

RESEARCH REPORT

COVID-19 Opinion Tracker

MAY 2021 | EDITION 8

Foreword

Business is working. That is the clear message of a year of polling as part of Kekst CNC's Global COVID-19 Opinion Tracker project.

We have all struggled with the disruptions and uncertainties of the coronavirus crisis over the course of the past year. And it's been really challenging. From the small dislocations in our daily lives, to the huge pressures on economies and societies. And the very real threat to life has caused fear and distress in communities around the world.

Going into the crisis, we thought that the public would view corporate performance in the same way it viewed big business during, and following, the Global Financial Crisis. But something very different has happened.

Faced with the pressures of COVID-19, business leaders have been able to reshape strategies, flex operating models, and reform relationships with local communities. The public have recognized the role that food and online retailers have played in serving their customers across the six markets we have polled. In the UK, in particular, there appears to be a significant reappraisal of the food retail sector, which had undergone a period of extended disruption over the past two decades.

In countries where the vaccine roll-out is seen to have been most successful, the pharma sector has benefitted from a dramatic improvement in public perception. And even financial services, the villain of the previous decade, has recorded consistently positive ratings across the Tracker. Perhaps a consequence of the resilience created by the reforms that followed the financial crisis. The workplace is experiencing something of a renaissance too.

Across the world, the novelty of enforced homeworking appears to be wearing off: two-thirds of workers across all six countries say they would rather spend more time in the office than at home, albeit with some flexibility.

But big business hasn't performed in isolation through this crisis. It's stood shoulder-to-shoulder with Government: for good and for ill. Unprecedented Government interventions in the corporate world have become as pronounced as restrictions in our personal lives. Partnership between the public and private sectors in the delivery of vaccine programs has brought recognition for the British and US Governments, as well as for the pharma sector. But the row between the European Commission and vaccine manufacturers appears to have badly damaged the perceptions of both. Germany, in particular, now appears to be experiencing a profound crisis of confidence in its state institutions and this is impacting attitudes to the private sector too.

Foreword

The correlation in attitudes between public and private is perhaps unsurprising, but it's a big contrast to the dominant debate in the developed world that sometimes sees zero-sum trade-offs between Government and business. 'We're all in this together' has become something of a cliché but, as this crisis has progressed, the ties that bind big business and big government together have grown stronger. Or perhaps they were there all along?

Whether you're a cabinet minister or a CEO, the lesson – again, somewhat obviously – is that delivery is what matters most. Operational resilience and flexibility are what's rewarded and remembered. Reflecting on the past year, competence appears to have been more important than character.

Business and political leaders are regularly told that they face a collapse in trust – initiated (or accelerated) by the Global Financial Crisis.

At times, this has precipitated a 'race to virtue', with new communications channels creating new venues to allow Governments and corporates to 'show they are listening' and build emotional connections with audiences. Of course, this matters. We all expect more from institutions in areas in which they have less control. But this year has shown us that nothing delivers like delivery. Governments and business earn their right to be heard by delivering on their promises.

Reputations have been made and remade over the past 12 months. Voters and consumers have been much more willing to reappraise entrenched viewpoints based on immediate experiences of how the powerful have delivered for them, and their communities. It's unclear whether attitudes formed in the pressure of this year of uncertainty will be locked in for the long term as restrictions unwind and some economies return to some sense of normality.

Tough choices lie ahead for politicians and businesses leaders. But for the moment, they are being viewed through the same lens.

Kekst CNC

May 2021

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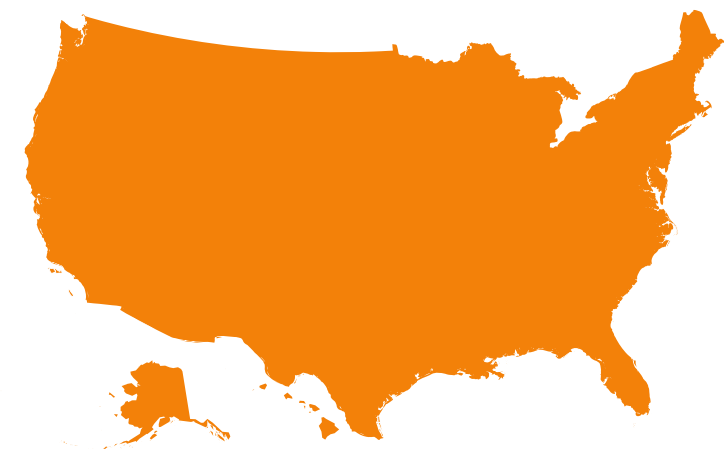
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Methodology

Polling conducted by KEKST CNC, nationally representative sample of:



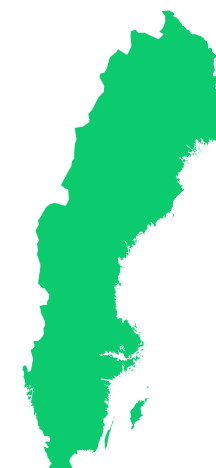
1,000 adults
in UK



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 8 took place on
22nd April – 30th April 2021

Fieldwork of wave 1 took place on
30th March – 3rd April 2020

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

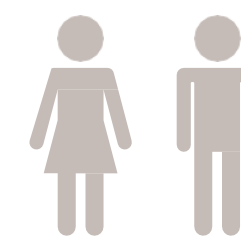
Fieldwork of wave 3 took place on
1st June – 5th June 2020

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

Fieldwork of wave 5 took place on
16th September – 22nd September 2020

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

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



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

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

Global key findings

1

Poor marks: people tend to rate their own country's pandemic performance poorly, but vaccine rollouts make the U.S. and UK stand out

People in all countries were asked to rate how various aspects of the state apparatus had functioned during COVID-19. The result is a **generally poor verdict from citizens**, with testing, coronavirus tracking apps, and treatment of non-COVID patients most under fire. Looked at in relative terms though, and **the U.S and the UK top the table because of their extremely well-received vaccine rollouts** – while Germany and Japan are the countries with the most critical populations.

2

Confidence rests on rollouts: Europeans are no more positive about their nations' vaccine rollout, while UK and U.S. confidence soars

While British people and Americans are very content with their governments' vaccine rollout, Europeans are becoming more critical of their countries' performance. Despite a speeding up, **majorities in Sweden, France, and Germany say their vaccine rollout is too slow** – and Japanese people have turned on their government on the issue too. This has a profound impact on confidence, with U.S. and UK institutions soaring in public confidence, while European and Japanese institutions see a collapse. This is particularly stark in Germany, where **perceived performance of Angela Merkel and the Federal Government – as well as local and state governments – is in negative territory for the first time**. Though business is viewed much more positively, this 'feel-good' effect has lifted views of businesses performance in the UK and the U.S., while the opposite effect has been seen in Germany and Japan, especially for the pharmaceutical industry.

3

The long pandemic: most countries expect the effects of the pandemic to last for longer than they thought at the start of the year

There has been a significant up-tick in the number of people, especially in Japan, Germany, and Sweden, who **expect the pandemic to last for longer than a year**. As coronavirus cases reach a world high, this is perhaps not surprising, but underlines the fact that – despite vaccinations – people expect the consequences of the global spread of the disease to impact them for a long time yet. The increase is especially stark in countries most critical of their government's vaccine rollout, with Japan seeing the starkest increase. The U.S. is the exception: Americans feel like the effects of the pandemic are receding and **fewer than half say it will affect the U.S. for another year**.

4

Likely vaccine uptake hits record levels: reaching as high as nine out of ten people

Though people expect the duration of the pandemic to last for longer, levels of personal concern are flatlining or trending down. This may be due to where the virus is now hitting globally, but also speaks to a rise in likely vaccine uptake. **For the fourth month running, the proportion of people who would or have already got the vaccine has increased**. It is now as high as 90% in the UK, higher than 80% in Sweden, and above three-quarters in the U.S. and Germany. Though Japan and France lag slightly behind, they have seen increases of almost twenty points since September of last year.

Global key findings

5

Two worlds of economic confidence: rollout performance also affects how people feel about the economy

Asked whether people expected the economic situation in their country to improve in three months' time, there is a clear relationship between this and the vaccine rollout. In the U.S. and the UK, **the public are buoyant, with more than half saying they expect the economy to be stronger** – and significant numbers say they expect to be better off themselves too. This in stark contrast to Germany, France and Japan, where the opposite is the case, **with more consumers expecting to feel worse off in three months' time than better off.**

6

The office calls: most workers want to be in the office more of the time than they are at home

What is the ideal working mix for employees? **Two-thirds of workers across all six countries say they would rather spend more time in the office than at home**, opting for either being in the office full-time or a flexible relationship where they are in the office three or four days a week. **Full-time home working is a niche desire**, even amongst those currently home-working, though employees want the flexibility to choose. It is perhaps a sense of boredom and frustration with online meetings and working that is fuelling this – though people rate digital collaboration software like Office 365 and Zoom positively, **significant numbers of people are bored with them, including around four in ten 18-44 year olds.**

7


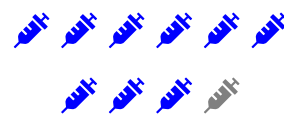



















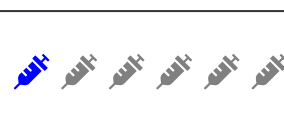


Travel warning: consumers happy to take tests and to arrive early, but feel that border delays would be unreasonable

For those in the travel industry, there is mixed news. On the one hand, consumers are **relaxed about having to arrive earlier for flights, and for having to take a test before going abroad and on return.** Some, especially in the U.S., UK and Sweden, also say that delays of up to an hour are reasonable in the circumstances of the pandemic. But **airport delays of more than an hour are seen as highly unreasonable – even given the circumstances – in all countries.** For travellers, they may be comfortable with tests, but they balk at substantial delays and see little excuse. In better news for the sector, **half of regular business travellers plan to travel abroad for business in 2021.**

01 One year in: pandemic performance

The British public rate their country the highest for pandemic performance, while Germany and Japan are at the bottom of the table

Performance on core COVID services
How well or badly do you feel the following have worked during the coronavirus?
Amongst people in each country

| | Overall score | Testing | Tracing app | Vaccine rollout | Healthcare for COVID patients | Healthcare for non - COVID patients |
|---------|---------------|---|-------------|---|--|--|
| UK | 40 |  | 22 |  |  74 |  24 |
| U.S. | 38 |  | 30 |  |  52 |  48 |
| Sweden | 21 |  | - |  |  63 |  32 |
| France | 20 |  | 25 |  |  39 |  28 |
| Germany | 16 |  | 16 |  |  43 |  28 |
| Japan | 5 |  | 8 |  |  21 |  14 |

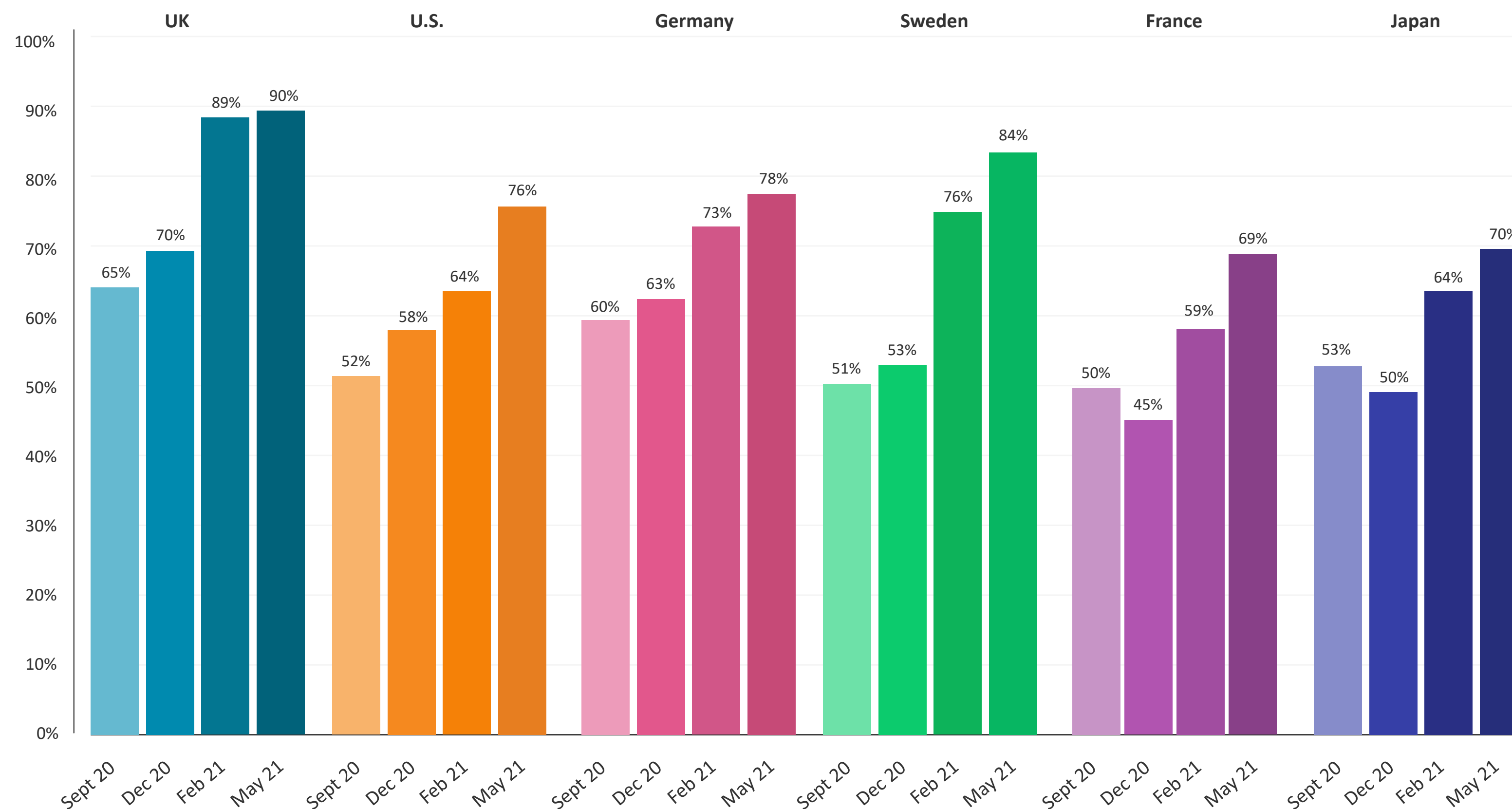


- By evaluating how people feel various parts of the state apparatus for tackling COVID-19 have worked in their country, we can give an overall score for how people feel their country has performed. The UK and the U.S. top the table amongst their own citizens, followed by a middle tier of Sweden and France, and then the lowest tier of Germany and Japan.
- On testing, it is the U.S. and France that gets the best verdict from its people, with Germany, the UK and Japan lagging behind. On tracing apps, it is also the U.S. and France which top the table. But it is the vaccine rollout where the starkest differences come out and show the UK and the U.S. significantly ahead of other countries in how their own publics rate the effectiveness of the rollout – with Germany and Japan right at the bottom of the table.
- Swedes and Brits feel their countries have done well at the handling of healthcare for COVID patients, while people in France, Germany and Japan are less sure.
- On healthcare for non-COVID patients, the UK comes at the bottom of the table alongside Japan, while around half of people in the U.S. feel this has been handled well.
- The range of answers here demonstrate that no single nation feels its country has had an impeccable COVID record – but that the vaccine rollout has had the most significant impact of all other aspects of the pandemic.

02 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

% who have already had, definitely would, or likely would take the vaccine



- **Once more, likely uptake of a coronavirus vaccine is up in all countries surveyed.** This is now highest in the UK, where nine of ten people say they have already had or would have the vaccine. Next in line is Sweden, where 84% say so and almost eight in ten say the same in Germany and three in four in the U.S..
- Likely uptake is lower in France and Japan, as has been the case since September, but the increase is substantial of around 20 percentage points since the autumn. **Around the world, confidence in the vaccine continues to grow** – and discussion of side-effects or changing guidance for some vaccines has had no perceptible effect in holding back this growth.

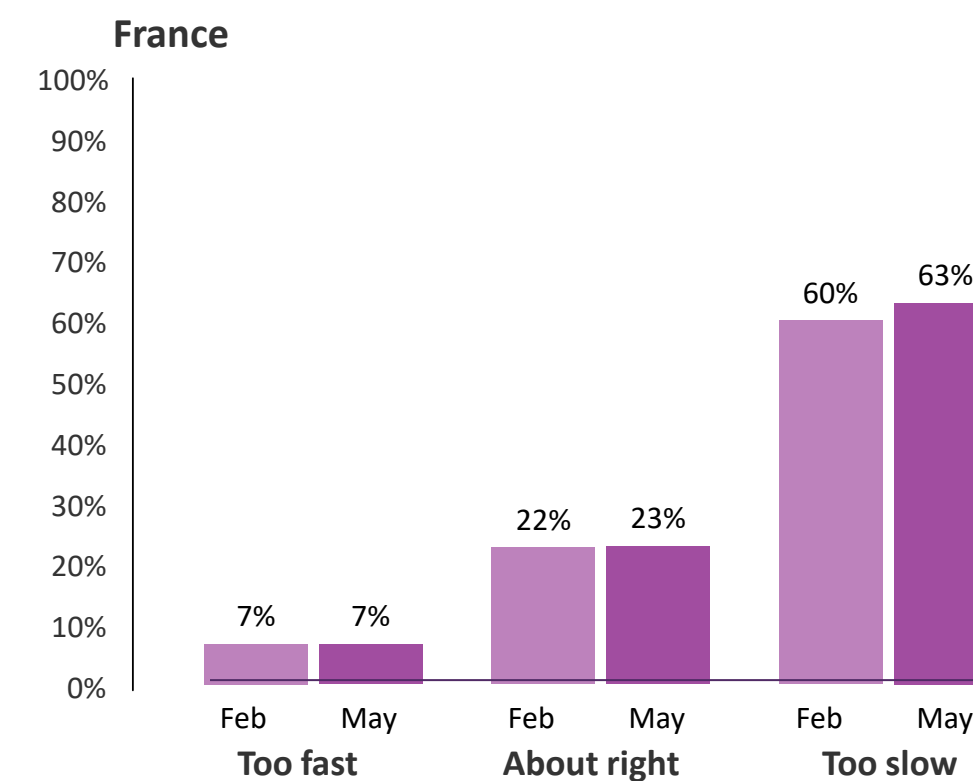
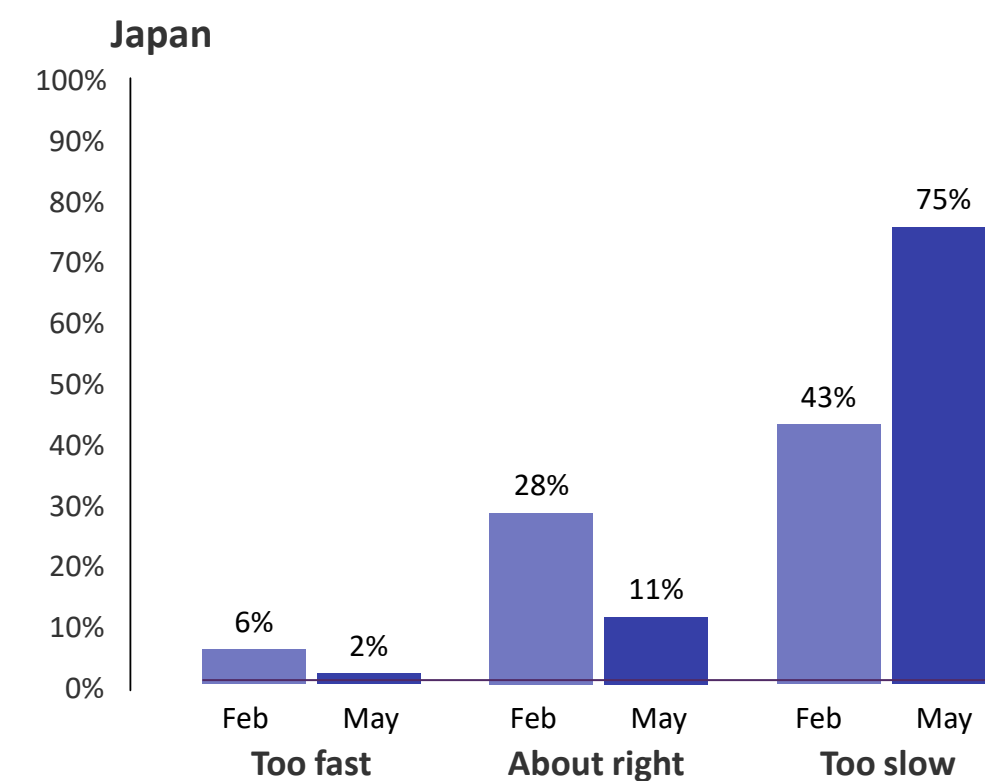
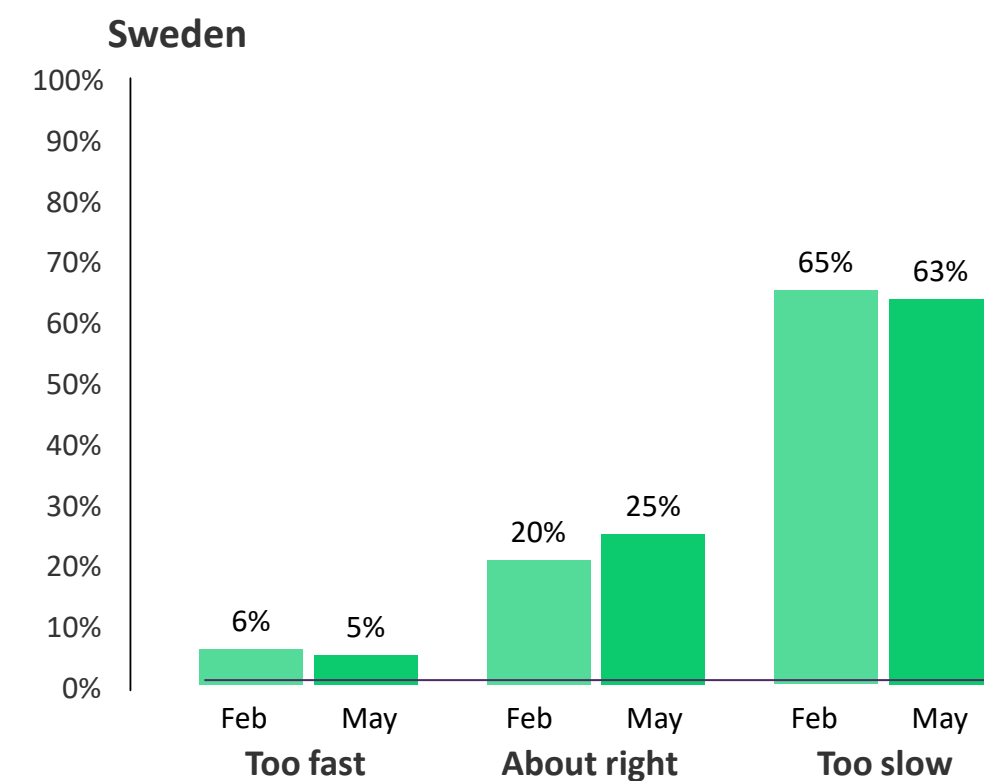
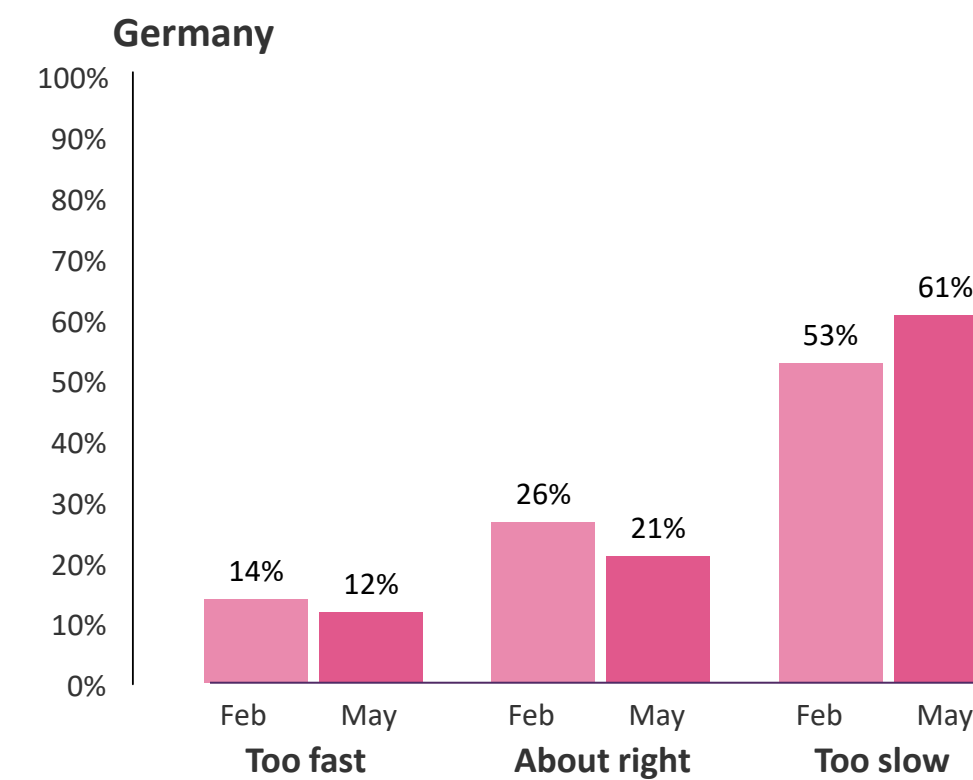
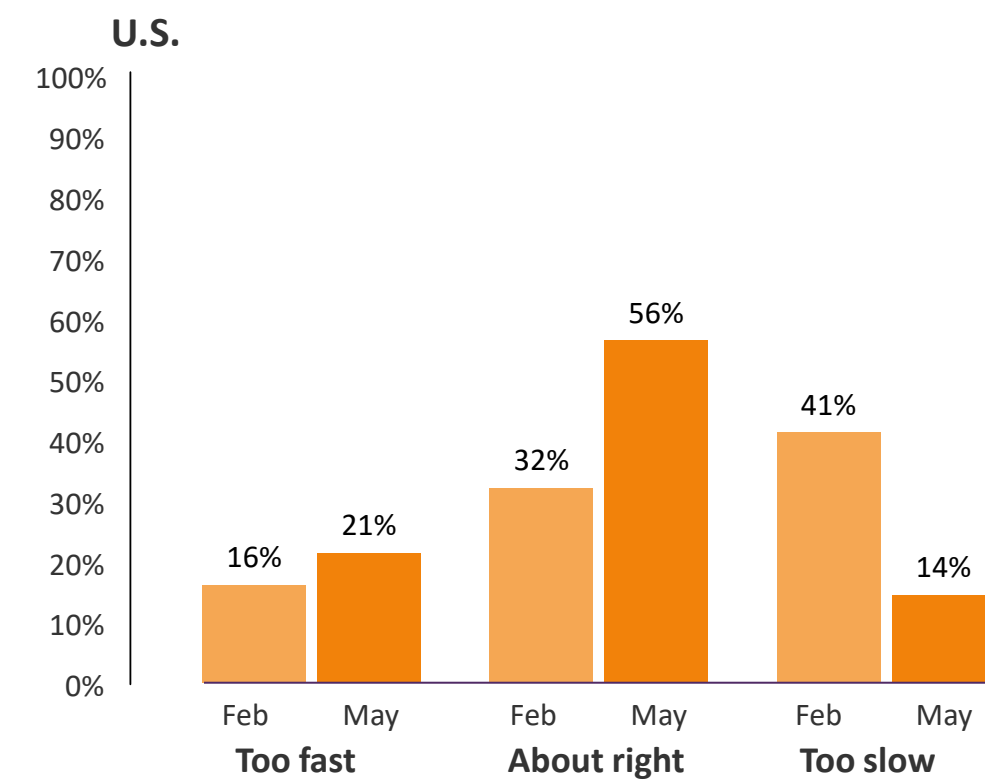
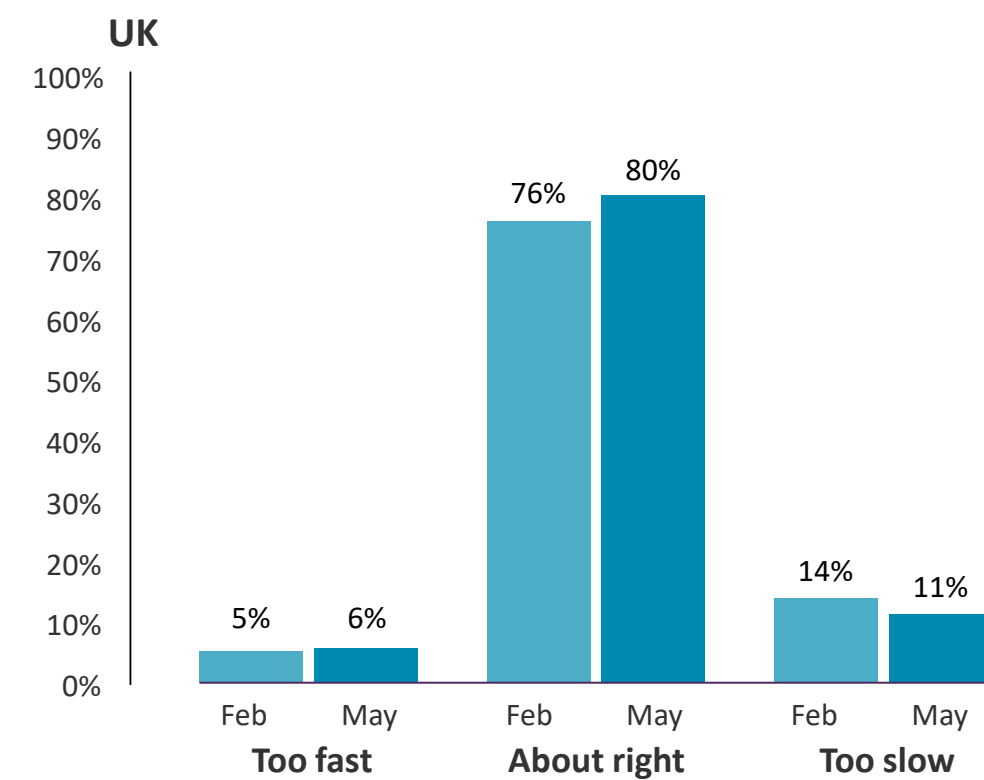
33 POINTS

The increase in likely vaccine uptake in Sweden since September

03 Speed of the vaccine rollout

The U.S. public have become dramatically more content with their vaccine rollout, while Europeans continue to feel their rollouts are too slow

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



27 POINTS

The reduction in the proportion of Americans who say their vaccine rollout is "too slow" between February and May

- **Americans have become significantly more supportive of their government's vaccine rollout.** Whereas in February four in ten said it was too slow, that figure is now only 14%, with a majority saying the speed of the rollout is "about right". The usual party divide is relatively absent, with a majority of Republicans (52%) agreeing with the 63% of Democrats who say the speed is about right.
- **Despite vaccine rollouts speeding up in Europe, the public remains unconvinced.** In Germany, there has been an 8-point increase in the proportion of people saying it is "too slow", while six in ten still see this to be the case in France and Sweden.
- **In Japan, the picture has worsened, with a significant increase from 43% in February to 75% today saying the rollout is too slow.** This contrasts to the UK, where the public are most content – with eight in ten saying the rollout speed is "about right".

04 Vaccine performance

Across the globe, Israel and the UK continue to top the table for who has performed best with their rollouts – and the U.S. sees improvement

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

Each country's assessment of... → ...these countries

| | Israel | UK | U.S. | Denmark | Sweden | Germany | Norway | Japan | The European Union | China | Austria | Canada | Russia | France | UAE | Italy |
|---------|-------------|--------------|--------------|-------------|-------------|-------------|-------------|-------------|--------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| UK | 50% (-1) | 83% (+6) | 32% (+16) | 12% (-3) | 14% (-3) | 12% (-4) | 14% (-2) | 16% (-2) | 10% (-4) | 19% (-1) | 11% (-1) | 20% (+1) | 10% (-2) | 8% (-2) | 19% (-1) | 8% (-2) |
| Germany | 62% (+5) | 50% (+8) | 47% (+14) | 27% (+3) | 25% (+2) | 15% (-4) | 24% (+2) | 27% (-1) | 17% (+0) | 33% (+1) | 23% (+2) | 24% (+2) | 28% (-1) | 19% (+2) | 16% (+2) | 15% (+1) |
| France | 60% (+9) | 52% (+10) | 45% (+14) | 28% (+3) | 31% (+4) | 33% (-1) | 28% (+3) | 30% (-3) | 23% (-1) | 32% (+0) | 22% (+1) | 27% (+4) | 25% (-4) | 19% (+2) | 21% (+2) | 22% (+1) |
| Sweden | 46% (-1) | 44% (+1) | 35% (+14) | 41% (+6) | 28% (+5) | 26% (+1) | 37% (+5) | 24% (0) | 28% (+0) | 22% (-1) | 17% (+0) | 20% (-1) | 19% (-3) | 21% (+1) | 13% (-3) | 16% (-1) |
| Japan | 44% (+8) | 43% (+3) | 37% (+7) | 20% (+1) | 27% (0) | 28% (-4) | 21% (+0) | 9% (-9) | 35% (-1) | 20% (+4) | 23% (+0) | 18% (-2) | 15% (+1) | 26% (-2) | 17% (+2) | 17% (+0) |
| U.S. | 38% (+8) | 36% (+7) | 51% (+23) | 29% (+3) | 32% (+3) | 30% (+2) | 30% (+3) | 32% (+5) | 31% (+3) | 25% (+2) | 29% (+5) | 35% (+4) | 24% (+3) | 30% (+4) | 25% (+4) | 26% (+2) |

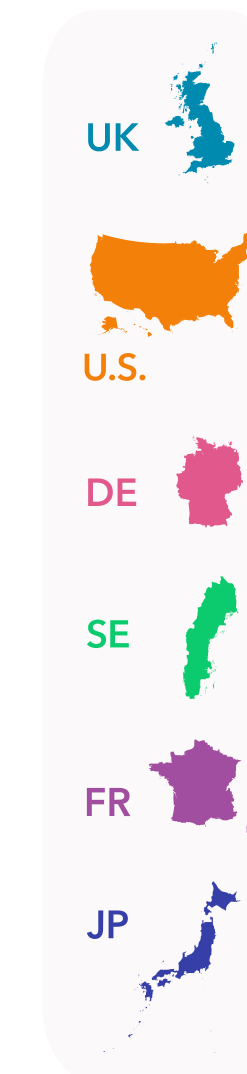
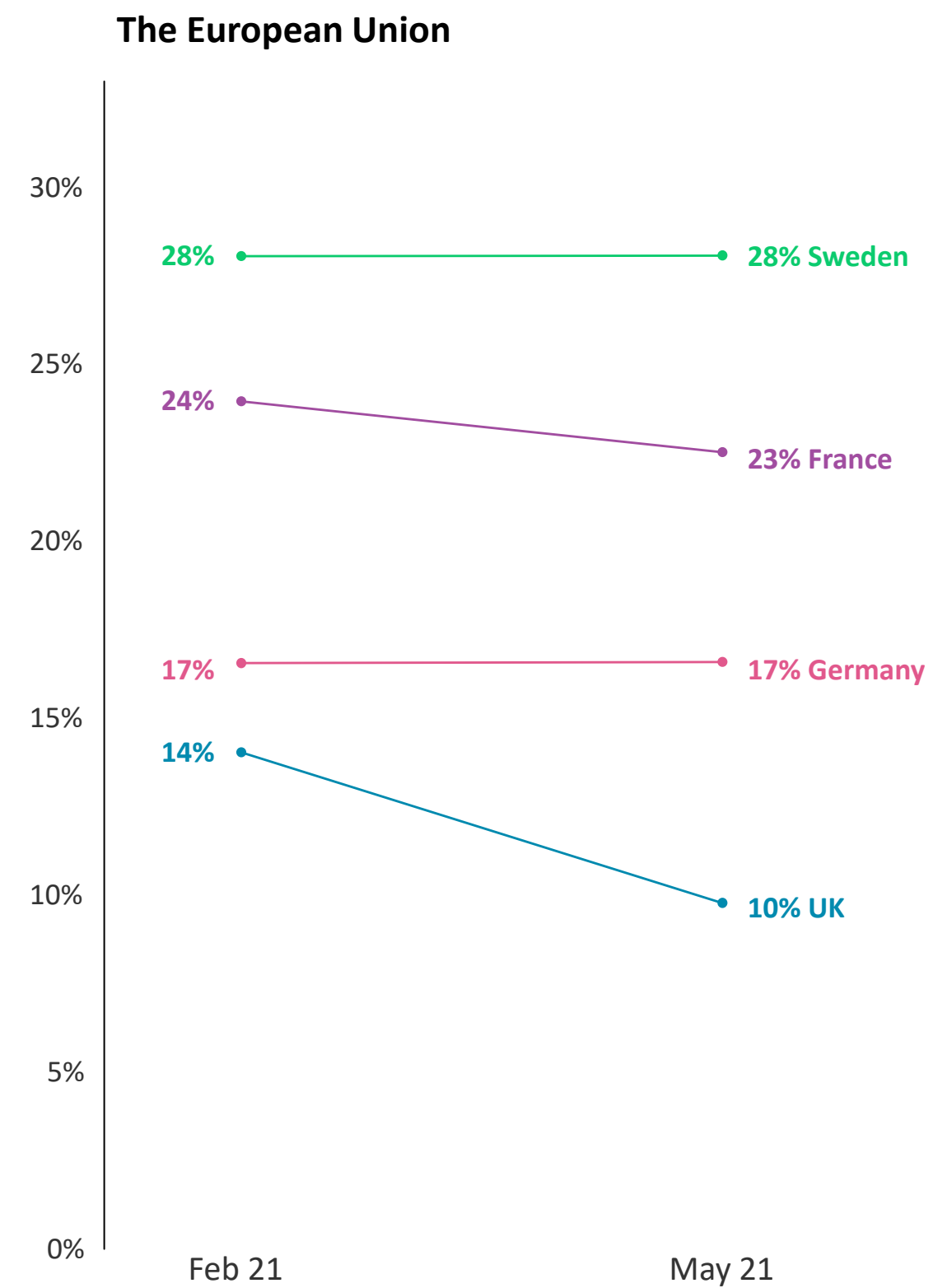
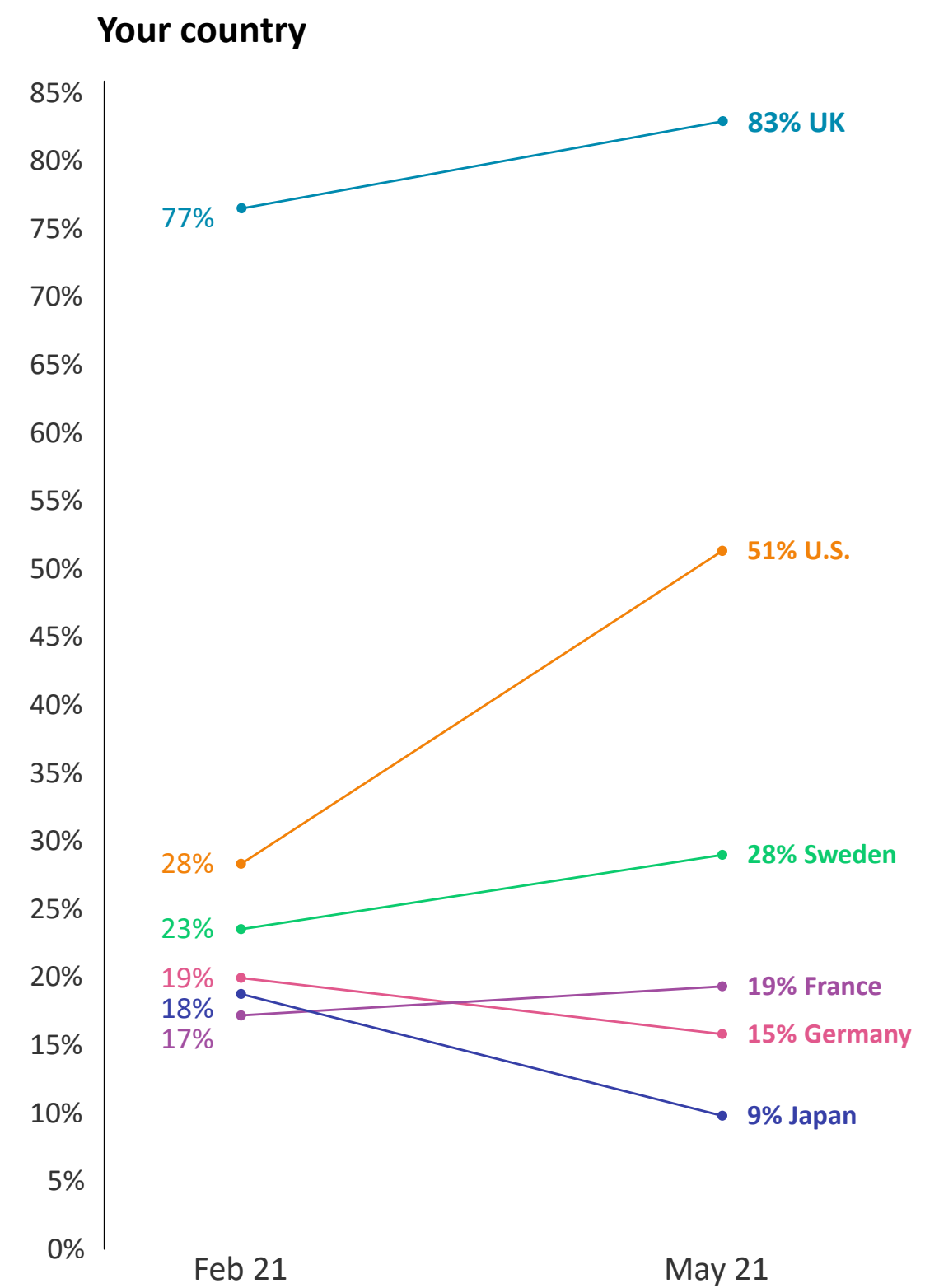
- Nations that were seen to have performed well – like Israel and the UK – are now seen as having done even better. Israel is the country that is seen to have done best on their rollout, closely followed by the UK, where a majority of Germans and French people say the UK has done well.
- Outside of these two countries, the U.S. is seen as having improved its vaccine rollout between February and May, with almost half of French and German people now saying the U.S. has done well.
- European nations continue to drag behind, with no real improvement at all in how the world views their vaccine rollouts. For example, perceptions of how Germany has performed relative to February has decreased by an average of 1.2 points. France is viewed as one of the worst countries in the world for its rollout, with only 21% on average saying it is doing well.



04 Vaccine performance

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?
Percent saying 'Well'



- In terms of how countries view themselves, the UK is the most ready for self-praise – with 83% of Brits saying the UK has handled its rollout well. Americans are also becoming more positive, with 51% saying they have done well – an increase of 23 points. But European nations are unchanged in their gloomy view – as is **Japan, where only one in ten say their country is handling the vaccine rollout well.**

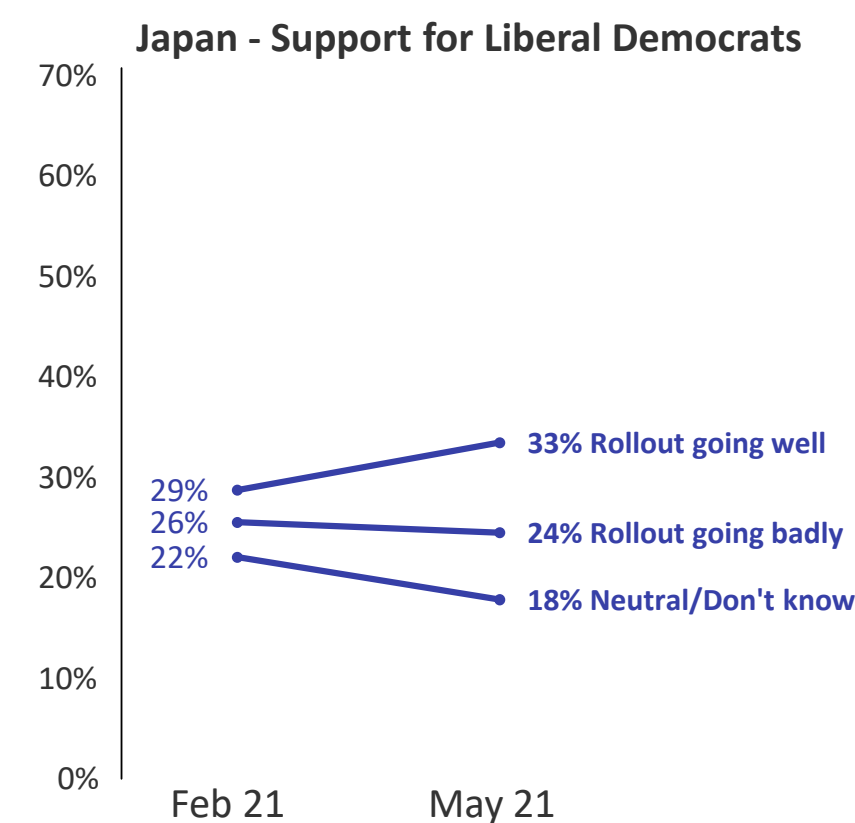
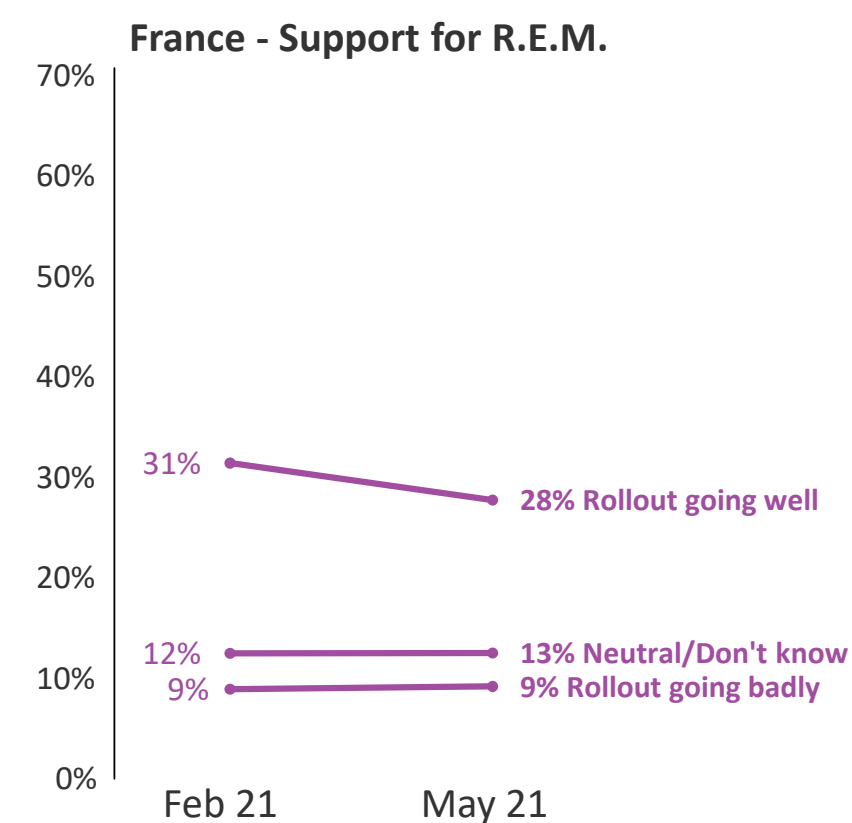
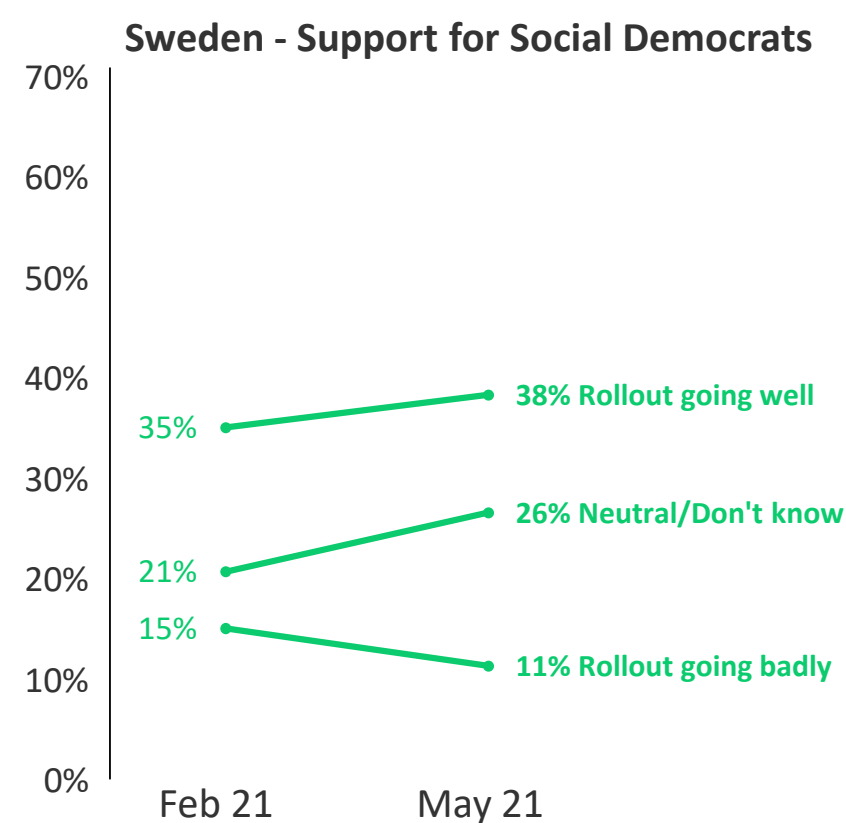
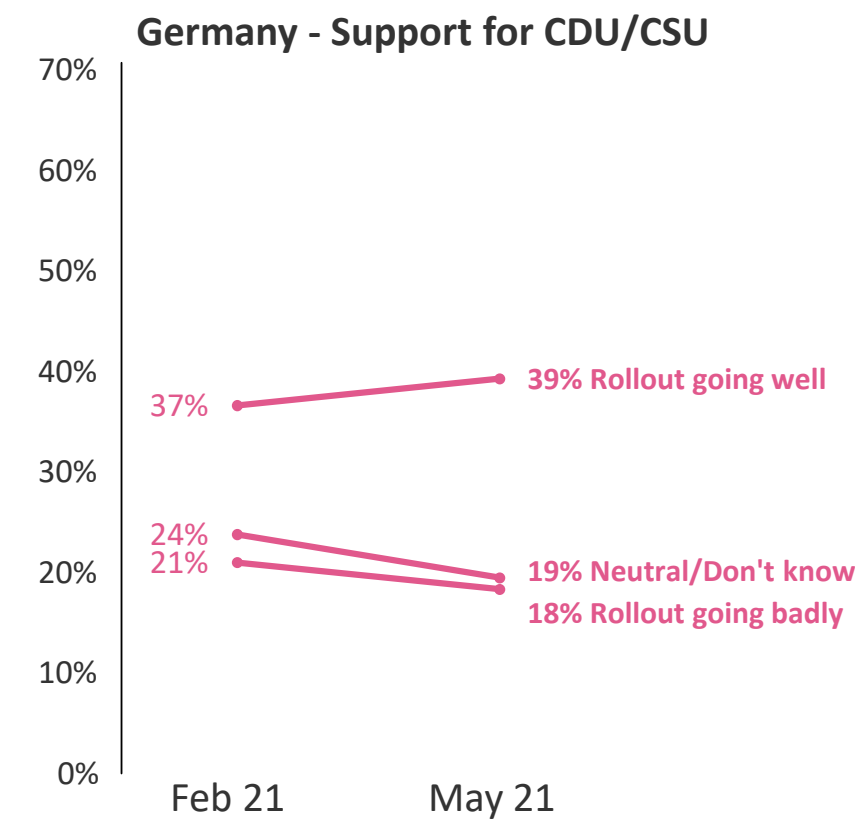
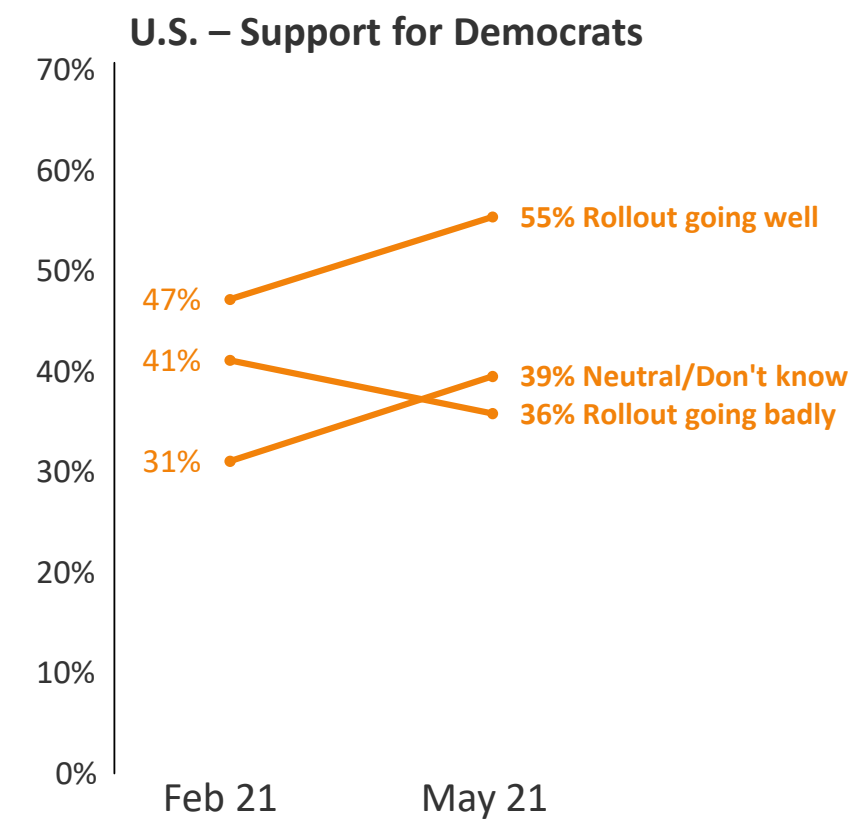
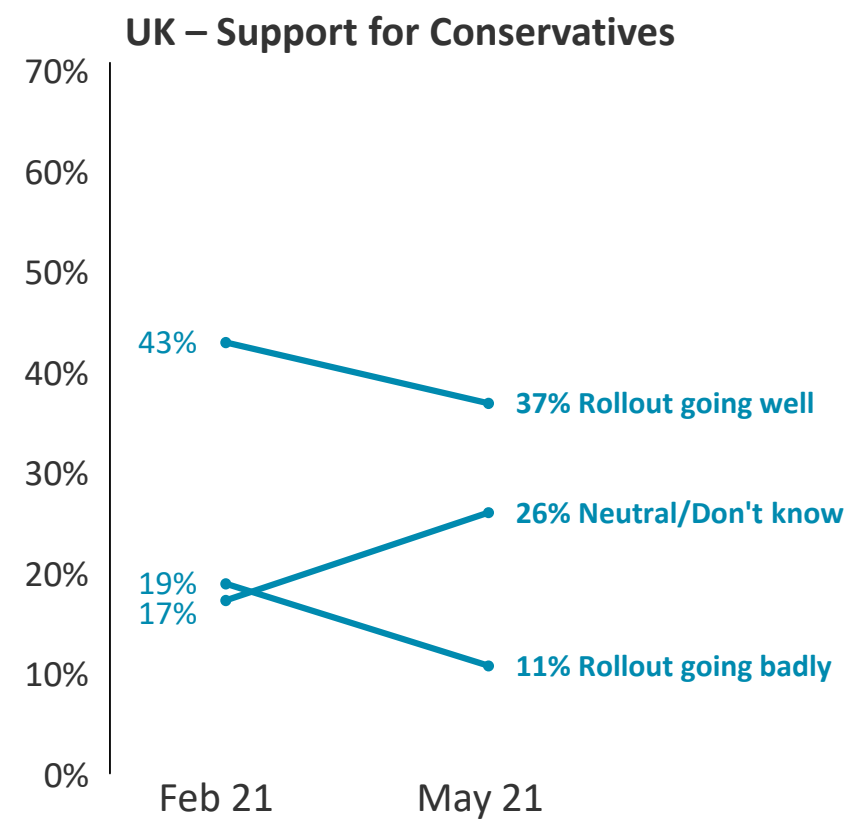
57%

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

05 Impact of the vaccine rollout on party support

Positive approval of vaccine rollouts is linked with a boost for most incumbent parties

Support for incumbent political party



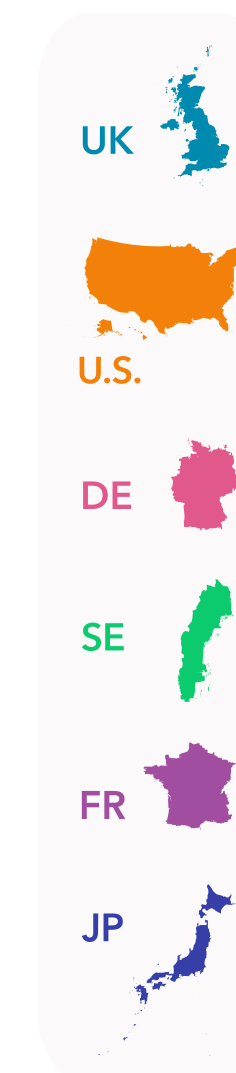
- Support for incumbent parties tends to be growing amongst those who think that the vaccine rollout program is going well in their country.
- In the U.S., the effect is most marked with **support for the Democrats spiking amongst those who think that the vaccine rollout is going well and falling with those who think that the rollout is going badly.**
- **In Germany, where the CDU have been struggling of late, part of the reason appears to be the rollout.** Support is actually increasing for the CDU/CSU amongst those who think that the rollout is going well but has fallen 3 points since February with those who think the opposite.
- The UK is an outlier, in part because almost the entire population thinks that the rollout has been going well (88%) and in part because the Conservatives are coming off a high where the rollout was already reflected in their February numbers.
- In Sweden the Social Democrats have been **gaining ground with people who think that the vaccine rollout is going well** – up from 35% in February to 38%.

06 Vaccine passports

People are very comfortable with vaccine certificates for a range of occupations, with comfort levels lowest in France and Germany

How comfortable or uncomfortable are you with the use of vaccine certificates as a necessary requirement for working in the following types of jobs?
% Net comfortable minus uncomfortable

| | UK | U.S. | DE | SE | FR | JP |
|------------------------------|-----|------|-----|-----|-----|-----|
| Shop worker | 42% | 37% | 24% | 30% | 18% | 29% |
| Airline worker | 55% | 42% | 31% | 43% | 29% | 41% |
| Bartender/waiter | 42% | 37% | 25% | 37% | 23% | 33% |
| Public transport worker | 52% | 40% | 29% | 41% | 26% | 40% |
| Teacher | 53% | 40% | 33% | 41% | 29% | 41% |
| Doctor/nurse | 63% | 43% | 36% | 53% | 40% | 48% |
| Plumber/engineer/electrician | 42% | 34% | 19% | 25% | 18% | 29% |
| Office worker | 34% | 35% | 21% | 21% | 16% | 24% |



- Majorities of the public are comfortable with vaccine certificates for most types of jobs, suggesting that there is a relatively low bar amongst the public in terms of the acceptability of vaccine passports when it comes to working status.
- Comfort levels are highest in regards to public-facing occupations like doctors/nurses, as well as teachers, public transport workers, and airline workers. **Permission is lower for vaccine passports for plumbers/engineers/electricians and office workers**, but there are still more people in each country who say they are comfortable than the number who say they were uncomfortable.
- **French and German people are the least likely to be comfortable**, especially on shop workers, plumbers/engineers/electricians, and office workers – though again pluralities said they are more comfortable than not.

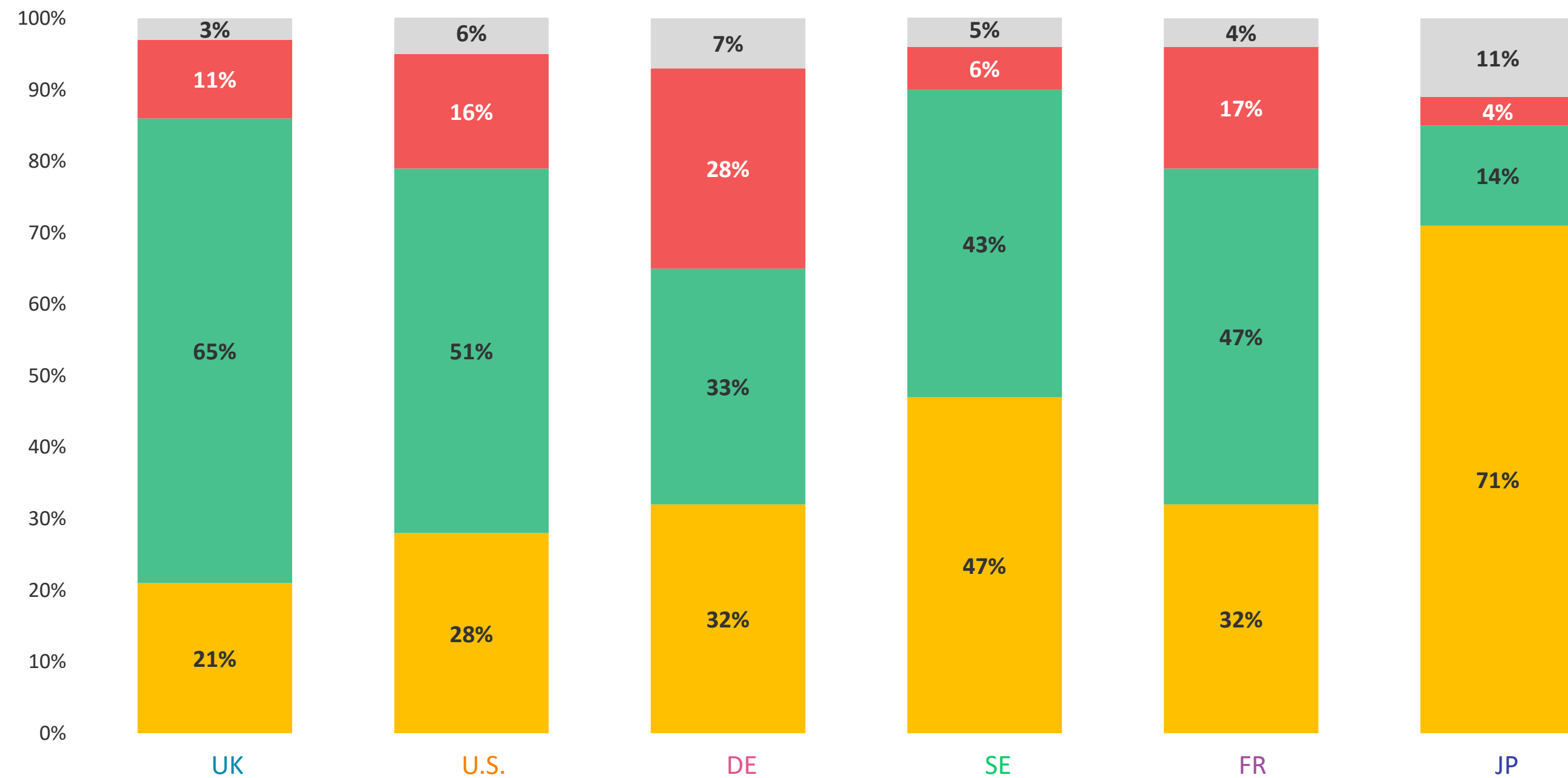
55%

The proportion of Americans who are comfortable with office workers needing to have vaccine certificates

07 COVID-19 restrictions

Most still feel COVID restrictions are either too soft or about right, though almost three in ten Germans say they are too hard

Are COVID restrictions in your country at the moment...



- Throughout the pandemic, people around the world have tended to support lockdown measures. This pattern is continued here, with a **majority in every country saying that their country's current COVID restrictions are either too soft or about right**, with only a minority saying they are too hard.
- People in the UK, the U.S. and France are the most likely to say their COVID restrictions are about right, while **people in Sweden and Japan are most likely to say that their current restrictions are too soft**. That applies to just under half (47%) of Swedes and seven in ten (71%) Japanese people.
- **Germany is the country that is most divided**. Though 32% say measures are too soft, and 33% say they are about right, 28% - the largest of any country surveyed – say that current COVID restrictions are too hard.

28%

The proportion of Germans who say COVID restrictions are too hard – the largest of any country surveyed

Key:

Don't know

Too hard

About right

Too soft

UK

U.S.

DE

SE

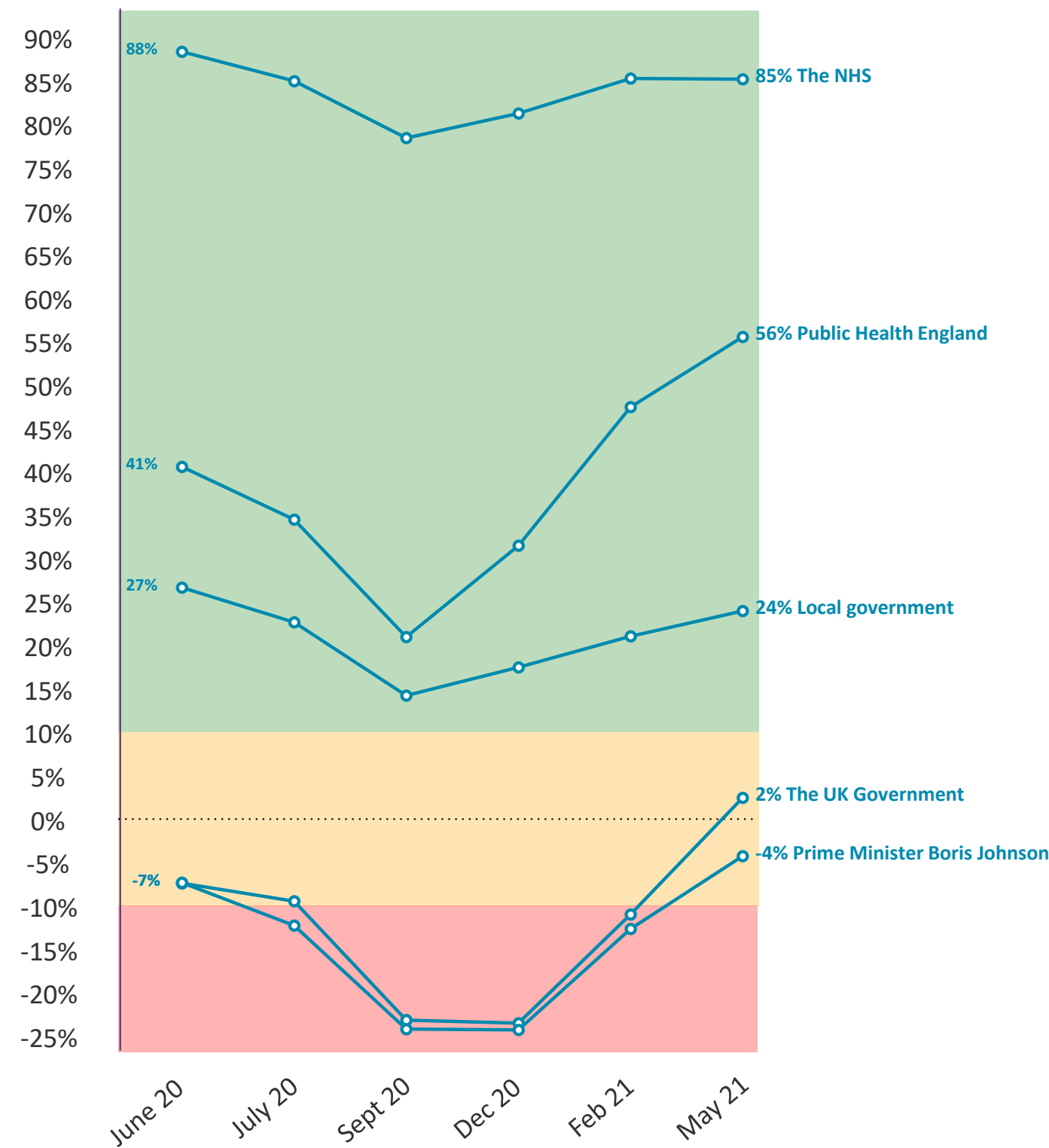
FR

JP

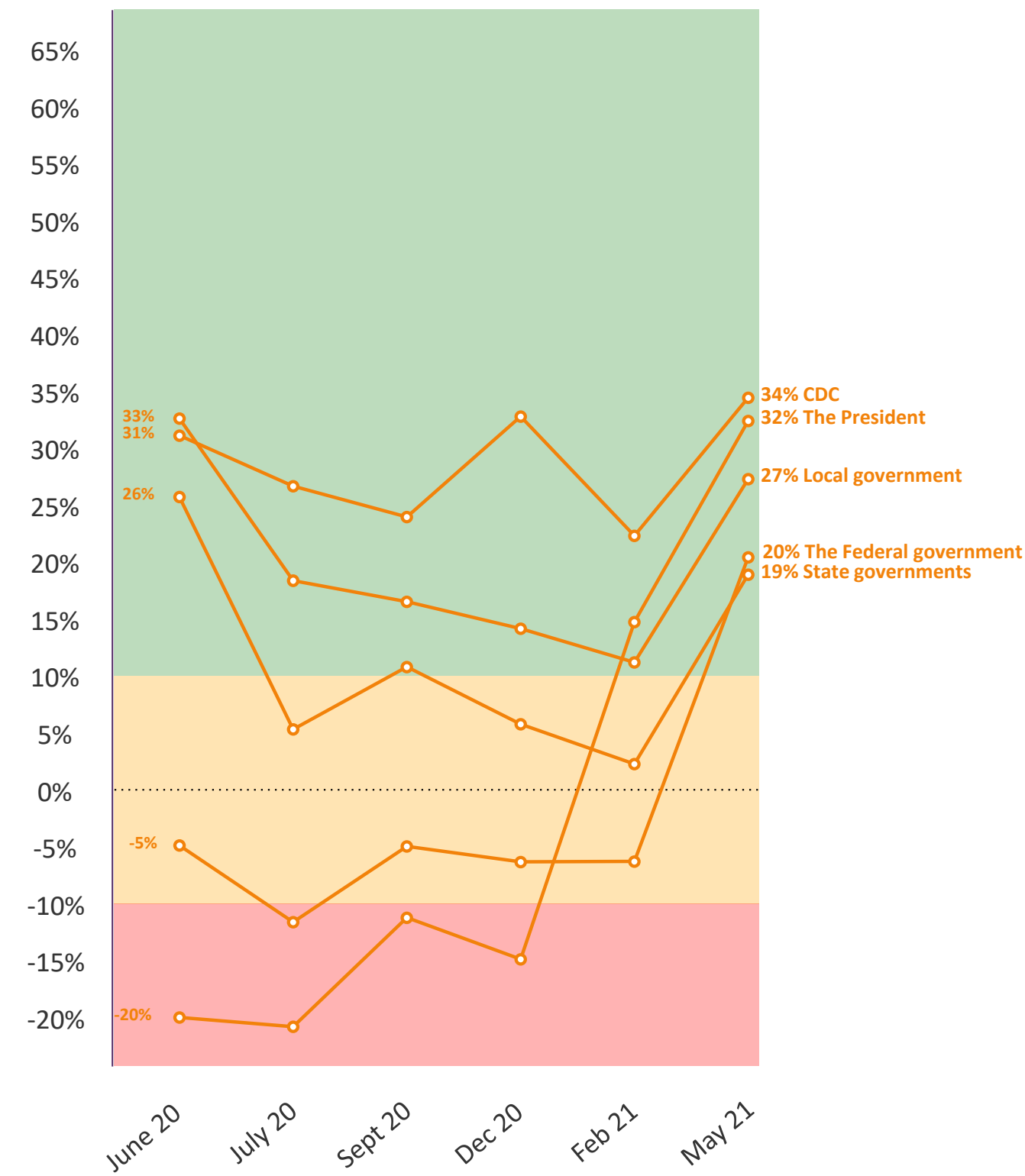
08 Performance of institutions

U.S. and UK confidence in institutions soars, while it collapses in Germany

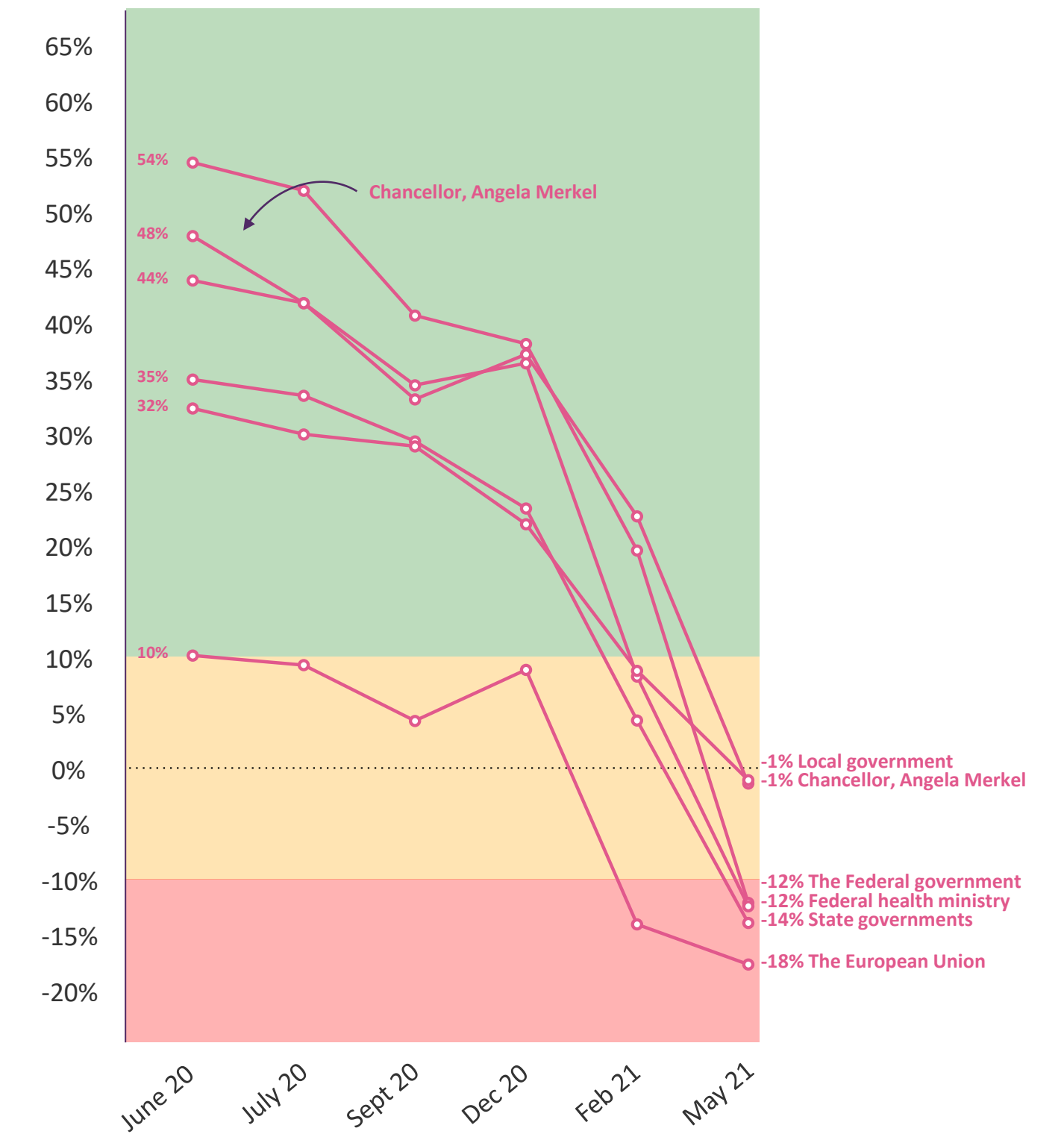
UK



U.S.



Germany

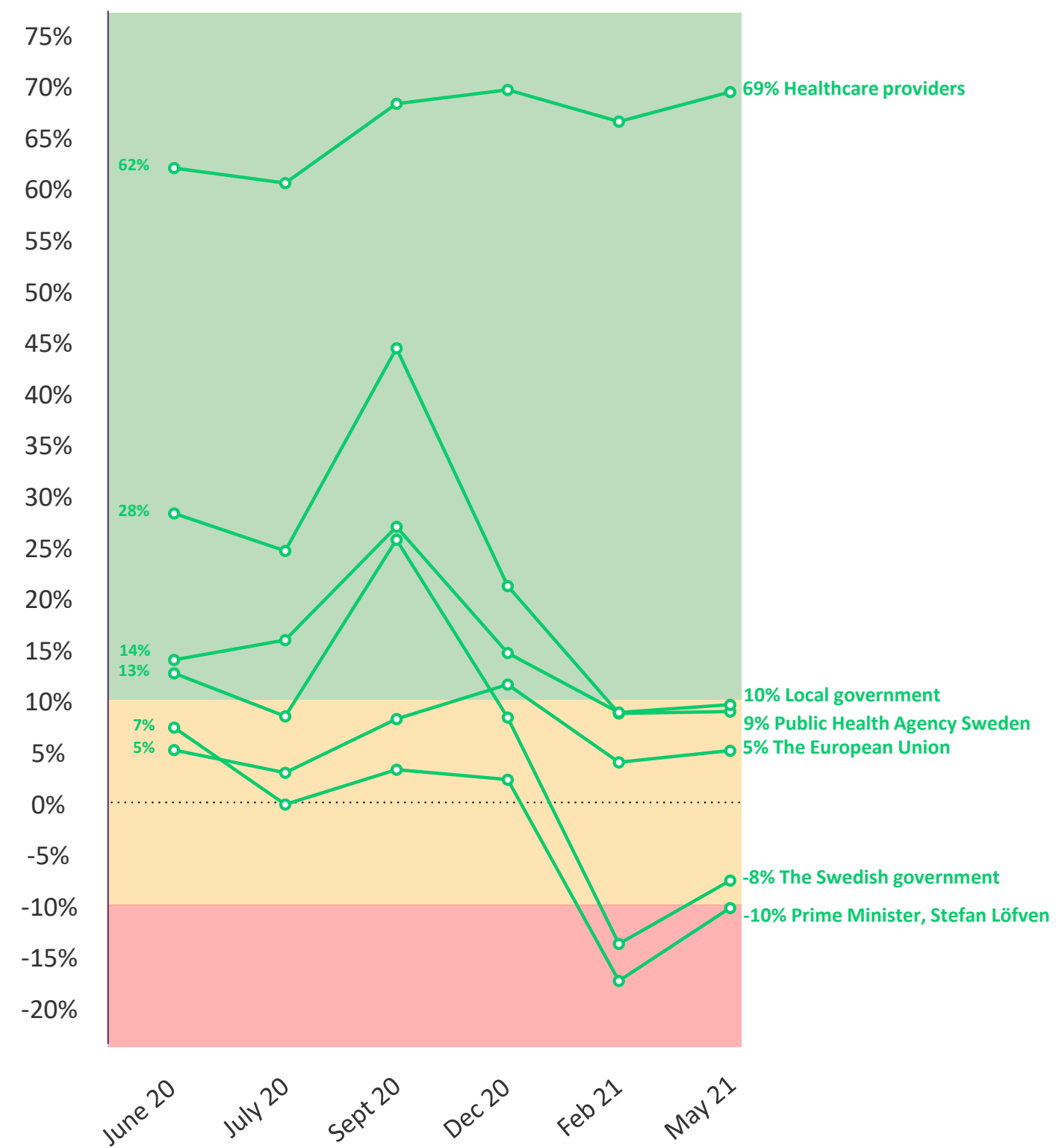


Respondents across all countries were asked whether they thought a number of institutions had done well or badly in responding to the coronavirus. Displayed is the net 'well' score in each country.

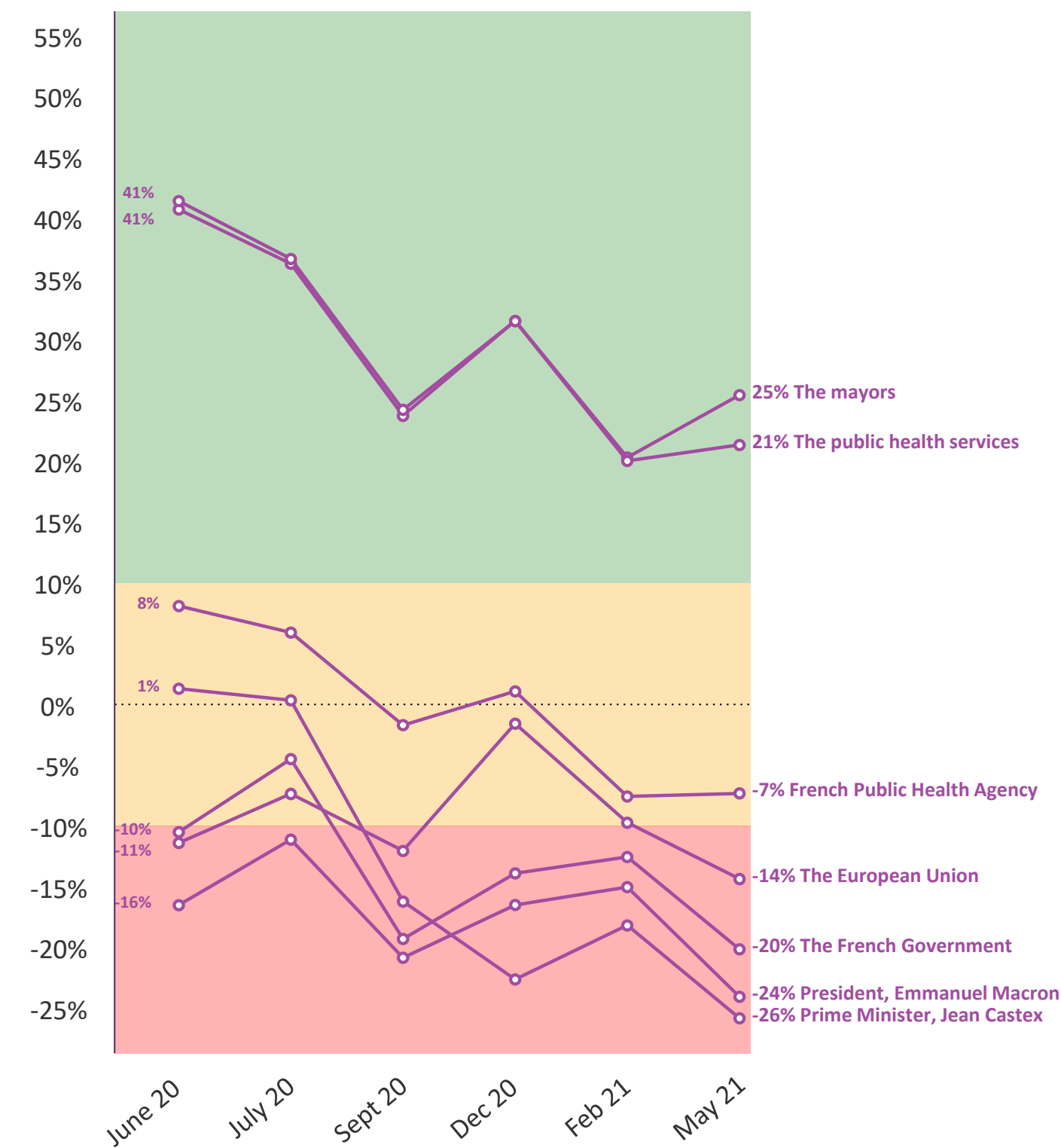
08 Performance of institutions

Some minor recovery to confidence in Sweden, but the performance of leaders in France and Japan hits rock-bottom

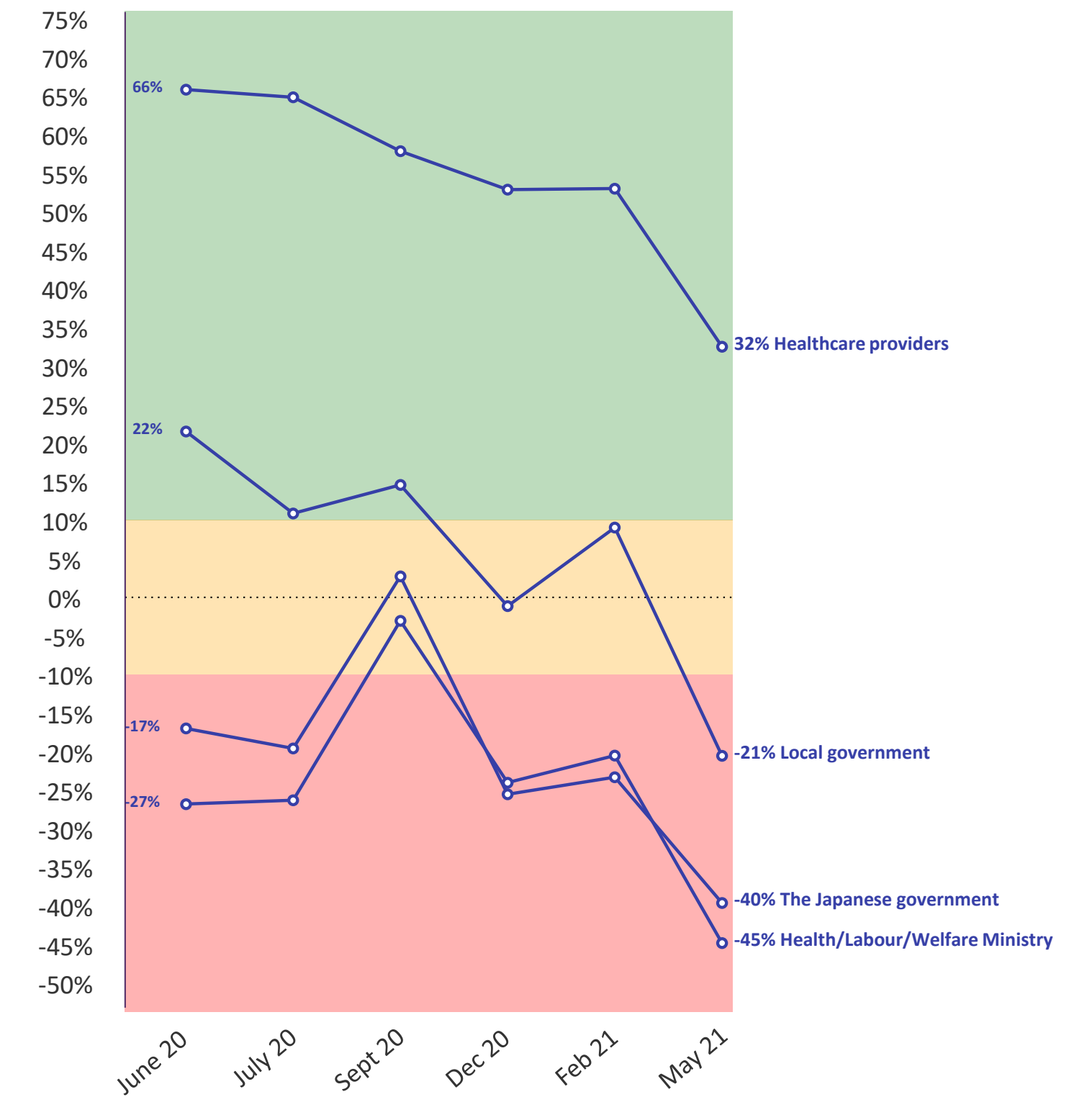
Sweden



France



Japan



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.

08 Performance of institutions

U.S. and UK confidence in institutions soars, while it collapses in Germany. Some minor recovery to confidence in Sweden, but the performance of leaders in France and Japan hits rock-bottom

- Vaccine rollouts continue to determine how the public view their major government institutions, with sharp increases in confidence in countries where the vaccine rollout is seen to be going well and decreases or opinion continuing to languish at a low level in countries where the rollout is seen to be going badly.
- In the UK, confidence in the UK Government has increased from -11% in February to a net +2% who say they are handling the pandemic well now - the first time it has been in positive territory since this tracking began a year ago. Boris Johnson's rating has also increased, from -13% to -4%. Both the UK Government and Boris Johnson were on scores of -24% in December 2020. There has also been sustained improvement in the reputation of Public Health England (now +56%) and local government (+24%), showing the effect is not limited to politics and national governments.
- In the U.S., confidence in government institutions to handle the coronavirus pandemic has increased sharply. President Biden's rating has increased from +15 to +32, now the highest scoring leader in all countries surveyed – and a stark contrast to President Trump's rating of -20 this time last year. The Federal Government increased by 26 net points, the CDC is in strongly positive territory, and state governments have improved too – with an increase from +2 to +19.
- The French public have also become more critical of their leaders. **President Macron now has his lowest ever rating in terms of how well people think he is handling the pandemic**, with a net score of -24, down from -15 in February. Jean Castex also has the lowest rating he has received to date, on -26 from -18 in February. The French government is down from -13 to -20, and the rating of the EU has also fallen. Unlike in other countries, the effect does not cut through to other levels of government, with people still net positive about the handling of the coronavirus crisis by local mayors (+25).
- The picture is also bleak for leaders in Japan. **The Japanese government is also at its lowest level for public confidence in its handling of the pandemic**, on a net score of -40, down from -23 in February. This extends to the health ministry, on -21 in February but now at -45. Local government has also been affected by this confidence collapse, going from a positive rating of +9 in February to a heavily negative -21 now.
- **Sweden is the only country that slightly bucks the trend and follows a more regular pattern.** Though public confidence has been heavily diminished compared to the middle of last year, ratings have slightly recovered on February, with the Swedish government and Prime Minister up to -8% and -10% respectively.
- Germany is a dramatically different picture. Here, in the context of a vaccine rollout that the public views critically, **confidence in all institutions has collapsed**. Angela Merkel has a net score of -1%, the first time this has been in negative territory and a significant fall from +23 in February and +48 in June 2020. The Federal Government is on -12, down from +20 in February and +54 in June 2020. More than this, every aspect of government is worse off. Local government has felt the effect too, rated -1 compared to +30 in February. State governments are also down to -14, from +2 in February and +35 in June 2020. The Federal Health Ministry also takes a significant knock to its perceived performance, down 20 net points on February, and a colossal 56 points on June 2020. The European Union is not saved from the criticism, with a net rating of -18, down from +10 in June 2020. **This is a picture of a collapse of confidence, going from a country that was the global peak of public confidence for coronavirus handling in 2020 to one where the public now question the basic competence of their rulers at every level of government.**

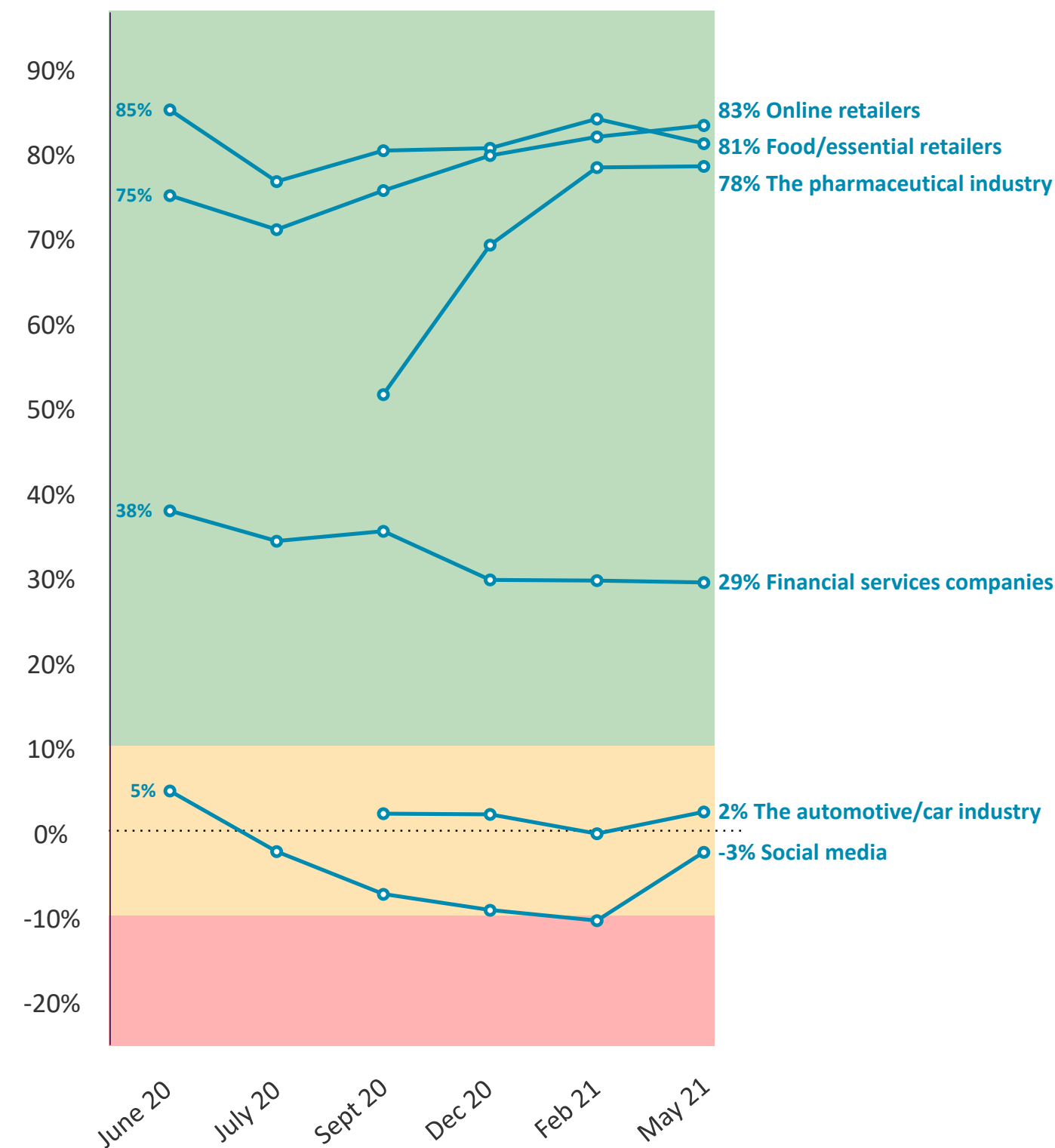
66 POINTS

The net fall in how well people feel the Federal Government in Germany is performing compared to June 2020

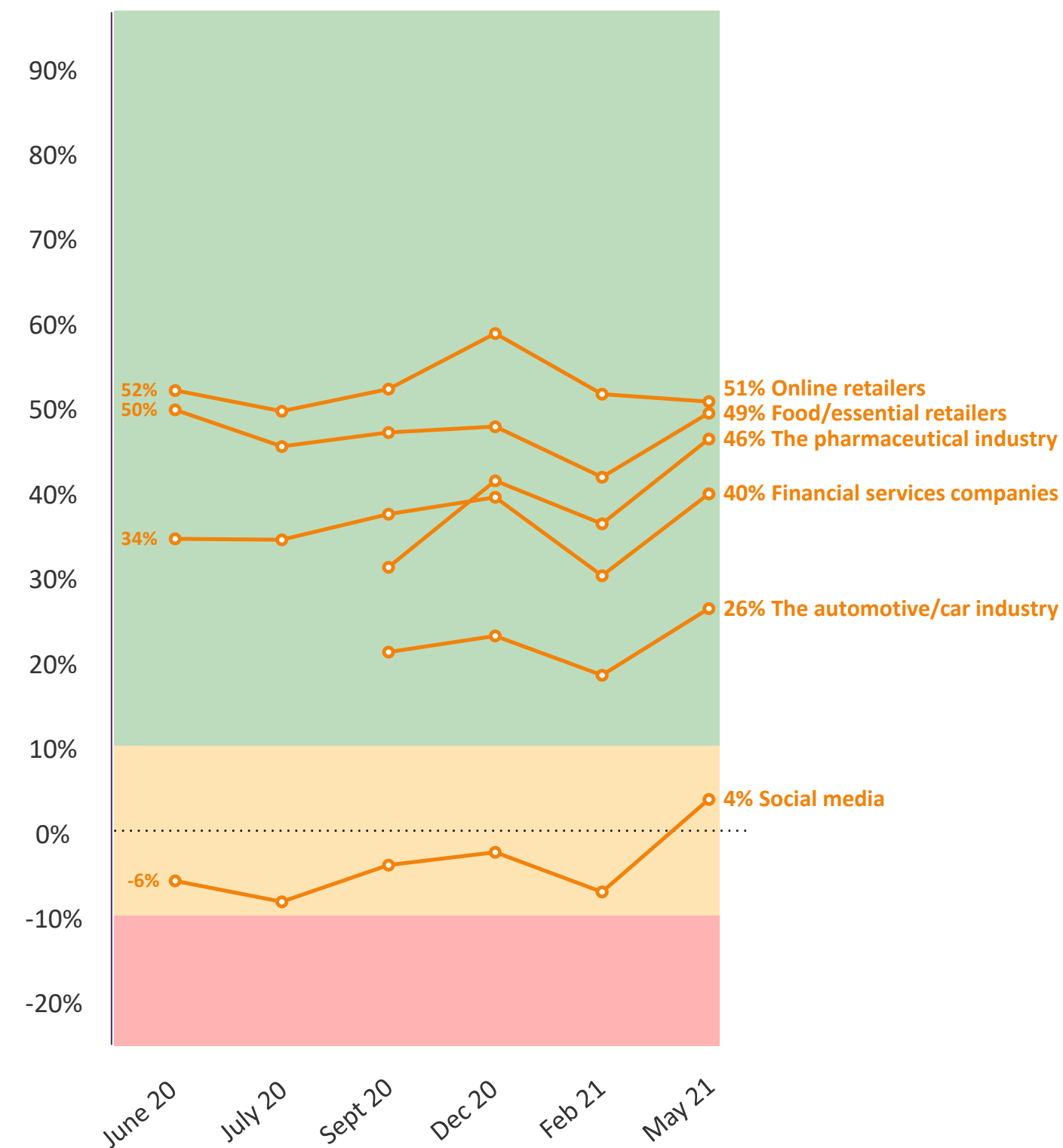
09 Performance of industry

Businesses' reputation improves in the U.S., but falters in Germany as the effects of the vaccine rollout loom large

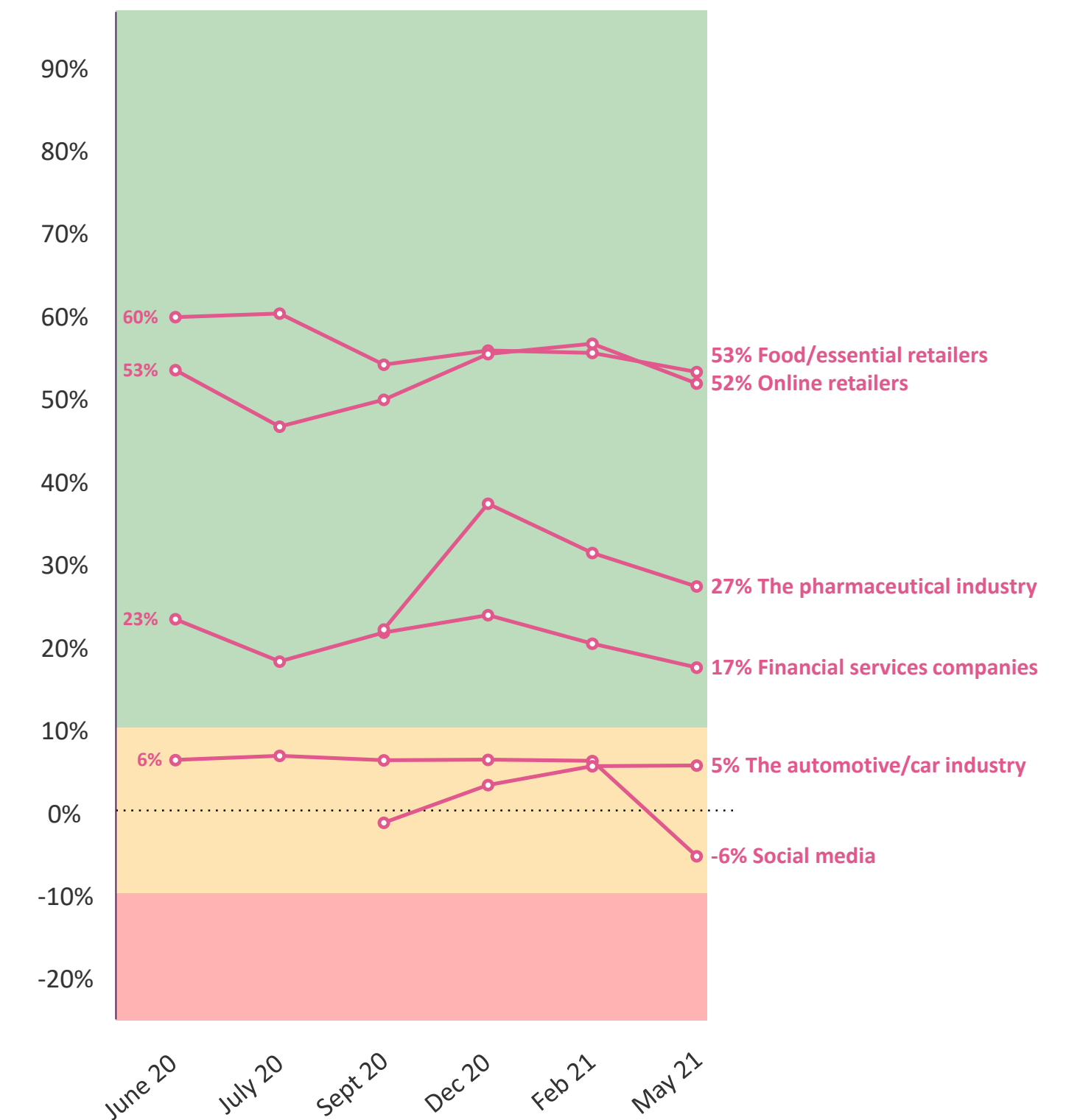
UK



U.S.



Germany

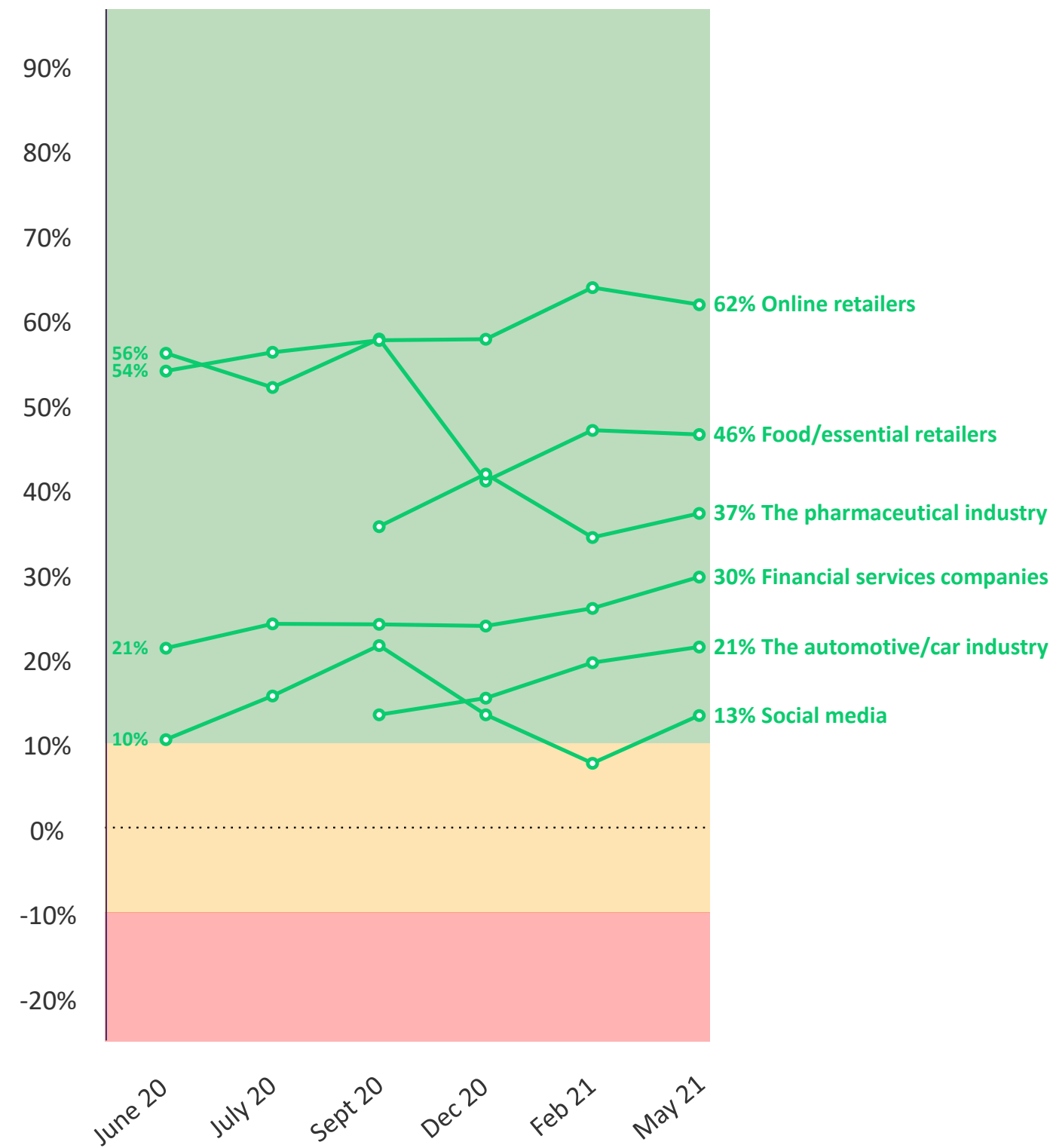


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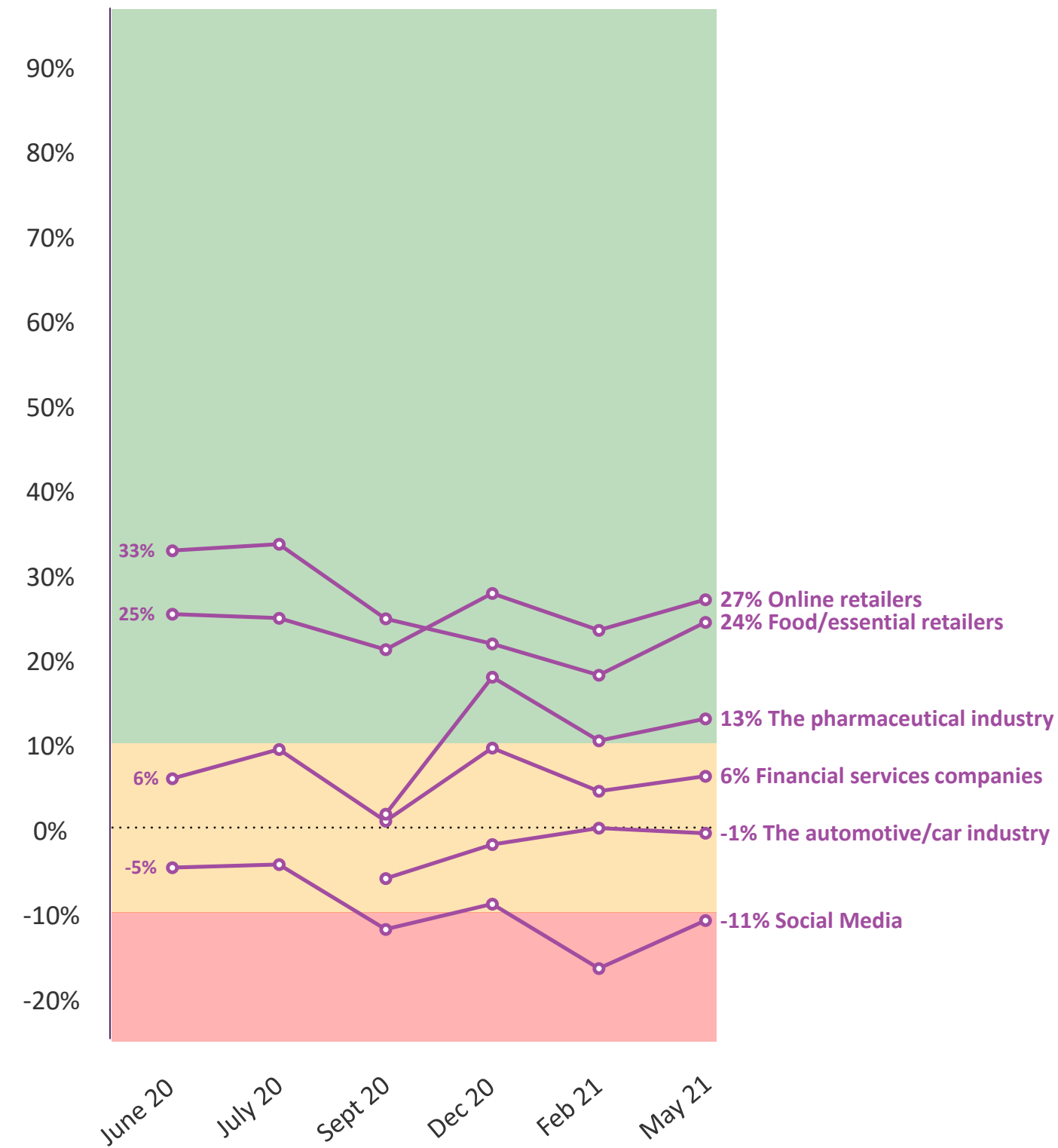
09 Performance of industry

Business is sheltered from a collapse in governmental trust in France, but the pharmaceutical industry takes a substantial blow in Japan

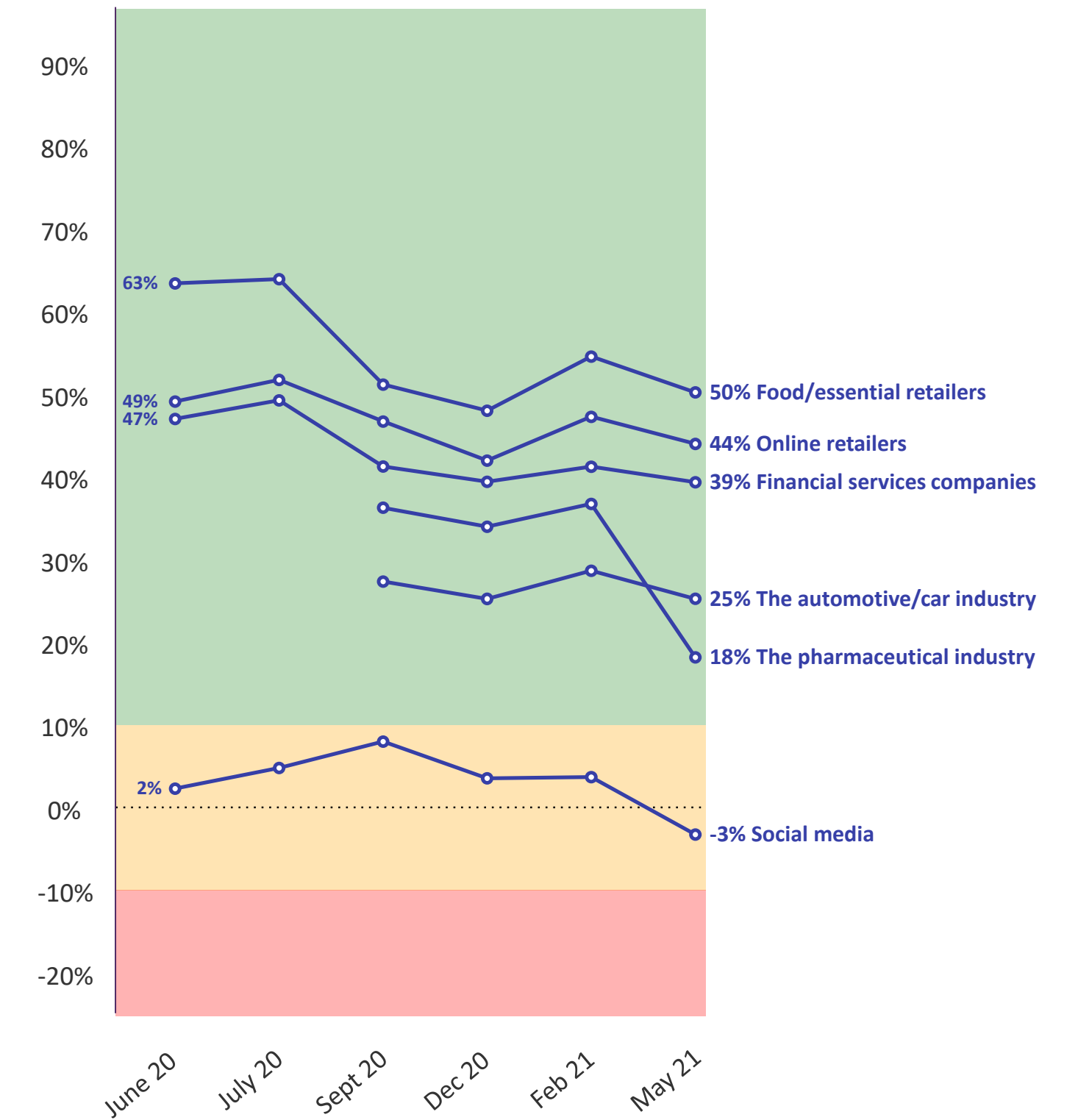
Sweden



France



Japan



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.

09 Performance of industry

In some countries, the vaccine rollout is affecting views of business and the pharmaceutical industry

- **Overall, business remains much more positively viewed by people than governments and institutions.** But there are signs that a 'feel-good' effect due to a vaccine rollout can also improve people's views on how business is performing – and a negative effect can have the opposite impact, denting confidence in business.
 - **In the U.S., for example, there are increases in the net proportion of people saying that various types of business have done well.** This is not just for the pharmaceutical industry, which sits at +46%, but also the financial services industry (up to +40), the automotive industry (up to +26), and even social media companies (up to +4%, the first time they have been in net positive territory in this tracker).
 - **By contrast, German industries suffer a minor blow to their reputation.** Though still more warmly received than government institutions, people are slightly less positive about online retailers (a decline of 4 net points on February), financial service companies (a decline of 3 net points), and social media (a decline of 12 net points). There has also been a worsening in the perceived performance of the pharmaceutical industry: from +31% in February to +27% in May.
- Effects are more muted in Sweden, the UK, and France, where reputation of various industries is broadly level. **The main difference comes on the pharmaceutical industry.** Pharma in the UK has a net rating of +78%, the highest of all countries surveyed and level with its score in February, while this is only +37% in Sweden and just +13% in France – and significantly lower than its peak in December 2020.
 - **In Japan, the decline in the perceived performance of the pharmaceutical company is the most dramatic.** In February, the net rating for pharma amongst Japanese citizens was +37%, a number on par with the automotive industry and the financial services companies. This has now fallen sharply to +18%, meaning it is only above social media companies in Japan. This may be connected to other findings in the survey, showing that Japanese people are becoming more critical of the nation's vaccine rollout – **and a reminder that the vaccine rollout has ramifications for private company reputation as well as that of national governments.**

19 POINTS

Decline in the net proportion of people in Japan who feel the pharmaceutical industry has responded well to the pandemic

Social media

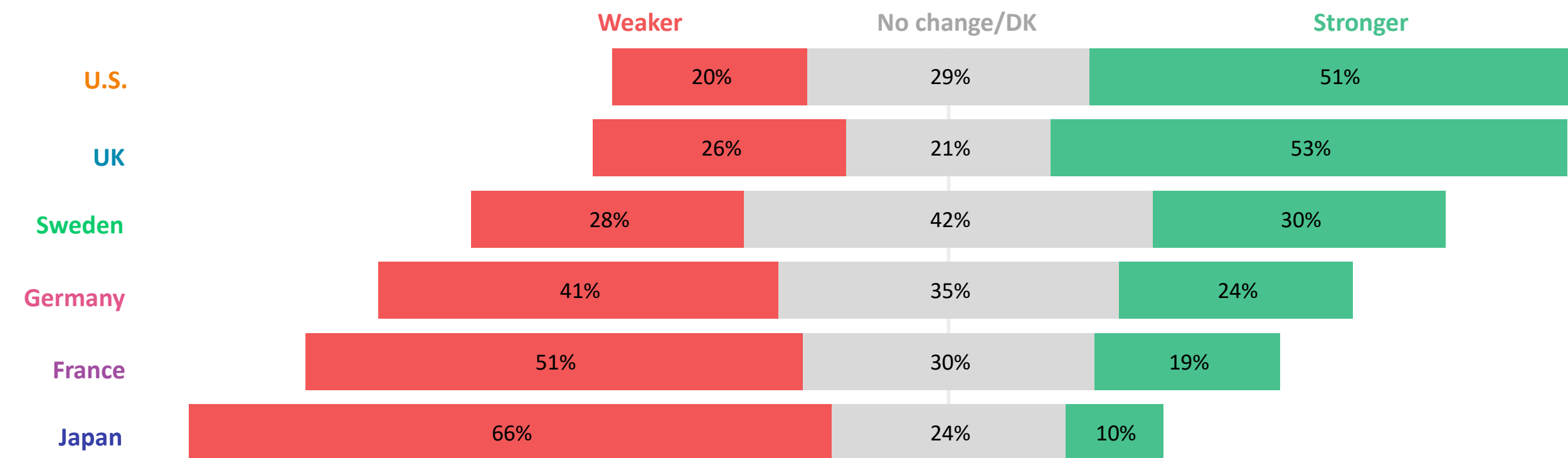
The worst rated industry in all six countries surveyed

10 Consumer confidence

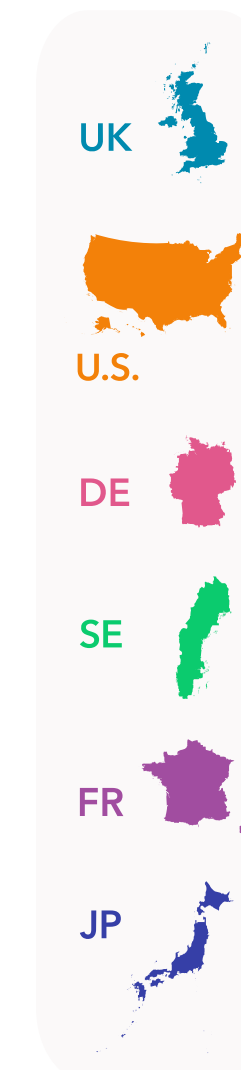
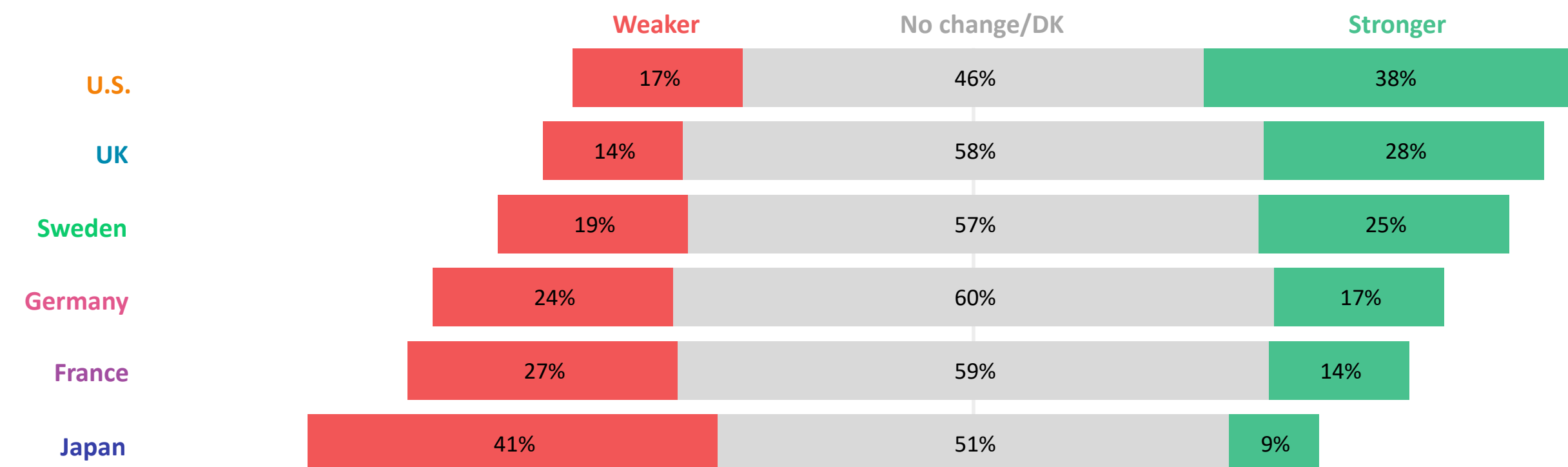
Countries with stronger vaccine rollouts look positively to their economic future – while those in Europe and Japan worry

Thinking about each of the following, do you expect them to be stronger or weaker in three months' time than it is now?

The economic situation in the country overall in three months time



Your own economic situation in three months time

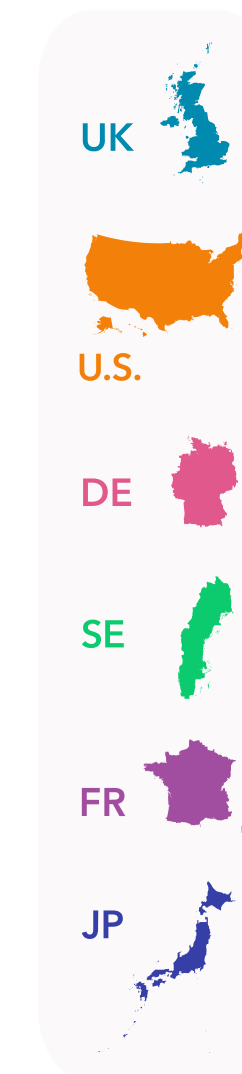
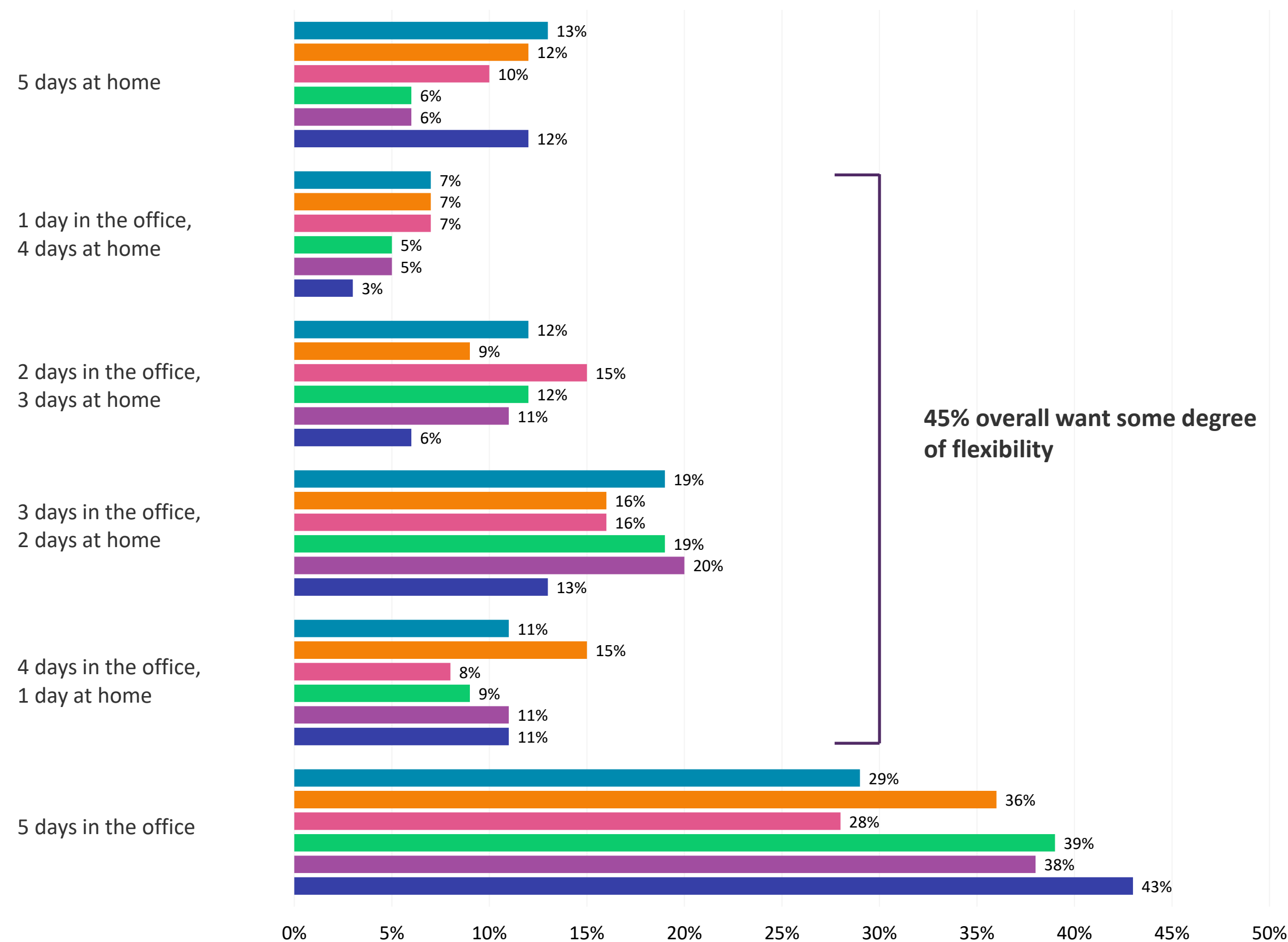


- **Consumer confidence closely tracks the performance of the vaccine rollout in the different countries surveyed.** In the UK and the U.S., the public are buoyant, and majorities expect a stronger economic situation in three months' time. Though the proportion who expect an improvement in their own economic situation is lower, more also expect it to be stronger than weaker in these two countries.
- The picture is starkly different in Germany, France, and Japan. **Four in ten Germans expect their economy to be weaker in three months' time, as do more than half of French people,** with only one in five expecting an improvement. And in Japan the figures are starker still, with two-thirds expecting the economy to be worse off in three months' time.
- This pessimism extends to people's personal lot too, with more expecting a deterioration than not in Germany, France, and Japan.
- In Sweden, the picture is less divergent, **with three in ten expecting a stronger economy and another three in ten expecting a weaker one** – with four in ten saying it will be much the same.
- There are stark demographic differences. For example, **one in five low-earners in the UK expect their economic situation to get worse, while this applies to only 7% of high-earners.** Similarly, in the U.S., 24% of low-earners expecting things to get worse for them in three months' time, compared to only 9% of high-earners.
- **The ramifications of this are more severe in countries who expect a weaker economic situation.** In France, one in three low-earners expect their own lot to deteriorate, as do three in ten under-45s.

11 The ideal working mix

Working from home full-time has only minor appeal and two-thirds want more time in the office than at home

In twelve months time, what would be your ideal working mix in a normal working week?



- Given an array of options on home and office working, **almost two-thirds of people across the six countries surveyed opt for spending more time at the office in a given week than at home.**
- The option of working at home for five days a week is a relatively niche one, with **only around one in ten saying this would be their preferred option.**
- But flexible working is a preference. Overall, 45% of workers across countries surveyed would prefer some degree of flexibility, being able to spend some days in the office and some other days at home.
- UK and German workers are the least likely to want to be full-time at the office, while Japanese workers are the most likely to want to do so.
- Amongst just those currently home-working, who are usually at an office, working at home is still preferred, with two-thirds preferring an option with a majority of time at home. **However, five days at home remains a relatively niche appeal – only one in four of this group say they would choose this option.**

64%

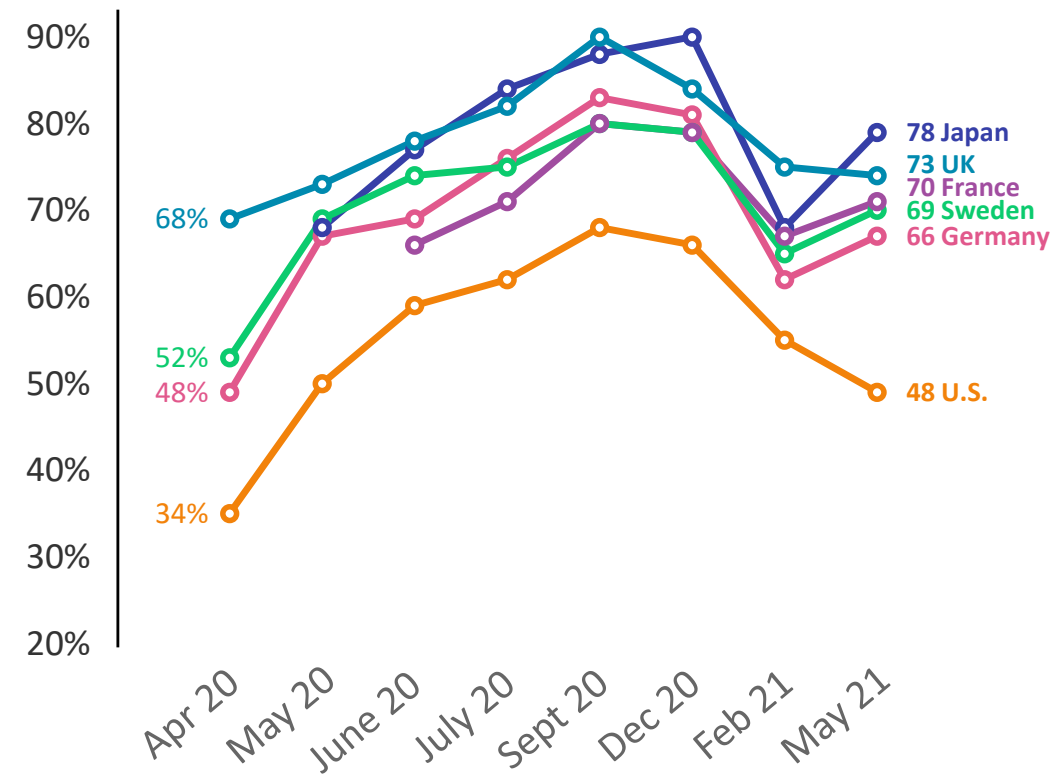
The proportion of workers globally who want to spend more time in the office than at home

12 Expected duration

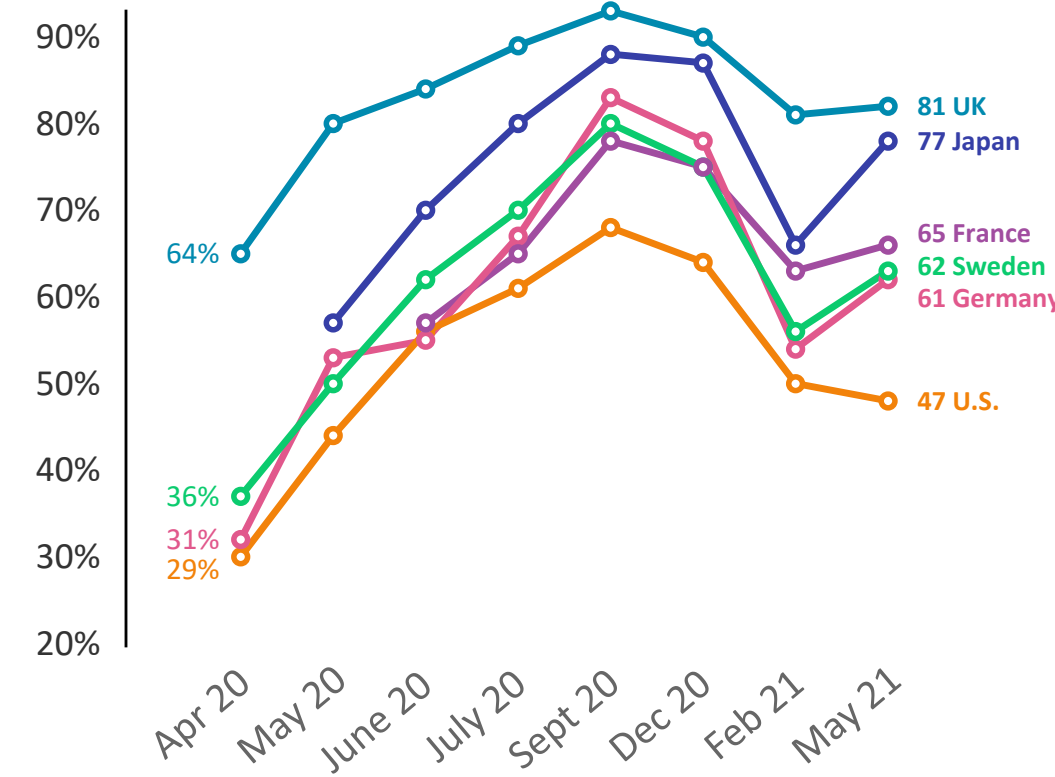
Increases in the expected duration of the pandemic once more in most countries; though the U.S. is more optimistic

% saying longer than a year

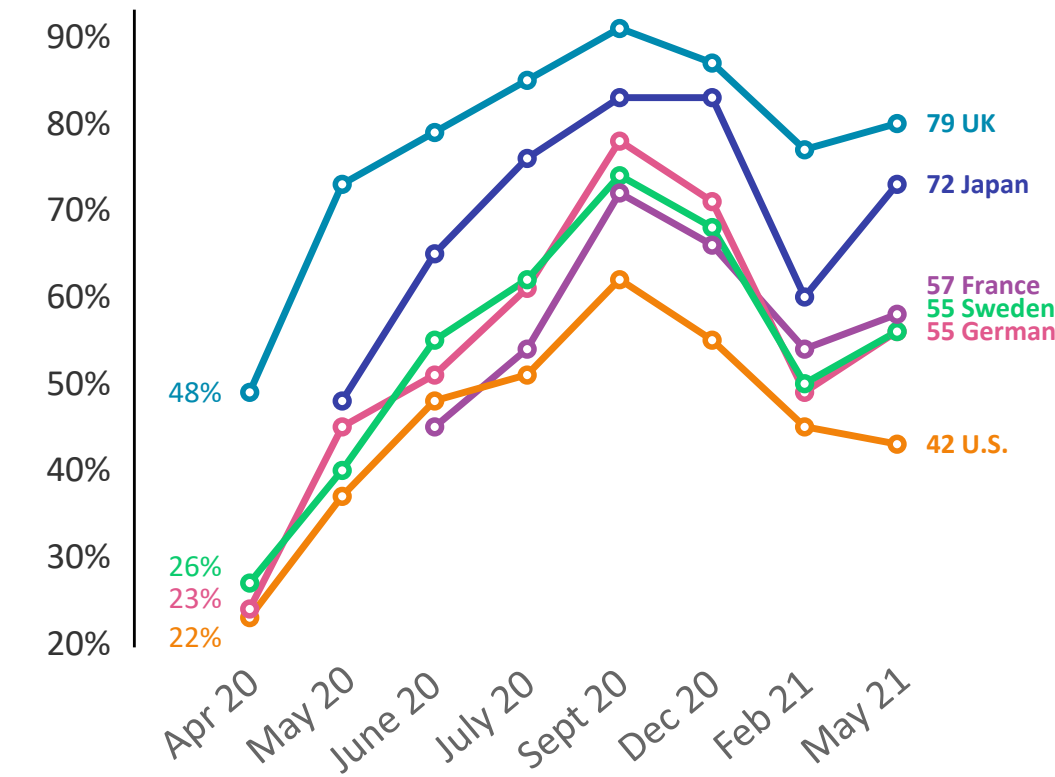
The impact on businesses and how they function



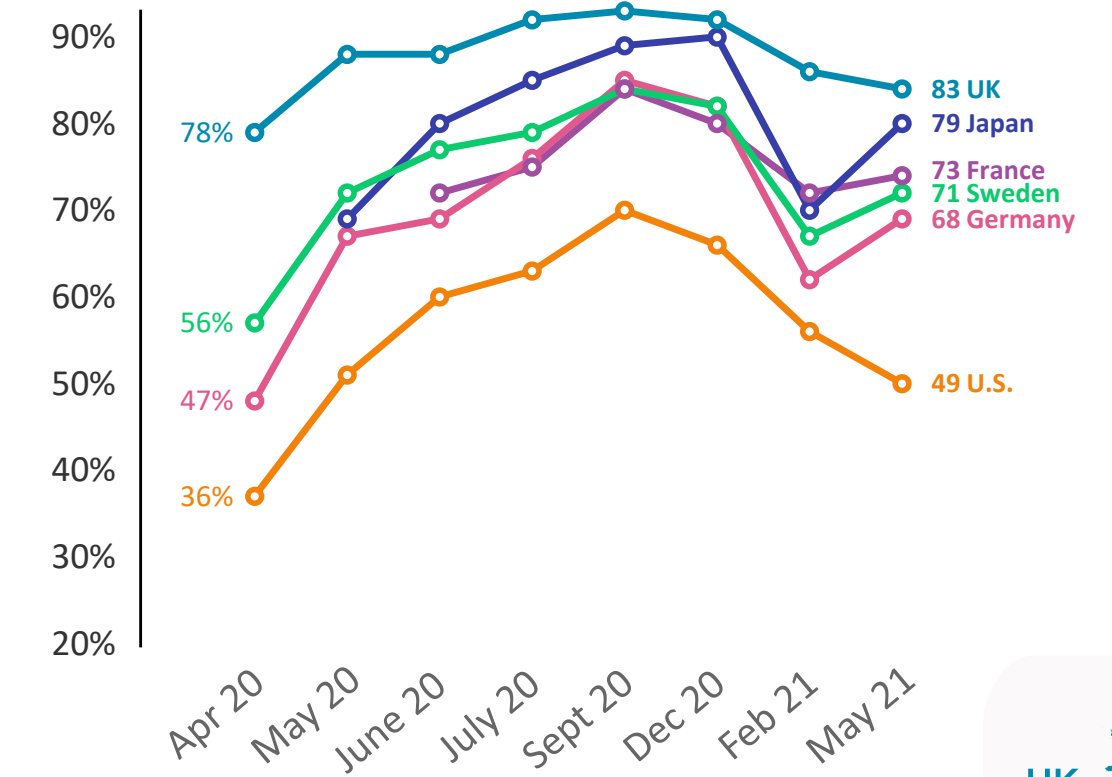
The impact on my country



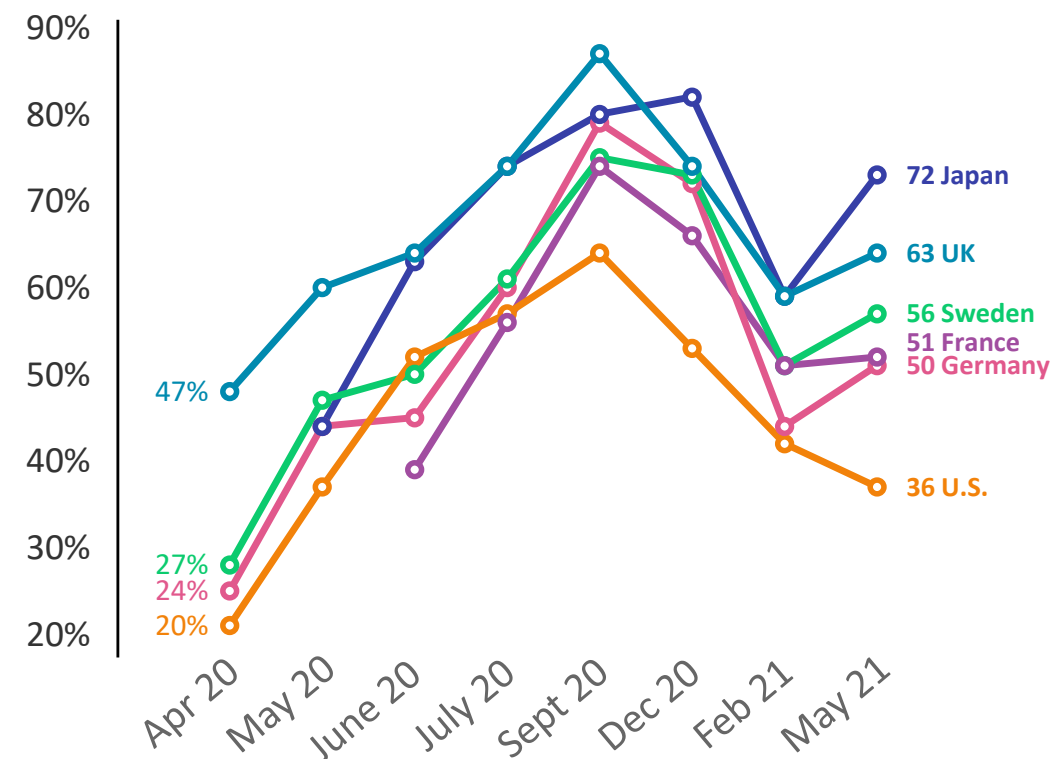
The impact on society overall



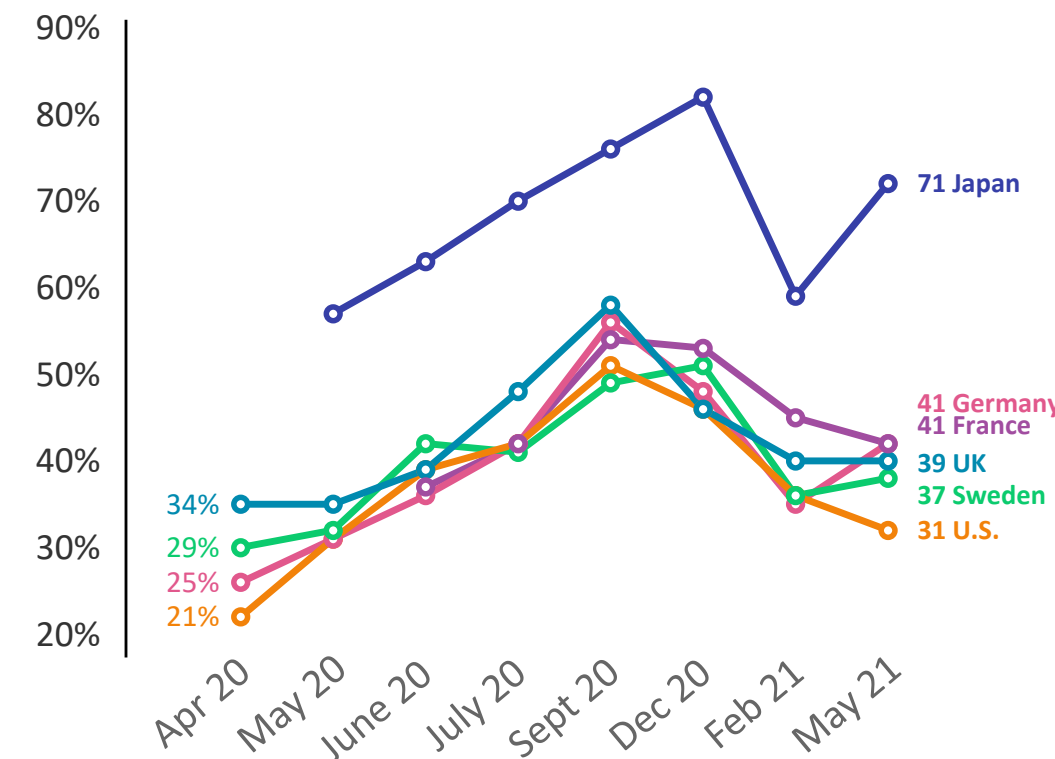
The impact on the economy



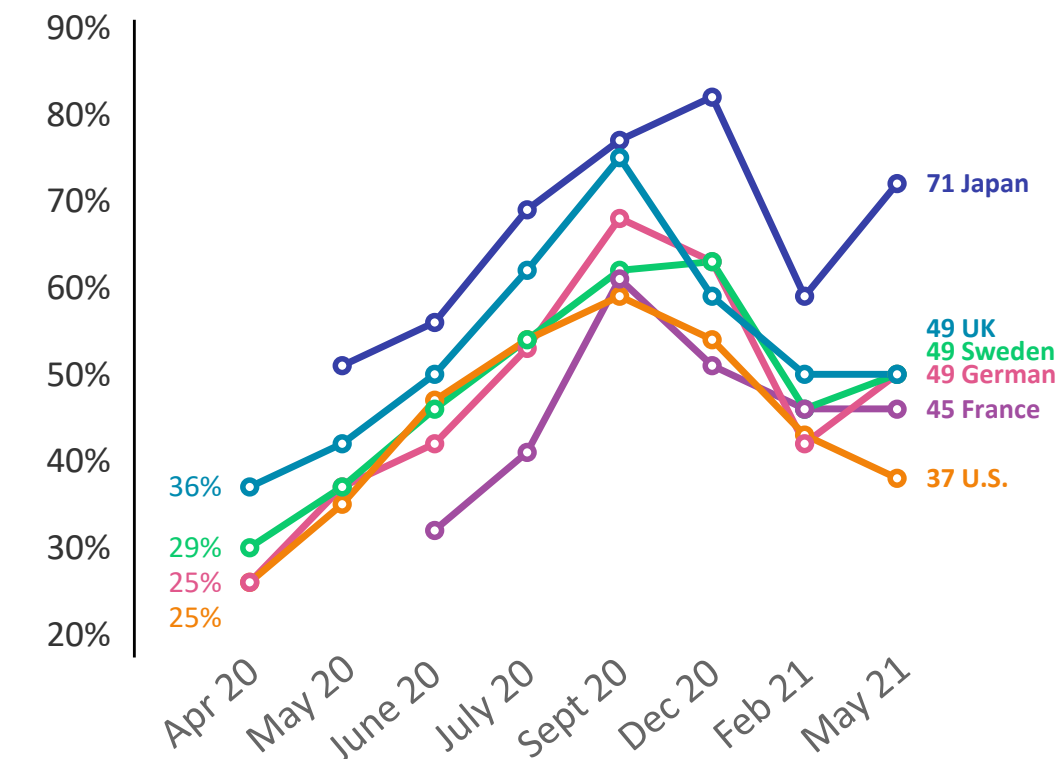
The impact on travel and holidays



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.



12 Expected duration

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

- There has been an **uptick in the perceived length of the pandemic in every country surveyed other than the U.S.** After consistent falls in the expected duration since September 2020 citizens have had to reassess the speed of recovery in light of slow vaccine rollouts and a third global wave of illness. People in Japan have revised up their expectations particularly sharply. What this means in these markets is that **expectations for the end of the pandemic are back to approximately where they were this time last year.** The hope is that this time there is not another intervening period of further pessimism in the next 12 months.
- **The U.S. is the exception** where the trend of shorter expected duration for the pandemic has continued unabated, although the decline has started to stall in terms of 'the impact on society' and 'the impact on my country' as, even in the US, people grapple with the long effects of the pandemic.
- **The UK is the country that is the most insulated from this latest uptick in pessimism** outside of the U.S. When it comes to the effect on the economy and the impact on business there are even very slight falls in the length of time the British public think they will last (down 1 point each).
- The area of life which has seen the sharpest increases is on the **impact on society overall.** The upticks in this area reverse some of the optimism of the last few months, but do not take expectations of duration back to anything like the levels seen around the turn of the year even in Japan where the increase is sharpest.

77%

The proportion of Japanese people who feel COVID-19 will impact Japan for more than a year from now

6 POINTS

The increase since February in the proportion of Germans who say that the impact on their household finances will last for more than a year

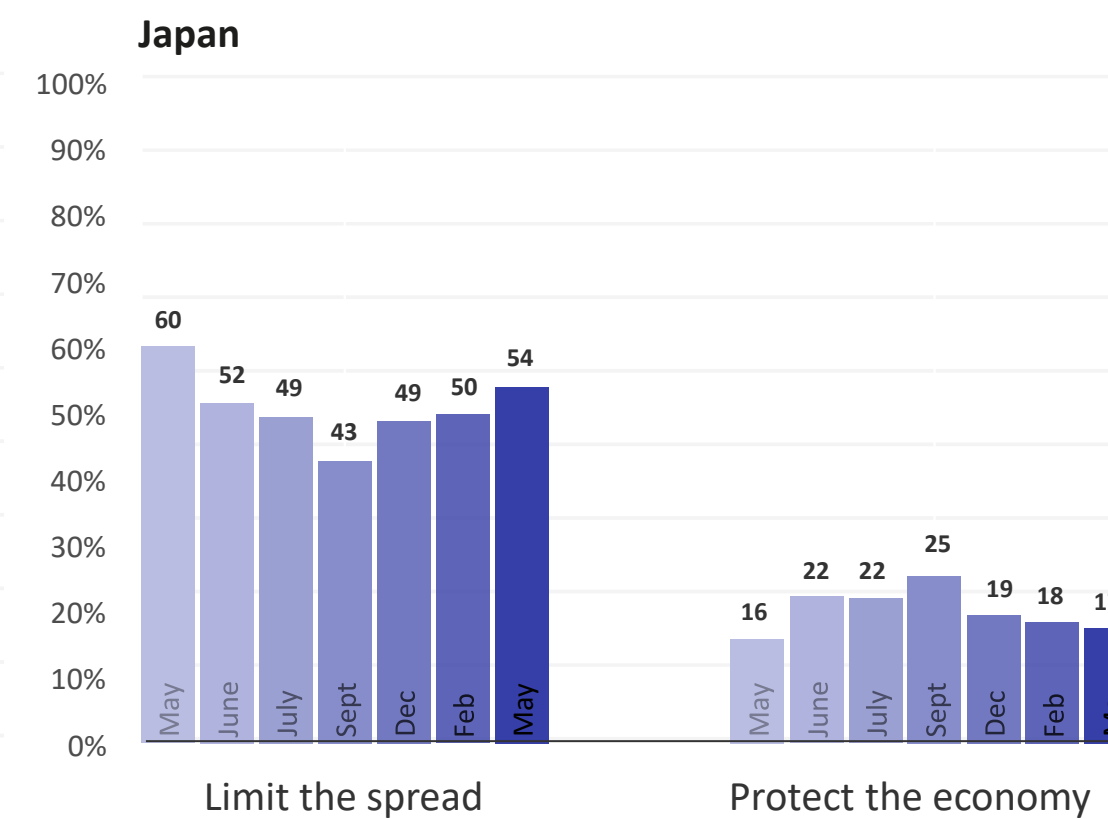
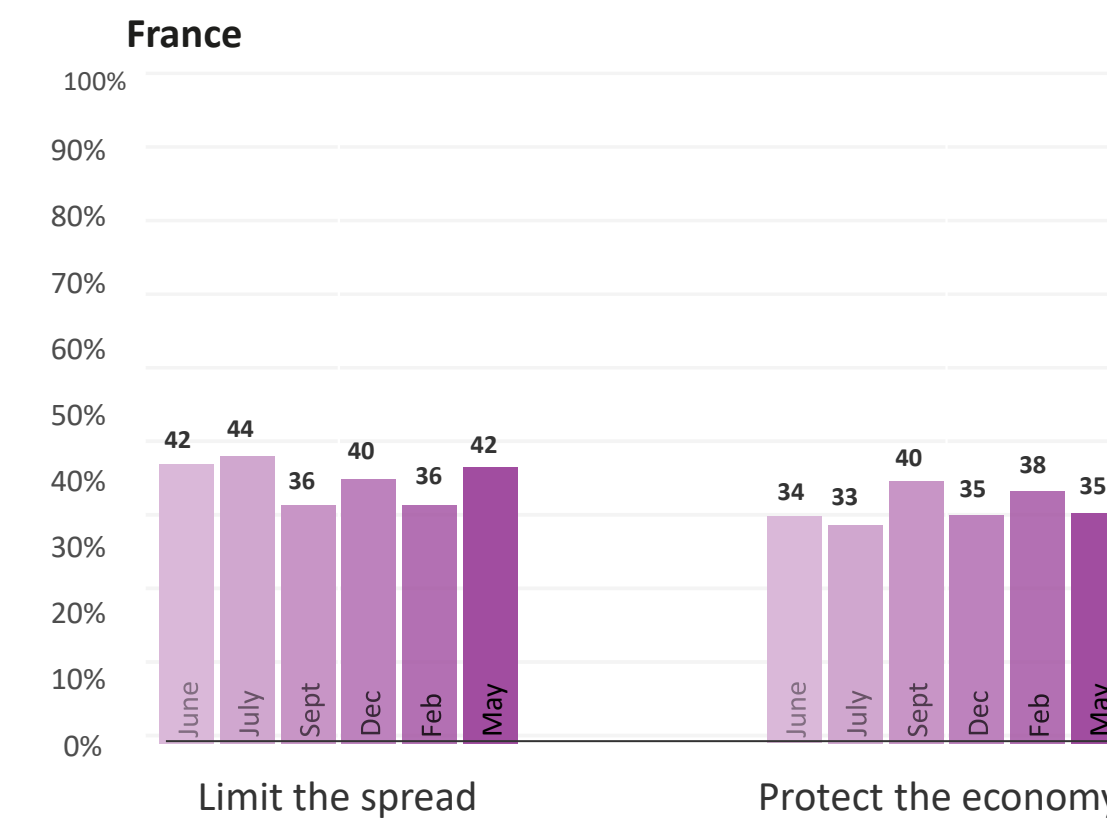
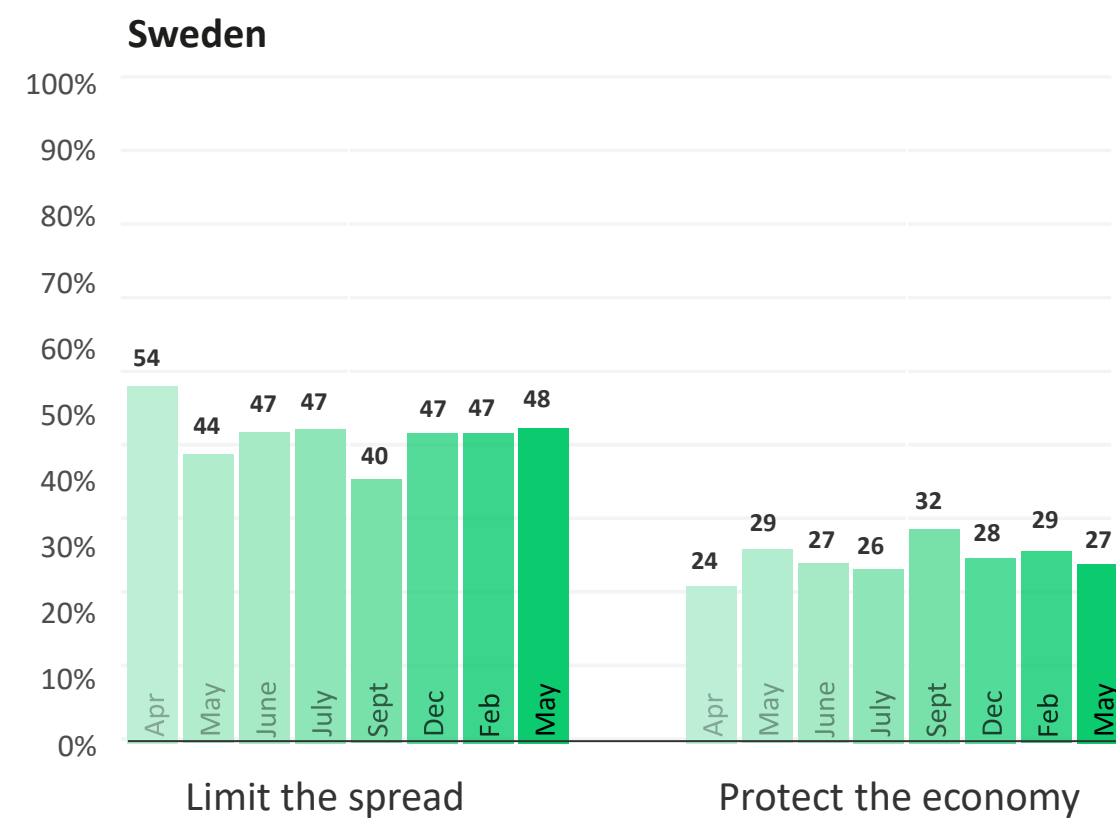
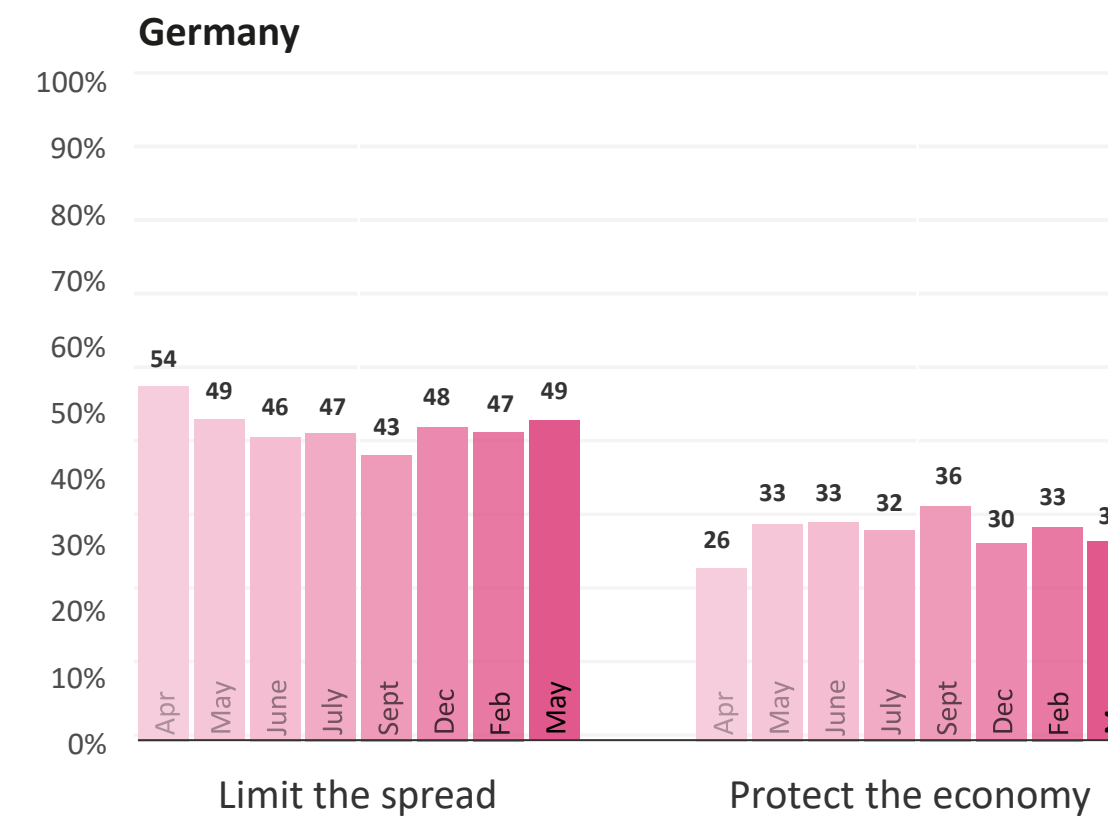
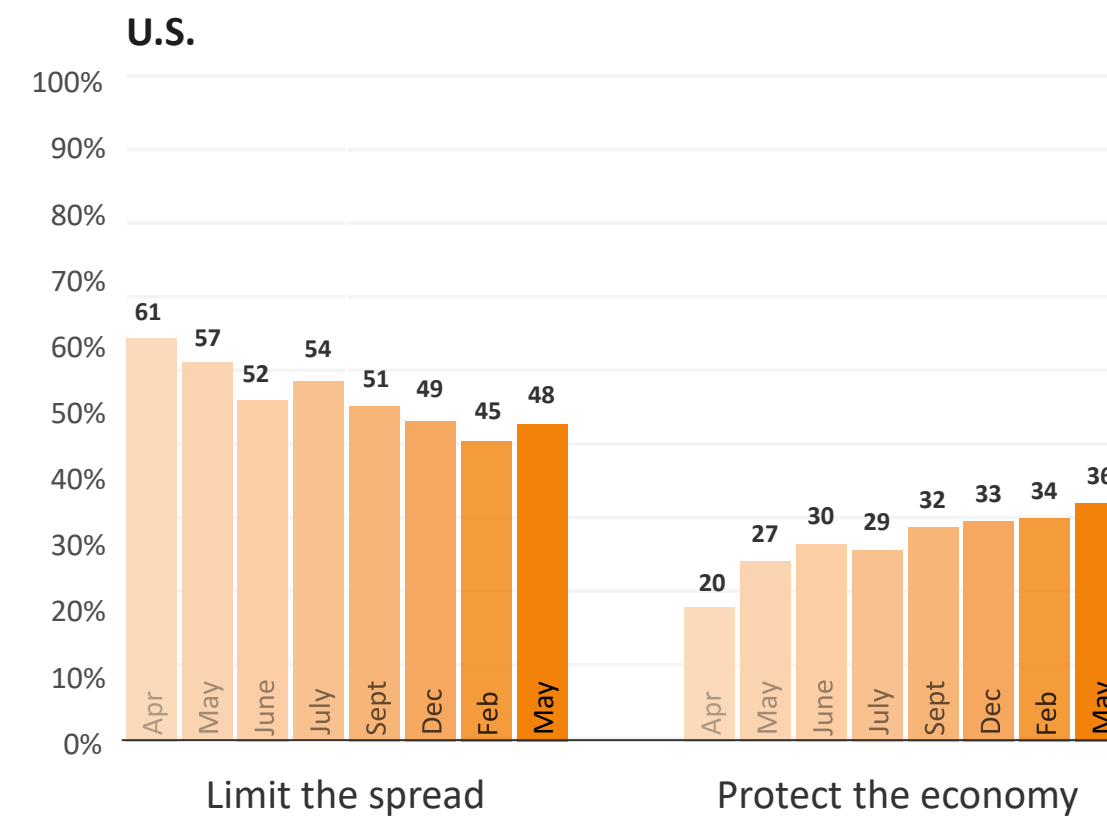
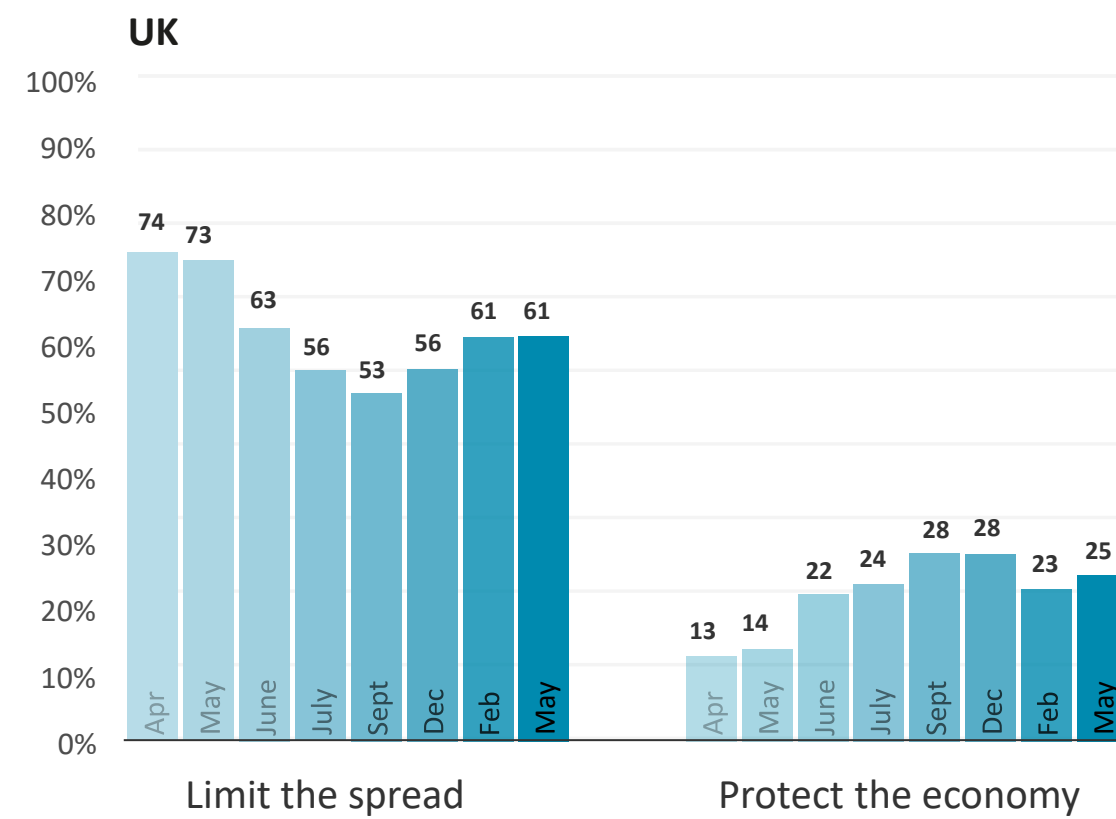
- Even when the outlook in all markets was improving in February we remarked on the significant proportion of people who expected these pandemic effects to last beyond another year. Three months on in May those numbers are even higher outside the U.S. What that means in practice is **almost two thirds of people in France, Germany and Sweden believe that the effects on their country will last beyond the middle of 2022.** The figures are higher in the UK and Japan where 81% and 77% respectively expect the effects to go on beyond May 2022.
- In light of these findings any narrative that has the end of the pandemic in summer 2021 or says that the northern hemisphere winter was the last of COVID have to be revised to match public wisdom.

31%

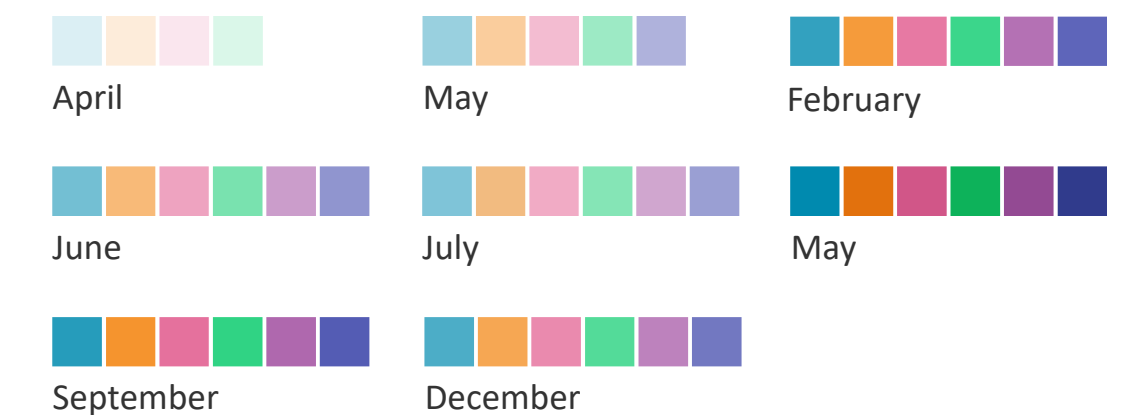
The proportion of U.S. adults who think that the impact of the pandemic on their household finances will run on longer than another year

13 Government decisions

More than 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 of the virus 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".



13 Government decisions

More than a year into the pandemic, health still matters most to most countries' populations

- There has been little change in the proportion of people who want to prioritize health over the economy, **with this being the preference of people in all countries**. The proportion of people wanting to prioritize limiting the spread of the disease is stable in the UK (unchanged on February), the U.S. (up 3), Germany (up two), Sweden (up 1), and Japan (up 4).
- The only significant change is in France, where again the pendulum has swung back to health on 42% (up 6), with the economy on 35% (down 3). This is the biggest gap between the two since last July, perhaps exacerbated by the recent wave of coronavirus in the country. It may also be linked to a 'one last heave' feeling as vaccination programs are rolled out.

61%

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

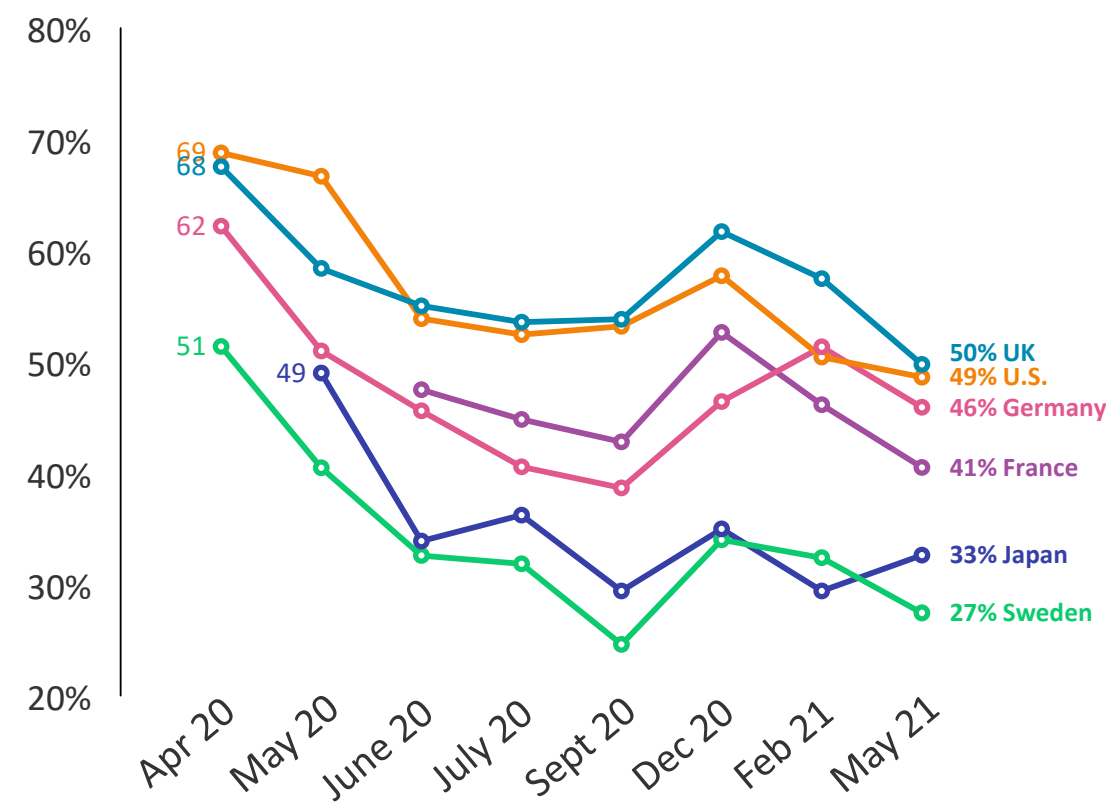
7 POINTS

The gap between health and the economy in France, the largest since last July

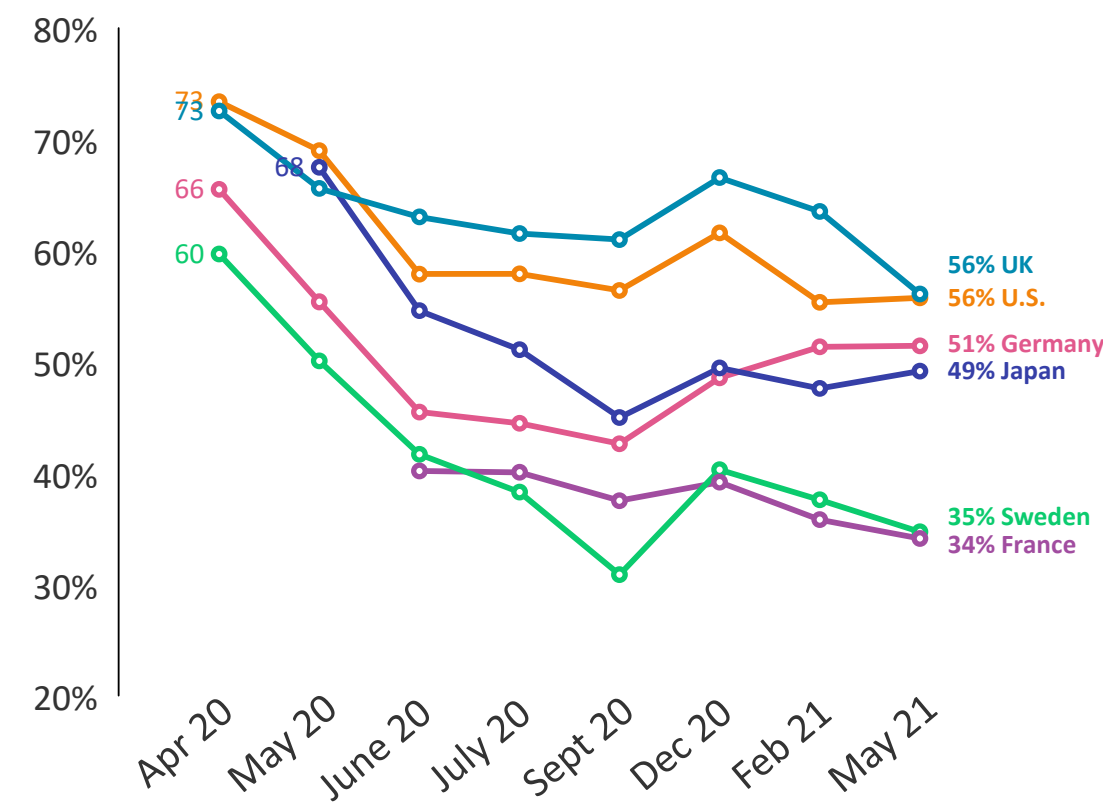
14 Levels of concern

Concern about the impact of the virus remains high

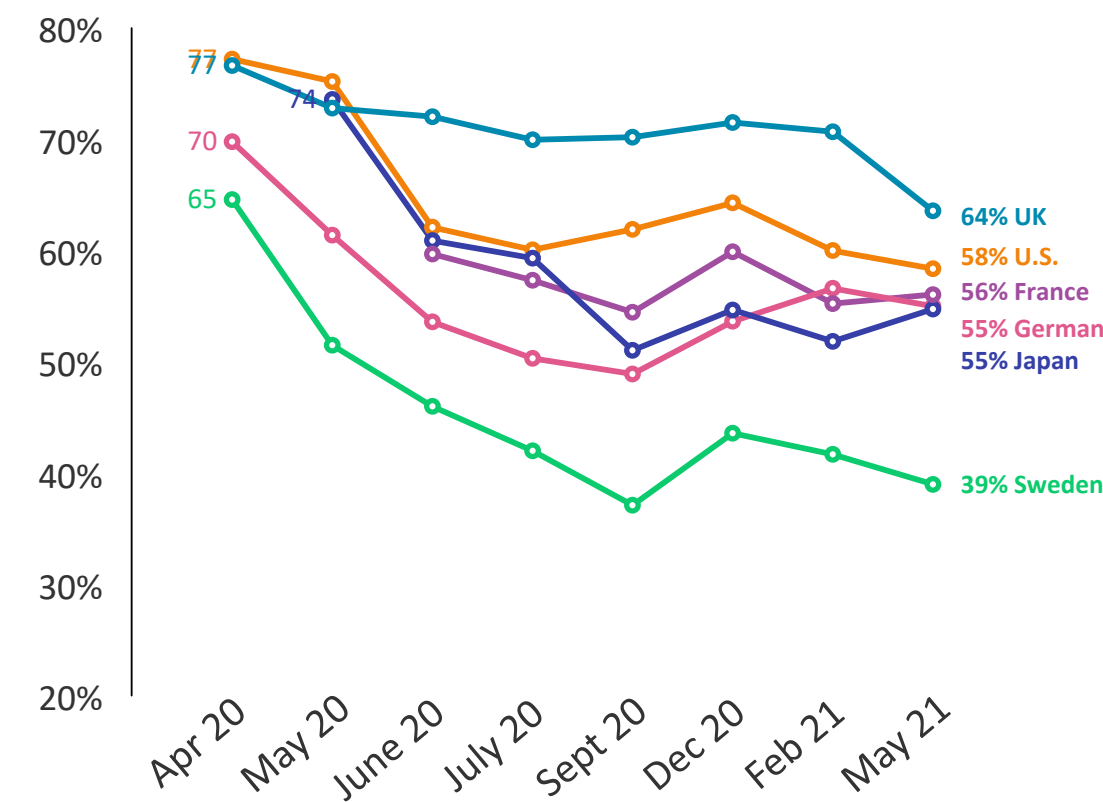
Businesses in my local area



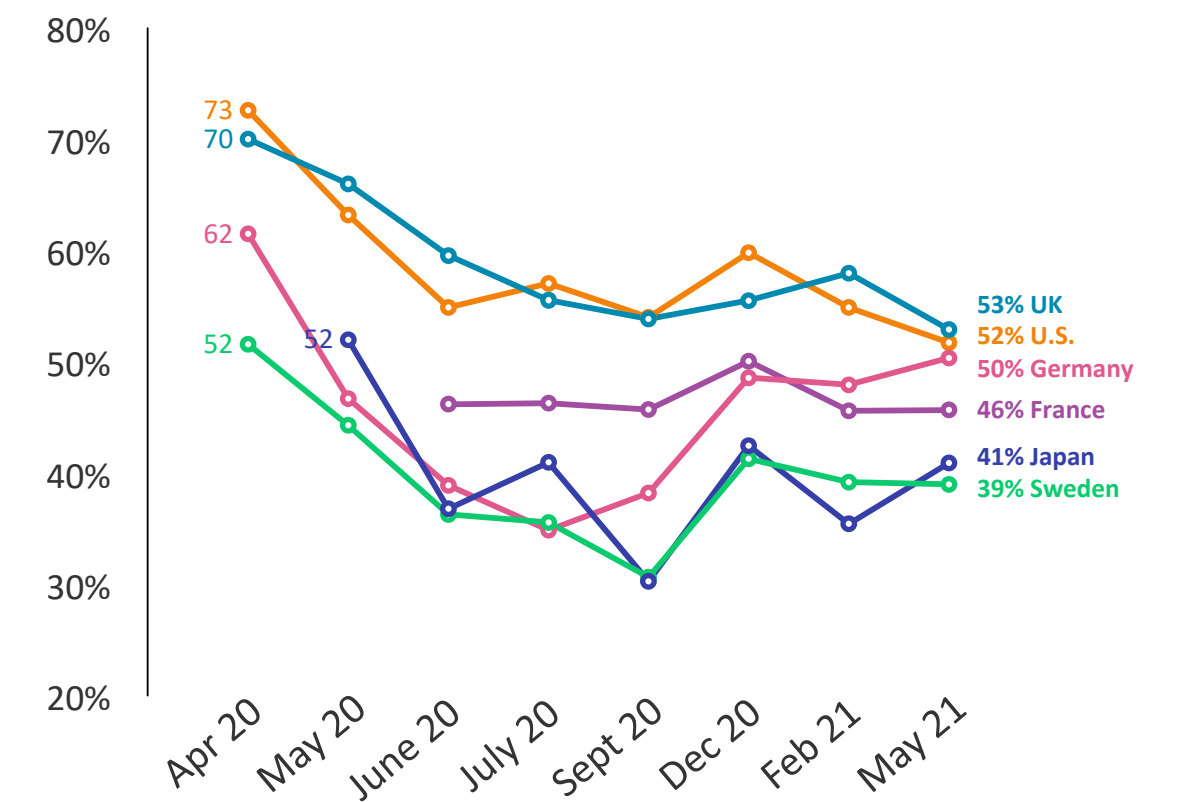
Businesses in the country as a whole



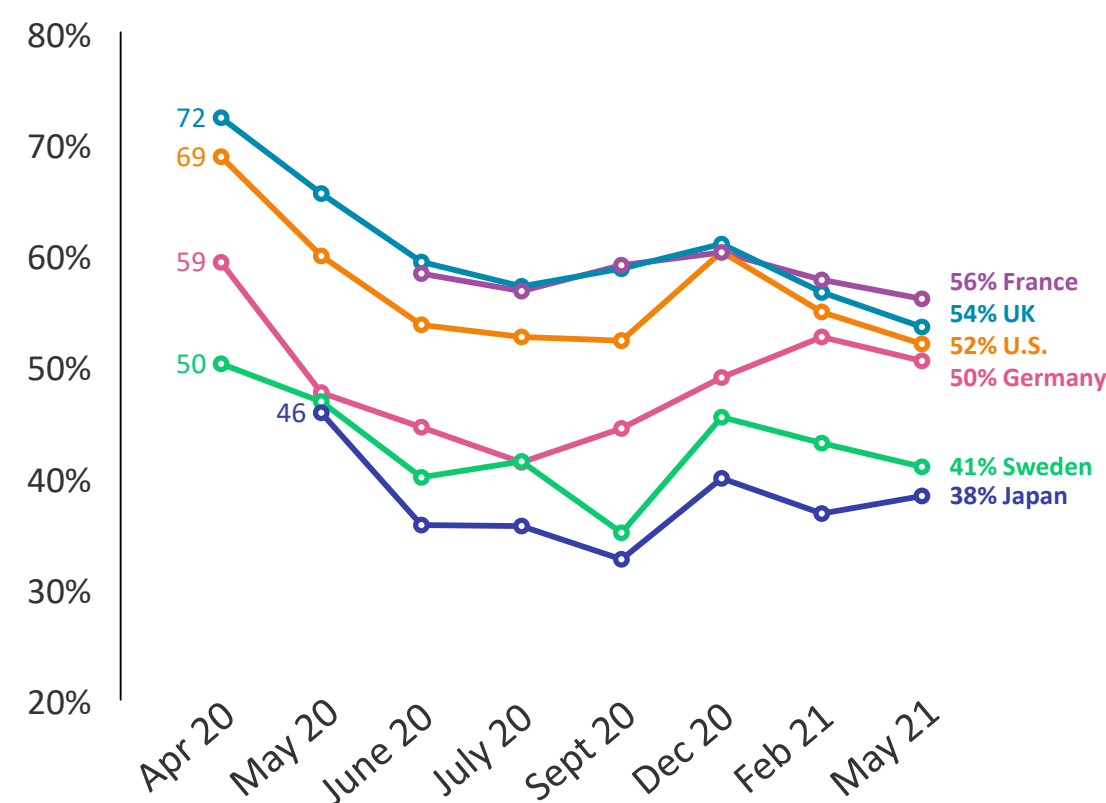
The economy as a whole



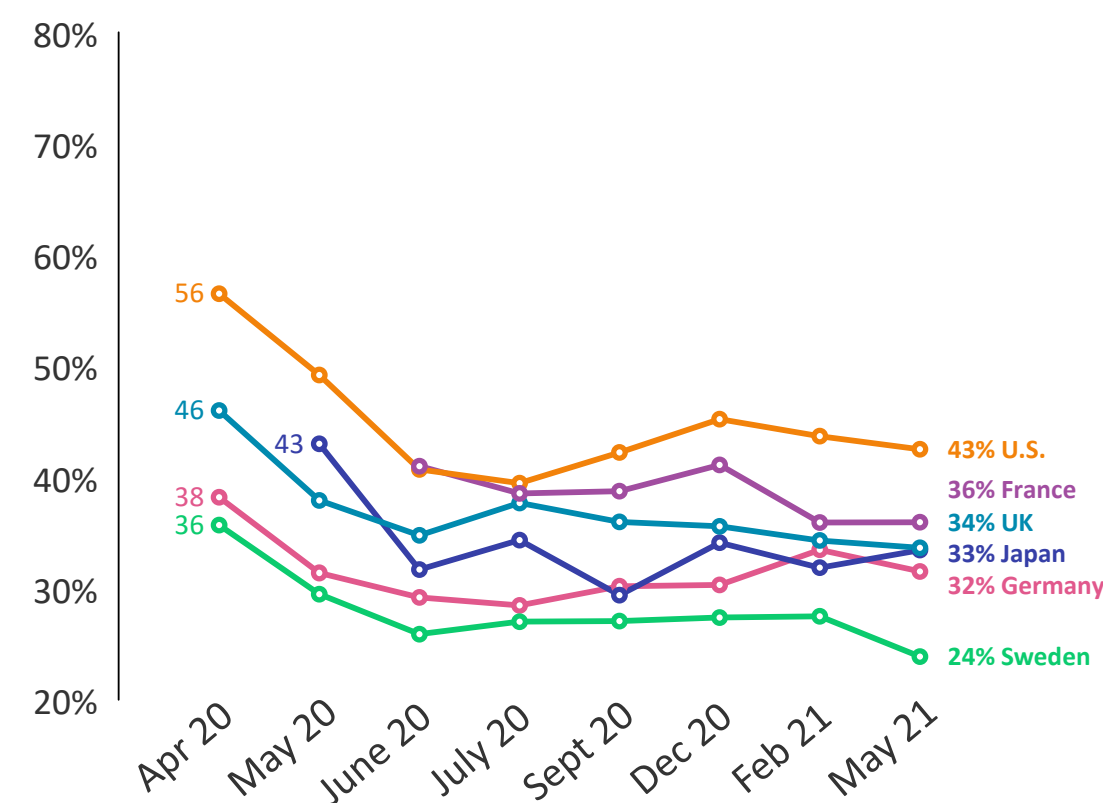
The health of people in the country as a whole



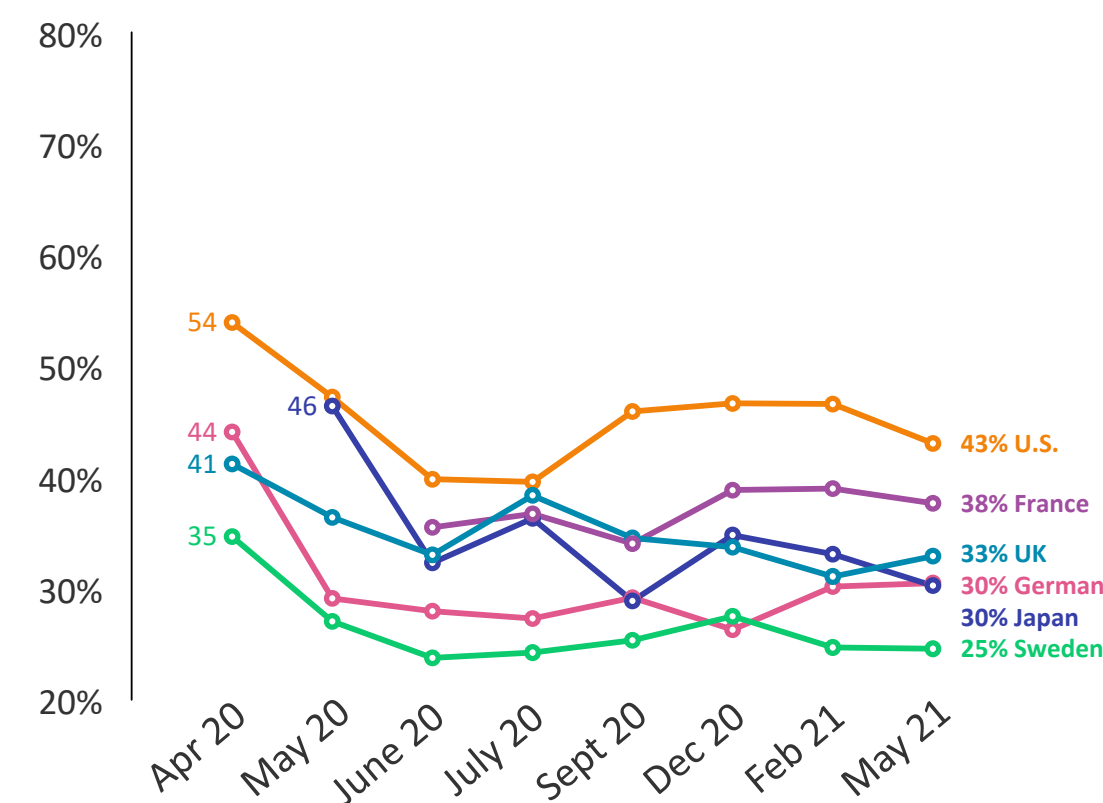
Your family's health



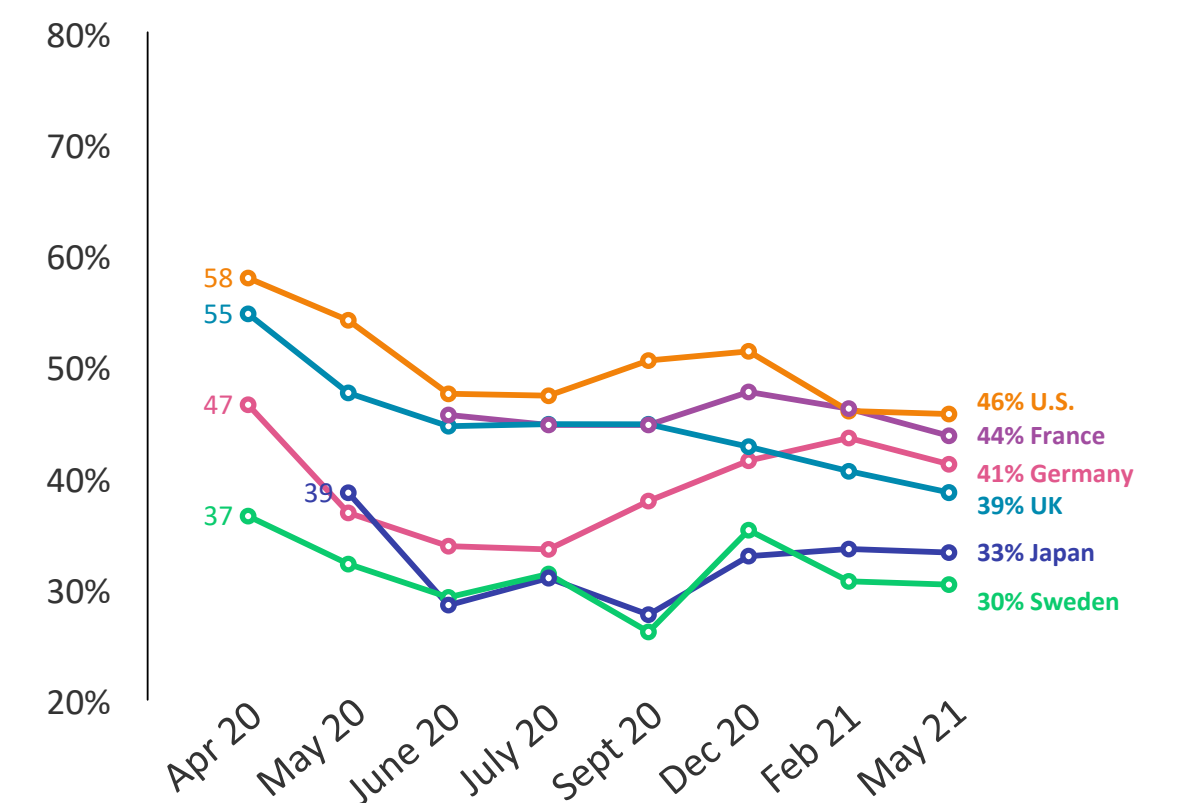
Your own household finances



Your own job



Your personal health



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.

14 Levels of concern

Concern about the impact of the virus on people themselves is level or trending down

- Despite a longer expected duration for the virus, **the trend of falling concern about the virus has continued** in most countries. This is true particularly of personal and economic metrics, e.g. the impact on businesses in one's local area has fallen in all countries apart from Japan.
 - There may also be a **vaccination effect**, with for example people in the UK and the U.S. being less concerned than in February about the impact of the virus on the health of people in the country as a whole, whereas this is stable in Sweden and France, but actually rising in Germany and Japan where satisfaction with the vaccine rollout is lowest.
 - **Overall, though, there has been a clear fall or plateau in concern levels when looking back to the start of the pandemic.** Then, 72% of Brits were very concerned about the virus' impact on their family's health - that figure is now 54%. Then, 77% of Americans were very concerned about the virus' impact on the economy - that figure is now 58%. These are still high numbers, but nothing like the high levels of fear documented at the start of this survey.
- Despite this falling concern in the U.S., **Americans still feel the most concerned of all other countries about the impact of the pandemic on their own household finances and their own job** – suggesting that relatively high personal exposure to economic effects continues in the U.S.
 - On the other side of the picture, **Sweden continues to be the country least concerned about the impacts of the pandemic** – sometimes dramatically so. For example, on the economic effects, only 39% of Swedes are very concerned, with the next-lowest being Japan on 55% (and the highest overall being the UK on 64%). The same also applies for personal economic impacts, with only one in four Swedes very concerned about the impact of the virus on their own household finances.
 - Looking broadly, it is important to stress that concern levels do remain high and usually at or above the 50% mark when it comes to one's family's health, the health of people in the country as a whole, and the effects of the economy as a whole. **There may be some time yet, based on these trends, before the fears elicited by this pandemic fully fade.**

1 in 4

The percentage of people in Sweden very concerned about the impact of Covid on their household finances

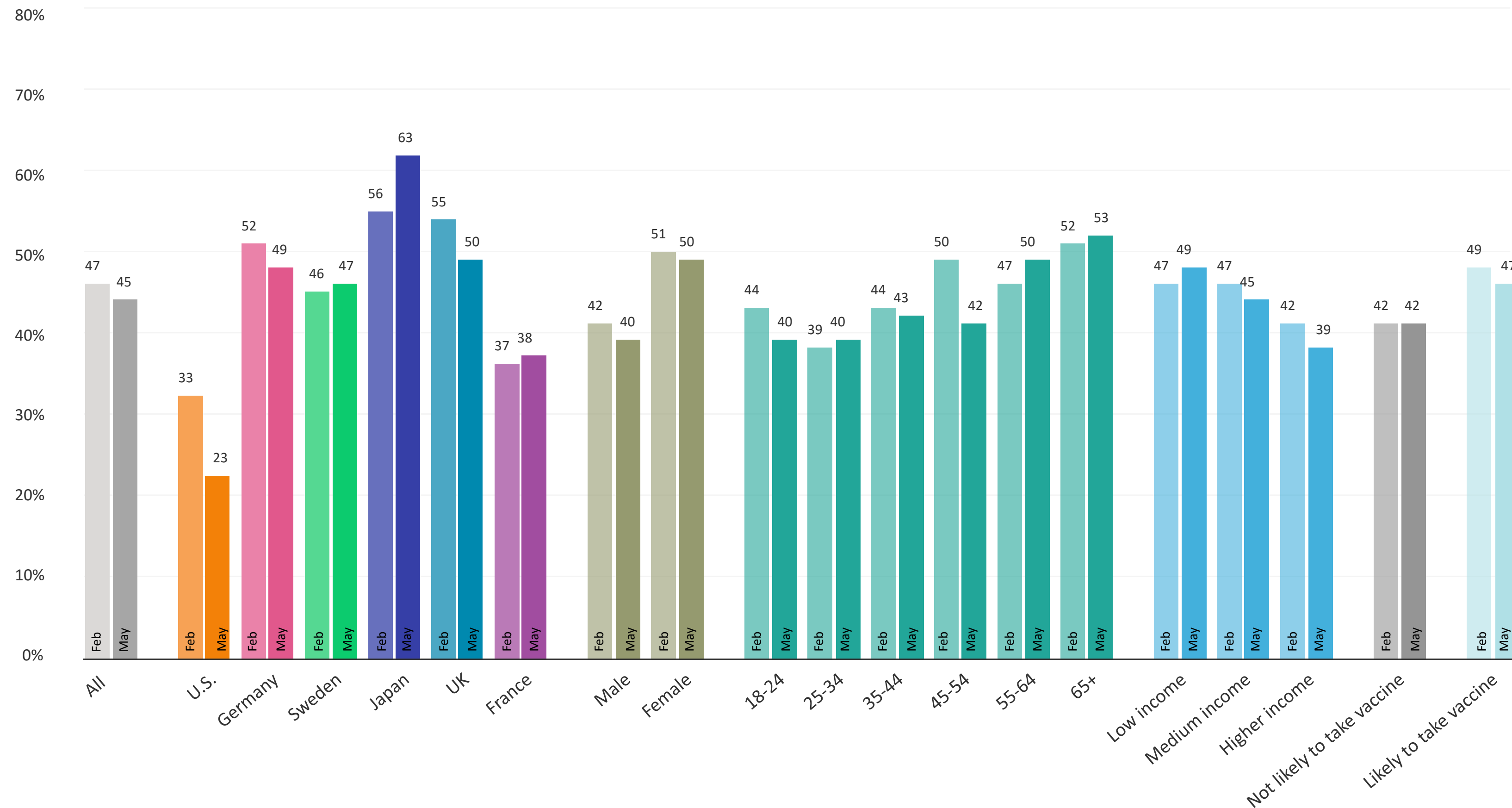
18 POINTS

The fall in the proportion of British people since last year who say they are very concerned about the impact of the virus on their family's health

15 Tokyo

The Japanese public harden their opposition to the Tokyo Olympics, though opposition has receded in the U.S.

Do you agree or disagree that the Tokyo Olympics should go ahead this year in Japan?
% Saying 'should not go ahead'



- There continues to be relatively little support for the Tokyo Olympics going ahead, with half of people opposed in Germany, Sweden, and the UK. More also oppose than support it in France, with 38% opposed and 27% in support.
- Japan, the host, has the most hostile public towards the idea. In February, opposition was at 56%; that is now 63%.
- Where there has been a change is in the U.S. Perhaps linked to its increasing optimism as its vaccine rollout is well-received, more Americans than not now agree the Olympics should go ahead, by a margin of almost two to one.

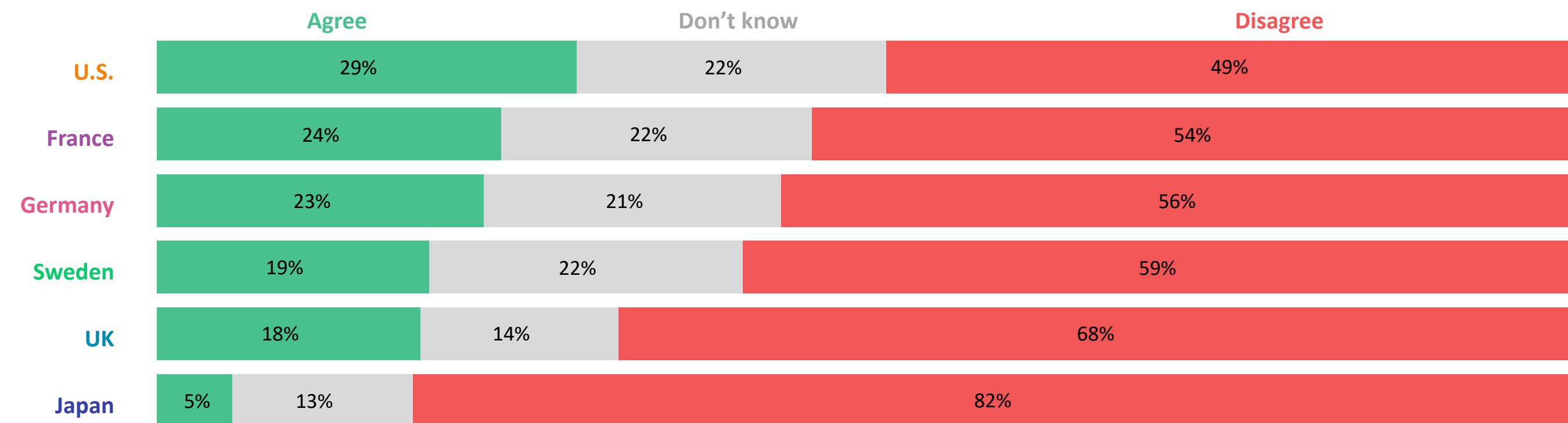
63%

The proportion of Japanese people who oppose the Tokyo Olympics going ahead

16 Travel trends

Most people do not expect to travel abroad in 2021, but half of business travellers are planning a trip

Do you agree or disagree with the following: I will travel abroad this year?



- In all countries surveyed, **half or more of people say they do not plan to travel abroad this year.** The country with people most likely to do so is the U.S., with 29% saying so, then one in four in each of France and Germany, followed by just under one in five in the UK and Sweden. Japan sees the fewest number of people who expect travel abroad, with only 5% saying they plan to.
- **Business travel, however, may be a different picture, with just over half (51%) of regular business travellers saying they plan to travel abroad this year for business.** This will still be a relatively low conversion rate considering these respondents did travel regularly before, but it does indicate a potential recovery in this sector.

Do you agree or disagree with the following: I will travel abroad this year for business?
 Asked only of those who travelled for business in the year before the pandemic



1 in 2

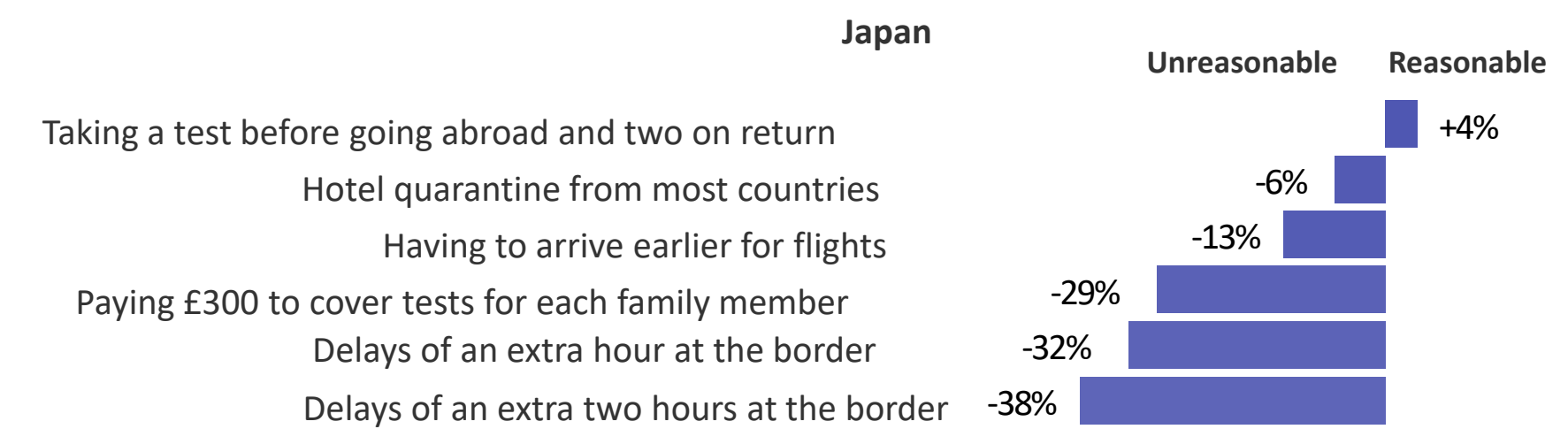
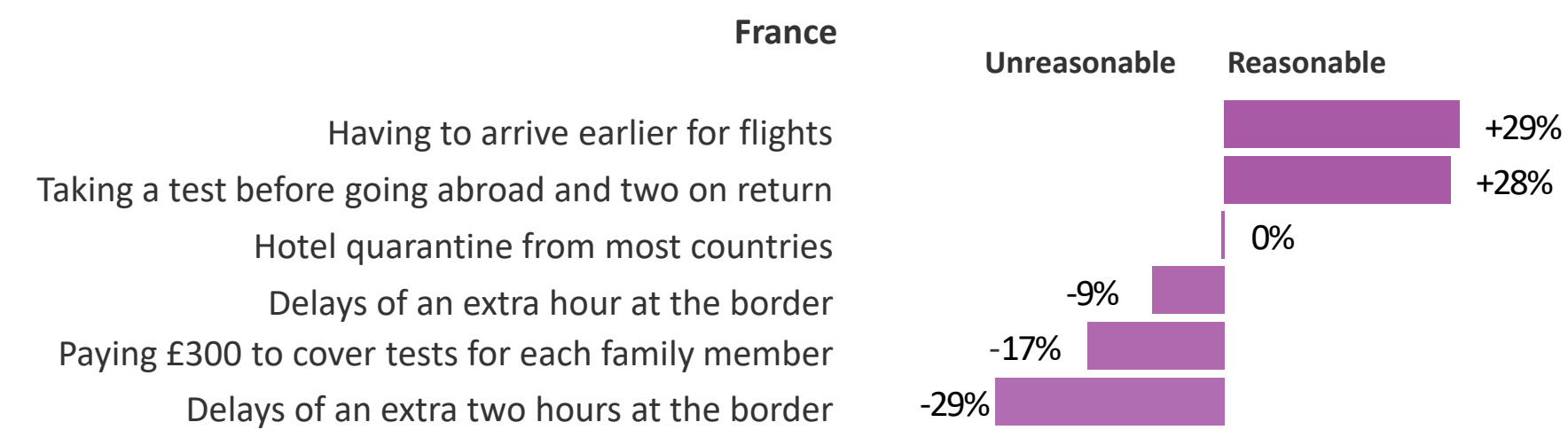
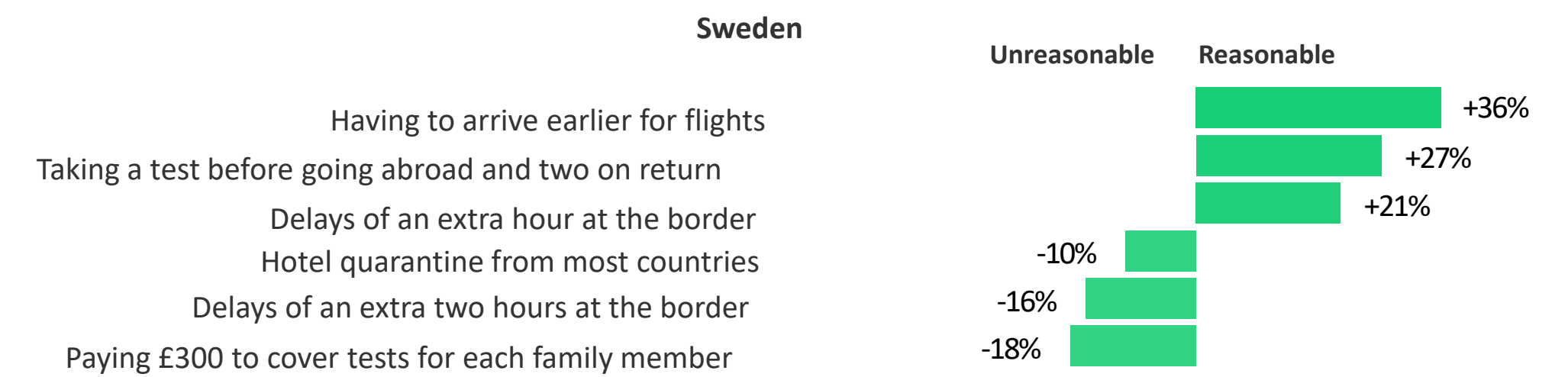
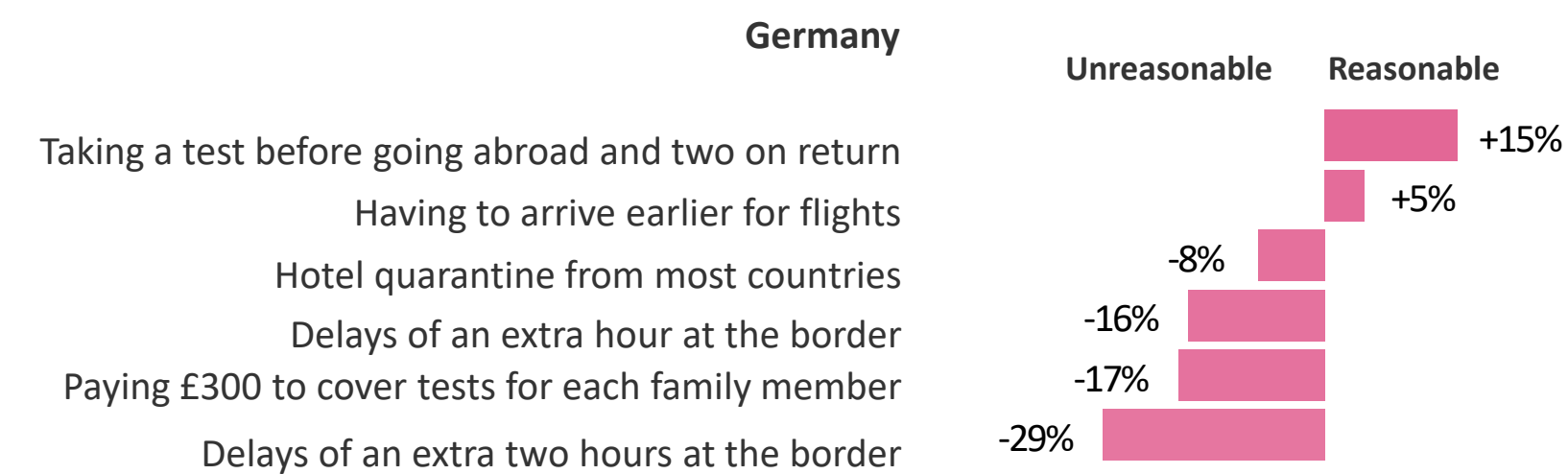
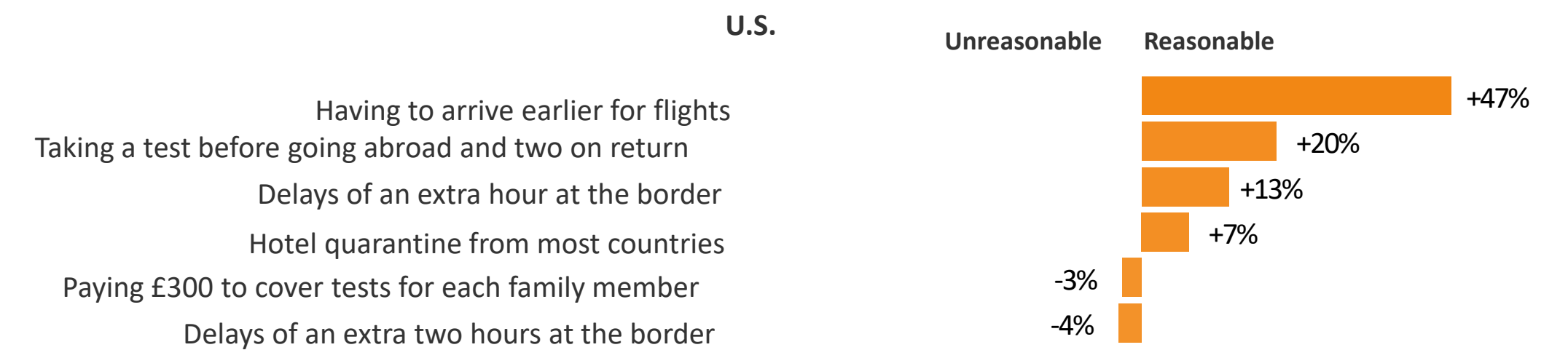
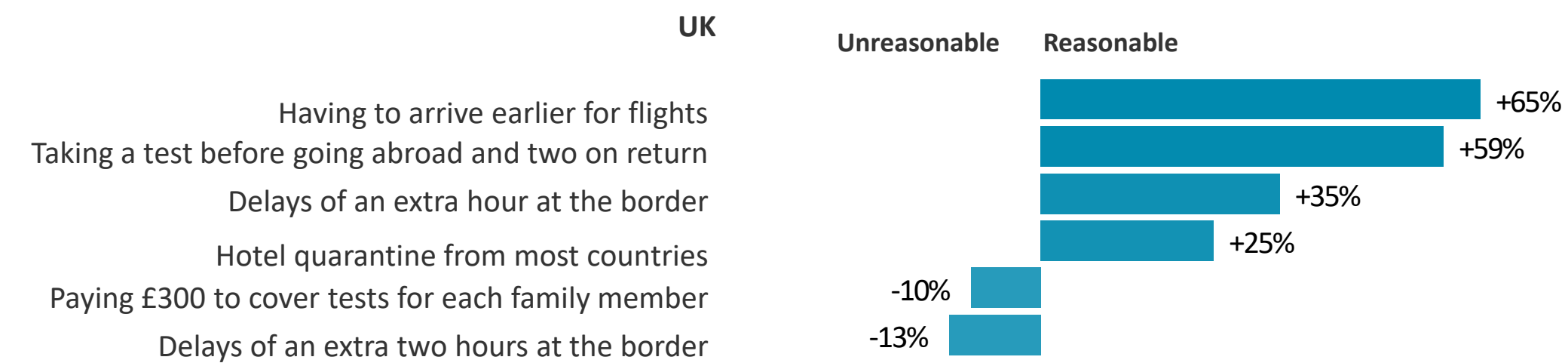
The proportion of regular business travellers who plan to travel abroad in 2021



16 Travel trends

Consumers are relaxed about having to arrive earlier for flights and to take tests, but balk at the prospect of long delays

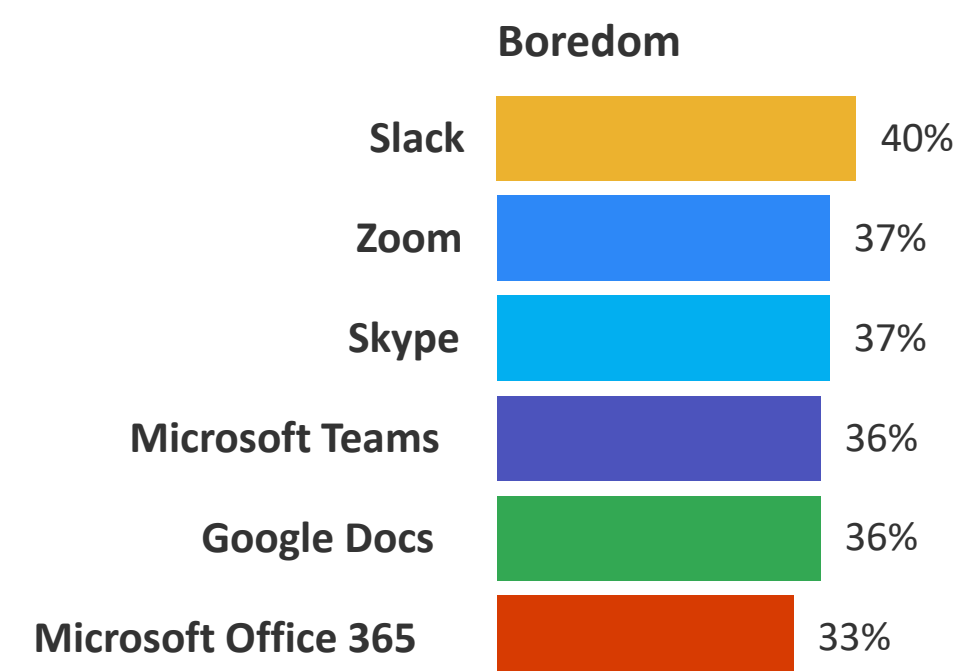
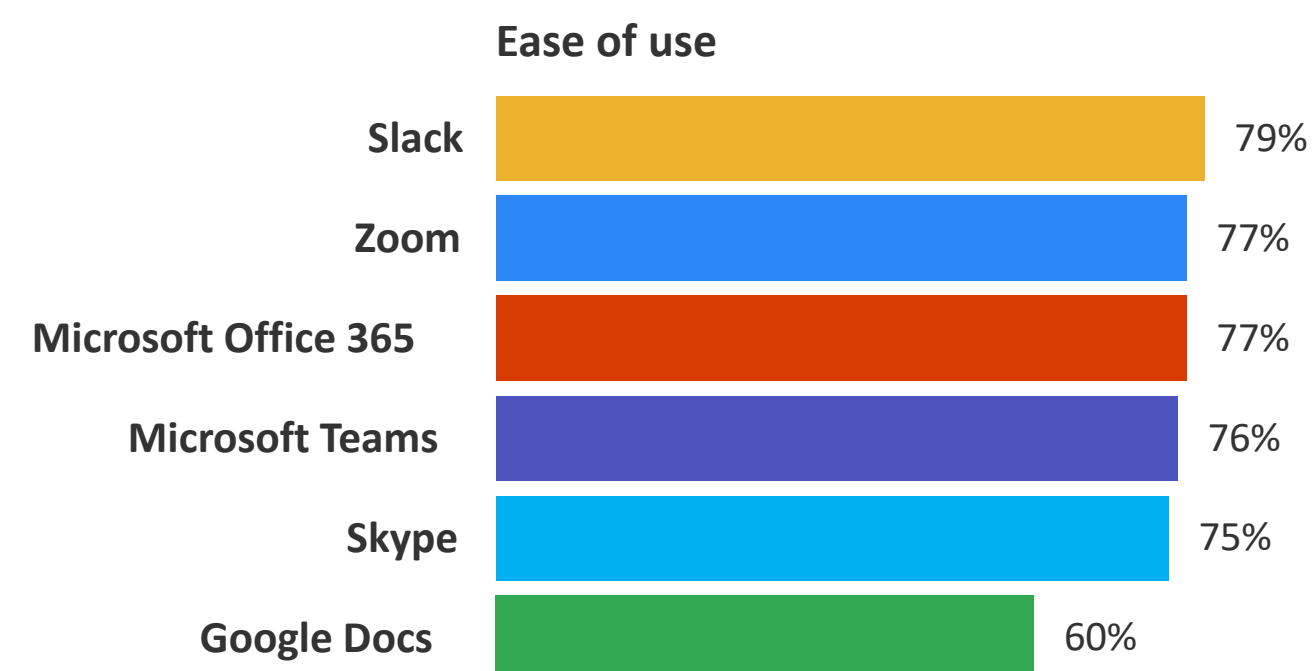
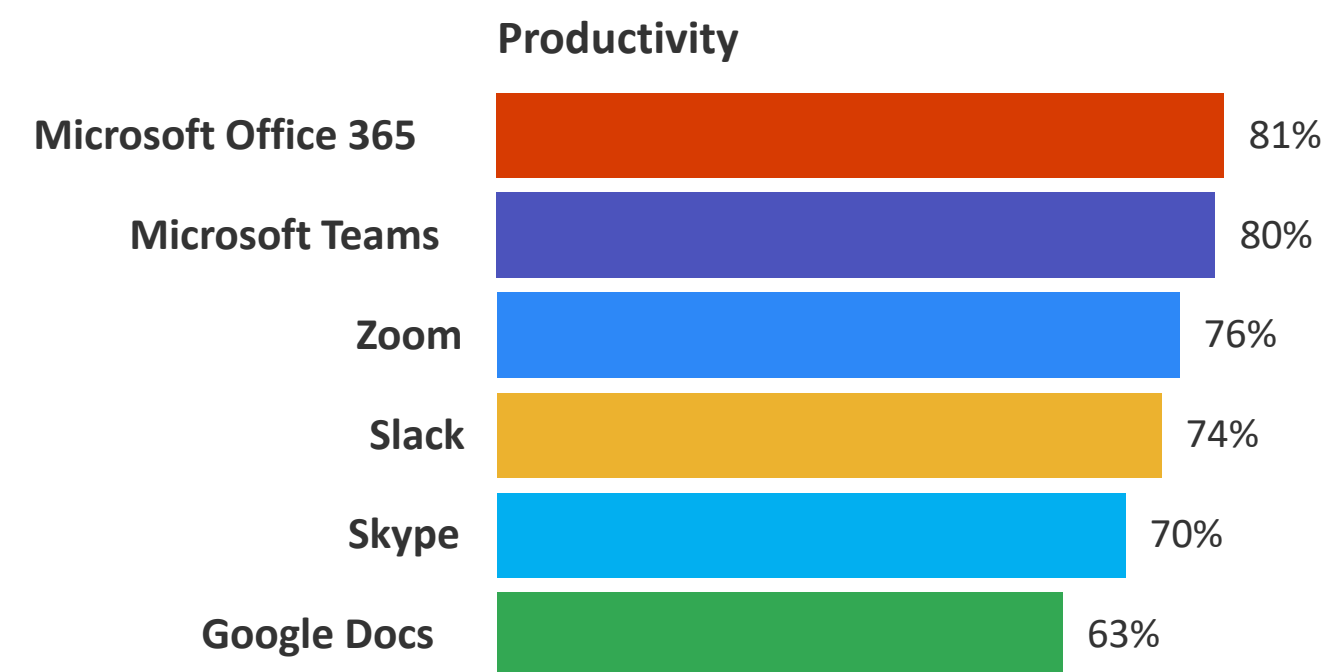
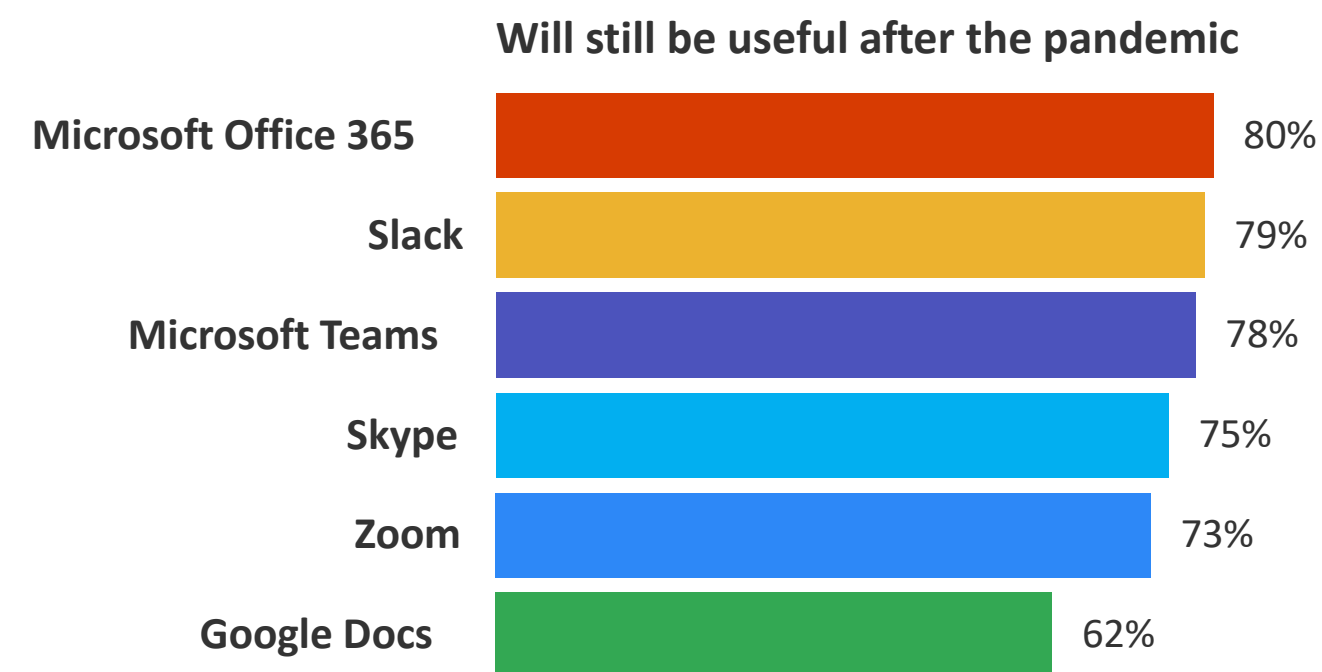
Net % saying this would be reasonable given the pandemic



17 Digital collaboration post-COVID

Most digital collaboration apps receive high marks from workers

% of those who use each product or service



- Almost all workers who use them **believe that their digital productivity apps will still be useful after the pandemic**. Office 365 leads the way with 80% of workers surveyed saying that they would still find it useful. Zoom and Google Docs trail the pack with 73% and 62% respectively.
- One reason why these apps have an appeal beyond the end of the pandemic is that workers say that they are **good for productivity**. Office 365 leads the way again.
- The numbers for ease of use are slightly lower, but still high, other than Google Docs, which scores less well on all metrics. All the services have **over three quarters of workers saying that they are easy to use**.
- There are, however, **a significant minority who are bored of using all these apps**. The figures are especially high amongst under-45s, 43% of whom are bored of Zoom compared to only 25% of their older working colleagues. Similar applies to other video apps, such as Microsoft Teams and Skype.

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