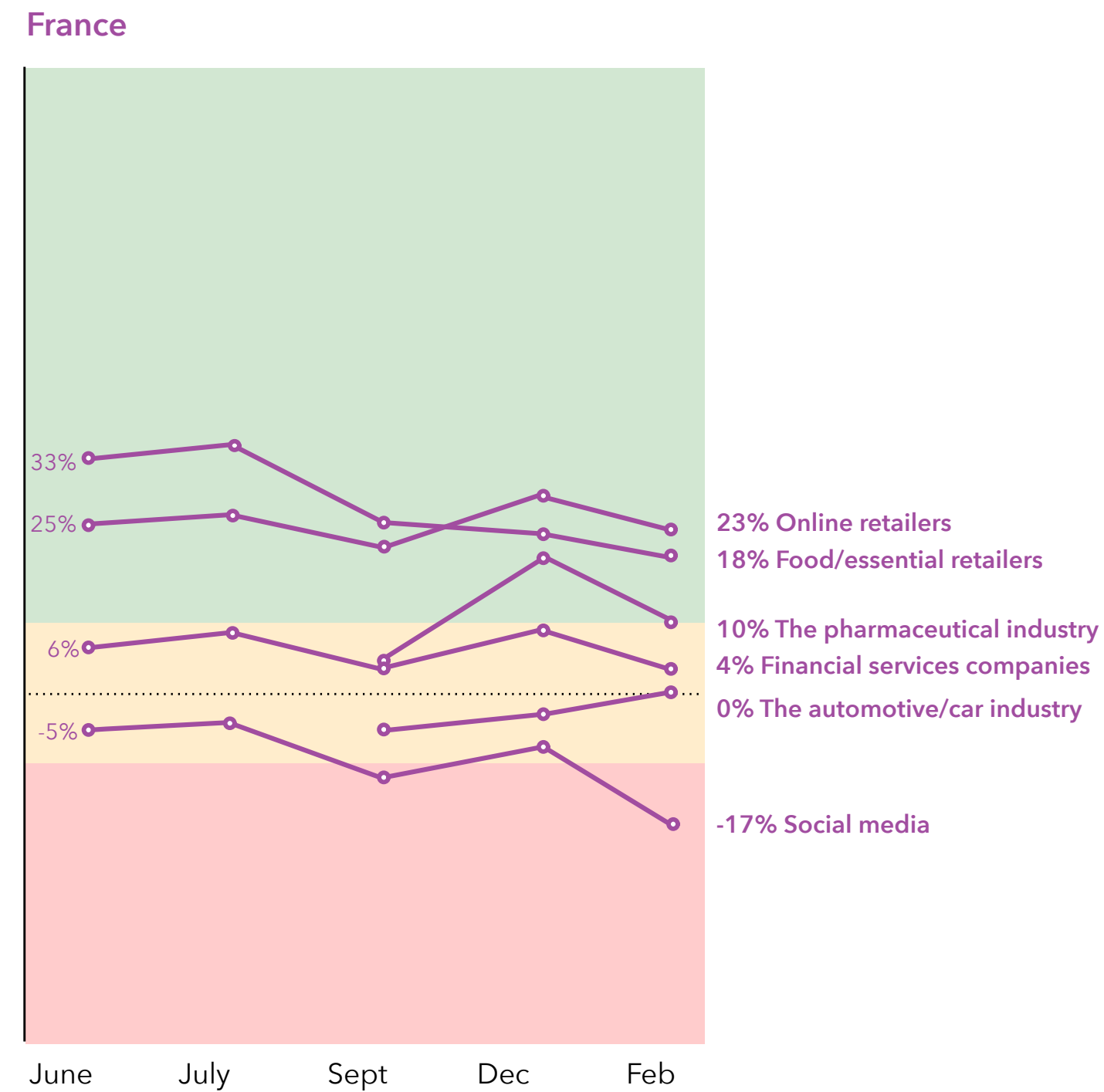
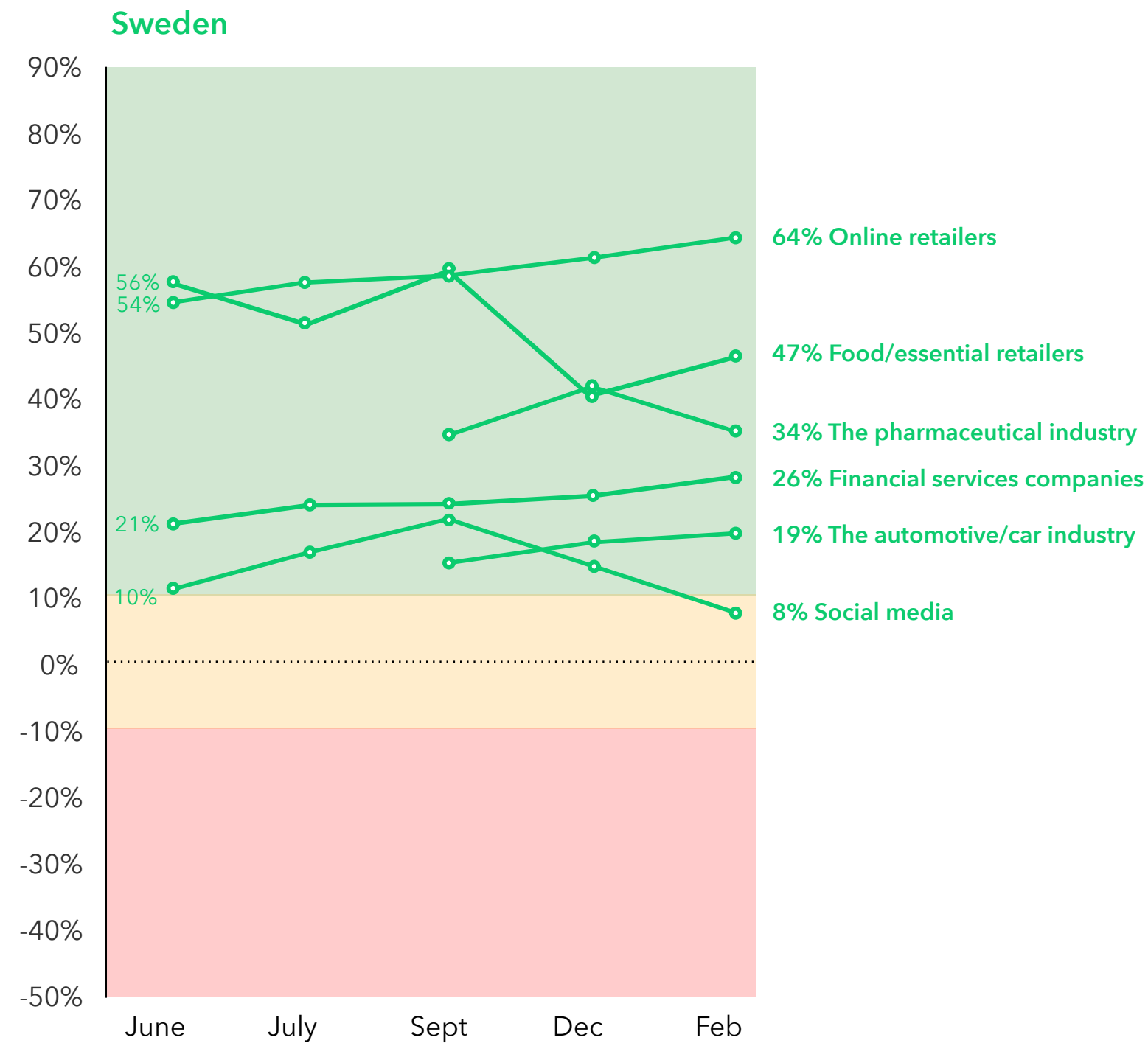
Respondents across all countries were asked whether they thought a number of institutions had done well or badly in responding to the coronavirus. Displayed is the net 'well' score in each country.



# 07 Performance of industry

COVID-19 OPINION TRACKER EDITION 7  
1 MARCH 2021

In the UK, the pharmaceutical industry gets a boost, but it's reputation is dented in Europe



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.

# 07 Performance of industry

In the UK, the pharmaceutical industry gets a boost, but its reputation is dented in Europe

- The perceived performance of the pharmaceutical industry during the pandemic has received mixed fortunes, depending on the success of the vaccine rollout in each country. **In the UK, the pharmaceutical industry has received a significant boost to its brand**, increasing from a net score of +51% in September to +78% today, **putting it in the company of other very highly rated industries like supermarkets** and only a few net points shy of the National Health Service.
- In Europe, however, the picture is different. **Germany, Sweden, and France have seen significant dips in the reputation of the pharmaceutical industry**, as vaccine rollouts take a slower pace and friction over company procurements continue. In France, this has gone from +18 in December to +10 now; in Sweden from +42 to +34; and in Germany from +37 to +31. Business reputation relies on rollout success – and is in the hands of government on this issue.
- However, it is worth noting that the **European Union has taken a more significant hit to its reputation than the pharmaceutical industry in most countries, especially Germany**. This suggests that though pharma companies have taken a hit, the public are tending to blame politicians rather than individual companies.
- Most other industries' reputations are unchanged on December, with general positivity from the public on different sectors, especially online retailers and supermarkets which continue to score highly. There has been a decline in how people feel financial services companies have performed in the U.S., but this remains in positive territory (+30%). **Generally speaking, the picture is one of a thumbs-up for businesses' response, but a warning that brands can shift quickly and unexpectedly.**

## +78

The net score amongst British people for how the pharmaceutical industry has performed during the pandemic, the highest of all countries surveyed

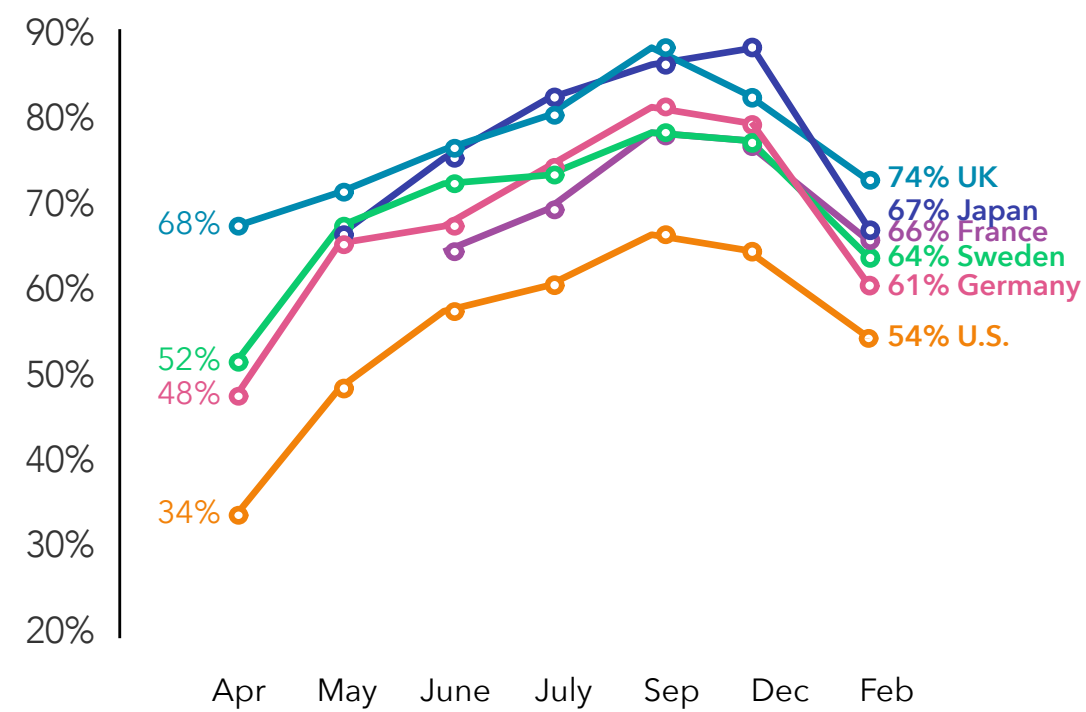
## Online retailers

The best rated industry in four of the six countries surveyed

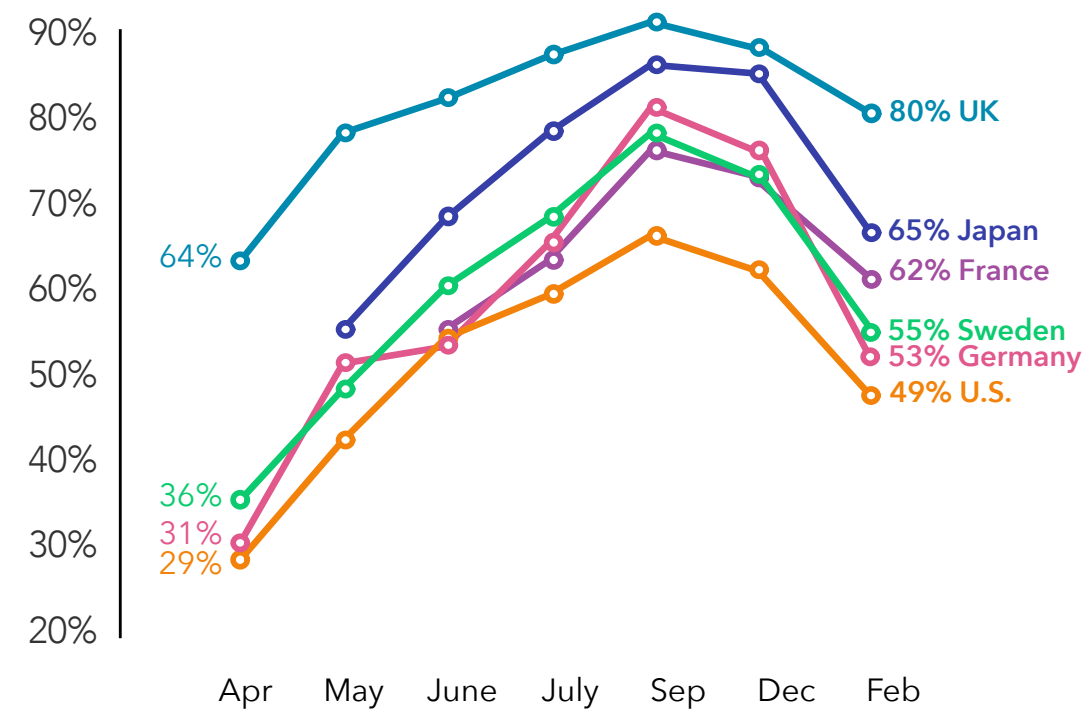
# 08 Expected duration

A continued fall in the length of time people expect the impacts of the virus to be felt for

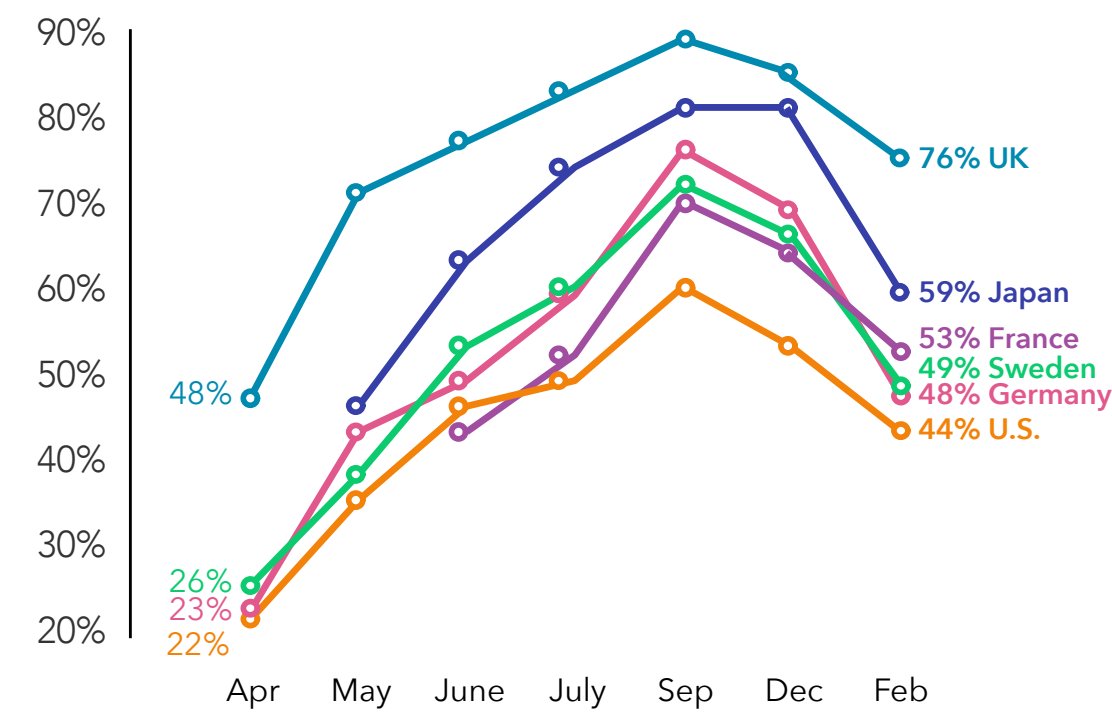
The impact on businesses and how they function



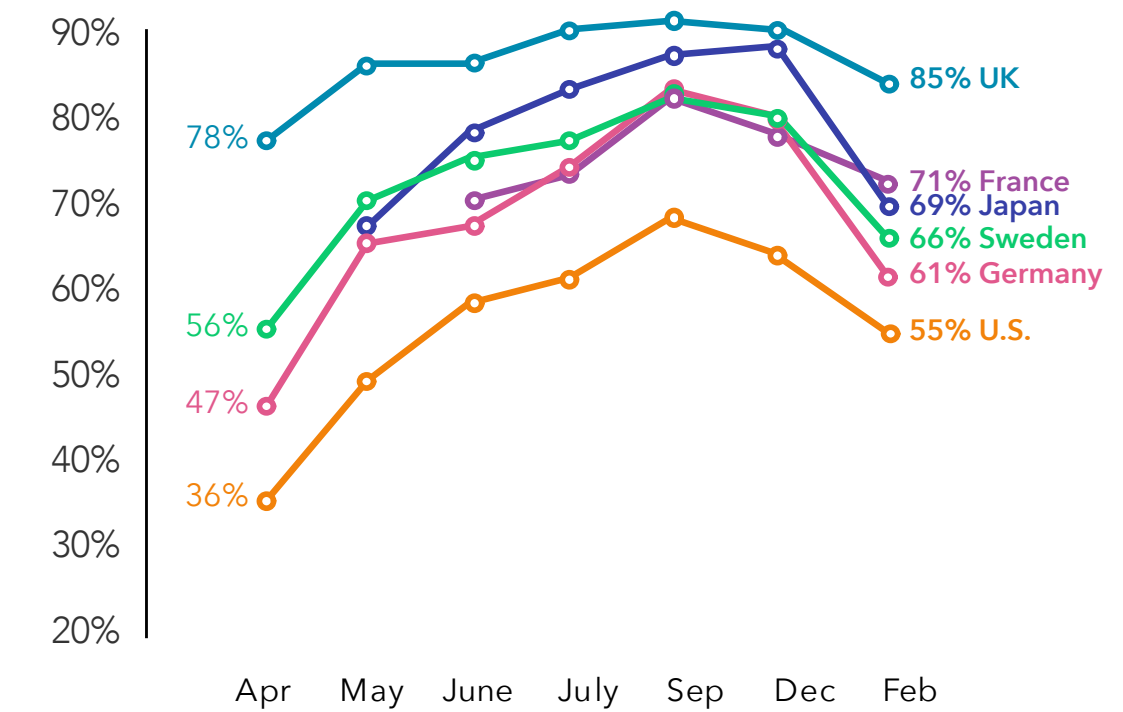
The impact on my country



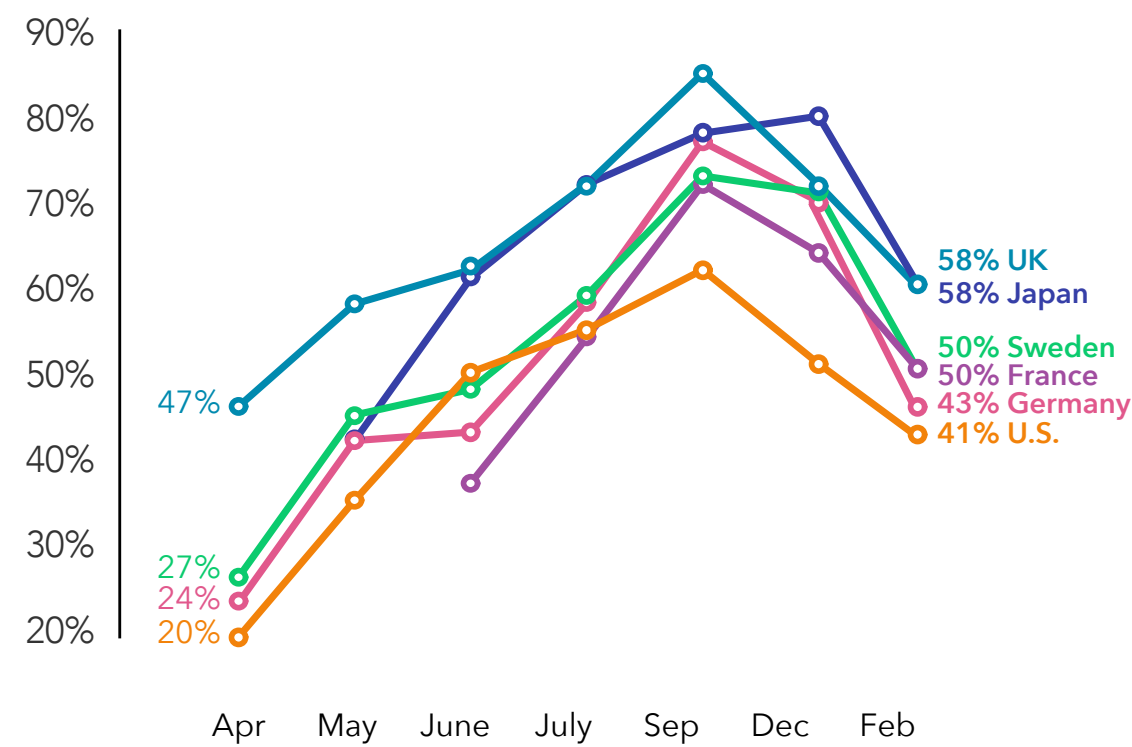
The impact on society overall



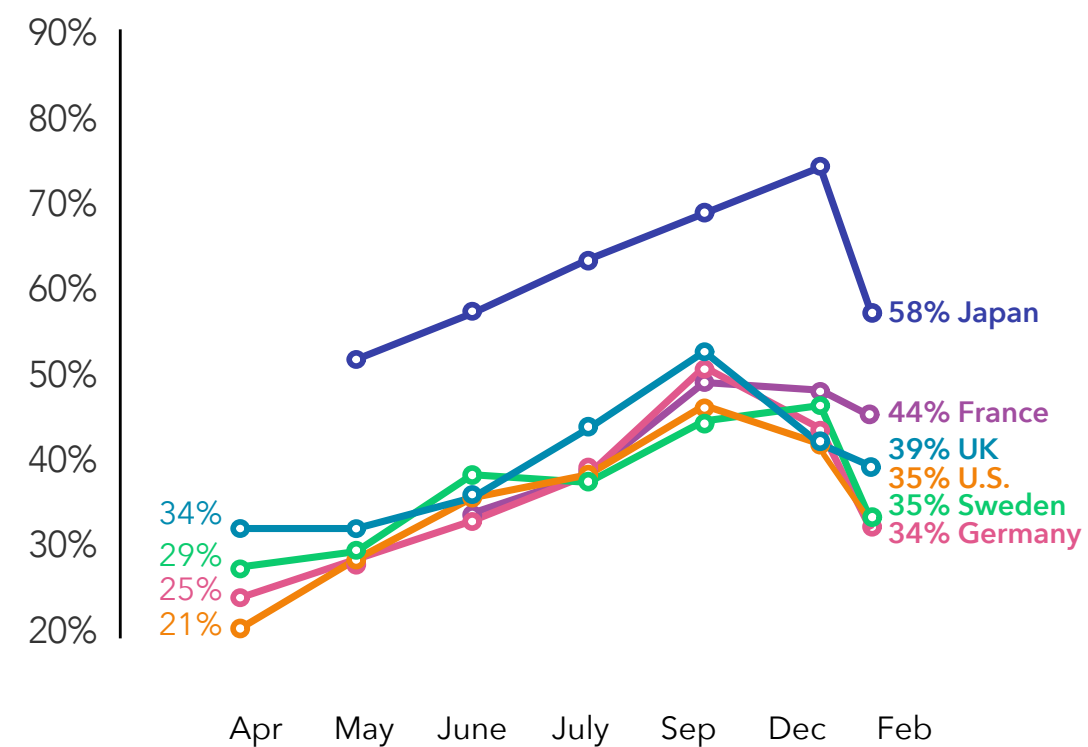
The impact on the economy



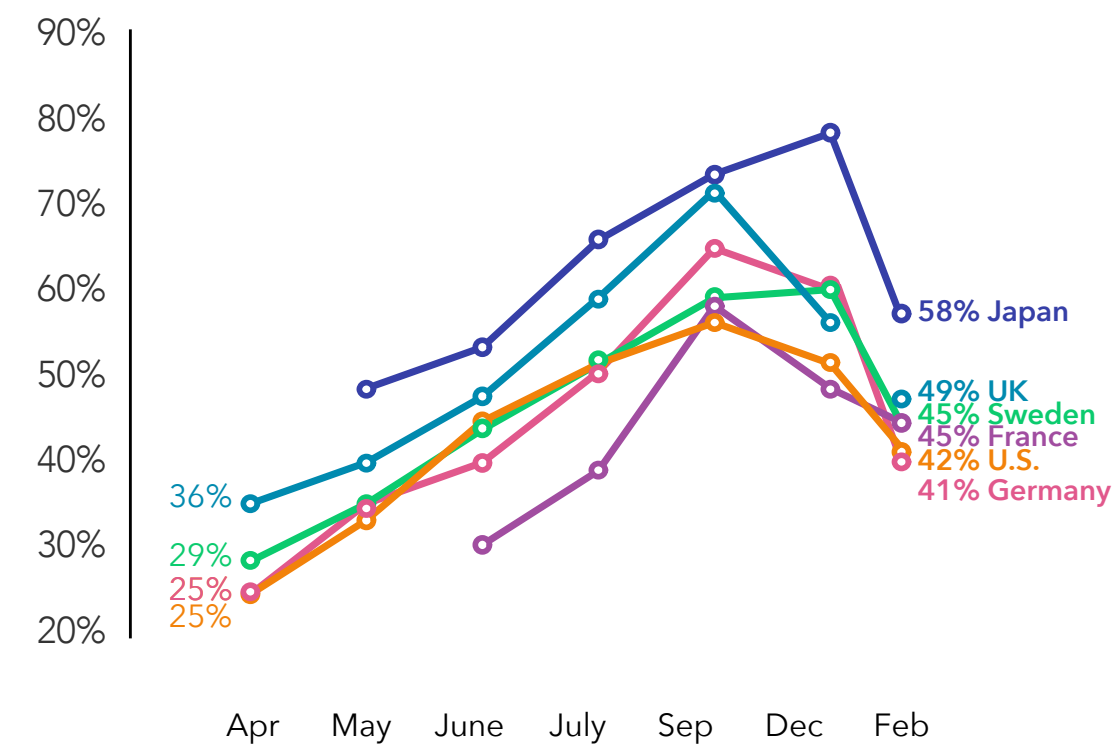
The impact on travel and holidays



The impact on your own household finances



The impact on your own life



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





# 08 Expected duration

A continued fall in the length of time people expect the impacts of the virus to be felt for

- There has been a **significant fall in the perceived length of the pandemic in every country surveyed**. After a small fall in December, that pace has now quickened as hope from the vaccine – despite slow rollouts – shortens the impact of the pandemic in people's minds. This brings it down to roughly the levels seen in the summer last year, as coronavirus cases first began to fall before peaking again in the autumn.
- The decline occurs in every country, across every facet of life– from the impact on the economy, to the impact on society overall. **The decline is most stark in Japan**, where the proportion of people thinking it will last for more than a year has decreased from 82% to 59% in the space of three months.
- The area of life which has seen the sharpest decline is on the **impact on travel and holidays**. Though significant numbers still do expect disruption, this suggests that expectations of travel habits are not being 'sheltered' from this boost of optimism.

## >55%

The percentage of people across all countries who expect the impacts of the pandemic on the economy to last for longer than another year

## 23 POINTS

The decline in the proportion of Japanese people who say the pandemic's impact on society will last for more than a year compared to December

- **Significant proportions of people, however, still expect the impact of the pandemic to continue for more than a year.** Despite the decline, very high numbers in the UK, for example, say it will impact the country for more than a year (80%), as well as the economy (85%), and businesses and how they function (74%). Even in countries with a more optimistic view of the situation, such as the U.S. and Sweden, more than four in ten expect the impact on society to last for more than a year, and majorities in all countries expect the economic impact and the impact on business to last for more than twelve months.

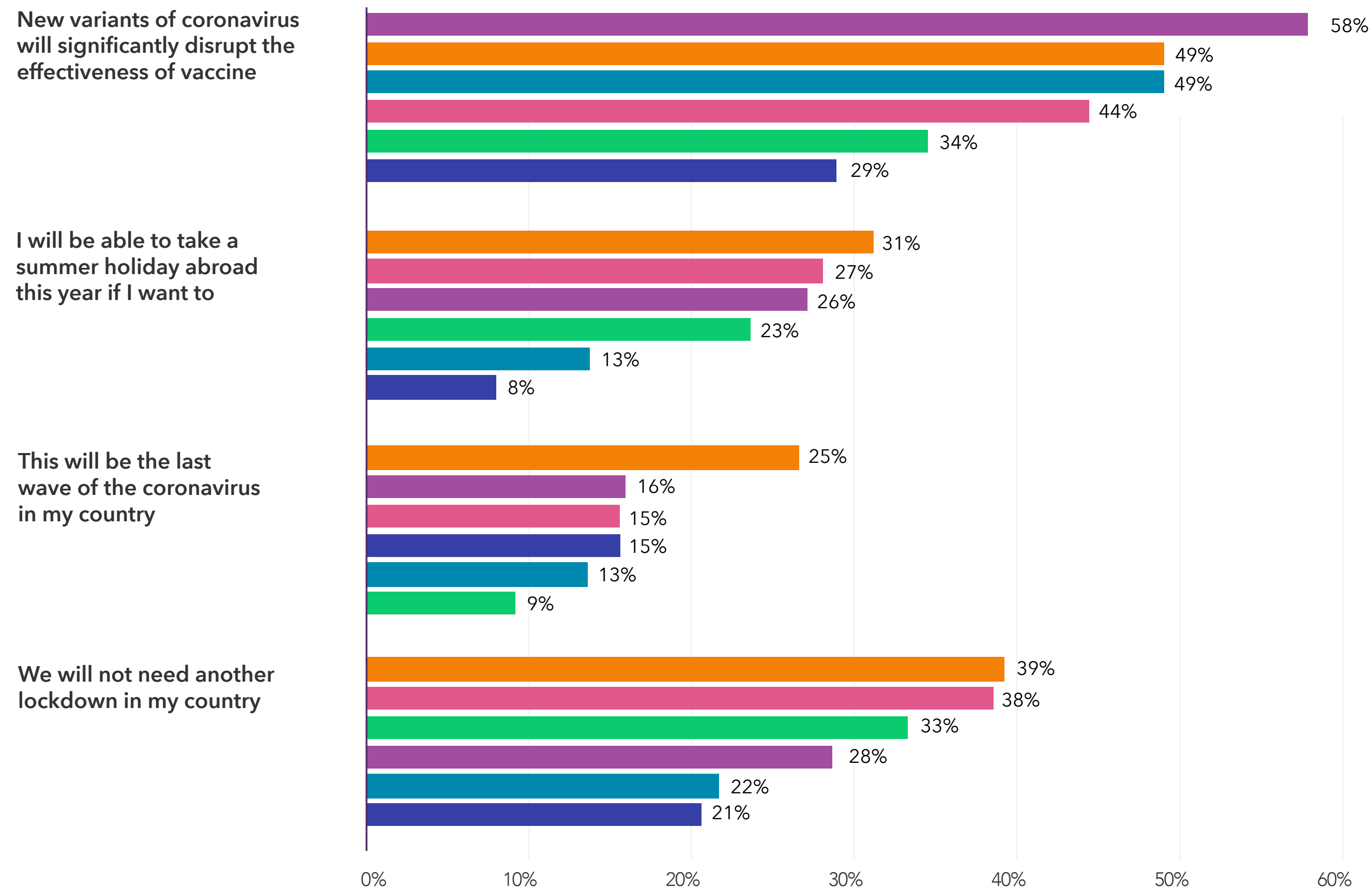
## 19 POINTS

The average decline in the global proportion of people who expect the pandemic's impact on travel and holidays to last longer than a year compared to December

# 09 Public concern about the future

But people do not feel their countries are out of the woods yet, with fear of variants, future waves of the virus, and more lockdowns

% Agree



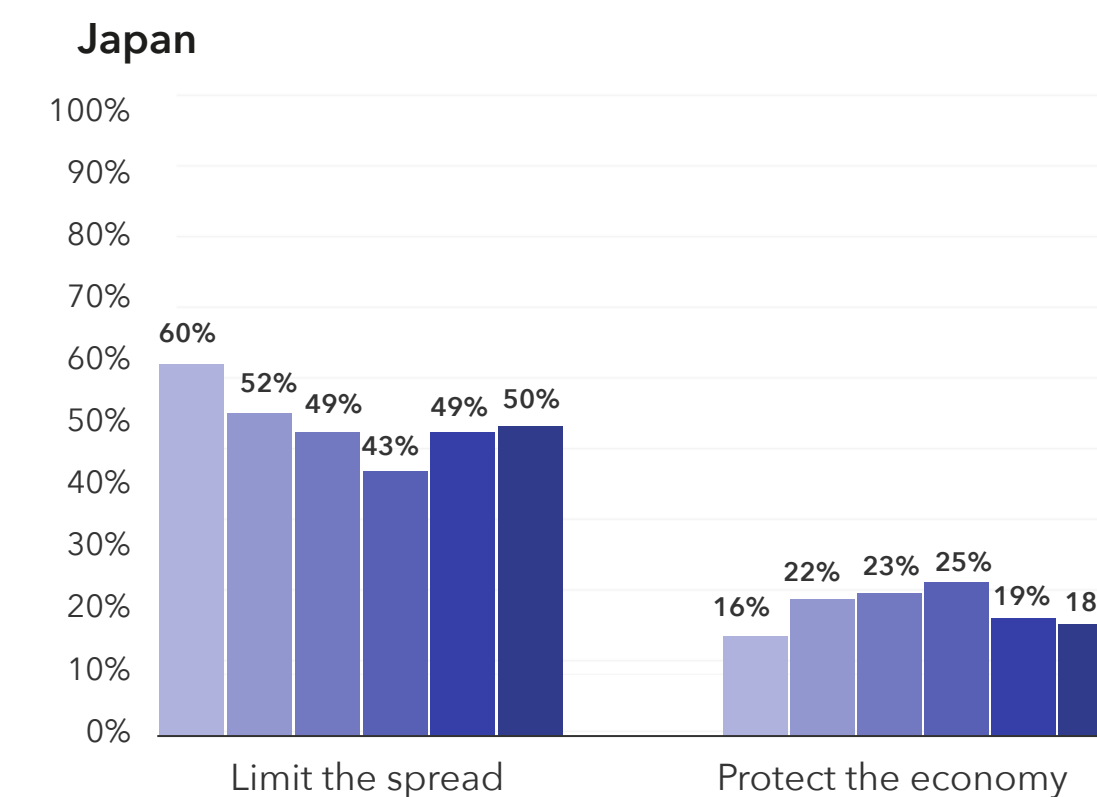
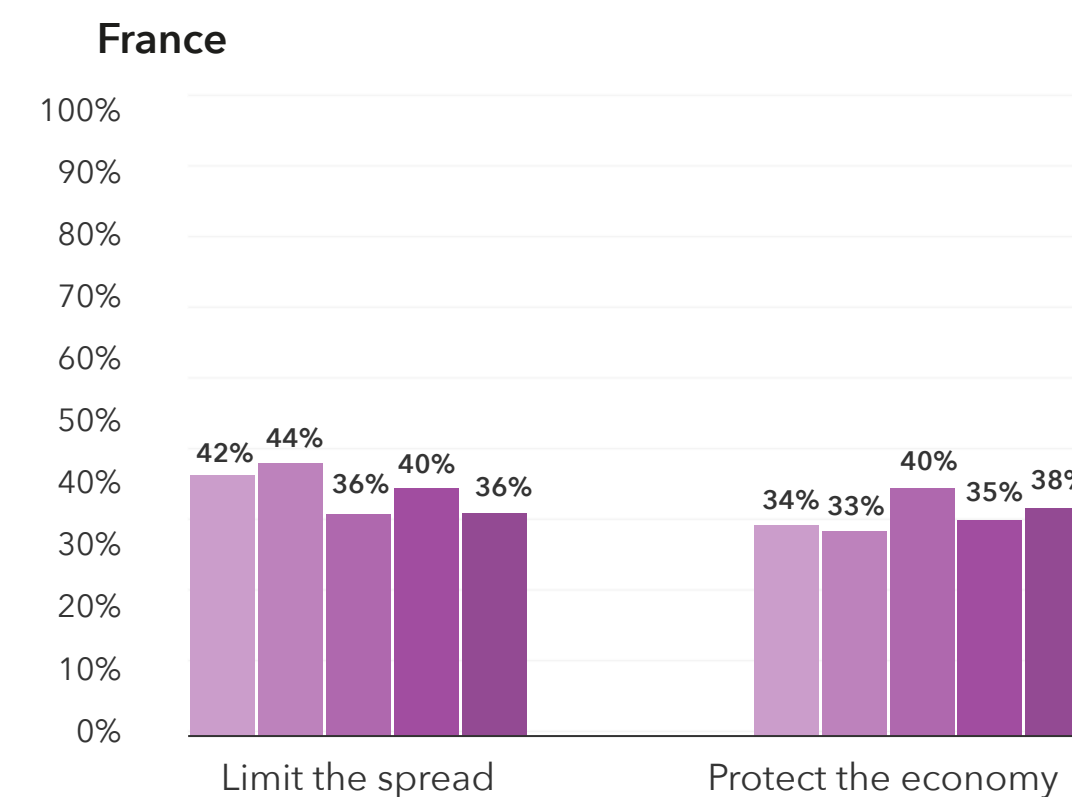
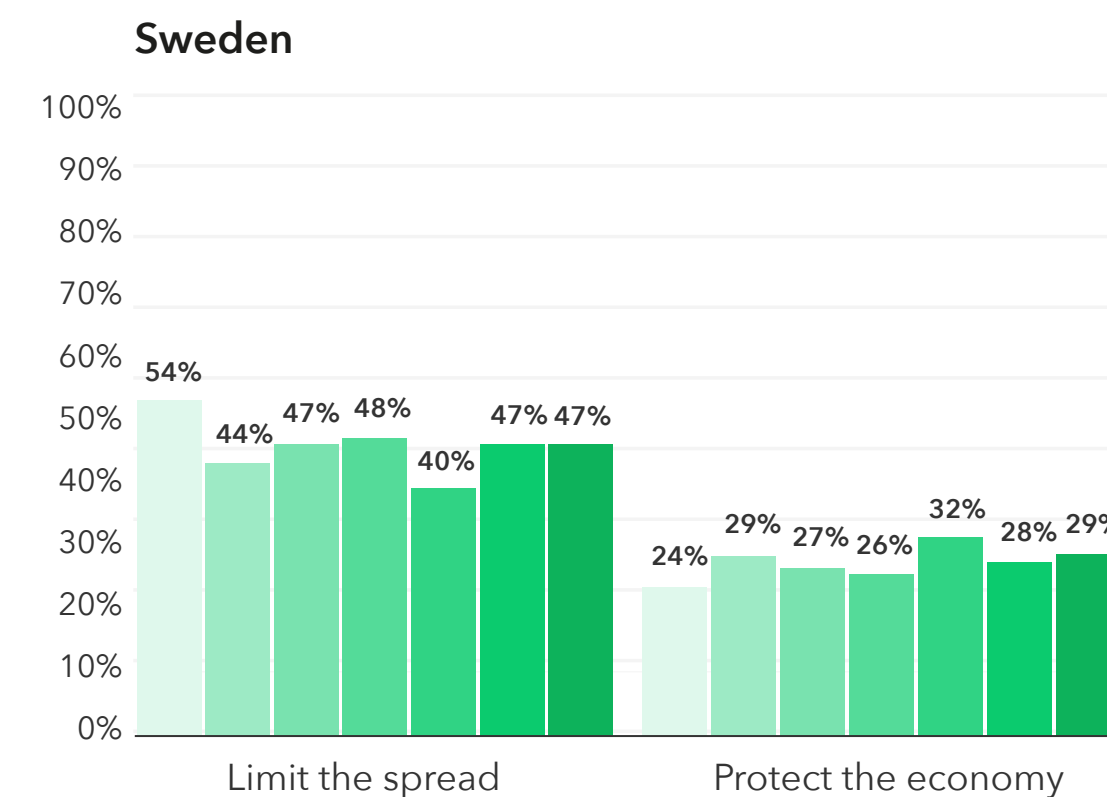
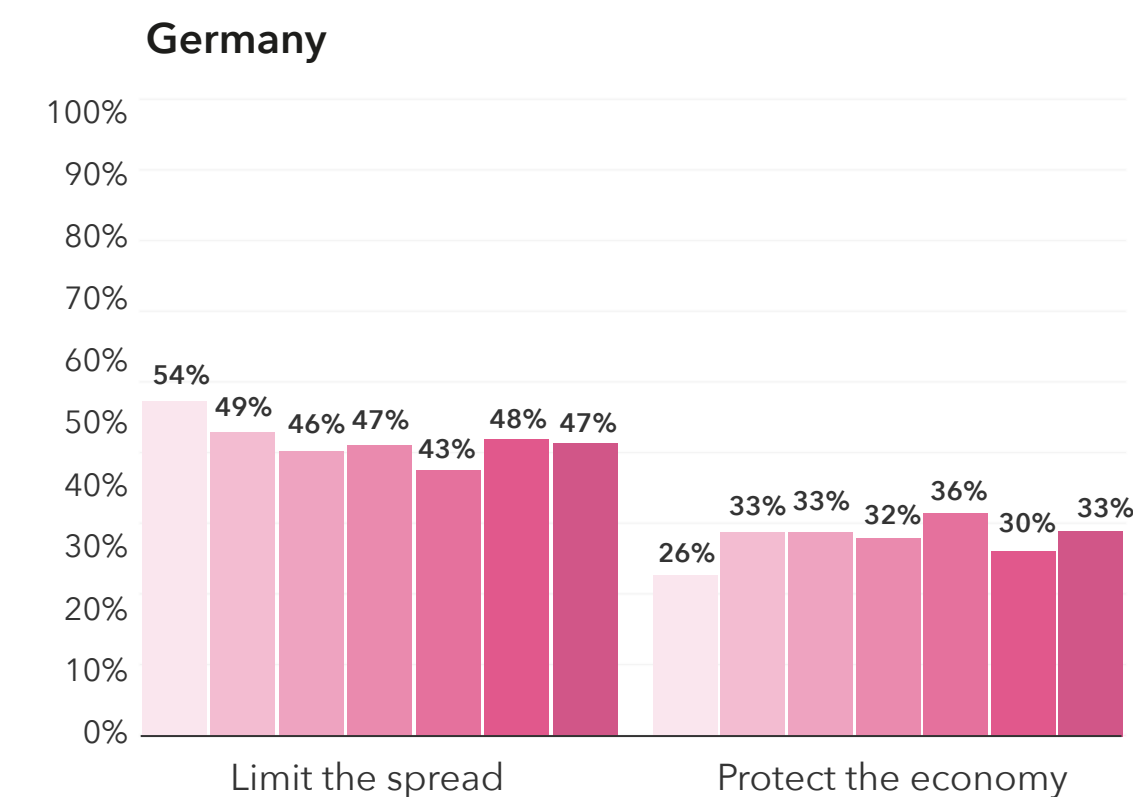
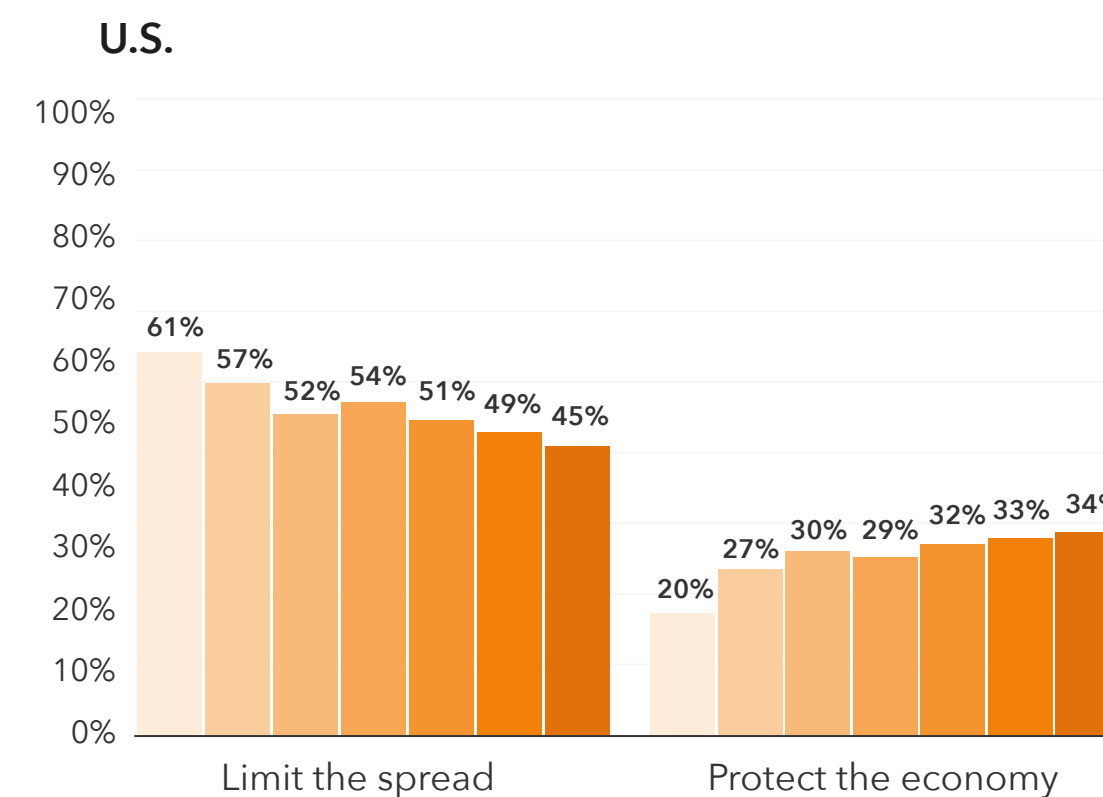
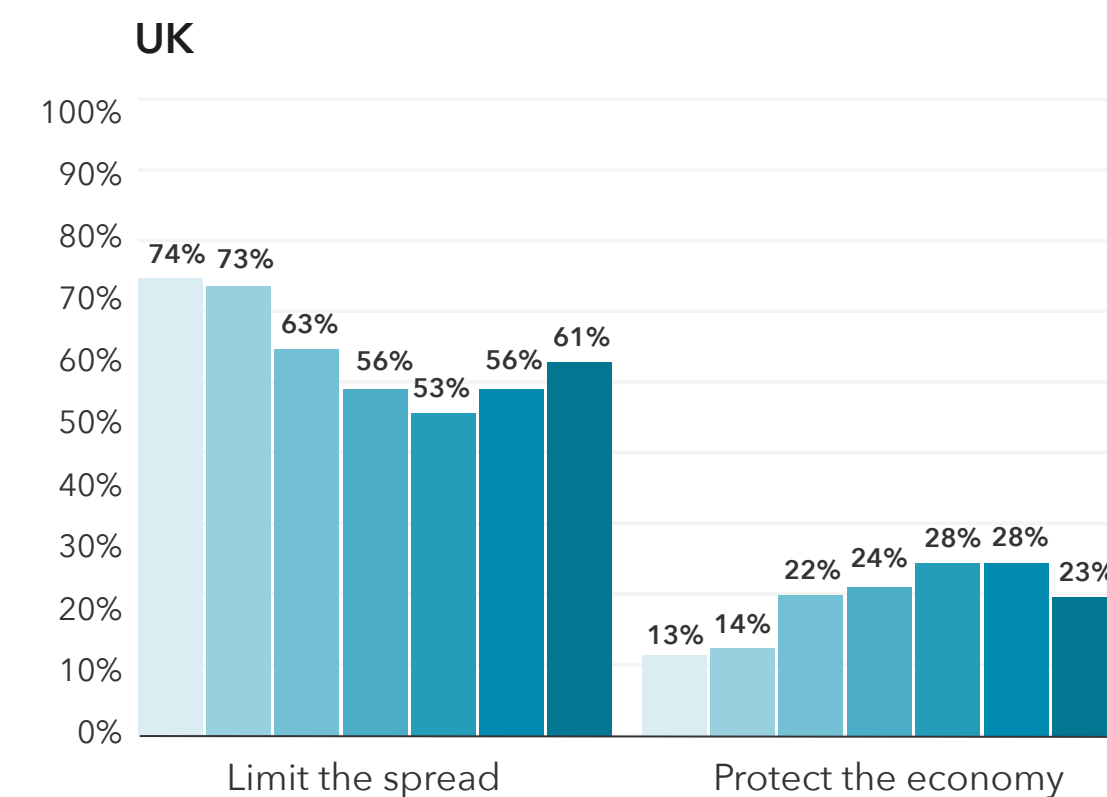
- Despite people becoming more optimistic about the end of the pandemic, publics around the world do not think we are out of the woods yet. **There is a significant amount of concern about new variants of coronavirus disrupting vaccination programmes** – almost six in ten French people think this, as well as almost half of Brits, Americans, and Germans.
- People are also **very reluctant to say that the current wave of the virus will be their country's last**. Only around 15% of people in each country, higher in the U.S. and even lower in Japan, expect this. And though more are likely to think their country will not require another lockdown, **publics remain sceptical there will not be another** – in France, the UK and Japan this is particularly low.
- Holidaymaking aspirations vary. British and Japanese people are very unlikely to say they will be able to go abroad this summer, 13% and 8% respectively. But around **one in four expect to be able to do so in Europe**, and three in ten in the U.S..



# 10 Government decisions

Despite being a year into the pandemic, health still matters most to most countries' populations

- To investigate the public's views on whether government should prioritize 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".





# 10 Government decisions

Despite being a year into the pandemic, health still matters most to most countries' populations

- There has been **no significant re-calibration of whether people think governments should prioritize limiting the spread of the virus or protecting the economy**. Six in ten still put health first in the UK, as do around half of people in Sweden, Japan and Germany, and – though the gap has continually narrowed – health still comes first in the U.S. too.
- **France is the only country where the economy comes above health**, with 36% opting for limiting the spread of the virus and 38% the economy.
- This general lack of change is revealing in the context of people expecting the pandemic to last for less long than they did three months ago. People just want the pandemic to end – can see that it might be – and do not want to do anything to upset this. In some countries, **this may reflect a 'one last heave' mentality, as vaccines are rolled out and hope is on the horizon**.

## 61%

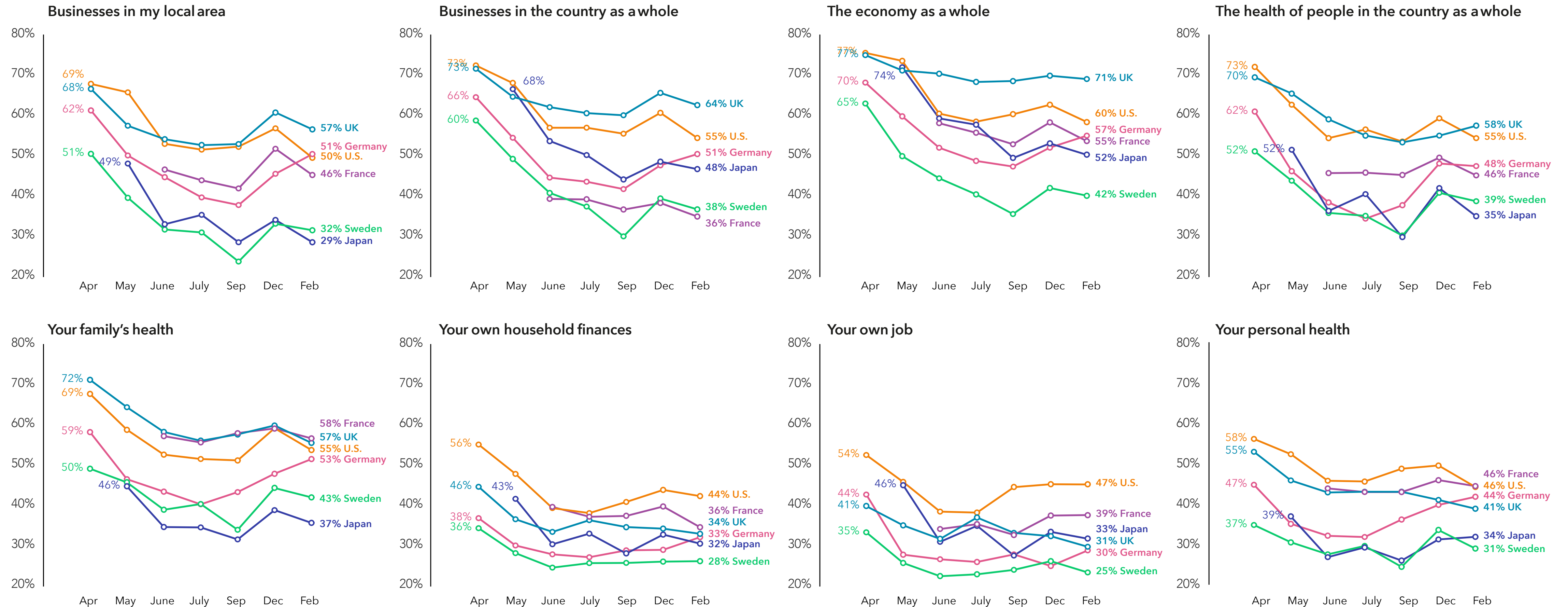
The proportion of British people who want to put saving lives above the economy, the largest of all markets surveyed

## 11 POINTS

The gap between health and the economy in the U.S., down from 41 points at the start of the pandemic

# 11 Levels of concern

## Concern about the impact of the virus remains high



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.

# 11 Levels of concern

## Concern about the impact of the virus remains high

- Levels of concern have largely ticked down across the board and in all markets, but mostly without returning to the lows seen last summer. **The fact that we still see relatively high levels of concern about personal health and the health of people in my country' correlates strongly with a lack of appetite for lifting lockdown measures too rapidly .**
- Once consistent theme in these concern figures for this wave is that **concern is up in Germany against the prevailing trend.** A two wave rise in concern about local businesses leaves Germans as the market with the second highest level of concern about business with a majority of people (51%) saying they are very concerned. This increase in Germany is compared to 10-point falls in France and the UK.
- There is a similar picture for 'businesses in the country as a whole'. Whilst five markets see falls from winter high levels of concern in Germany concern is up and above 50% for the first time since May. **In Sweden and France people remain comparatively less concerned about the prospects for businesses** (38% and 36% of people respectively are very concerned).
- When it comes to concern about personal health the markets are starting to bunch together. Japan and Sweden remain in the mid-thirties, but all the other markets have between 41% and 46% of people who are very concerned about their personal health. **The second winter with COVID has not brought the same increases in concern** as people get to grip with the risks. Whereas in April 2020 58% of Americans were very concerned about COVID that figure is down to 46% this wave. The exception is Germany where levels of concern are almost back to their April 2020 peak (just 3 points off at 44%).
- It is notable that **levels of concern in Sweden remains remarkably low** given the significant changes in the climate around institutions in the Swedish market. Even on concern about personal health only 31% of Swedes remain very concerned – the lowest proportion of any market and regaining that spot from Japan.

47%

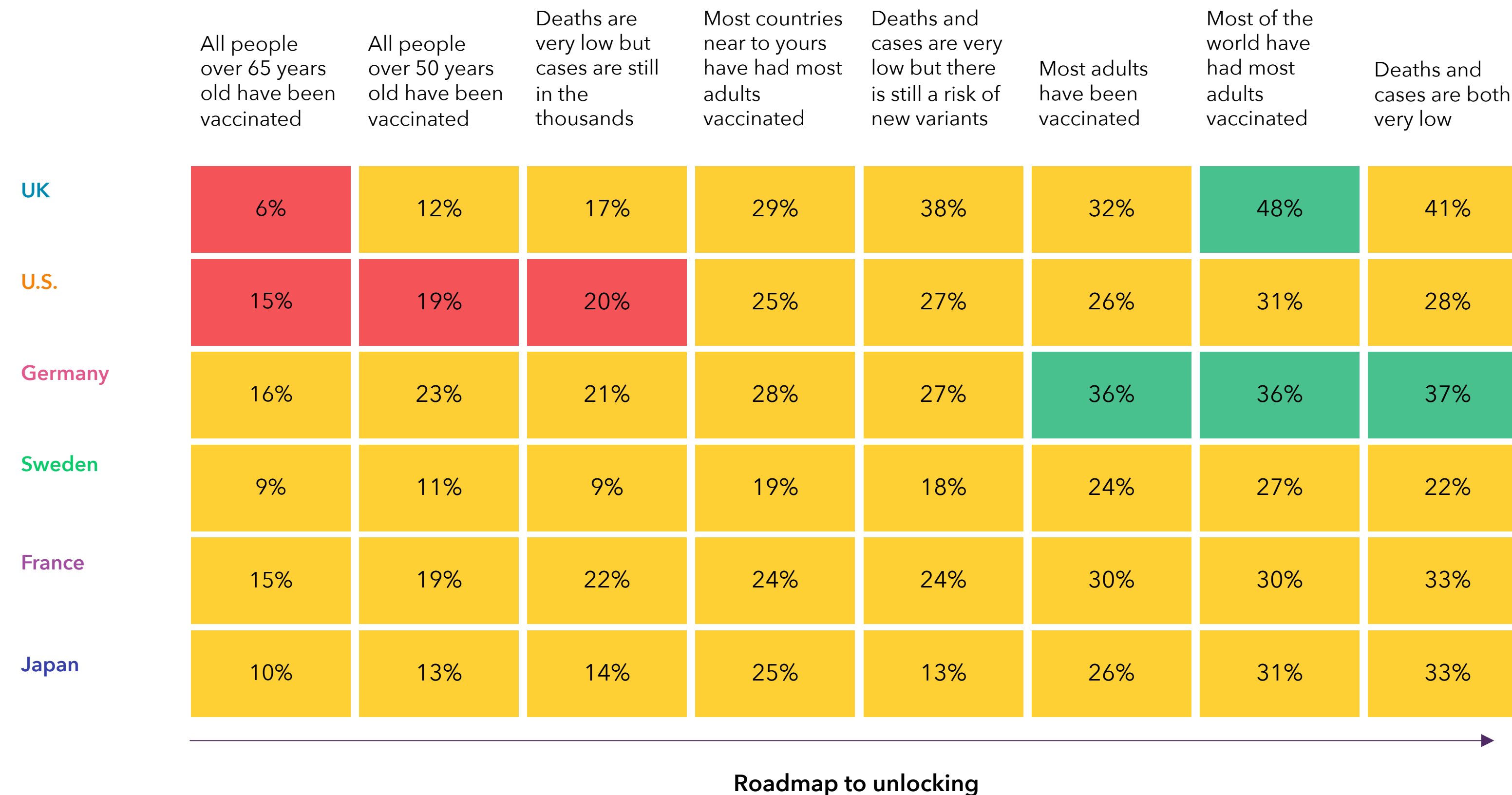
The percentage of people in the US who are worried about their job



# 12 Lifting restrictions

The public are extremely cautious about lifting restrictions, with people struggling to say they should return to pre-COVID levels even in the best-case scenarios

% who say restrictions should be fully lifted in each scenario



**Key:**  
Most respondents opt for...

- Keep restrictions as they are
- Loosen restrictions but keep some
- Fully lift restrictions to pre COVID position

# 12 Lifting restrictions

The public are extremely cautious about lifting restrictions, with people struggling to say they should return to pre-COVID levels even in the best-case scenarios

- People are extremely cautious about the lifting of lockdown restrictions. The public struggle to say they want to see all COVID restrictions lifted even in the best-case scenarios, **with people preferring some restrictions to remain in place rather than return to pre-COVID levels**. Given a range of scenarios, from all people over the age of 65 being vaccinated to deaths and cases being very low, for France, Japan, Sweden and the U.S. the lifting of all restrictions to pre-COVID levels is never the most popular option. Only in Germany do we see this for when most adults are vaccinated, for when most of the world has been vaccinated, and deaths and case are very low. In the UK, the only scenario where full lifting of restrictions becomes the most popular option is when most of the world becomes vaccinated.
- This is a snapshot of opinion at a time when many countries are facing or have recently faced difficult waves of the virus. It may be that this changes over time, or that governments lead and change public opinion. But for now, **because of continued concern about the virus, nervousness of additional waves of the virus, and a feeling that people's own countries came out of restrictions too quickly last year**, the public are very cautious.

9%

The proportion of Swedes who want to see restrictions return to pre-COVID levels in the scenario where deaths are very low but cases are in their thousands

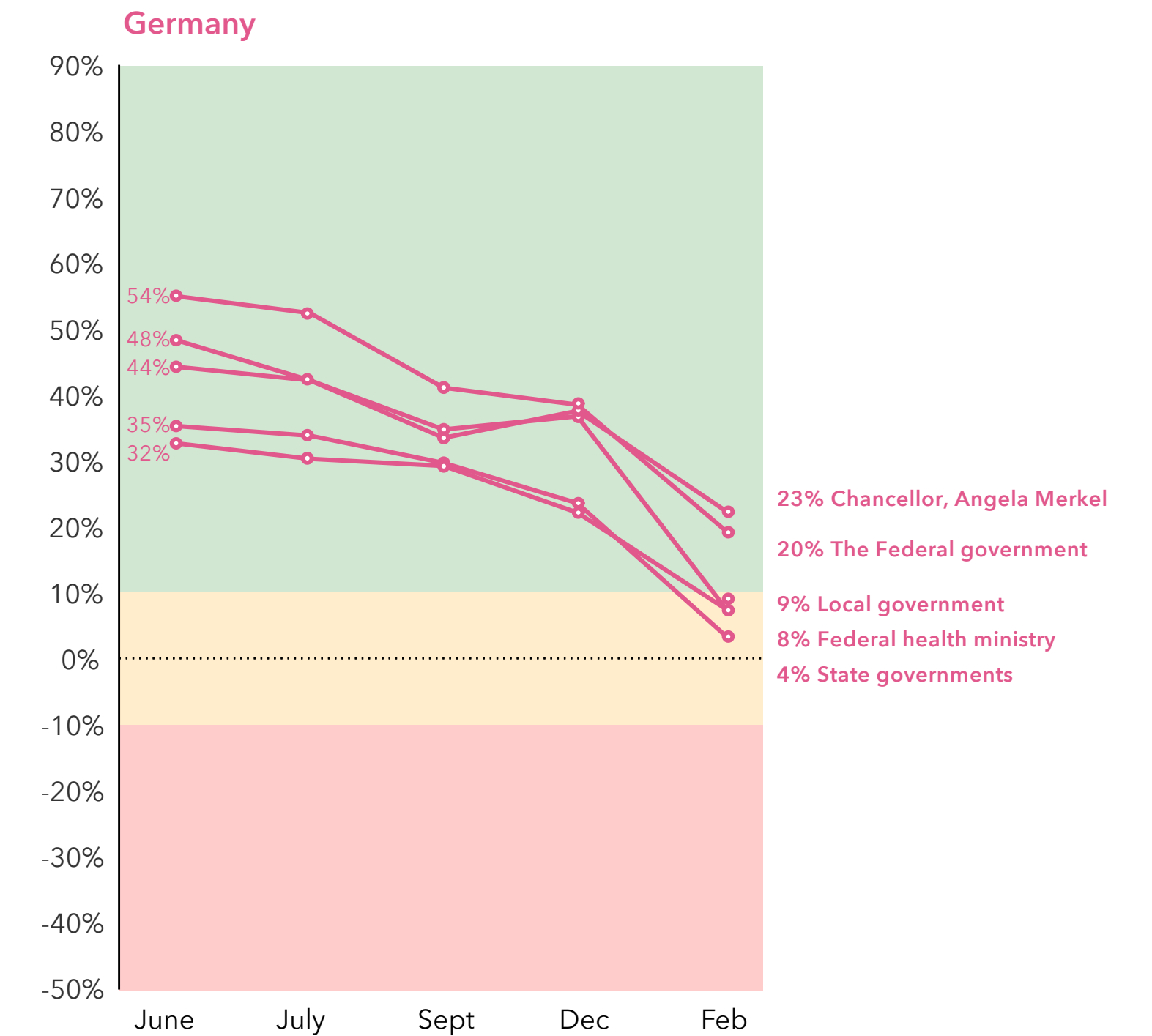
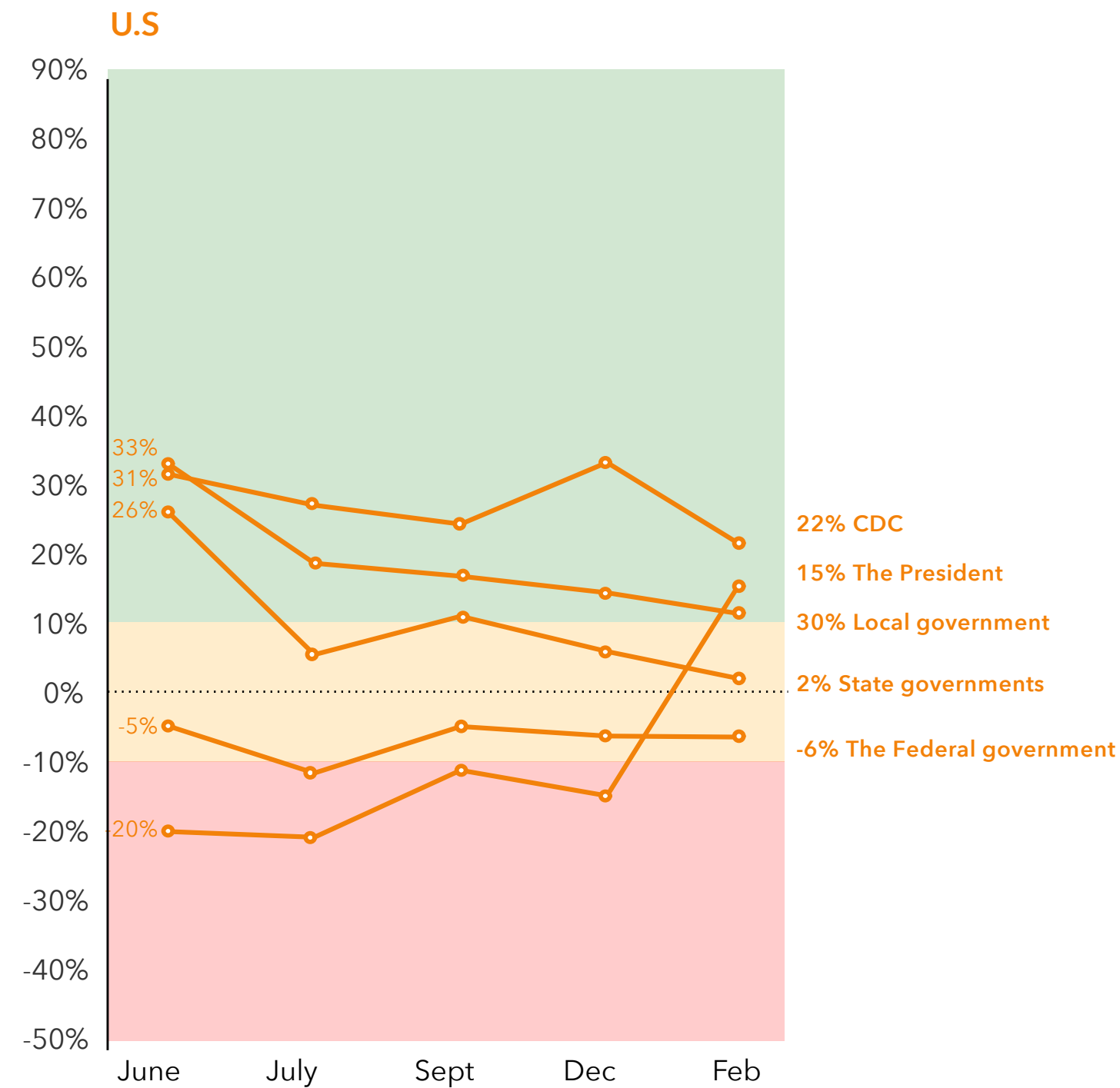
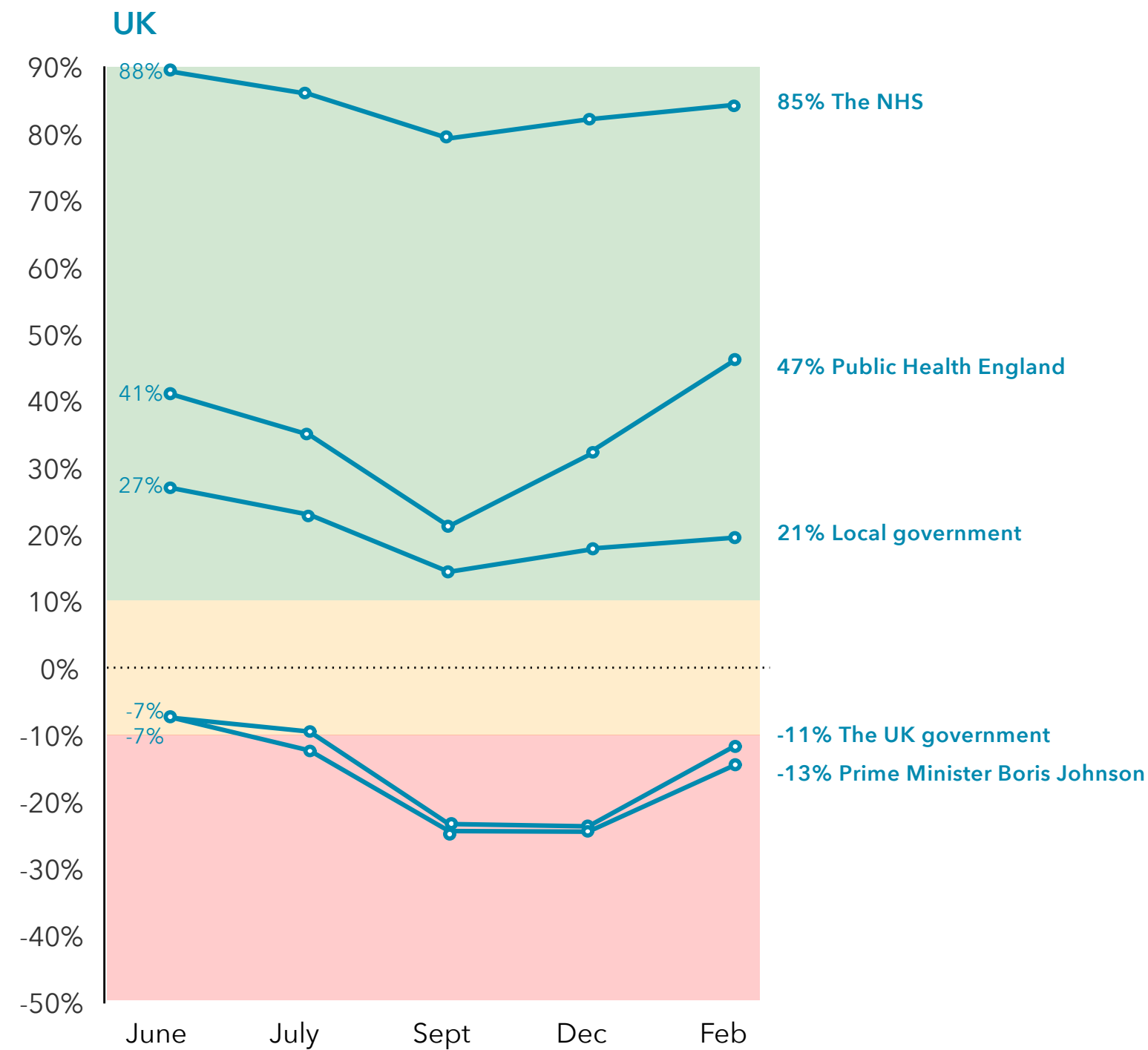
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The number of COVID scenarios that a full lifting of restrictions becomes the most popular option in Sweden, the U.S., Japan and France

- **Sweden is the most cautious of all countries about the lifting of restrictions**, with only one in ten countenancing the lifting of full restrictions in the event of most vulnerable people being vaccinated or deaths being low but cases being in their thousands.
- These results may also point to a relaxed attitude amongst the public to certain restrictions continuing, e.g., continued use of mask-wearing. And it is worth noting that, though full lifting of the restrictions is resisted, **most countries want to see at least some restrictions lifted in most scenarios**.

# 13 Performance of institutions

A 'Biden boost' in the U.S., and government reputations mirror their performance in the vaccine rollout

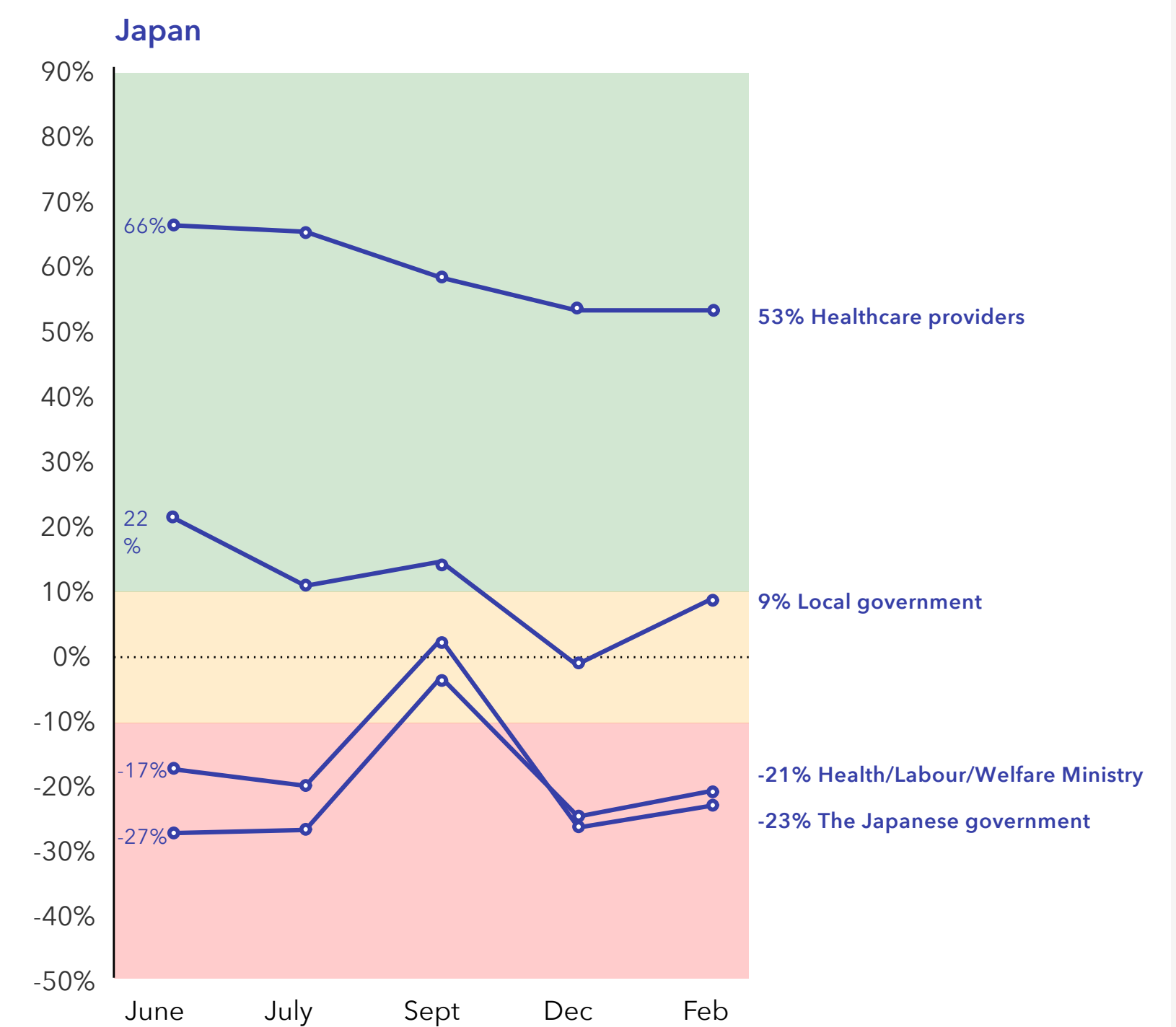
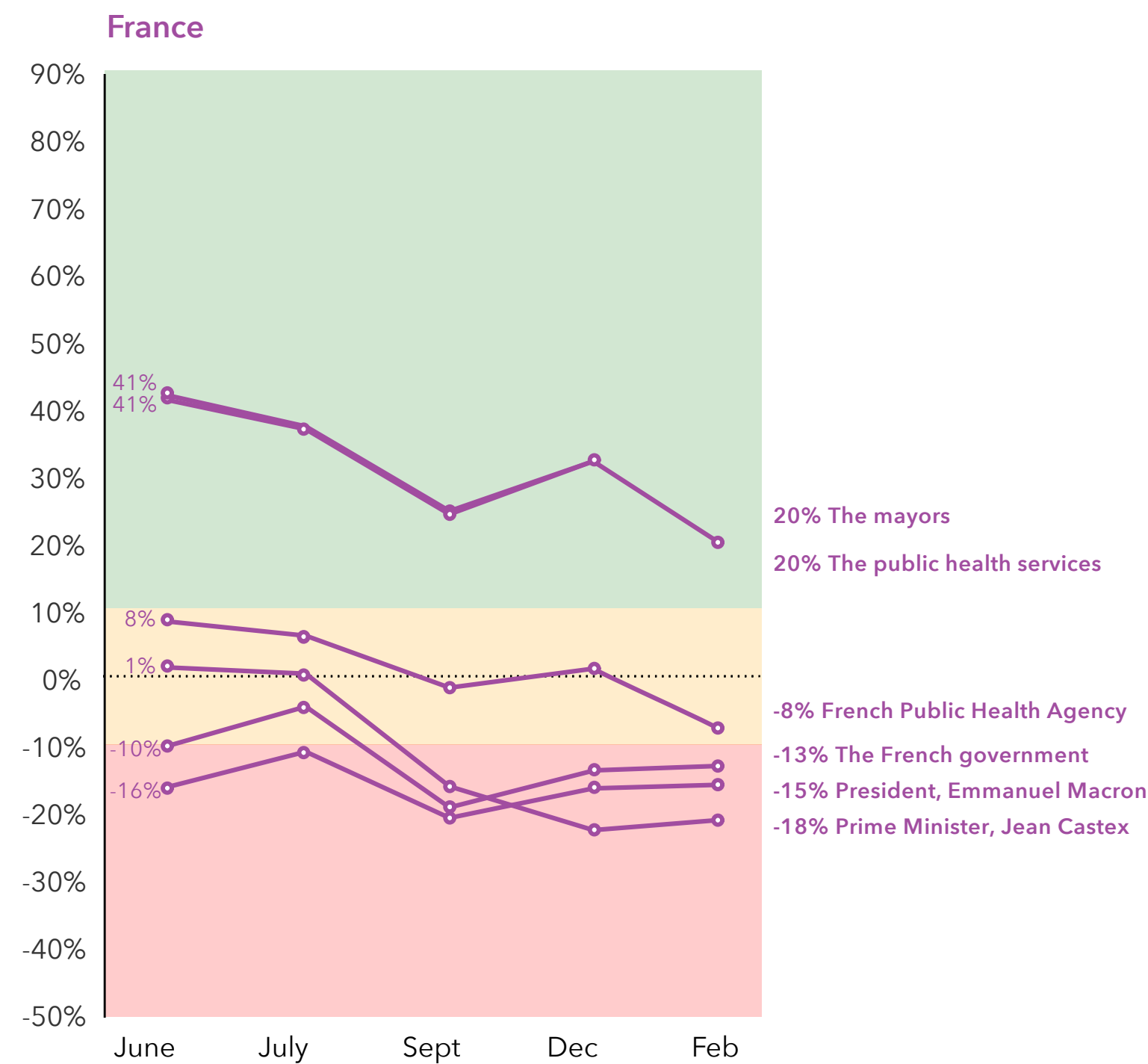
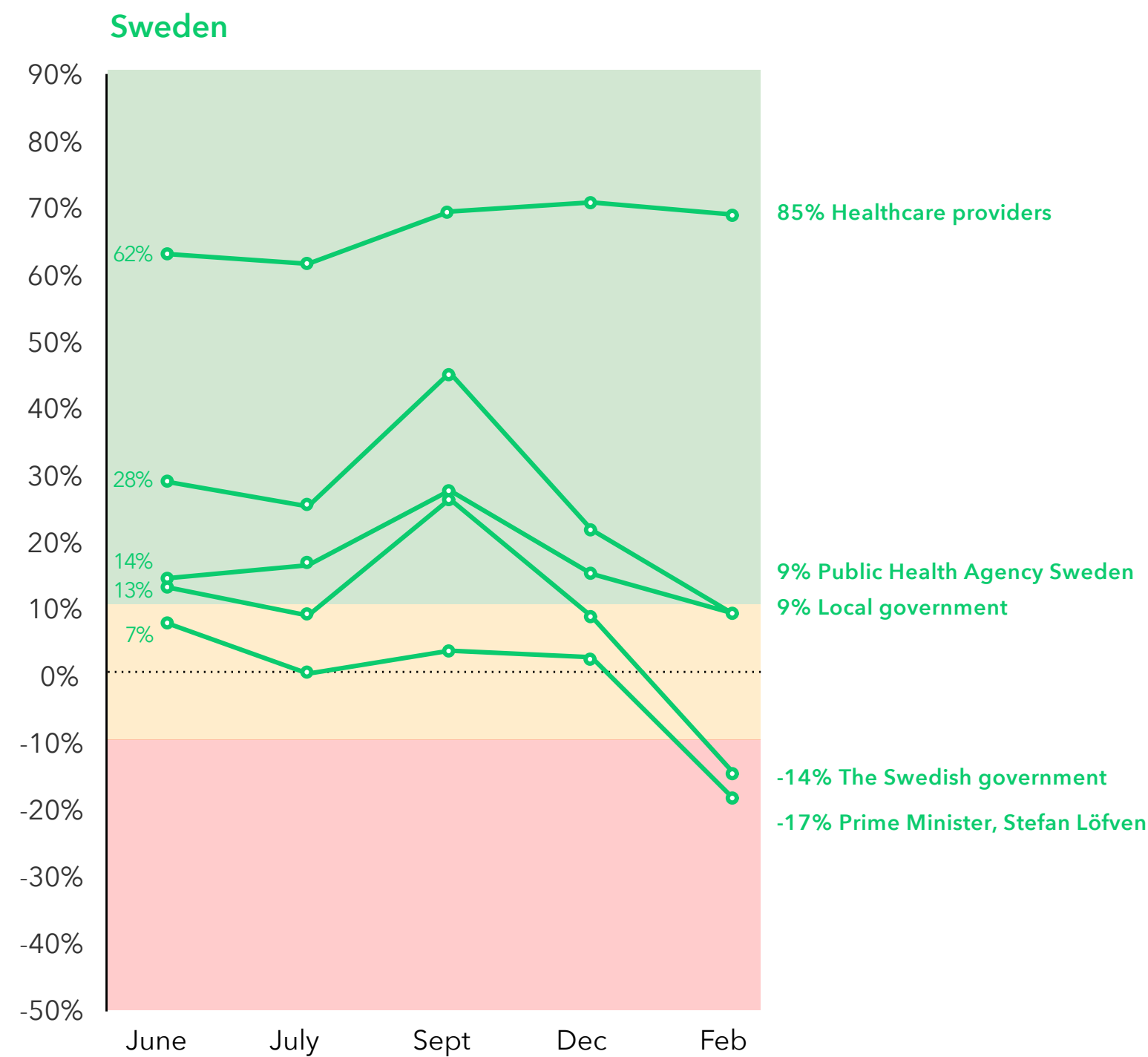


Respondents across all countries were asked whether they thought a number of institutions had done well or badly in responding to the coronavirus. Displayed is the net 'well' score in each country.



# 13 Performance of institutions

A 'Biden boost' in the U.S., and government reputations mirror their performance in the vaccine rollout



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.

# 13 Performance of institutions

## A 'Biden boost' in the U.S., and government reputations mirror their performance in the vaccine rollout

- The second wave of the pandemic has shaken public's views of institutions across markets producing a new set of winners and losers. In the U.S., the arrival of a new president with new energy an accelerated vaccine program and the possibility of a stimulus has caused **Biden's ratings to jump up 25 points from where Trump was in December to +15**. In the UK an even more successful vaccine rollout has seen Public Health England's ratings jump 24 points since September and Boris Johnson to rise from -24 to -11. The increasing ratings extend to local government (+21) and the NHS (+85) as well and the NHS is the highest rated institution in any market.
- Where vaccine rollouts have been slower in the EU the blame has been spread widely and this can be seen across institutions in Germany, France and Sweden. **The European Union has seen its ratings fall across these three markets - down 7 points in Sweden, down 8 points in France and down fully 24 points in Germany.** This is a real change of fortune for the EU institutions after having maintained or improved their position with the public since the start of the pandemic.

- In Sweden even in the absence of a sharp spikes in coronavirus cases public institutions have languished in the public's eyes during the latest wave of the pandemic. **Prime Minister Stefan Lofven now rates a score of only -17 from the Swedish people** making him the second least highly rated leader ahead of only the Japanese Prime Minister. Local government in Sweden and the national government have seen large and sustained falls over the last two waves in how the public rate their handling of the pandemic. **The national government has suffered the most spectacular two wave sustained fall of any of the institutions we have been tracking** through this pandemic despite an ambitious target for vaccinating the whole adult population. In September, its handling of the crisis was rated at +26 and it now finds itself at -14. This dramatic move speaks to a theme of this wave - the elasticity of people's views of institutions and furthermore that you are only as good or bad as your last crisis.

# 40 POINTS

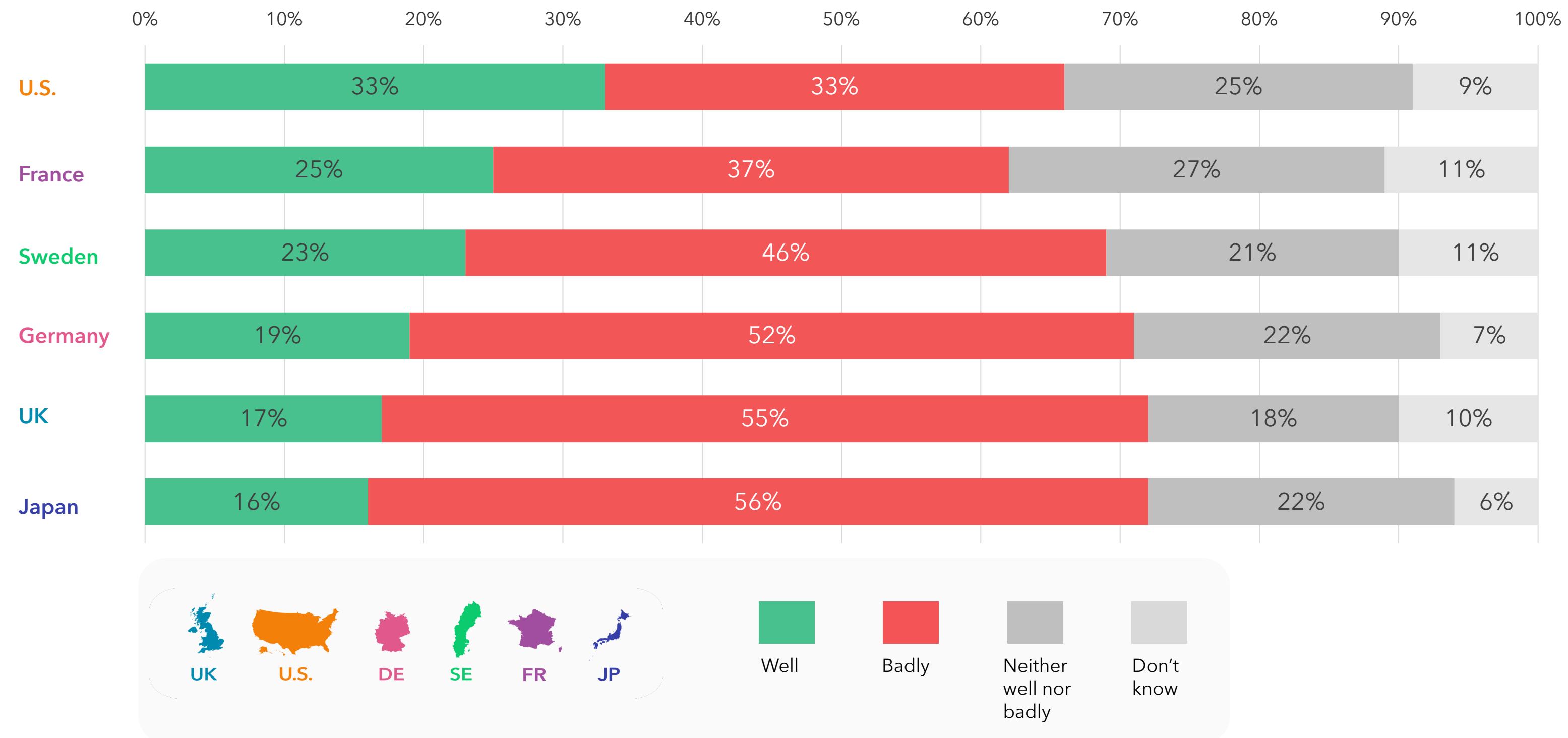
The fall in ratings for the government in Sweden

- In Germany dissatisfaction had been growing with public institutions since the summer, but slowly and from a high base. This looked like mean reversion before Christmas as Germany started to see higher levels of COVID cases. But since December ratings have fallen sharply. Chancellor Merkel is down 17 points on December even though she remains in net positive territory on +23 and the leader seen to have done best of the six markets. **The Lander, the Federal government and local governments have all suffered similar falls leaving them just in net positive territory.** Blame seems to have fallen largely on the Federal Health Ministry. Its rating of +34 in September is down to +8 with a fall of 29 points just since Christmas. We will be watching carefully to see if this sudden loss of confidence shakes up the electoral environment as we look ahead to Federal elections in September.
- In France, the changes this wave are more mixed than in Germany perhaps owing to the lower starting position for most institutions. View of Emanuel Macron are largely unmoved on -15, but the Public Health Agency, the mayors and the Public Health Services are all sharply down.
- Japan has seen relatively little churn in opinion despite now seeing a spike in COVID cases. The government as a whole and the Health Ministry are marginally up whilst local government has seen a +10 improvement.

# 14 Tokyo

In a climate of caution, people oppose the Tokyo Olympics going ahead this year, especially in Japan

Do you agree or disagree that the Tokyo Olympics should go ahead this year in Japan?

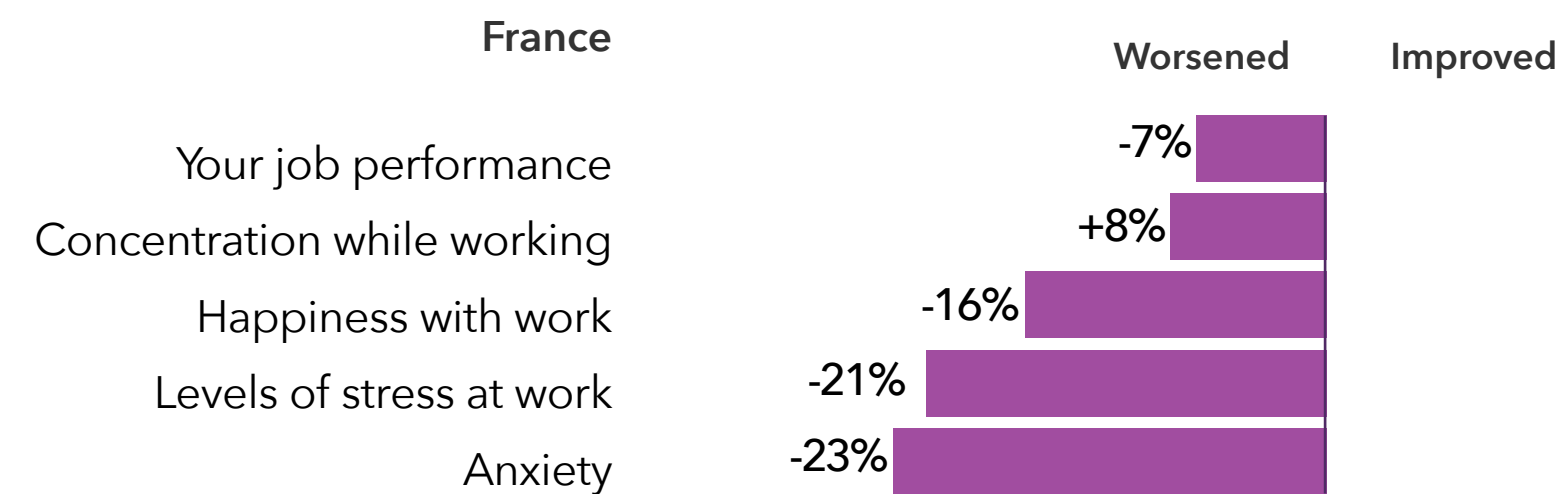
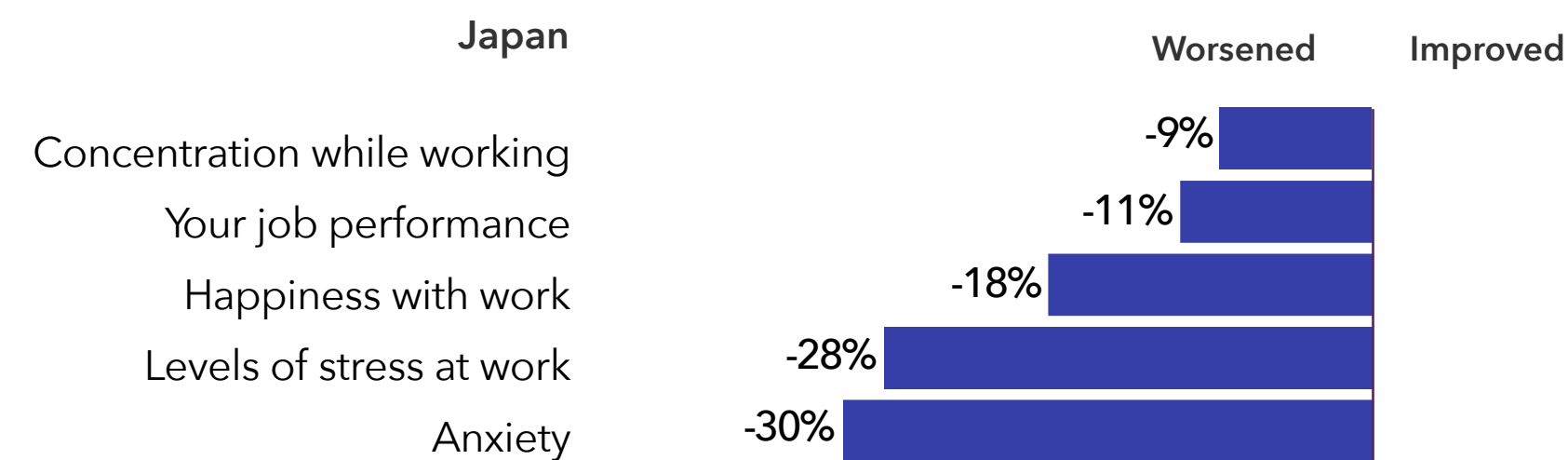
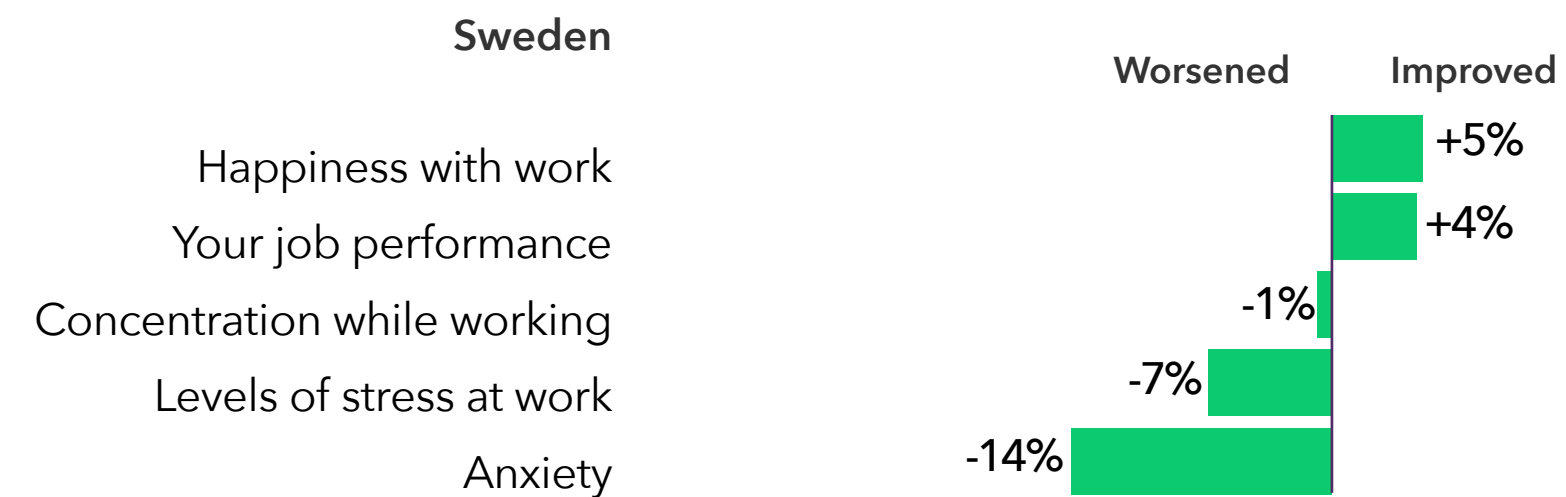
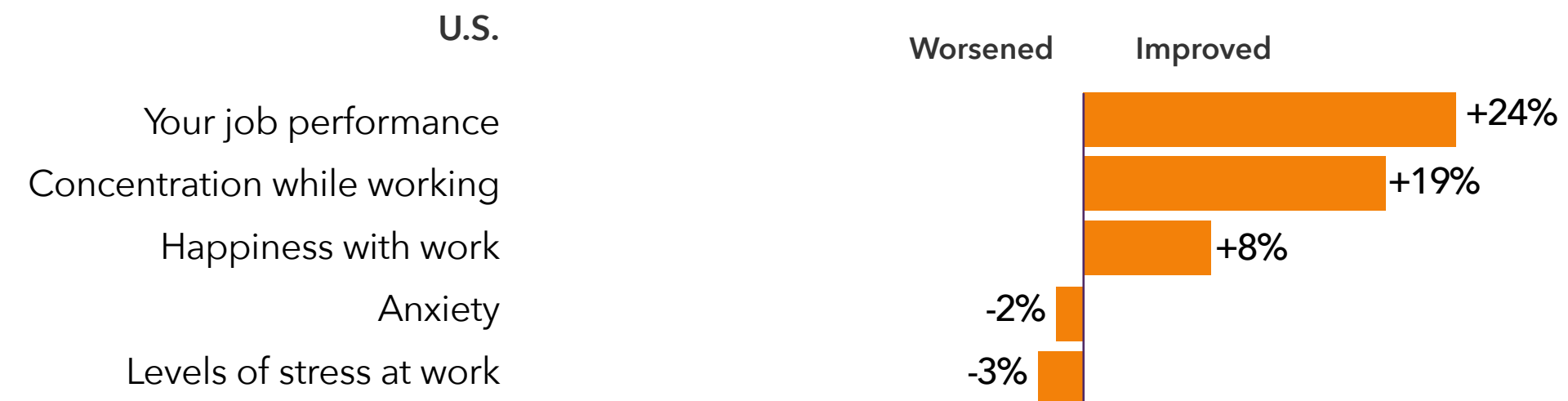
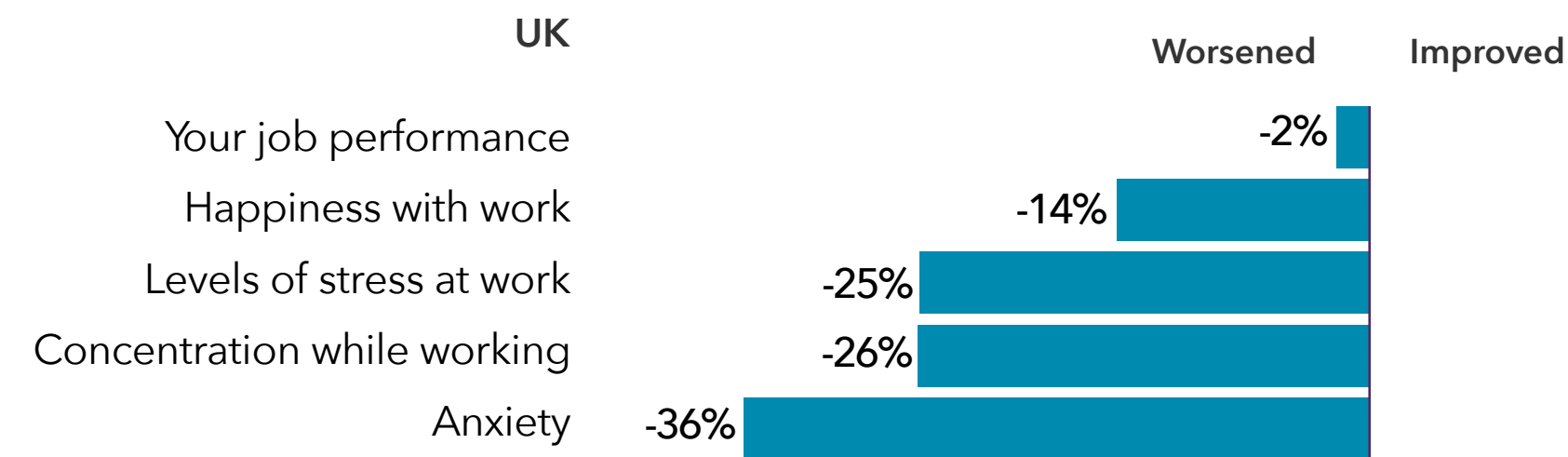


- As things stand, **there is little public appetite for holding the Olympics this year**. Only in the U.S. did the proportion of those wanting to see the Tokyo Olympics go ahead match those opposed (33% each).
- In the markets outside the U.S., **support for going ahead ranges from 16% in Japan itself to 25% in France**.
- In the UK, Japan and Germany **absolute majorities actively oppose holding the Olympics** (55%, 56%, 52%). The Japanese public are the most opposed to the Games taking place.
- Globally, **women** are particularly skeptical about the idea of holding the Olympics (51% vs 42% opposition with men).
- There remain a significant number of people in each market who have yet to make up their mind who may well still be persuadable.
- **This picture could change very rapidly if vaccine rollouts in these markets accelerate** and life returns to normal, but it is important to note this position at the start of the year.



# 15 Employee mental health

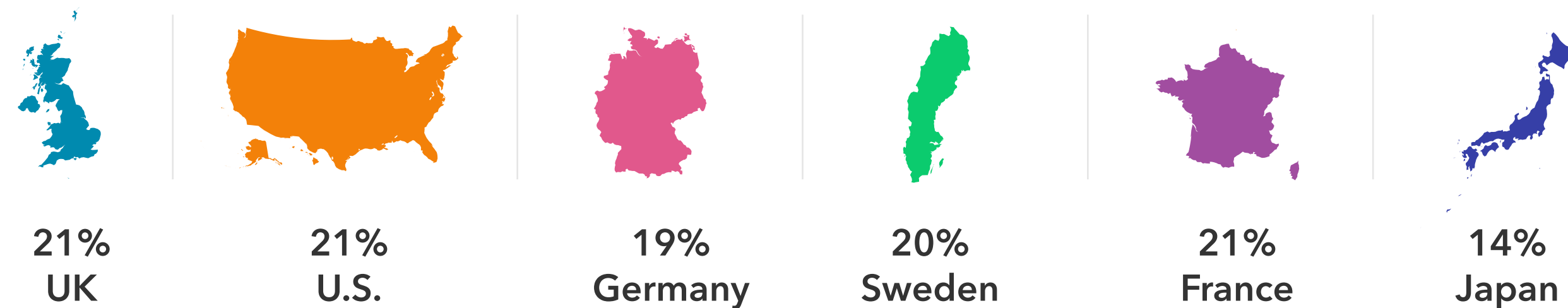
Employees say their mental health has worsened, and one in five feel they cannot approach their employer about it



# 15 Employee mental health

Employees say their mental health has worsened, and one in five feel they cannot approach their employer about it

% of those who report worsened mental health or job performance and have not raised their concerns with their employer because they are worried about their response



## 49%

The share of UK employees who say their anxiety levels have worsened since the pandemic began

## +24%

The net increase in job performance reported by American workers, the highest of all markets surveyed

- There are two different stories from how employees say their productivity and mental health has changed during the pandemic – productivity and concentration are stable, **but beneath the surface for many workers there is a significant increase in anxiety and stress.**
- **Employees' self-assessed job performance and concentration is either up** (Sweden net +4 performance, U.S. net +24 performance) or down only marginally. This fits with the narrative of time saved on commuting, and more time on task.
- At the same time, **levels of anxiety are on the increase from before the pandemic and doing so even in those markets where performance is up.** In the UK and Japan, the situation appears particularly grave (-36% and -30% net worse), whilst Germany, France and Sweden form a second tier of worsening (-20, -23 and -14). In the U.S., the net change in anxiety is relatively small (-2).
- **Happiness at work is also down outside of Sweden and the US.** Japan, France and the UK employees feel this especially acutely (-18, -16 and -14).
- It is possible that employers have noticed the first trend in relation to productivity, but not fully appreciated the second. There may also be communication difficulties between employees and employers: **one-fifth of employees who had a problem said they had not talked to their employer because they were worried about the response**



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