KEKST CNC

RESEARCH REPORT

COVID-19 Opinion Tracker

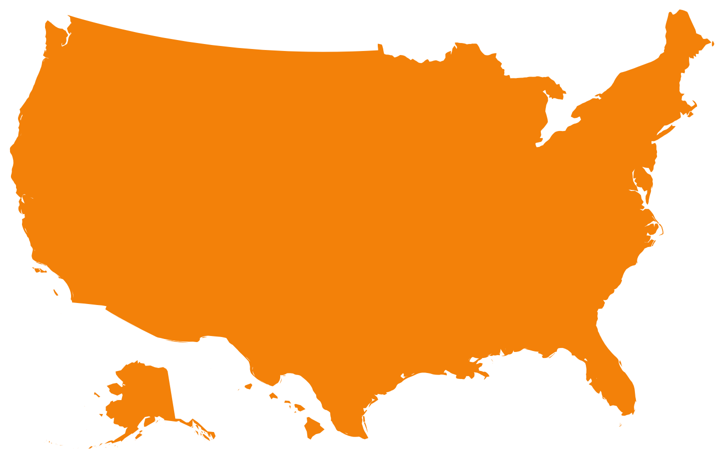
OCTOBER 2021 | EDITION 9

Contents

Methodology

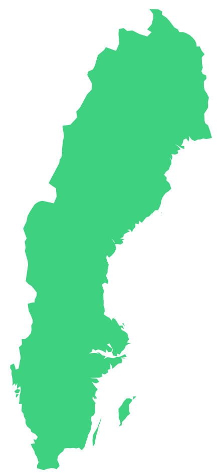
Polling conducted by KEKST CNC, nationally representative sample of:

1,000 adults
in UK



1,000 adults
in US

1,000 adults
In Germany



1,000 adults
in Sweden

1,000 adults
In France

1,000 adults
in Japan

Fieldwork of wave 9 took place on
28th September – 5th October 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

Fieldwork of wave 8 took place on
22nd April – 30th April 2021

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

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

Polling conducted by Kekst CNC Research, Data, and Analytics, covering qualitative and quantitative products and consulting services

Global findings – executive summary

1. **Attitude Shift:** Protecting the economy is becoming the public's new priority, meaning new expectations of government, business, and public institutions
2. **Rejecting Restrictions:** The tide is turning against restrictions, with very little appetite for a return to lockdown measures
3. **Boosterism:** There is a big appetite for booster shots, but Americans are now the least likely to get the vaccine in the first place
4. **Atlantic Worries:** While Continental Europeans have become more confident about their immediate economic future, Americans and Brits have seen a collapse in economic confidence
5. **Fragmented Society:** The "all in it together" mood has degraded into an "out for ourselves" society, with stark divisions opening up between the vaccinated and unvaccinated
6. **Pandemic Playbook:** The public looks back favorably on business leaders' response to the pandemic and want more of the same when it comes to issues like net zero
7. **A Warning on Business Taxes:** Despite popular rhetoric, there is a potential backlash from the public to too large an increase in taxes on business
8. **What's Next:** The public has moved on to the next set of challenges facing them on climate, cost of living, and public finances -- and they do not like what they see

Global key findings

1

Attitude Shift: Protecting the economy is becoming the public's new priority, meaning new expectations of government, business, and public institutions

In every country, the proportion of those wanting their governments to prioritize limiting the spread of coronavirus over protecting the economy has decreased. **The UK and Germany have seen a jump in the proportion of the public wanting to prioritize protecting the economy** over limiting the spread of the coronavirus, with the gap almost closed in both Germany and France. This shift comes despite high case numbers, particularly in the UK, and poses a fresh challenge for business and government – the public no longer see limiting the spread as the only policy goal, and institutions will need to listen to and reflect this.

2

Rejecting Restrictions: The tide is turning against restrictions, with very little appetite for a return to lockdown measures

The public appears to be mellowing in their attitudes to coronavirus restrictions. **The time when the overwhelming majority were in favor of lockdowns appears to be at an end.** Large majorities reject most restrictions under a range of different scenarios for the spread of the coronavirus, including if hospitals begin to struggle in the winter. There is some appetite amongst a majority for mask mandates and vaccine certification if health systems come under significant pressure.

3

Boosterism: There is a big appetite for booster shots, but Americans are now the least likely to get the vaccine in the first place

There is **a very high appetite to take a third "booster" shot** of the coronavirus vaccine across countries, higher than the levels seen before the initial vaccine rollout. Looking at just those who have already been vaccinated, retention rates are high: above 80% in all cases apart from in France where there is a fall-off of about one in four people. On the question of vaccination in general, the US has become the country with the population least likely to get the vaccine, falling behind both France and Japan.

4

Atlantic Worries: While Continental Europeans have become more confident about their immediate economic future, Americans and Brits have seen a collapse in economic confidence

There has been **a sharp reversal since May in how positive British people and Americans are about their economic prospects**, perhaps linked to rising cost of living and supply chain concerns. People in both countries have become significantly less confident that they will be better off in the next three months, and that the economy in general will improve in that timeframe. Meanwhile, Continental European populations are more bullish, recovering from the previously downbeat view during the vaccine rollout. The relationship between views of political institutions and economic confidence continues – and, in the midst of supply chain issues, business's reputation in the US and the UK has been slightly dented.

Global key findings

5

Fragmented Society: The "all in it together" mood has degraded into an "out for ourselves" society, with stark divisions opening up between the vaccinated and unvaccinated

In addition to divisions on COVID restrictions, **almost every question covered in the COVID Tracker saw a large gap in the answers between those who had received a vaccine against coronavirus and those who had chosen not to.** One particularly stark example we see is on optimism about the next three years – amongst those who have had a vaccine +28 points, amongst those who have not -26. And significant numbers of people say they would cut off unvaccinated friends, and consider not joining a company without vaccine mandates.

6

Pandemic Playbook: The public looks back favorably on business leaders' response to the pandemic and want more of the same when it comes to issues like net zero

Asked how they feel CEOs have communicated on a range of issues, the most positive reactions concerned how company leaders have handled the pandemic. **Meanwhile, on other crucial challenges CEOs face – like the environment – business leaders are not seen to have performed as well.** There is particular room for improvement in the areas of environment and sustainability, especially given the prominence of these messages in recent months.

7

A Warning on Business Taxes: Despite popular rhetoric, there is a potential backlash from the public to too large an increase in taxes on business

Most characterizations of the public's view on business taxation is that they want to see substantial tax hikes. Though this may be true, there is a gap between hope and expectation. Across a number of countries, people are keen to see business taxes rise, but more people think they will increase than those who want them to. This suggests an opening for business: **the appetite for more business taxation is not universal nor unlimited.**

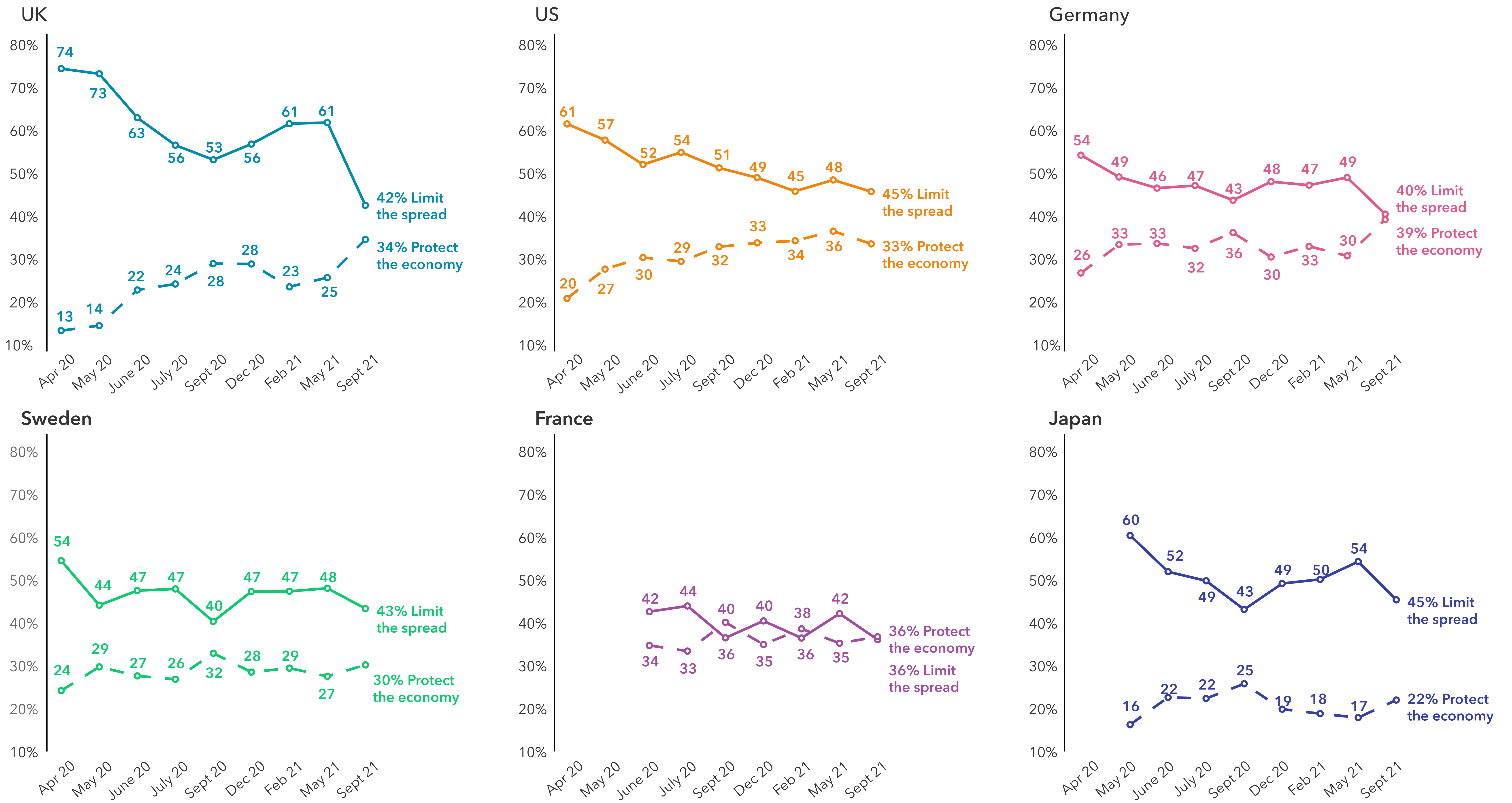
8

What's Next: The public has moved on to the next set of challenges facing them on climate, cost of living, and public finances -- and they do not like what they see

The public, in all six countries, are expecting the worst on a series of challenges they face as we come out of the COVID crisis. In all countries surveyed, **there was an expectation that the position of the consumer is going to be substantially squeezed in the absence of large wage rises.** Taxes, the cost of goods, and the cost of living are all expected to go up by significant proportions of respondents in every country. On top of that, there is a conviction that hopes on climate change are also going to be dashed. The public's hope in every country is that the damage felt may be mitigated – but it is these issues that business and government reputation will be determined by in the future.

01 Health versus the economy

The public is gravitating towards protecting the economy over limiting the spread of the virus – especially in the UK and Germany



- 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 countries 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".

01 Health versus the economy

The public is gravitating towards protecting the economy over limiting the spread of the virus – especially in the UK and Germany

- As majorities get vaccinated, political leaders change tone, and public behavior alters, **people are becoming more likely to say the government should prioritize the economy over limiting the spread of the virus.** This change is most significant in the UK and Germany, where in May people backed limiting the spread by a margin of 36 points and 19 points respectively. That gap is now only 8 points in the UK and 1 point in Germany.
- **In France, the public are split between limiting the spread of the virus and protecting the economy,** though the public in France has often put the economy higher since the start of the pandemic than in other countries.

1%

The gap between health and the economy in Germany, the narrowest since the pandemic began.

- The gap between the two is also closing slightly in Japan and Sweden, though limiting the spread of the disease remains the clear priority in both these countries.
- In the US, the picture is static, with more (45%) saying the government should limit the spread of the virus rather than protect the economy (33%). **The largest gap between the two priorities is now in Japan,** where 45% want government to limit the spread first, but only 22% want it to protect the economy.

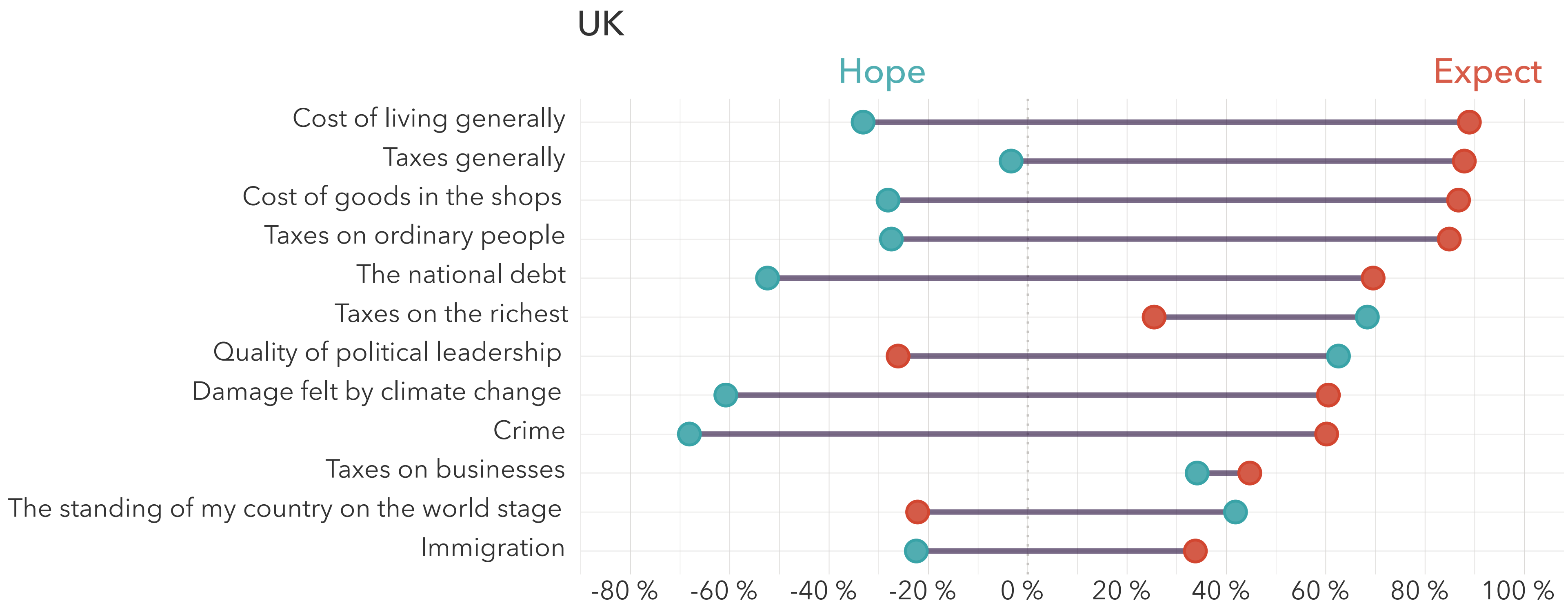
28 POINTS

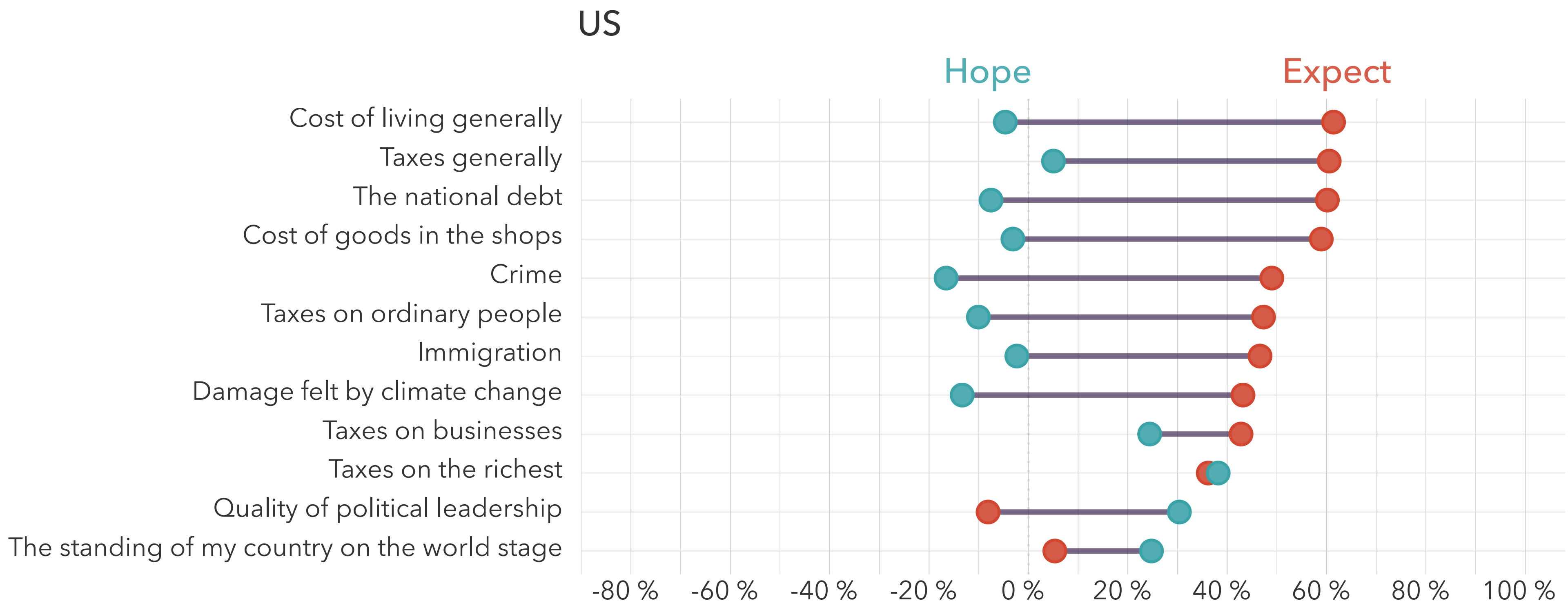
The amount by which the gap between limiting the spread and protecting the economy has shrunk in the UK since May.

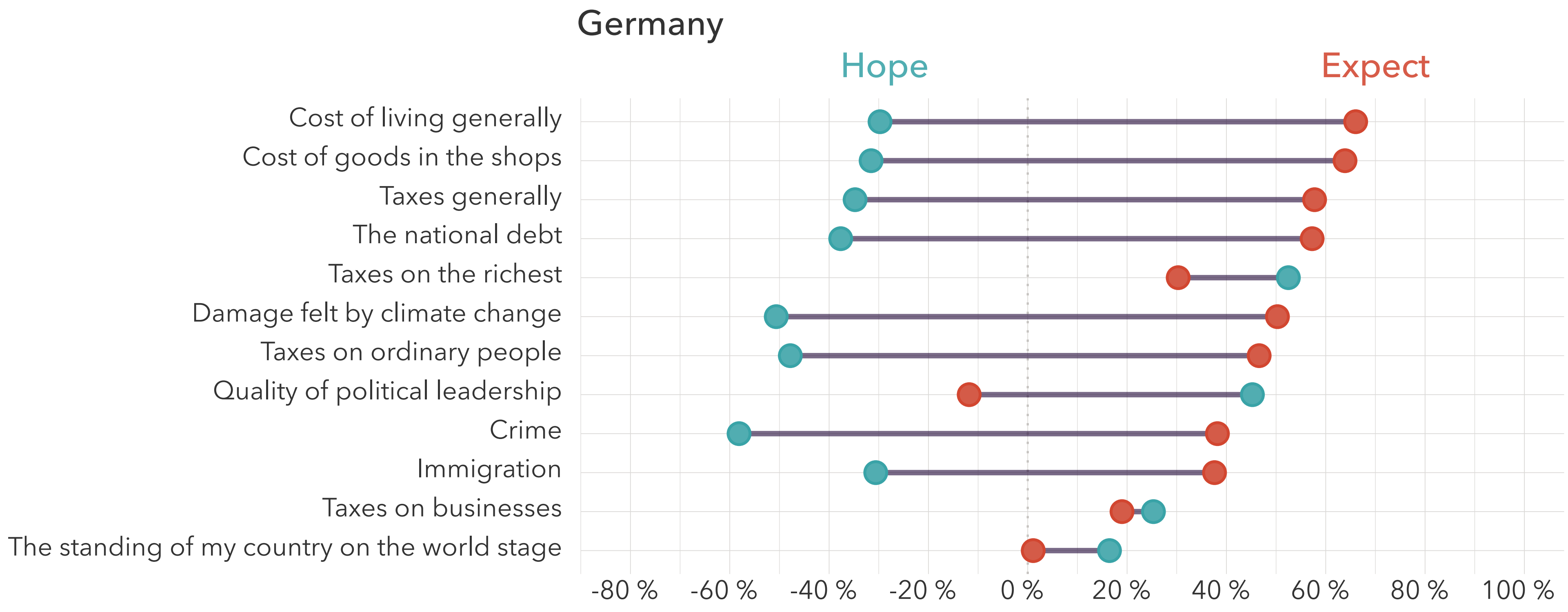
02 Looking ahead to the next three years

People in all countries expect to be disappointed in the next three years – particularly when it comes to the cost of living and goods, climate change, debt, and taxes

Q. In the next three years, do you think the following will go up, down, or stay the same in your country? (net '% saying go up' minus '% saying go down')







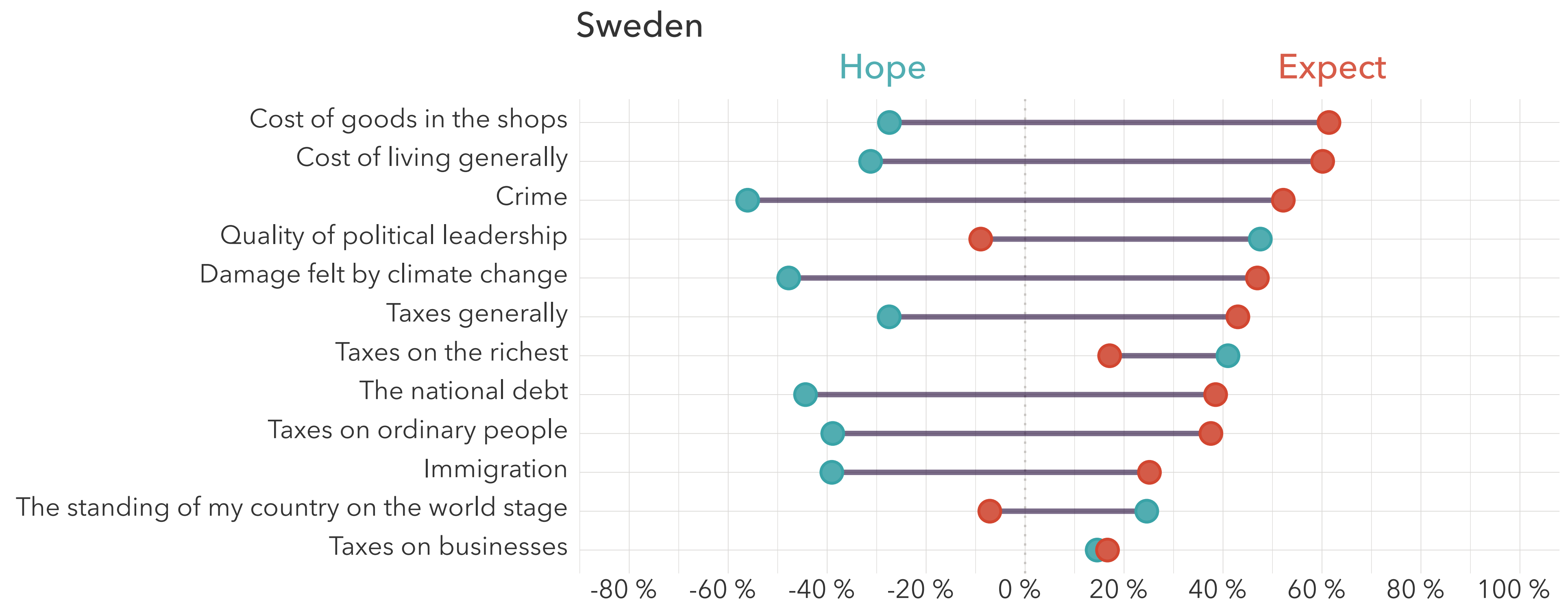
94 POINTS

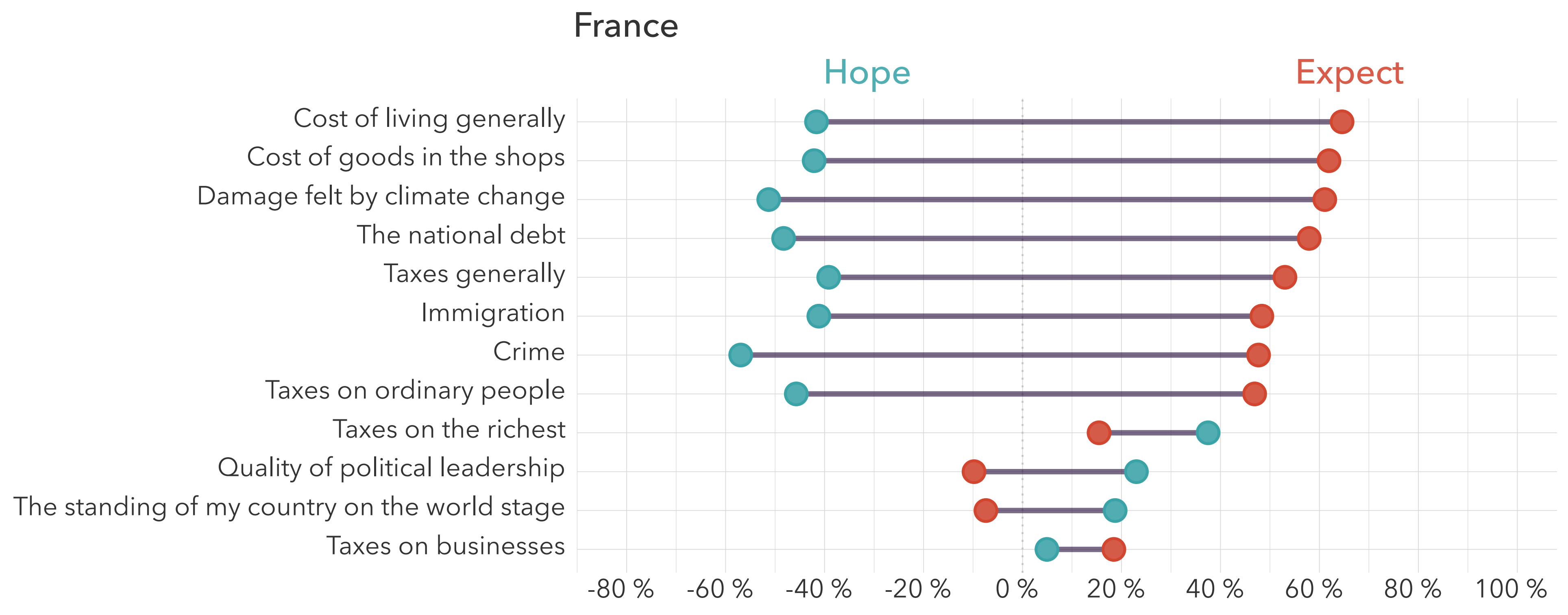
The gap between hope and expectations on the cost of living in Germany.

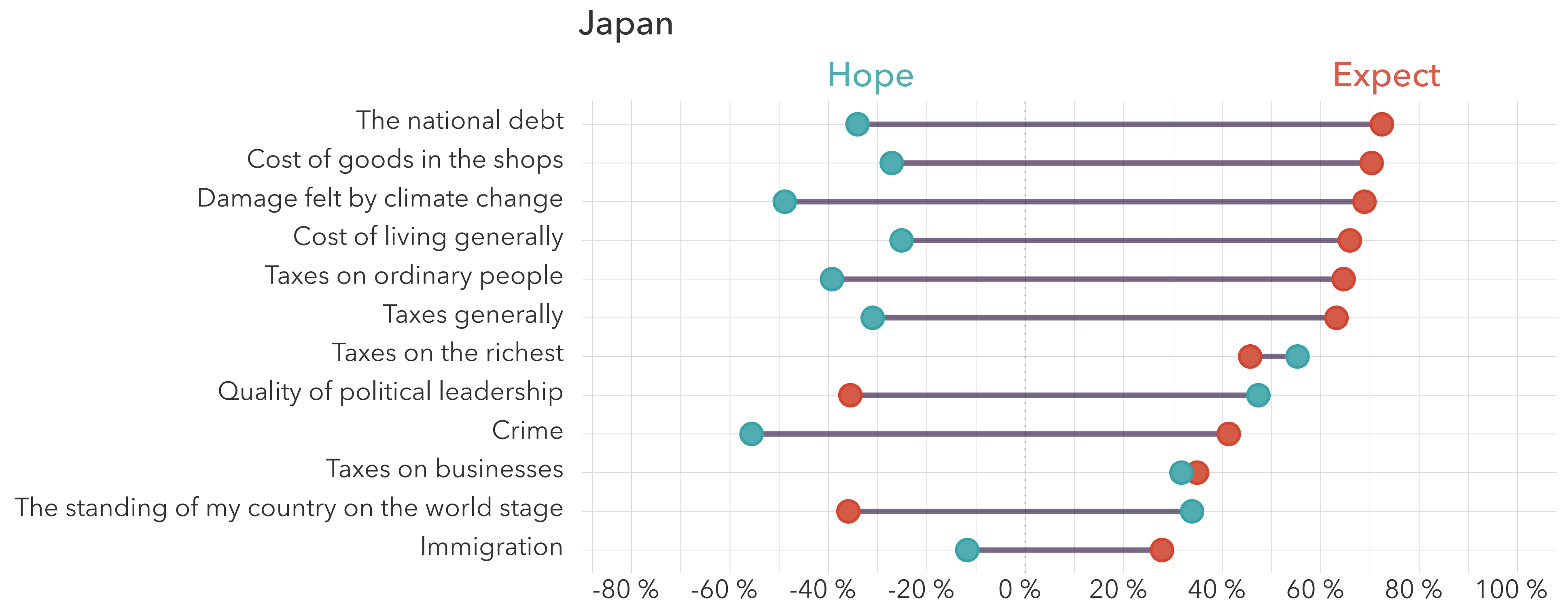
02 Looking ahead to the next three years

People in all countries expect to be disappointed in the next three years – particularly when it comes to the cost of living and goods, climate change, debt, and taxes

Q. In the next three years, do you think the following will go up, down, or stay the same in your country? (net '% saying go up' minus '% saying go down')







- In all countries surveyed, **there is an expectation that the position of the consumer is going to be substantially squeezed in the absence of large wage rises.** Taxes, the cost of goods and the cost of living are all expected to go up by significant proportions of respondents in every country. On top of that, there is a conviction that hopes on climate change are also going to be dashed. The public's hope in every country is that the damage felt may be mitigated, but the public's expectation is that the opposite will happen.
- Consumers expect to be disappointed in their hope to see increases in taxes on the wealthy and businesses -- not by as wide a margin, but the gap between hope and expectation exists across the board.

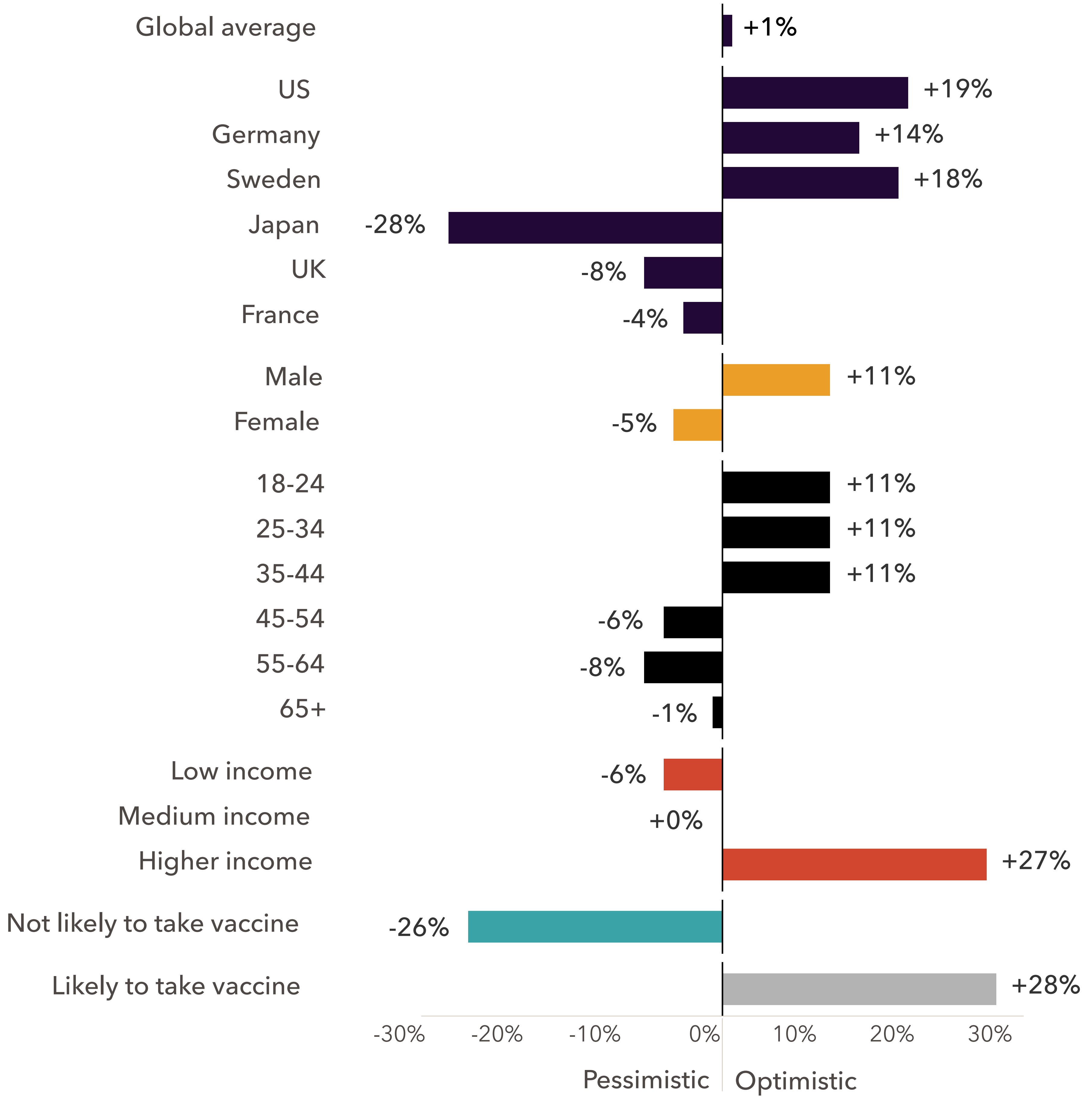
54%

Percentage of French public who want to see immigration reduced.

02 Looking ahead to the next three years

Questions about optimism for one's own country presented stark variations between regions, and three countries believe business taxes are rising too much

Q. How optimistic, if at all, do you currently feel about the future of your country? Net optimistic minus pessimistic displayed



- Beyond a wall of pessimism on specific issues, there are other patterns of note. For example, across all countries people do expect taxes on the richest – something they also hope for – to rise. Although they do not expect this to match the increase they see for ordinary people, it is a rare example of hopes and expectations aligning, especially in the US where people feel this is increasing in line with what they want to see.
- There is some better news for business in terms of how hopes and expectations align on business taxes. People do expect to see an increase in tax on business, but this is far from universal, and **in the US, France and the UK, people expect tax on business to increase above what they actually want to see,** suggesting a more nuanced narrative on business taxation than many assume the public to hold.
- In a warning for political and business leaders, there is a stark mismatch between hopes and expectations on immigration. **All populations want to see immigration come down**, especially in Germany, but even in low-immigration Japan.
- In the UK, where immigration is becoming a dividing line in domestic politics only 12% expect immigration to decline in the next three years, while 90% expect the cost of living to increase.
- **There are wide disparities in levels of optimism across demographics and countries.** In the US, Germany, and Sweden there is net positivity, in the UK and France the public mood nets out slightly pessimistic, whilst in Japan there is clear net pessimism
- In global demographics there are also disparities, none more so than the gap between those who are willing to take a vaccine (+27%) and those who are not (-26%)
- **The gap in optimism between different income levels is almost as stark.** The score for those on the highest incomes nets out at +27%, but those on the lowest incomes net out on the pessimistic end of the scale by 6 points.
- This income trend is not well explained by age because the trend runs in the opposite direction to the one we might expect – younger people are +11% points on the optimistic side of the scale, whilst older people are all slightly on the pessimistic side when netted out.

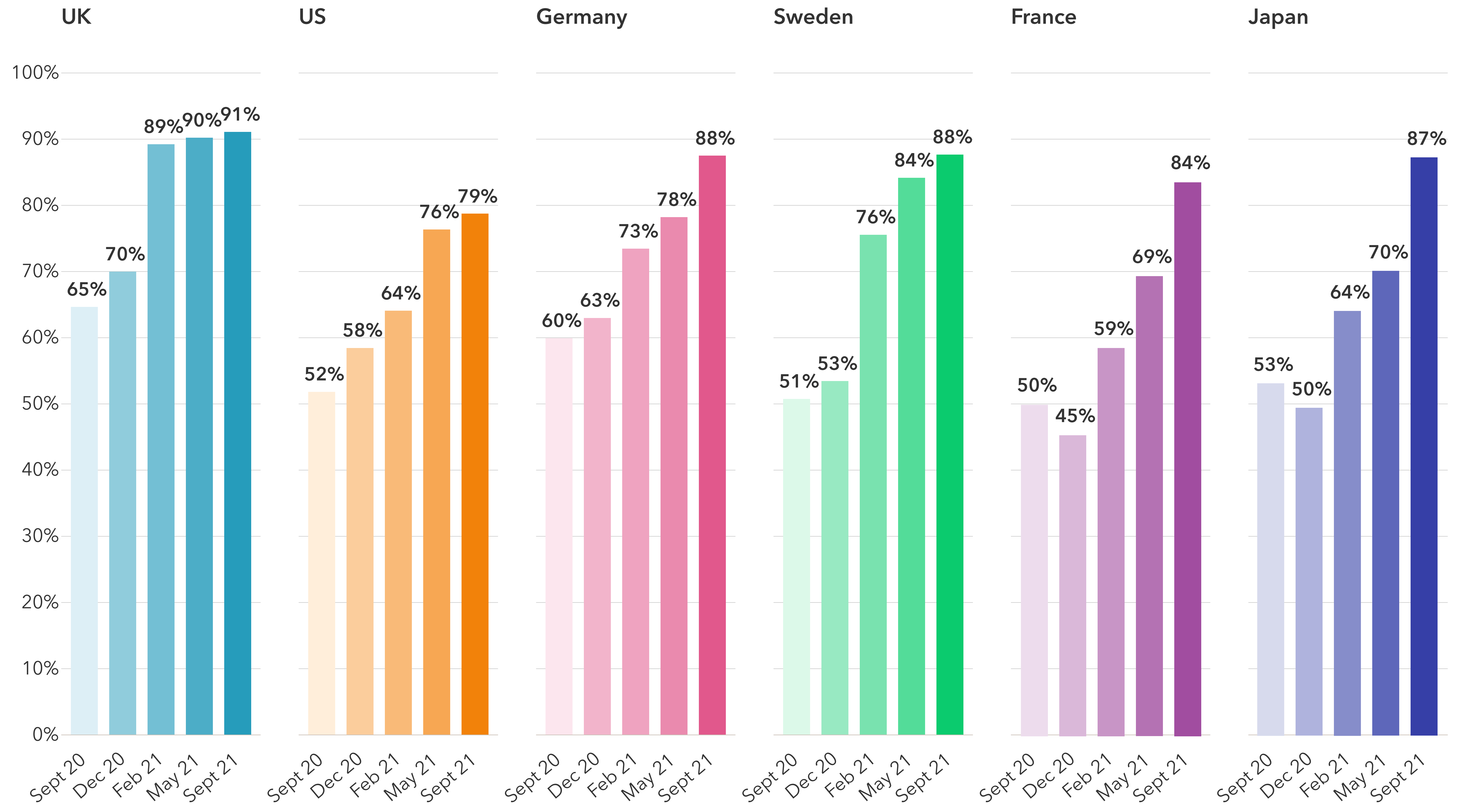
45%

The percentage of people who want to see tax on business stay the same in Sweden - the most popular option.

03 Likelihood to take the vaccine

As vaccine rollouts continue, citizens of the US are now the least likely to get the vaccine

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



One fifth

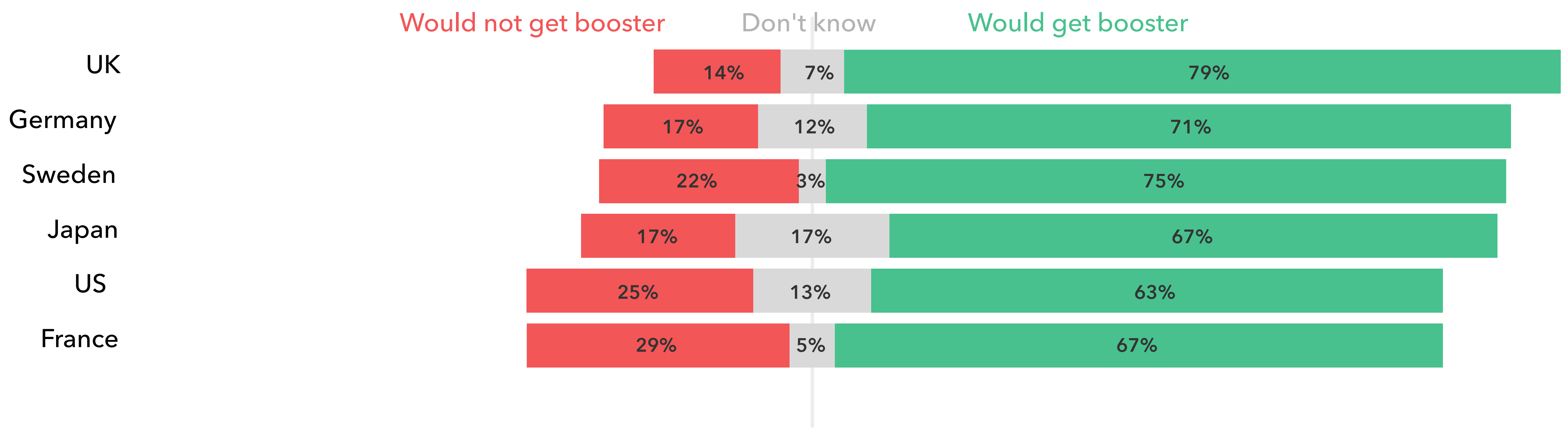
The proportion of Americans who do not say they will get the vaccine.

- For the fifth wave of polling in a row, the proportion of people saying **they will take the coronavirus vaccine is up in every country** – despite some countries closing in on the ceiling of possible vaccinations.
- It also appears that even in countries where vaccination rates are high, there are around one in ten who are still hesitant.
- The public in Japan and France were the least likely to say they would get the vaccine when last polled in May. Now both are above 80% of the public saying they have taken a vaccine or will be likely do so (Japan: 87% up from 70%; France: 84% up from 69%). This puts them roughly on par with the UK, Germany, and Sweden.
- **The US is now the country with the lowest enthusiasm for the coronavirus vaccine** and trails France by 5 points

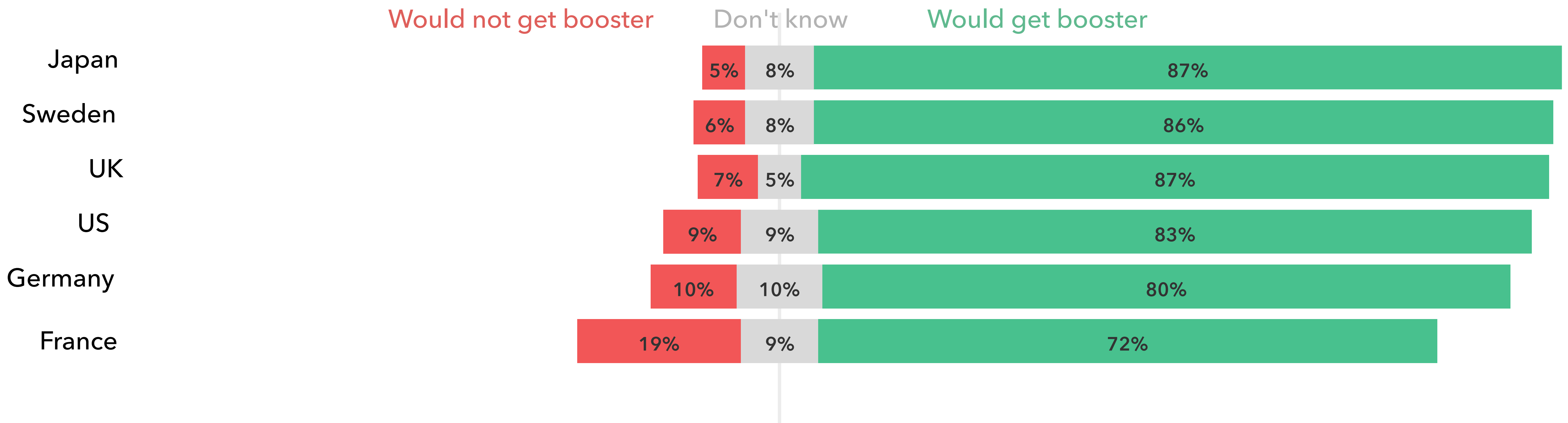
03 Likelihood to take a booster vaccine

Among people who had the vaccine in the first place, there is a very strong appetite to get a booster shot

How likely or unlikely are you to choose to have a third 'booster' shot of the coronavirus vaccine?



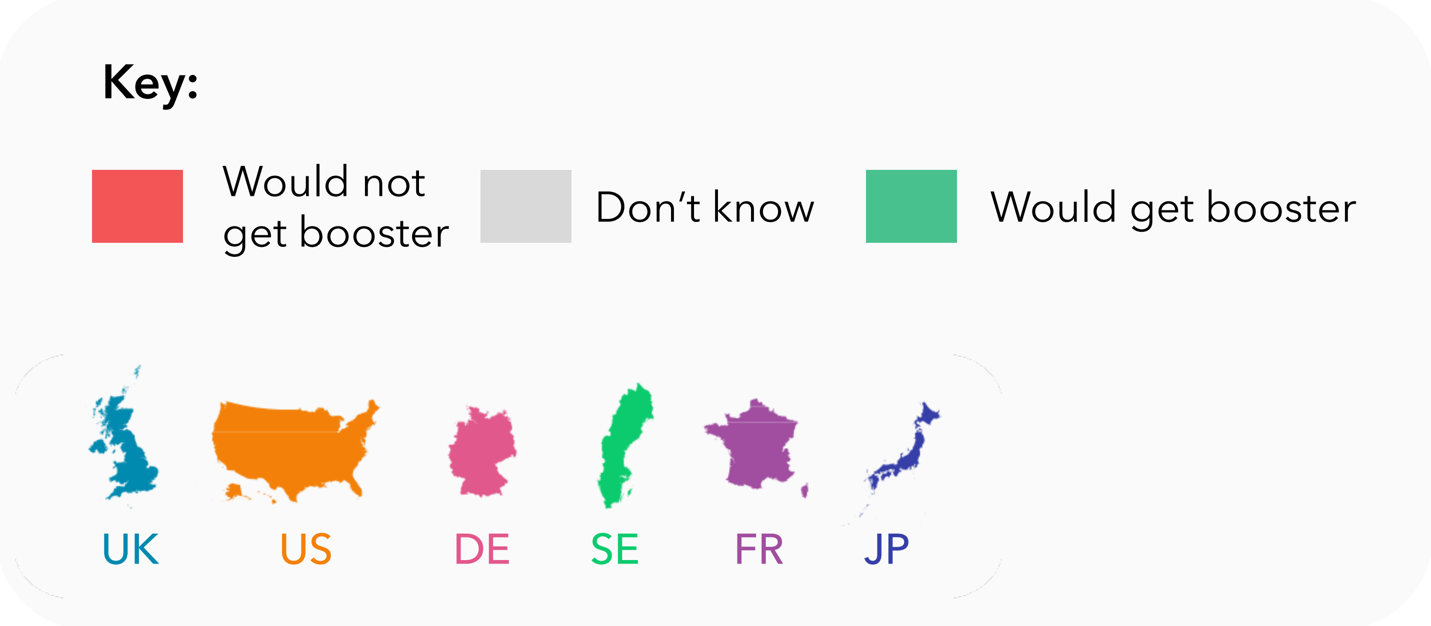
Amongst those who have already been vaccinated against the coronavirus



87%

Of those in Japan who have had a vaccine would get a booster shot.

- There is **very high appetite** to take a third 'booster' shot of the coronavirus vaccine across countries, higher than the levels seen before the initial vaccine rollout.
- Rates are highest in the UK, with eight out of ten saying they would get a booster jab, and lowest in the US (66%) and France (61%).
- Retention rates are high among those who have already been vaccinated: above 80% in all cases apart from in France, where there is a fall-off of about one in four people.

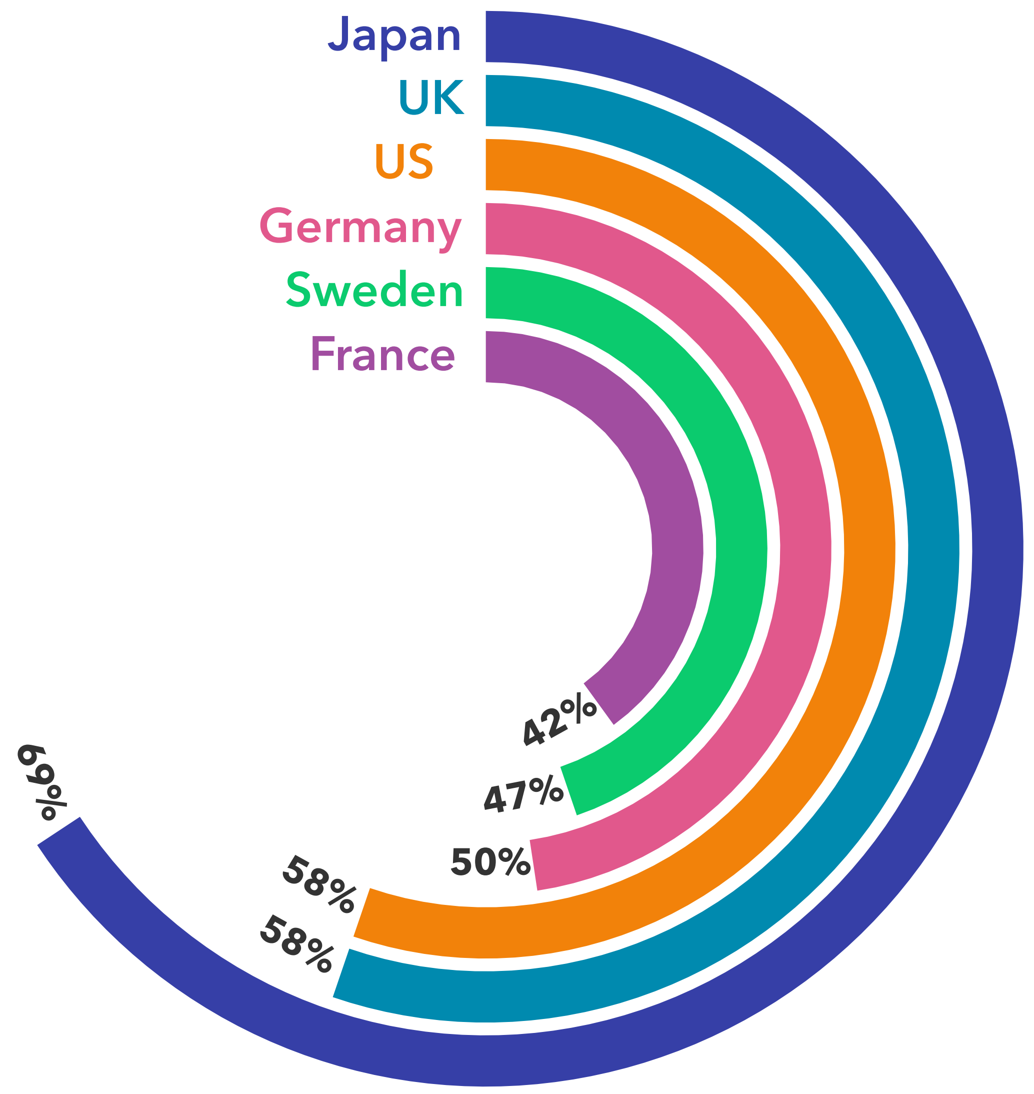


04 Winter expectations

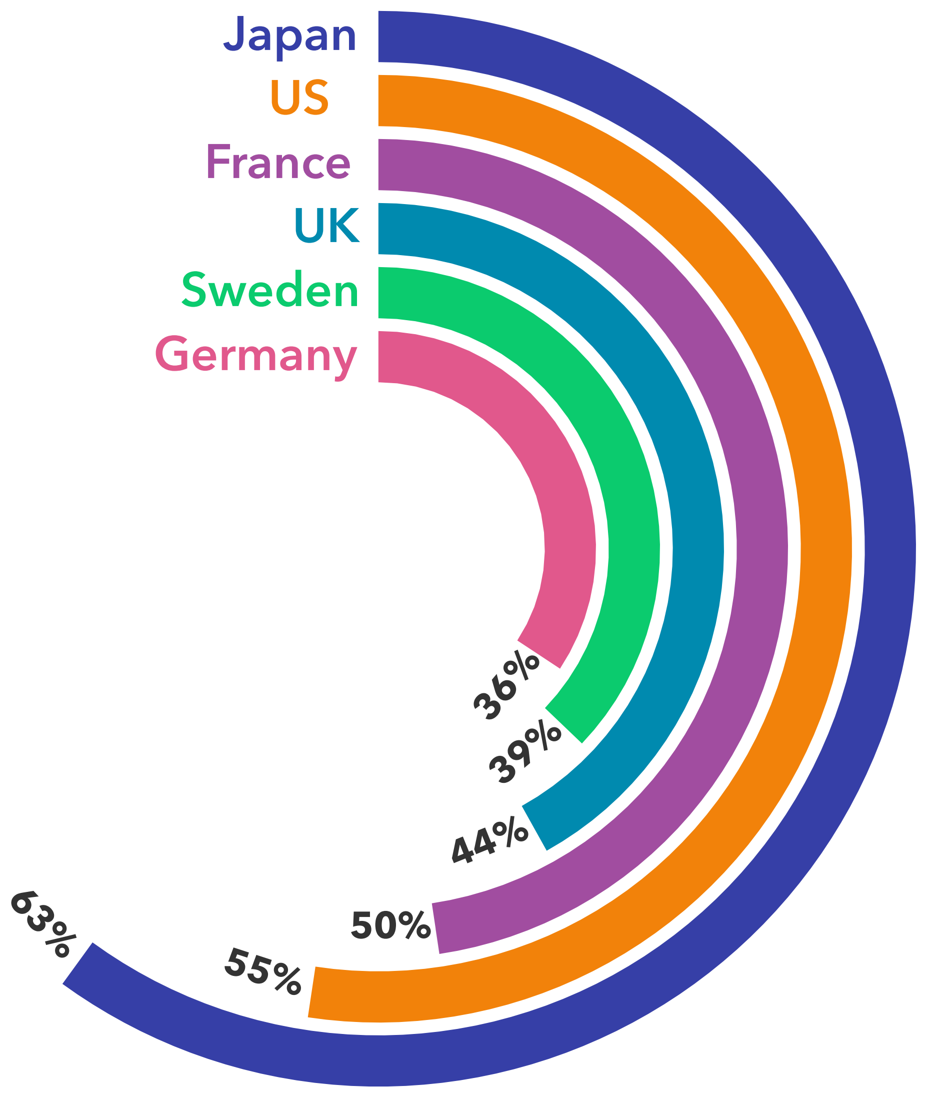
A large proportion of the public in each country still expect this winter to be very difficult

Q. Do you agree or disagree with the following:

I expect there to be another severe wave of coronavirus this winter



I expect there to be a vaccine-resistant variant of coronavirus this winter



- **There is a strong 'hope for the best, but expect the worst' theme in this wave of data on COVID opinion, but with some large differences across countries.** Much as last winter, over 50% of the public in Japan, the US, Germany and the UK expect another severe wave to hit during the northern hemisphere winter. In Sweden 47% of people expect a severe wave and in France only 42% do. Japan is a real outlier with the most pessimistic expectations - over 2 in 3 people think that the COVID situation this winter will resemble a severe wave.
- When it comes to expectations about a truly vaccine-resistant strain of coronavirus, the spread across countries is even greater. Most Germans and Swedes are optimistic that we will get through the winter with current vaccines still providing effective protection against hospitalization. In Japan, the US, and France, majorities of people think that the vaccine wall will be breached this winter. Given the global nature of coronavirus, a majority of the public in half these countries are going to be surprised.

2 IN 3

Of the Japanese public are expecting a vaccine-resistant strain of coronavirus to emerge as soon as this winter.

05 A shift on attitudes to COVID restrictions

There is very little appetite for a return to national lockdown measures, even if hospitals struggle due to pressure

Please indicate which restrictions should be in place in each of the following scenarios: (% saying restrictions should be in place)

UK

	COVID deaths equal flu deaths	Most dying are unvaccinated	Cases high, hospitalizations low	Hospitals are struggling
Proof of vaccination for big events	43%	59%	53%	63%
Mandatory masks indoors	44%	51%	55%	67%
Social distancing introduced	31%	37%	41%	58%
Work from home recommended	30%	36%	38%	57%
Proof of vaccination for shops/bars	23%	42%	28%	40%
Nightclubs closed	19%	26%	23%	46%
None of these	32%	20%	21%	11%
Mandatory masks outdoors	13%	18%	16%	22%
Only six people can meet at once	10%	14%	13%	25%
No mixing with other households	7%	15%	8%	22%
Pubs and restaurants closed	6%	12%	8%	22%
Schools closed	5%	10%	6%	16%
Non-essential shops closed	5%	8%	4%	16%

US

	COVID deaths equal flu deaths	Most dying are unvaccinated	Cases high, hospitalisations low	Hospitals are struggling
Mandatory masks indoors	44%	50%	49%	53%
Social distancing introduced	31%	34%	34%	34%
Proof of vaccination for big events	30%	36%	31%	35%
Mandatory masks outdoors	27%	31%	28%	32%
Proof of vaccination for shops/bars	24%	30%	25%	29%
Work from home recommended	22%	28%	25%	31%
Only six people can meet at once	22%	25%	22%	25%
Nightclubs closed	20%	24%	19%	26%
Pubs and restaurants closed	18%	20%	17%	24%
Schools closed	18%	20%	17%	21%
No mixing with other households	18%	21%	17%	20%
Non-essential shops closed	15%	16%	13%	20%

Germany

	COVID deaths equal flu deaths	Most dying are unvaccinated	Cases high, hospitalisations low	Hospitals are struggling
Mandatory masks indoors	42%	46%	48%	57%
Proof of vaccination for big events	41%	50%	47%	53%
Proof of vaccination for shops/bars	35%	47%	42%	49%
Social distancing introduced	29%	36%	34%	44%
Work from home recommended	27%	32%	31%	45%
Nightclubs closed	19%	26%	24%	39%
Mandatory masks outdoors	19%	22%	22%	25%
Only six people can meet at once	17%	20%	19%	30%
Pubs and restaurants closed	11%	17%	14%	27%
Non-essential shops closed	11%	16%	12%	24%
No mixing with other households	10%	16%	12%	21%
Schools closed	10%	12%	11%	18%

- The public appears to be mellowing in their attitudes to COVID restrictions. The time when the overwhelming majority were in favor of lockdowns appears to be at an end. **Most heavy restrictions, such as closing schools and shops, are rejected by large majorities under scenarios such as hospitals facing pressure over the winter months.** There is some appetite amongst a majority for reintroduction if the health system comes under significant pressure.
- The top tier of restrictions that most are comfortable with include proof of vaccination for big events, mandatory masks indoors, the 2 metre rule, and work from home recommended – plus in Germany and the US and France, vaccination proof for shops and bars.
- **The UK and Japan are the countries that are still most open to COVID restrictions generally.** On average the level of support is 10 points higher for any given restriction under a particular scenario for the Japanese and Brits. The UK is also the only country where proof of vaccination at large events is the restriction with the most support on average. Elsewhere mandatory masking indoors garners the most support.

16%

16% of Brits support school or shop closures in the event of hospitals struggling this winter.

05 A shift on attitudes to COVID restrictions

There is very little appetite for a return to national lockdown measures, even if hospitals struggle due to pressure

Please indicate which restrictions should be in place in each of the following scenarios: (% saying restrictions should be in place)

Sweden

	COVID deaths equal flu deaths	Most dying are unvaccinated	Cases high, hospitalisations low	Hospitals are struggling
Proof of vaccination for big events	39%	53%	44%	52%
Social distancing introduced	33%	38%	41%	50%
Work from home recommended	27%	32%	35%	47%
Proof of vaccination for shops/bars	28%	43%	31%	38%
Mandatory masks indoors	24%	34%	34%	43%
Nightclubs closed	24%	31%	32%	44%
No mixing with other households	17%	24%	20%	31%
Only six people can meet at once	16%	21%	20%	28%
Pubs and restaurants closed	14%	20%	19%	30%
Mandatory masks outdoors	14%	19%	17%	19%
Schools closed	10%	14%	12%	20%
Non-essential shops closed	9%	13%	10%	18%

Japan

	COVID deaths equal flu deaths	Most dying are unvaccinated	Cases high, hospitalisations low	Hospitals are struggling
Mandatory masks indoors	54%	56%	58%	66%
Mandatory masks outdoors	49%	53%	53%	62%
Proof of vaccination for big events	40%	53%	45%	58%
Social distancing introduced	40%	46%	43%	58%
Proof of vaccination for shops/bars	35%	48%	39%	52%
Work from home recommended	32%	36%	32%	53%
Only six people can meet at once	28%	36%	29%	50%
Nightclubs closed	24%	31%	23%	49%
Non-essential shops closed	17%	23%	17%	42%
No mixing with other households	11%	20%	12%	32%
Pubs and restaurants closed	10%	17%	10%	34%
Schools closed	8%	14%	7%	30%

France

	COVID deaths equal flu deaths	Most dying are unvaccinated	Cases high, hospitalisations low	Hospitals are struggling
Mandatory masks indoors	42%	44%	47%	55%
Proof of vaccination for big events	36%	46%	41%	46%
Proof of vaccination for shops/bars	29%	40%	35%	42%
Mandatory masks outdoors	31%	35%	35%	42%
Work from home recommended	31%	31%	35%	43%
Social distancing introduced	25%	31%	29%	40%
Nightclubs closed	20%	22%	24%	35%
Only six people can meet at once	15%	17%	17%	26%
Pubs and restaurants closed	11%	12%	11%	21%
No mixing with other households	9%	14%	10%	18%
Schools closed	9%	11%	10%	18%
Non-essential shops closed	7%	9%	8%	16%

- In Sweden, often described as pursuing an alternative version of lockdown, there is still significant appetite for masking indoors (43%) and closing nightclubs (44%) if hospitals struggle under the pressure of COVID this winter. Only two measures ever achieve support from a majority – proof of vaccination for large events and social distancing and only in combination if the health system is struggling.
- But **in Japan, the story is one of continued caution**. Well over a majority of the public are happy to see masks indoors mandated under all the scenarios presented and outdoors to a slightly lesser extent. If hospitals are struggling, there is majority support for most measures, but not for closing venues.
- In all the countries surveyed, the appetite for closing schools and shops has dried up since the lockdowns earlier in the year. In France, only 18% would support closing schools if there were pressure on hospitals, and the figure is 30% in Japan, 20% in Sweden, and only 16% in the UK. In Germany, only 18% support closing schools, and the figure is slightly higher in the US (20%) if hospitals are struggling.

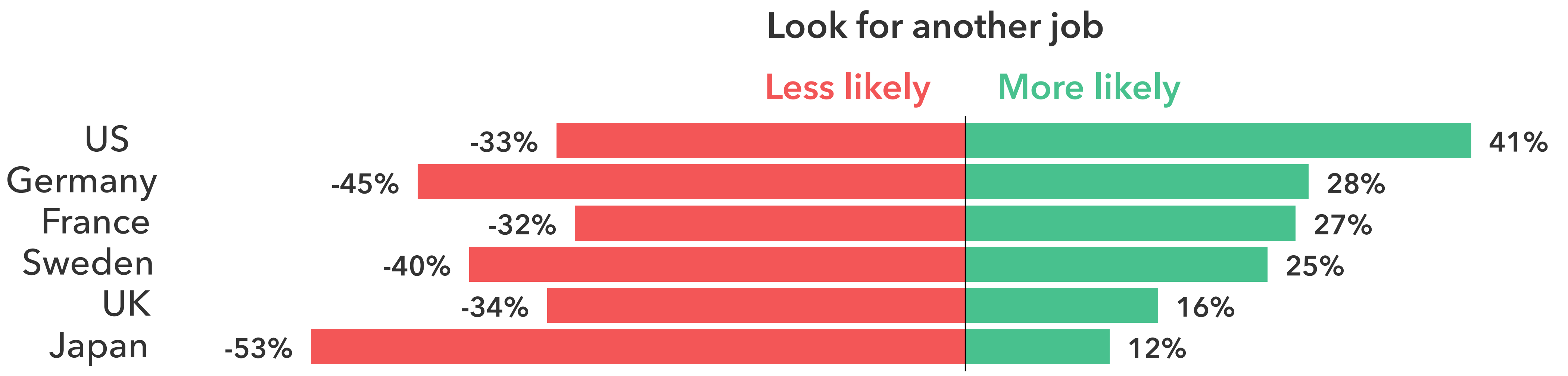
35%

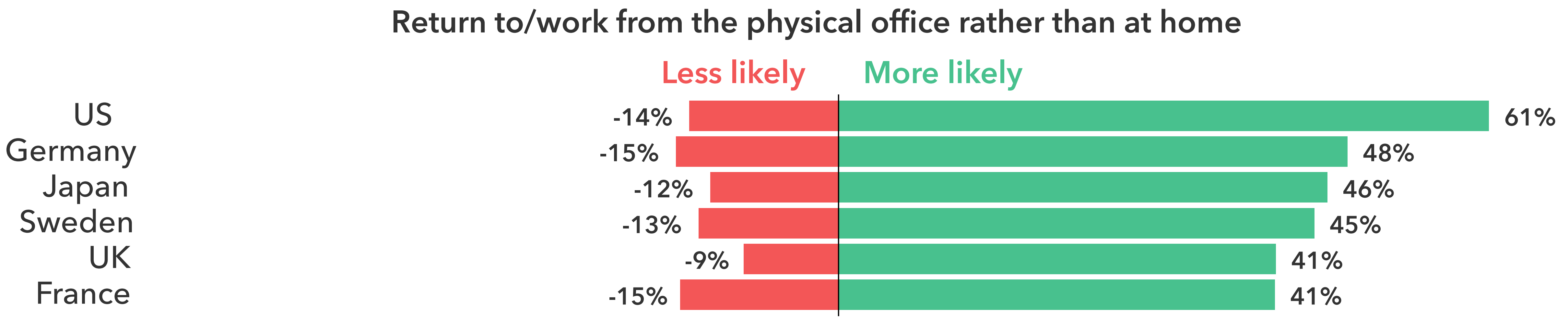
The proportion of the French public that support closing nightclubs if hospitals struggle with COVID.

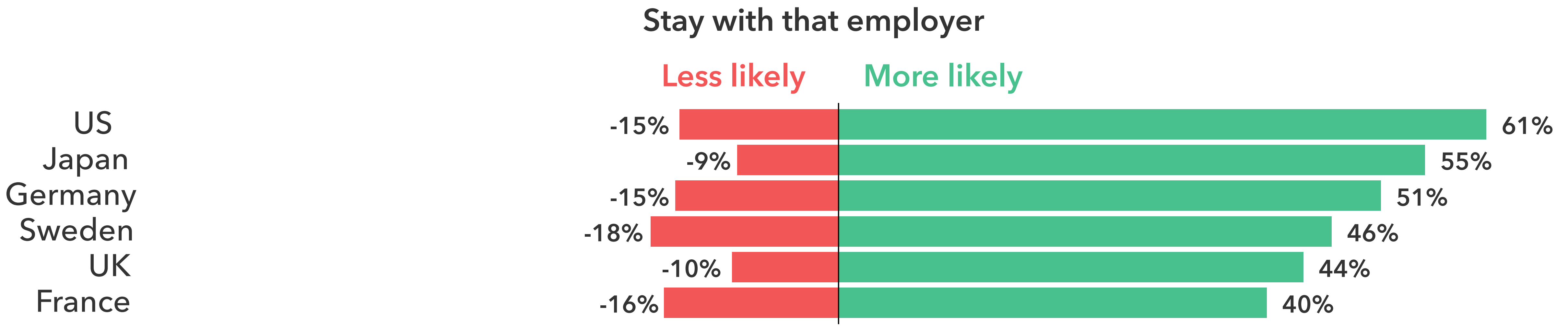
06 Vaccine requirements for work

Vaccine requirements for work attract net support, but there are significant minorities of workers in each country who are hostile, and distinct gender effects

Q. If your employer required vaccines to work where you currently do, would this make you more or less likely to… (workers only)





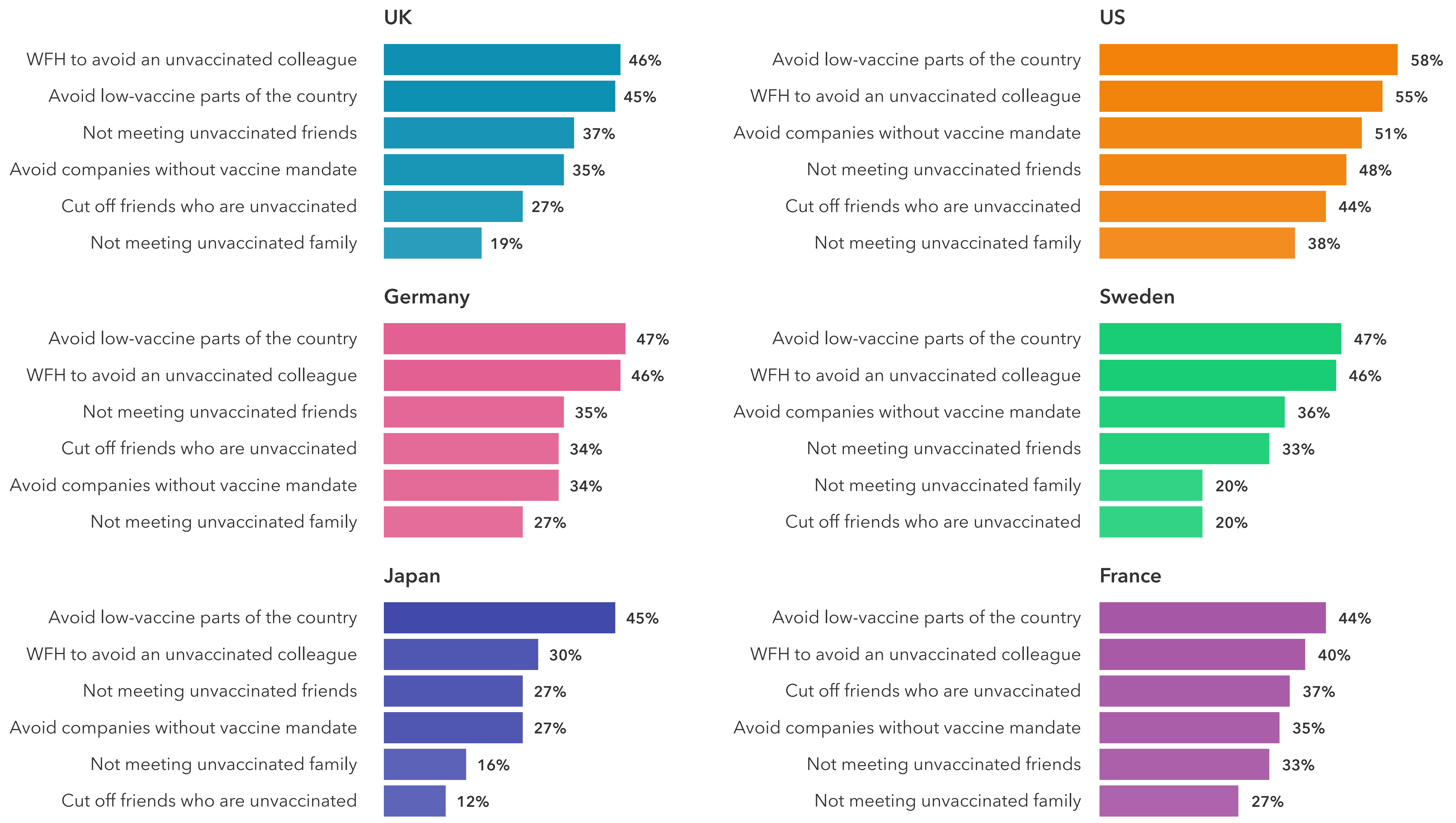


- **Vaccine mandates receive a net positive response from workers.** By 33 points workers in Germany said that they were more likely to make them return to work in the workplace, and by similar amounts in all the European countries surveyed.
- More workers said that vaccine mandates were likely to make them stay with their employer than said they would be less likely to stay, and by wide margins: 46 points in the US and Japan, and still 26 points in France with the lowest net score.
- **The picture is more mixed when asked if a vaccine mandate would make workers more likely to look for another job.** The net scores are still positive in all countries, and overwhelmingly so outside of the US, but there are sizeable minorities in all countries who say they would be more likely to look for another job; and any benefits from vaccine mandates should be weighted carefully against these data.
- The US is an exceptional case on all three of these questions asked of workers. A full third of US workers said that a vaccine mandate from their employer would make them more likely to look for another job (making a net score on that measure of only +8%).
- On return to work, the minorities saying that vaccine mandates would make them less likely to do so are small enough to look the other way. But as with those looking for another job, the small minority who say they would be less likely to stay with their current employer have to be taken into account.
- Some of these trends are being driven by a gender gap – **with men marginally more likely to take offense at the idea of vaccine mandates**. In the US, 25% of women said that they were more likely to look for another job in the even of a vaccine mandate being imposed by their employer, whilst 40% of men said the same.

07 Reactions to those still unvaccinated

People are likely to take extraordinary measures to avoid those people who are unvaccinated and places with low uptake

Q. Some people have chosen not to have a coronavirus vaccine. How likely would you be to do each of the following things? Percent of people saying they would be likely to...



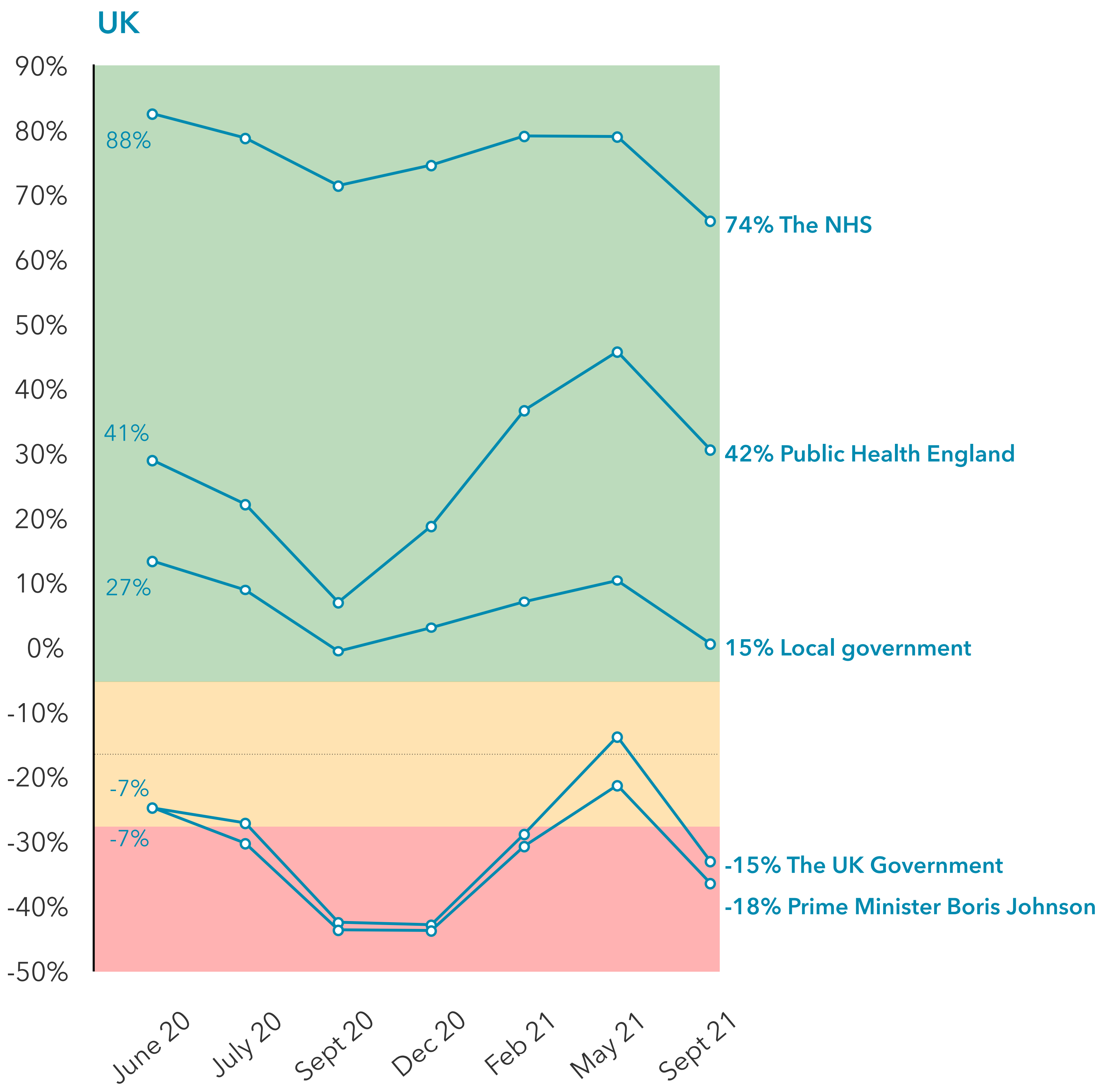
- The top two actions that people say they will take in response to those who are unwilling to get a vaccine are to work from home and to modify their travel. **In the US a significant majority of the public (58%) say that they are going to actively avoid travel to parts of the country with low vaccine uptake**, the largest proportion saying as much. France is a way behind the US, but still 44% of the French public say they are going to avoid travel to areas with low uptake.
- **Working from home to avoid an unvaccinated colleague is an action that just under a majority of Brits, Swedes, French and Germans would be likely to take.** Japan is an outlier on the low side in this regard, with only 30% saying they would stay home. The US is an outlier in the other direction, with 58% saying that they would work from home to avoid an unvaccinated colleague.
- There are also significant minorities in all countries who say they would not meet unvaccinated friends and family, but this does not mean that these respondents have taken such action, given how few are left unvaccinated in these well-off countries.

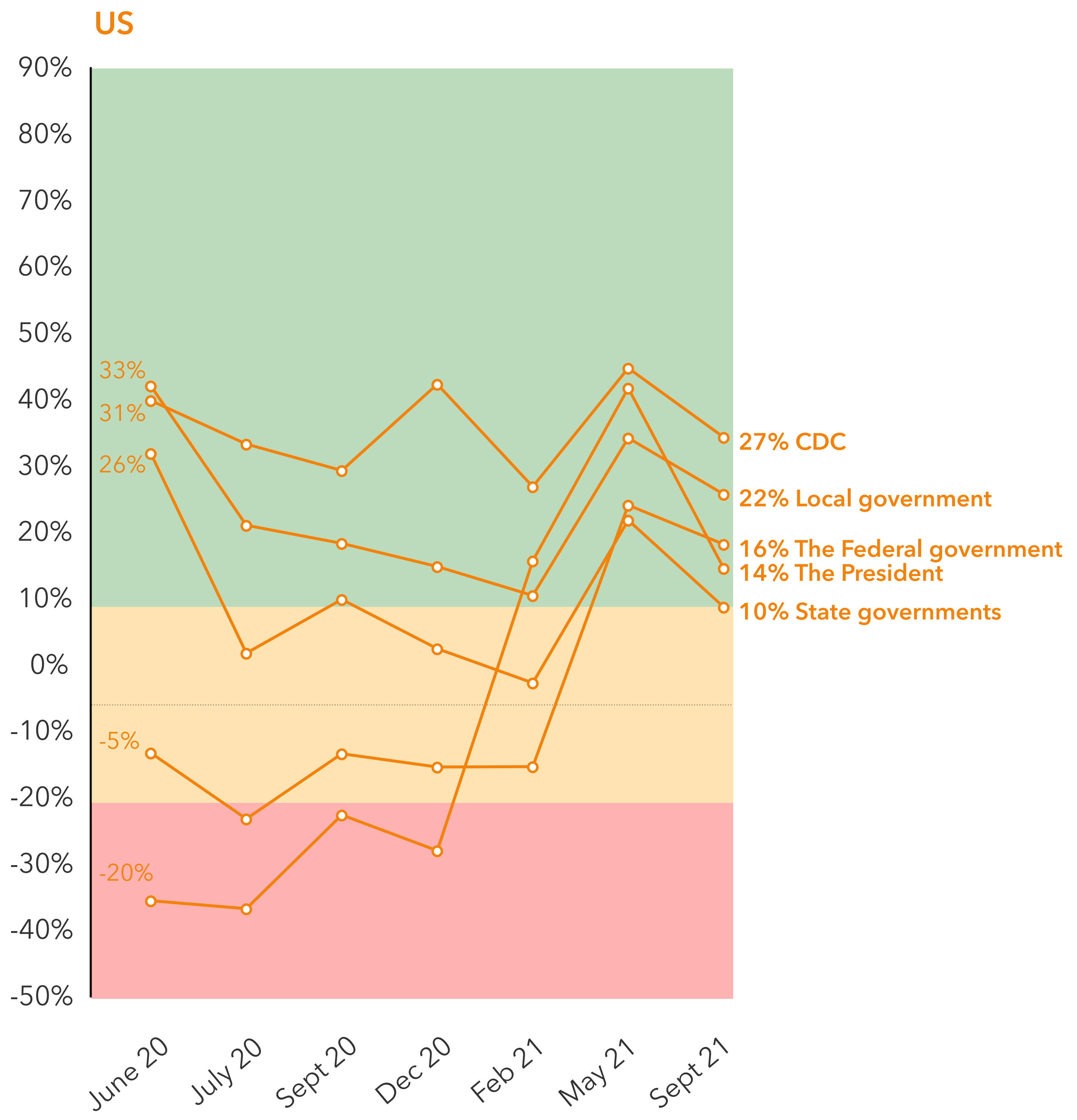
58%

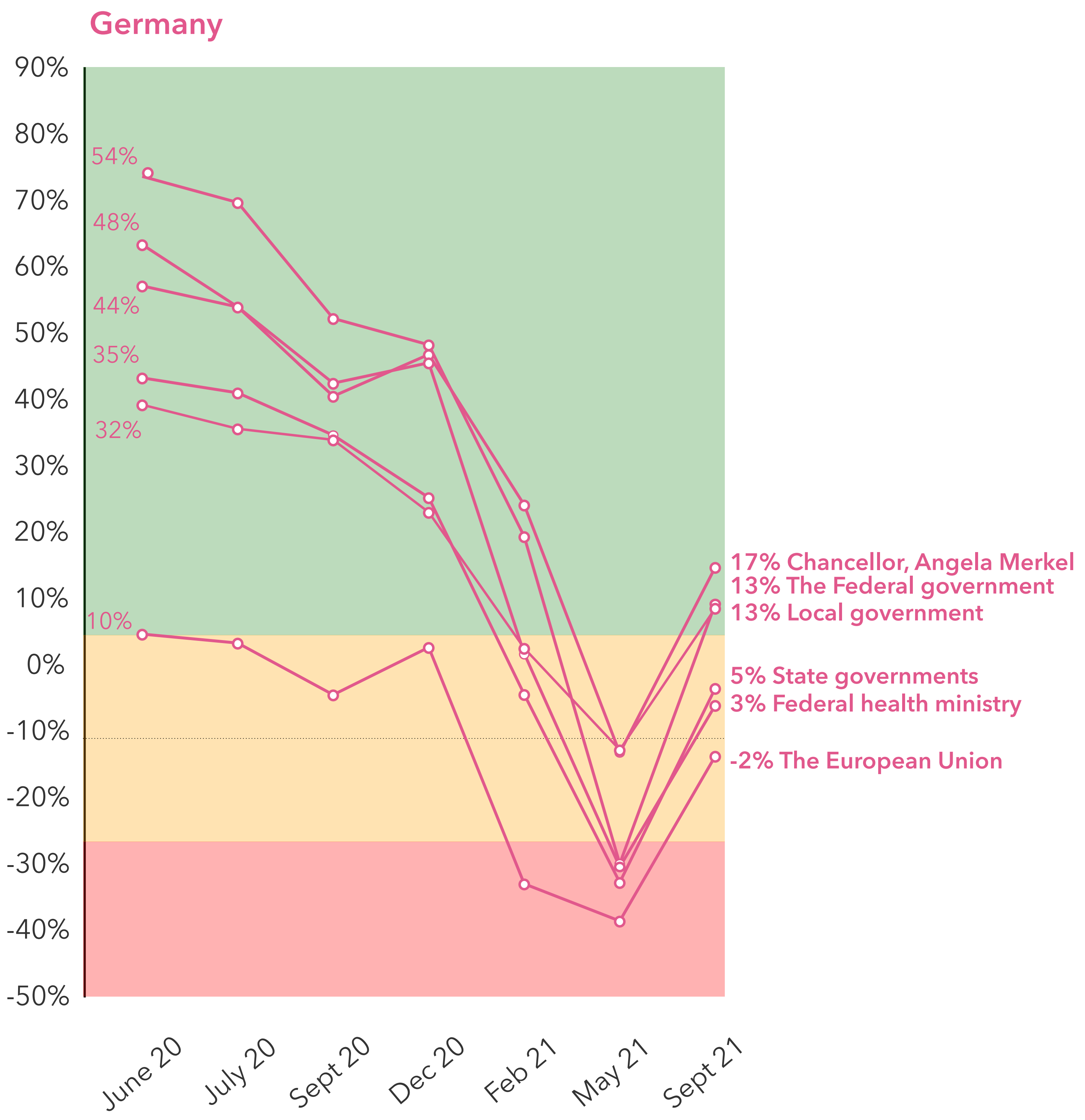
Of Americans are likely to avoid travel to low vaccine uptake regions of the US.

08 Performance of institutions

US and UK political and public health institutions take a hit while German leaders recover



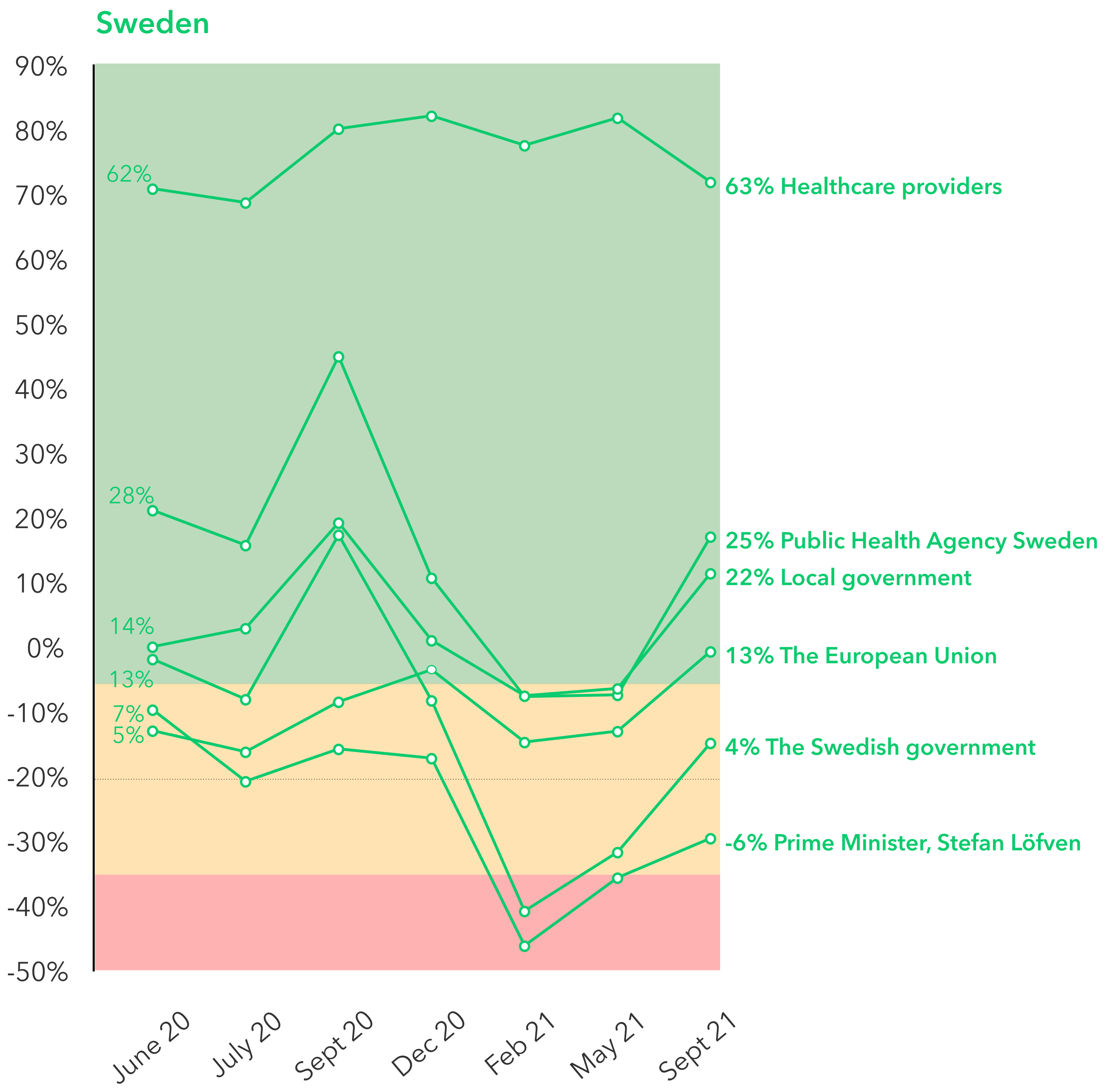


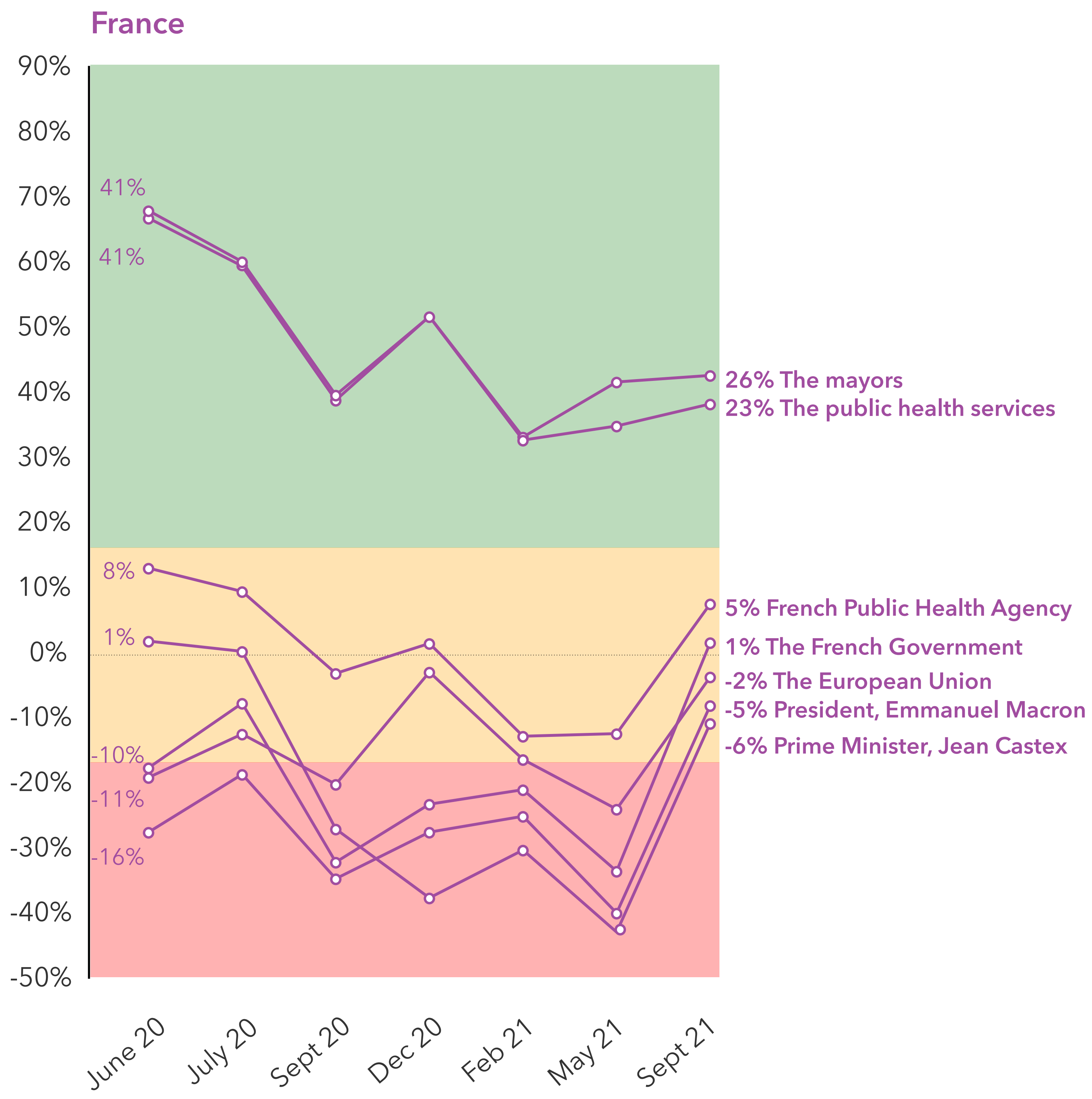


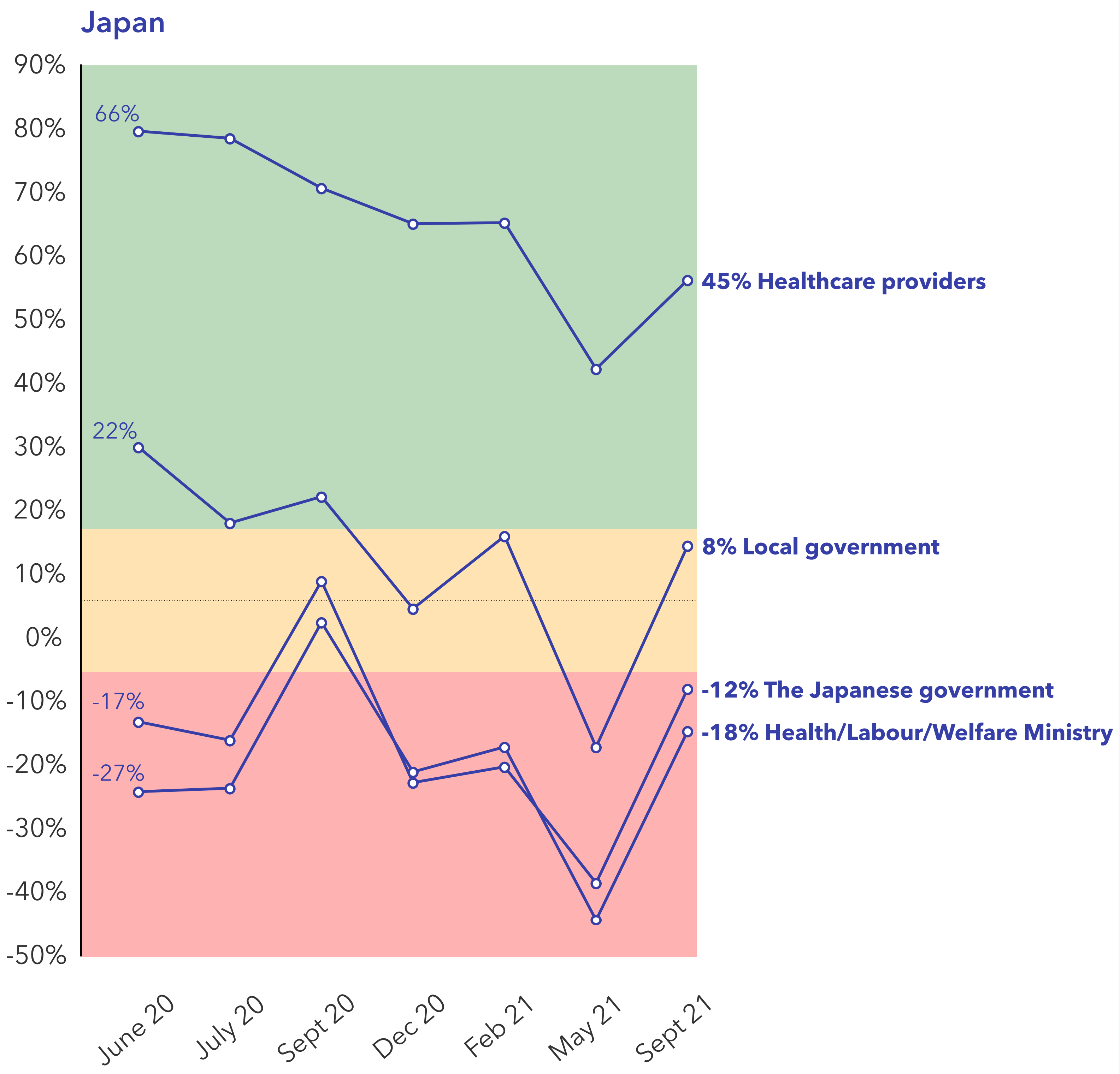
Respondents across all countries were asked whether they thought a number of institutions had done well or badly in responding to the coronavirus. Displayed is the net 'well' score in each country.

08 Performance of institutions

A strengthening recovery in Sweden, and the performance of leaders in France and Japan also bounces back going into fall







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

Good news for President Macron as assessments of his performance jump back into positive territory. A rocky summer for US and UK leaders

- **Confidence in major government institutions has dipped in the UK and the US over the summer** as other crises have piled up on top of the coronavirus pandemic.
- **Confidence in the UK government has dropped by 17 net points,** from +2% in May to -15% by October, with the public's assessment of Boris Johnson's leadership also decreasing from -4% to -18%. There has similarly been a minor loss of faith in the NHS, which saw its favorability rating decrease from +85% to +74%, and Public Health England, which saw its favorability rating decrease from +56% to +42%.
- A similar picture can be seen in the US, although here public perceptions of major government institutions remain favorable overall. **Confidence in Joe Biden saw the largest decrease and is down by 18 net points** to +14%, from a score of +32% in May. The same pattern follows for local and state governments, whose net positive ratings fell from 27% to 22% and 19% to 10% respectively. Federal government suffered from a less marked decrease in confidence; its favorability rating decreased from +20% to +16%.
- In stark contrast, **faith in government institutions has soared in Germany** as as COVID rules are loosened. Confidence in Angela Merkel's leadership increased by 16%, from +1% to +17%. Alongside the federal government (+13%) and local government (+13%), Merkel received the highest score. Public perceptions of the European Union have also improved dramatically, taking it close to a net favorable overall rating for the first time since 2020.
- Similar changes can also be observed **in France, where positivity towards in the President, Prime Minister, national government and European Union increased to the highest levels seen this year.** The largest increases in confidence came for Emmanuel Macron and Jean Castex, who saw their ratings improve from -24% to -5% and -26% to -6% respectively. In comparison, public perceptions of mayors and public health services remained positive, but increased only slightly to +26% and +23%, respectively.

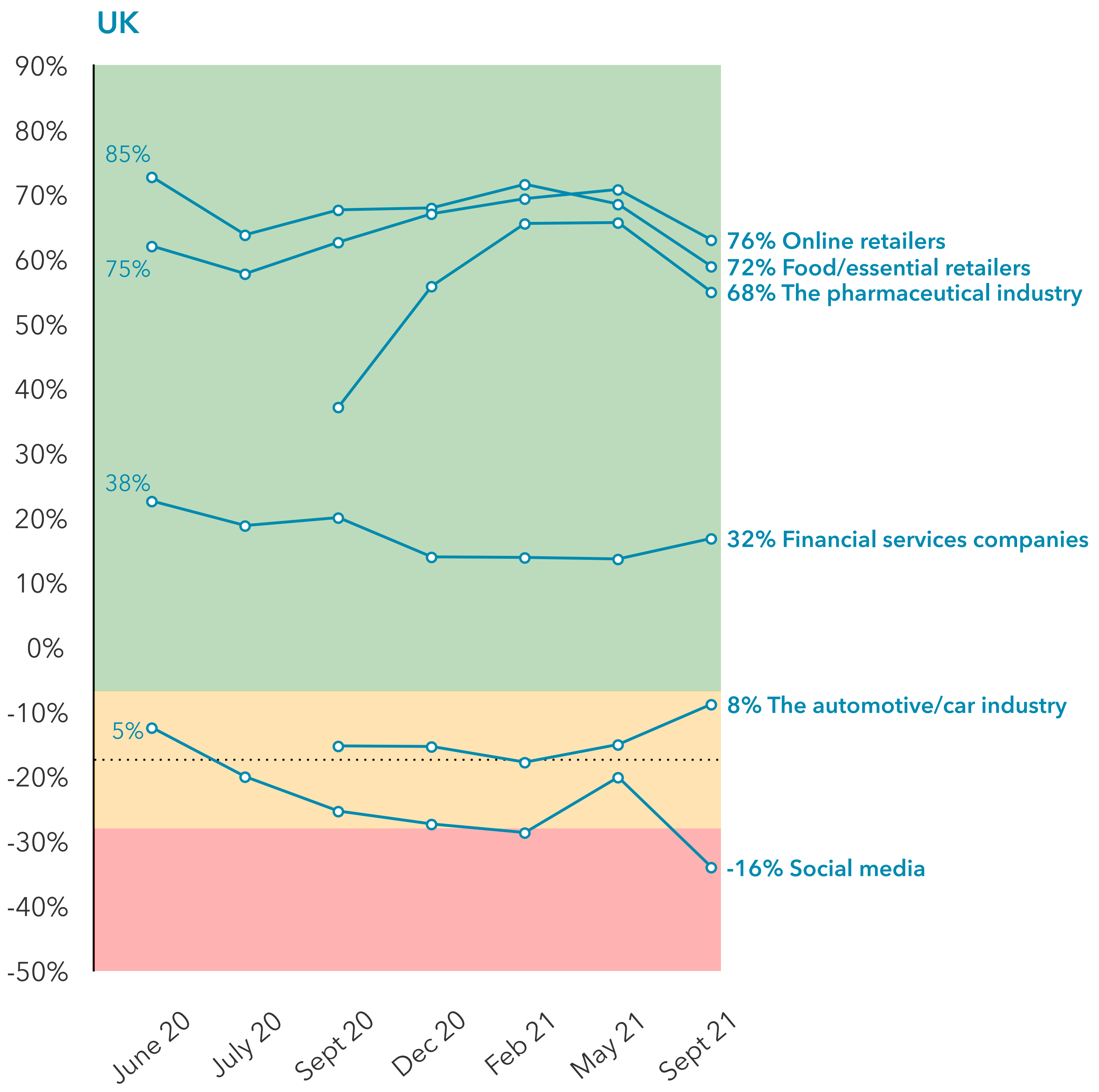
18 POINTS

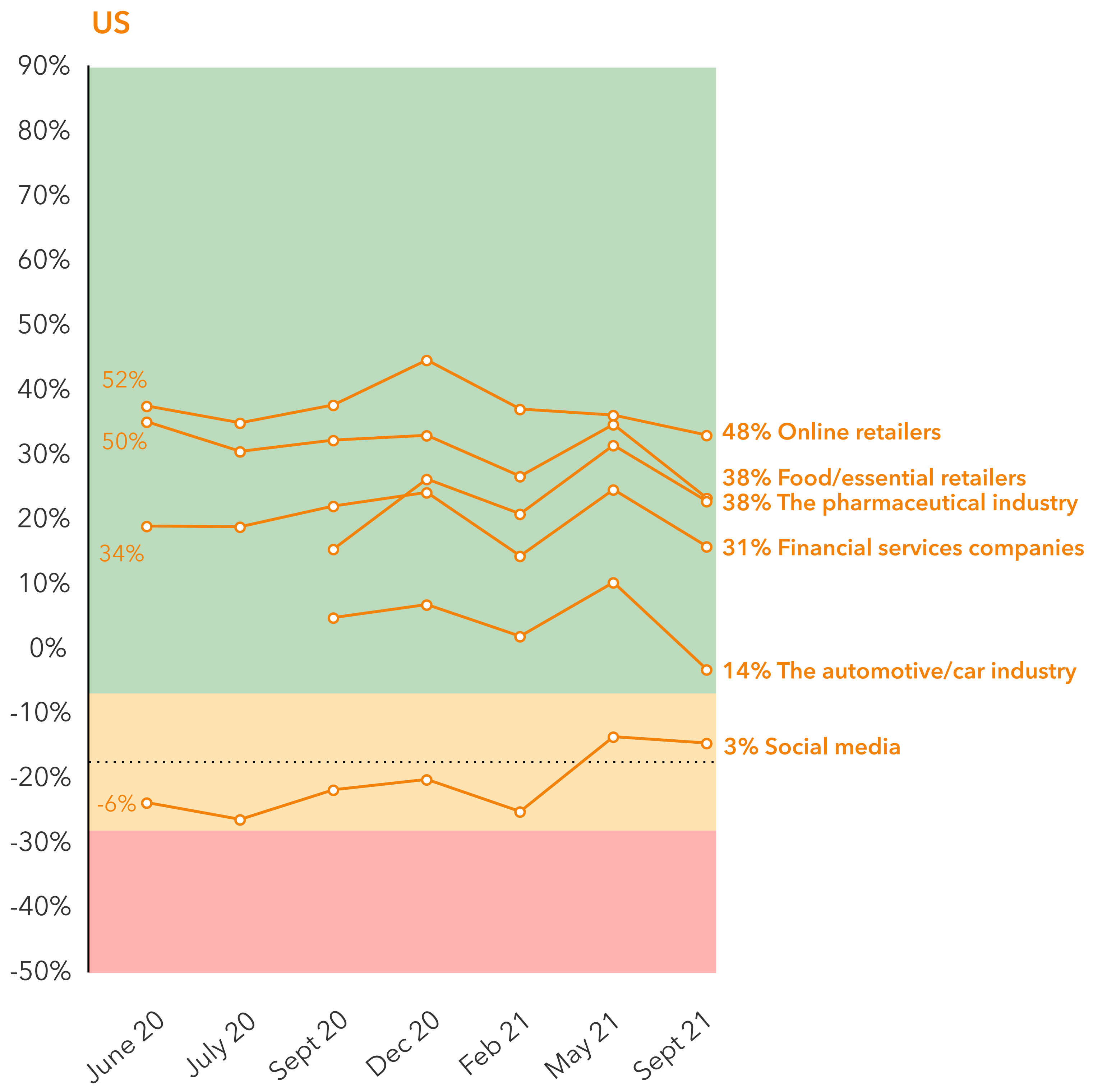
The net decrease in public perceptions of Joe Biden's COVID leadership

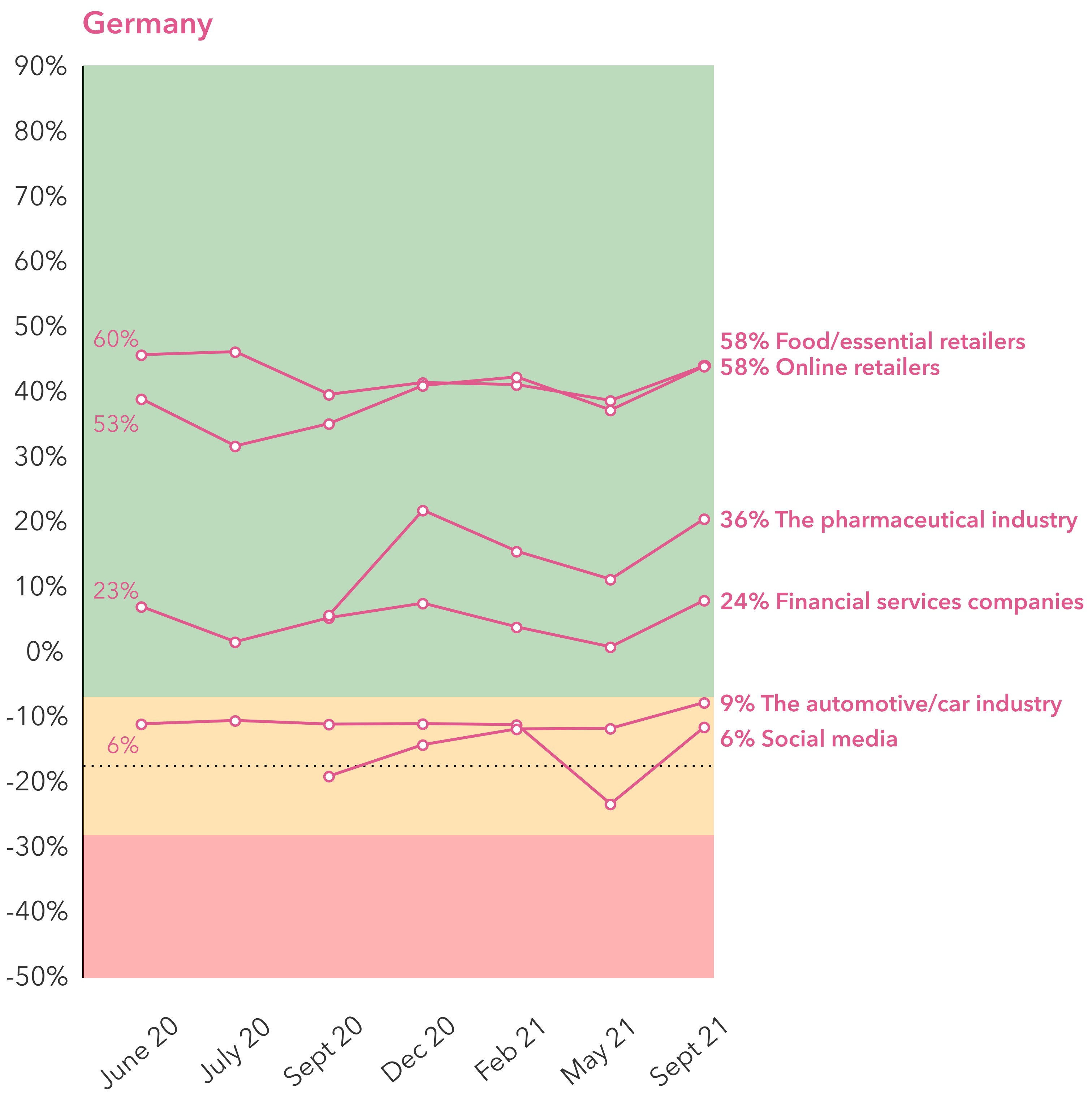
- This time around the picture is less bleak for leaders in Japan, as all government institutions received improved confidence scores. While **the public's overall assessment of the Japanese government (-12%) and the health ministry (-18) remain negative**, these figures improved dramatically from net scores of -40% and -45%.
- **In Sweden confidence in government institutions improved slightly,** with the exception of Swedish healthcare providers. Confidence in Public Health Agency Sweden, local government, the European Union and national government increased across the board, with all achieving net positive scores compared to May. Confidence in Prime Minister Stefan Löfven's leadership similarly improved, from -10% to -6%. Bucking the trend, confidence in Swedish healthcare providers worsened, from a rating of +69% to +63%.

09 Performance of industry

There is an attrition to the ratings of the industries that have responded best in the UK and the US and a slight recovery in Germany





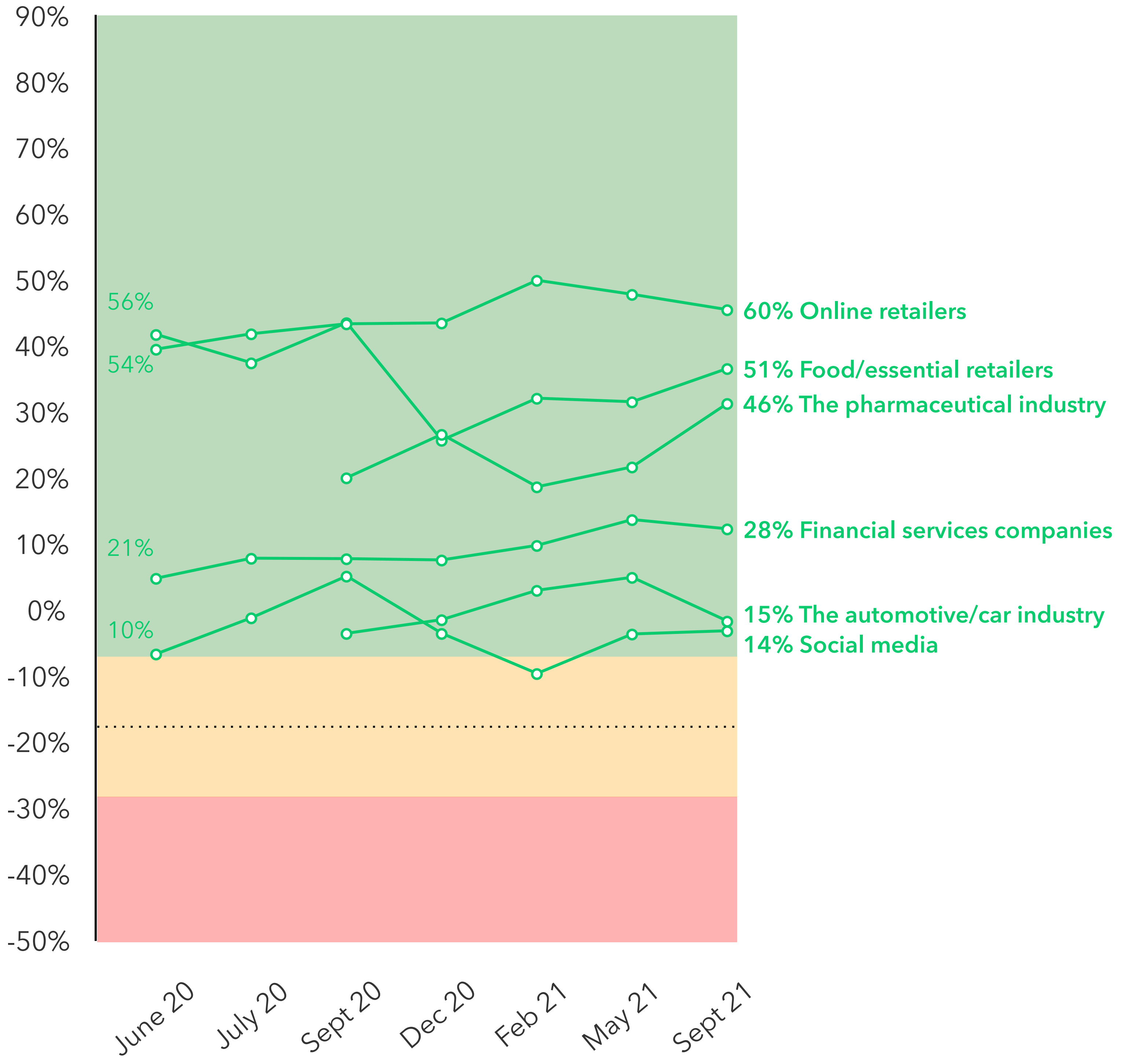


Respondents across all countries were asked whether they thought a number of institutions had done well or badly in responding to the coronavirus. Displayed is the net 'well' score in each country.

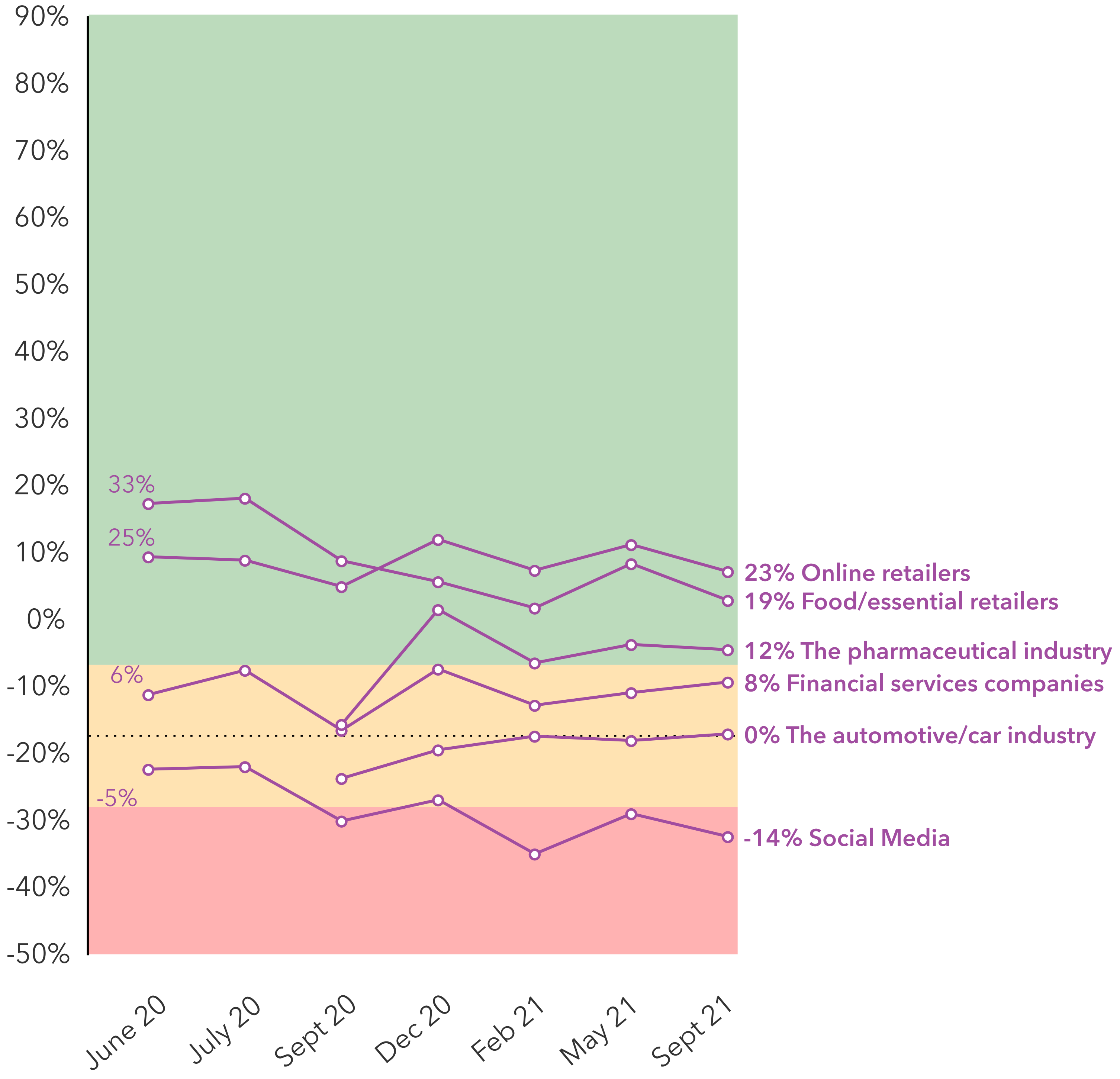
09 Performance of industry

Industries hold steady in Sweden, France and Japan, with the Japanese pharmaceutical sector rebounding

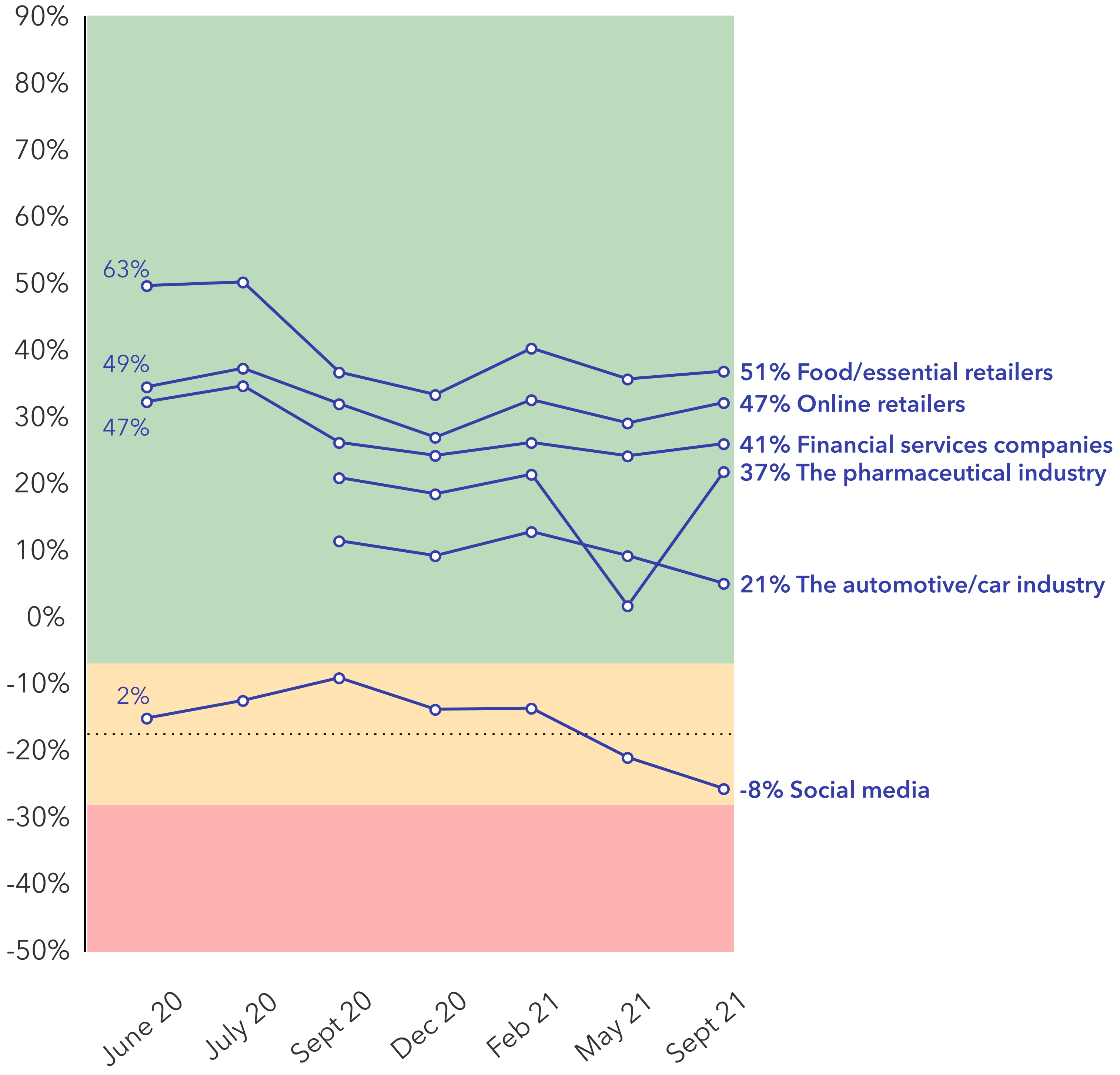
Sweden



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

Sectors delivering essential services for customers still continue to dominate in the public's assessment of industry

- **As societies return to some kind of post-COVID normality,** perceptions of essential retailers, online retailers and pharmaceutical companies dipped in the US, and the UK.
- **Business in the US has suffered its largest overall fall in reputation since the beginning of this tracker.** Every type of industry in the US experienced a fall in the net proportion of people saying it had done well. The automotive industry and food and essential retailers recorded the biggest falls in perceived performance, dropping 12% and 11% respectively (to +38% and +14%). While the net rating of US business had enjoyed an overall increase in the last edition of the tracker, the past four months has shown a significant change in the general public's view of industry.
- Completing an almost mirror image to the situation in the US, **all German industries surveyed improved in the general public's estimation in this edition.** Social media returned to a net positive rating (+6%), but perhaps the most notable increase was to pharmaceutical companies, up eight percentage points to +36%, as the domestic vaccine rollout picked up pace. Food and essential retail (+58%) and the financial industry (+24%) also experienced an increase in the net proportion of people saying the sector had done well.
- **Pharmaceutical companies experienced a dramatic turnaround in perception in Japan and Sweden** as they did in Germany. In both countries, pharmaceutical was the industry to record the highest increase in net rating when compared with other business types (up to +37% in Japan from +18%, and up to 46% in Sweden from 37%).
- **In Germany, Sweden and Japan, the industries with the highest net ratings throughout the pandemic enjoyed an upswing in reputation.** Online retailers, food and essential retail, and pharmaceuticals in these countries all experienced a rise in net rating when compared with the previous edition, with the sole exception of online retailers in Sweden, who recorded a minor fall.
- By contrast, the same industries suffered a blow in the UK, US and France. **Online retailers, food and essential retailers, and pharmaceutical in these countries all experienced a decline in this edition of the tracker.** This may be linked to supply chain issues, particularly in the Atlantic countries. Despite the fall, all three sectors retain the highest rating when compared with other industry types across the three countries. Online retailers still score the highest in each country, at +76% in the UK, +48% in the US and +23% in France.

19 POINTS

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

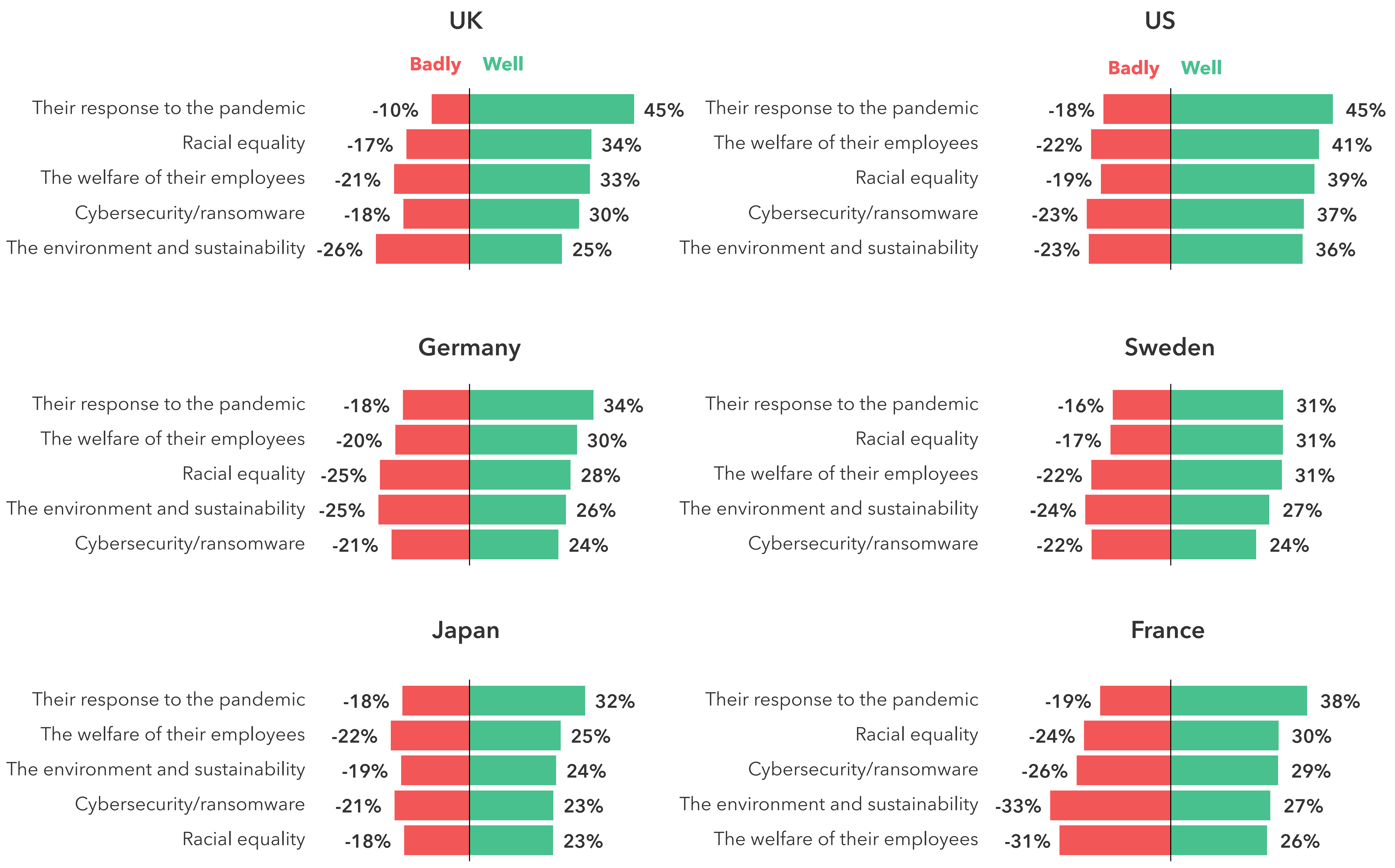
Online retailers

The highest rated industry in all six countries surveyed, despite falls in the UK, US and France.

10 CEO Communications

Positive signs for business leaders in the public's rating of the response to the pandemic, but warning signs on the environment

Q. How well or badly do you think CEOs of major companies in your country are doing in handling...



- The public were asked to assess the handling of five key issues that they are hearing about from company leaders.
- **The most positive reactions concerned how company leaders have handled the pandemic.** In France, for example, the public rated the response at net +19%, in Sweden at +15% and in the US at +27% and the positivity is to be found across all countries.
- On the other four metrics the picture is more mixed, varies by country, and calls for careful consideration. On handling the question of racial equality, the public in Sweden, the UK and the US are reasonably positive (net +14%, +17% and +20%). However, in France, Germany and Japan views are more marginal (net +6%, +3% and +5%).
- **There are warning signs on the environment and sustainability too, especially given the prominence of these messages in recent months. In the Germany the public rate CEO's handling at just net +1%, in the UK at -1%, in Japan at +5%, in France at -6%, and in Sweden at +3%.**
- Crucially, previous editions of the COVID tracker have shown that the public prizes caring for employees above all else when it comes to the actions of business leaders. We can see that the public in Japan and France have very mixed views on this dimension of CEO comms (net +3% in Japan and –5% in France). In the other countries outside the US people score business leaders around +10% on employee welfare, which suggests there is work to do. In the US the public are more positive at +19%.
- Overall, the response from the public is net positive in almost all aspects of CEO communications. **But the stubbornly high minority on almost all issues speaks to an underlying tough landscape for the average business with the public.**

11 Consumer confidence

The UK and the US have seen dramatic falls in assessments of the outlook for the economy as a whole

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

	Net score	Change on May	% saying stronger	% saying weaker	People on lower incomes	People on medium incomes	People on high incomes
My own economic situation							
US	18%	-3	39%	21%	–2%	12%	50%
Sweden	4%	-2	23%	19%	–8%	2%	12%
Germany	–1%	+6	20%	21%	–23%	–2%	27%
UK	–2%	-17	21%	23%	–4%	–1%	2%
France	–9%	+5	17%	26%	–20%	–9%	23%
Japan	–17%	+14	12%	30%	–26%	–10%	–8%
The economic situation in the country overall							
Sweden	18%	+16	36%	18%	20%	17%	17%
Germany	17%	+35	40%	23%	2%	16%	34%
US	10%	-21	41%	31%	–1%	3%	35%
UK	8%	-18	39%	31%	1%	13%	26%
France	5%	+37	33%	28%	2%	2%	42%
Japan	–24%	+33	20%	43%	–30%	–14%	–27%

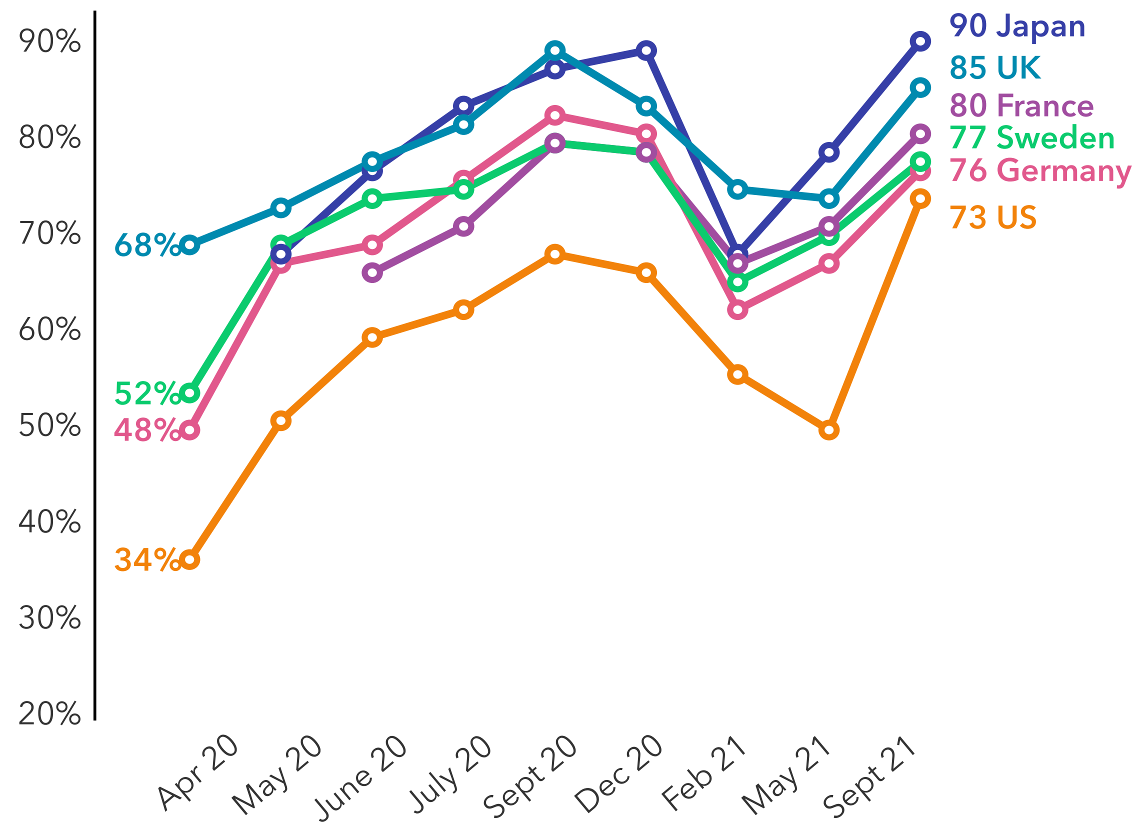
- **Consumers' own view of the economic situation in the UK and the US has collapsed since May.** In the UK, net optimism is down 18 points, while in the US it is down 21 points. Both are still in net positive territory (+10% and +8%), and still above the scores in France and Japan, where consumers' views are dramatically up, but still only just net positive.
- **Assessments of consumers' own situation largely reflect the respective economic situations in their countries as a whole,** but with less dramatic swings. The exception to this rule is the UK, where the fall in consumer confidence is only one point less than the decline in their assessments of the country's economic situation (down 17 points). Consumer sentiment on these measures is now higher in Germany and Sweden than the UK.
- **Sweden has seen a big jump in consumers' assessments of the situation in the country as a whole** (up 16 points), but a slight fall in personal confidence (down 2 points).
- There are stark income gaps in these assessments across the piece. **On consumers' personal economic, the only country in which the assessments of higher income consumers are not dramatically higher is the UK.** In terms of assessments of the country's economic position as a whole, only Sweden does not have similarly large income gaps.
- **The better off feel much much better about the next three years than those with lower incomes.**

12 Expected duration

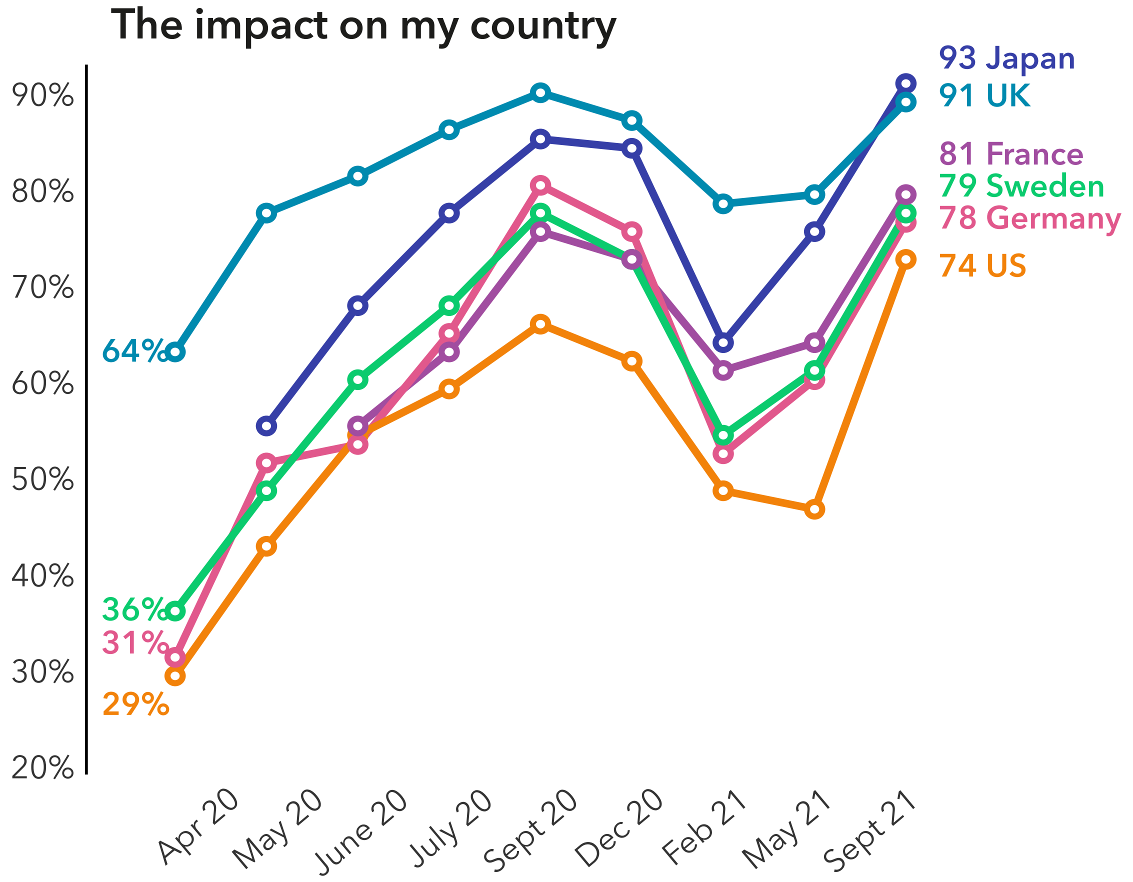
Increases in the expected duration of the pandemic once more in most countries; though the US is more optimistic

% saying longer than a year

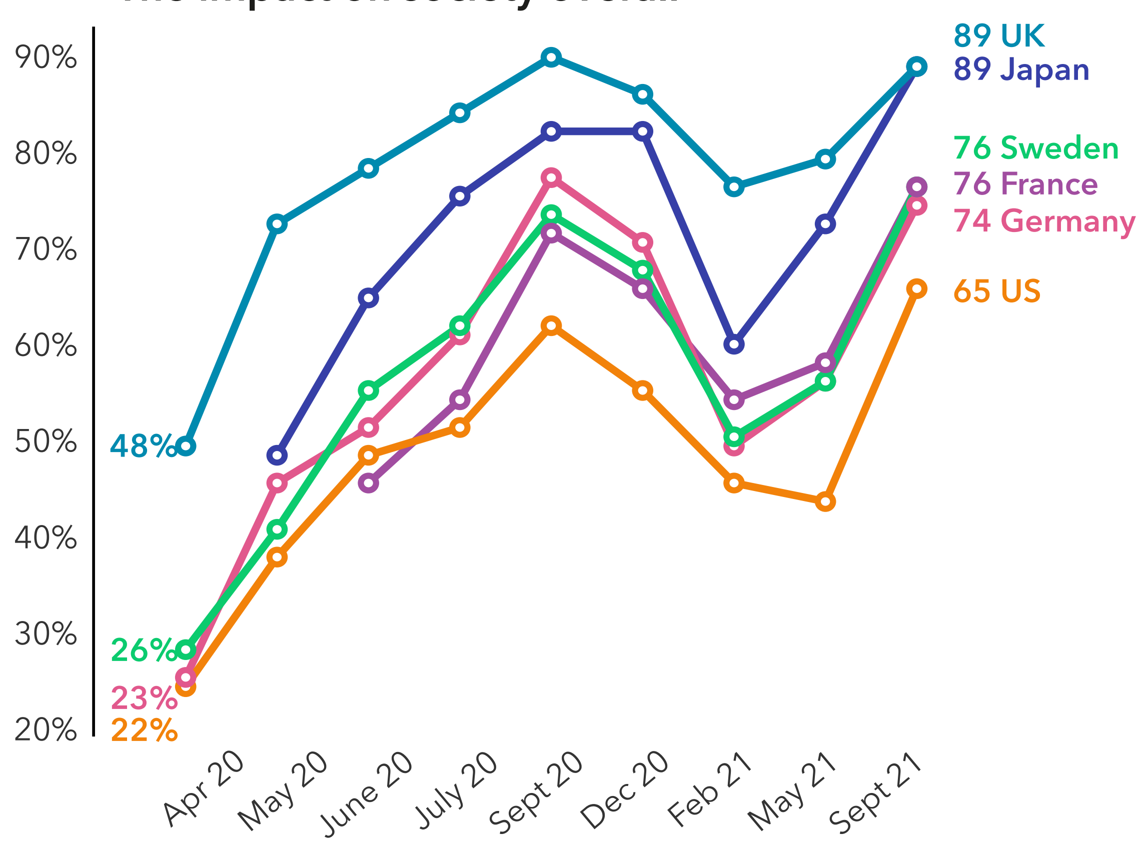
The impact on businesses and how they function



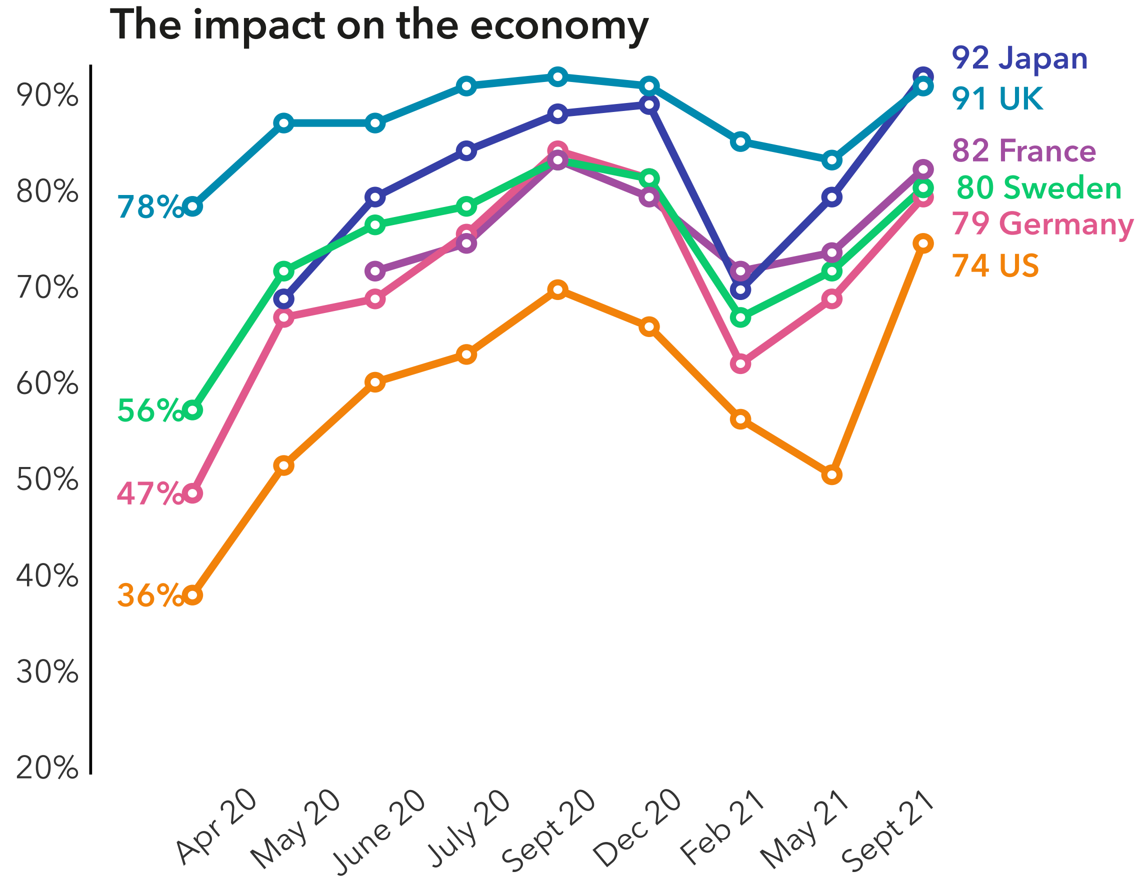
The impact on my country



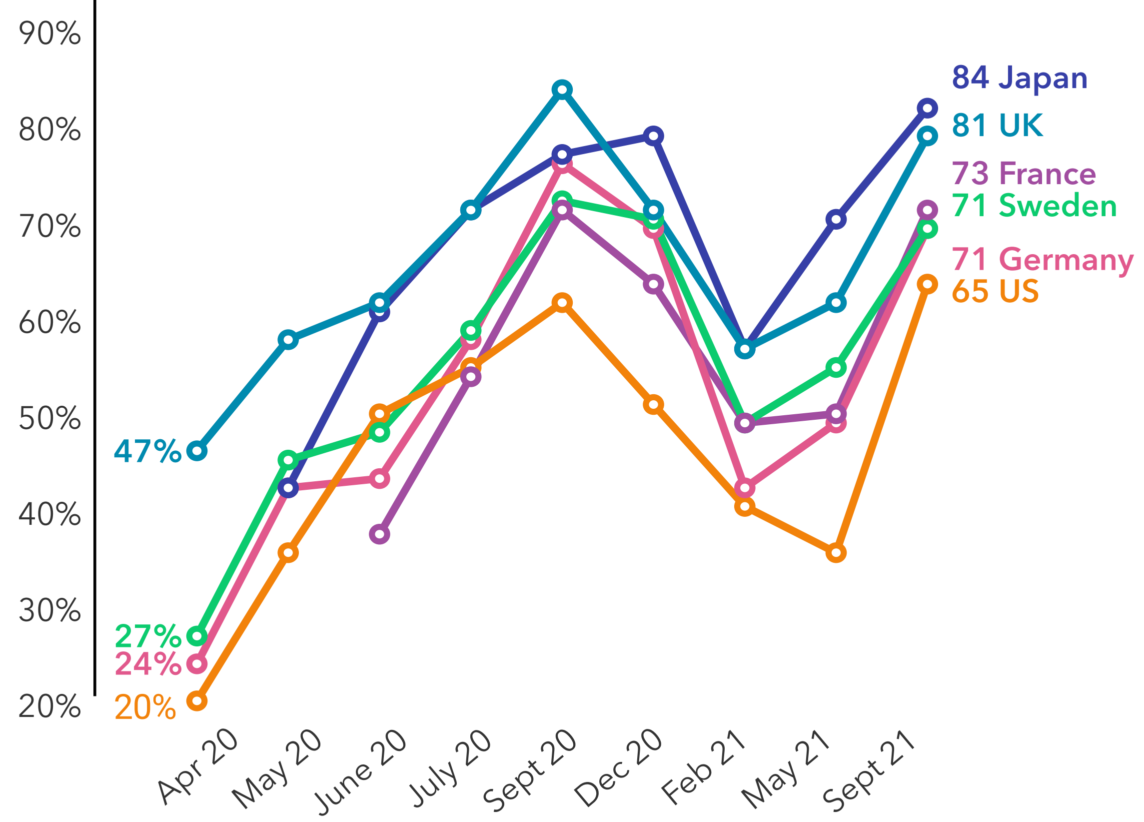
The impact on society overall



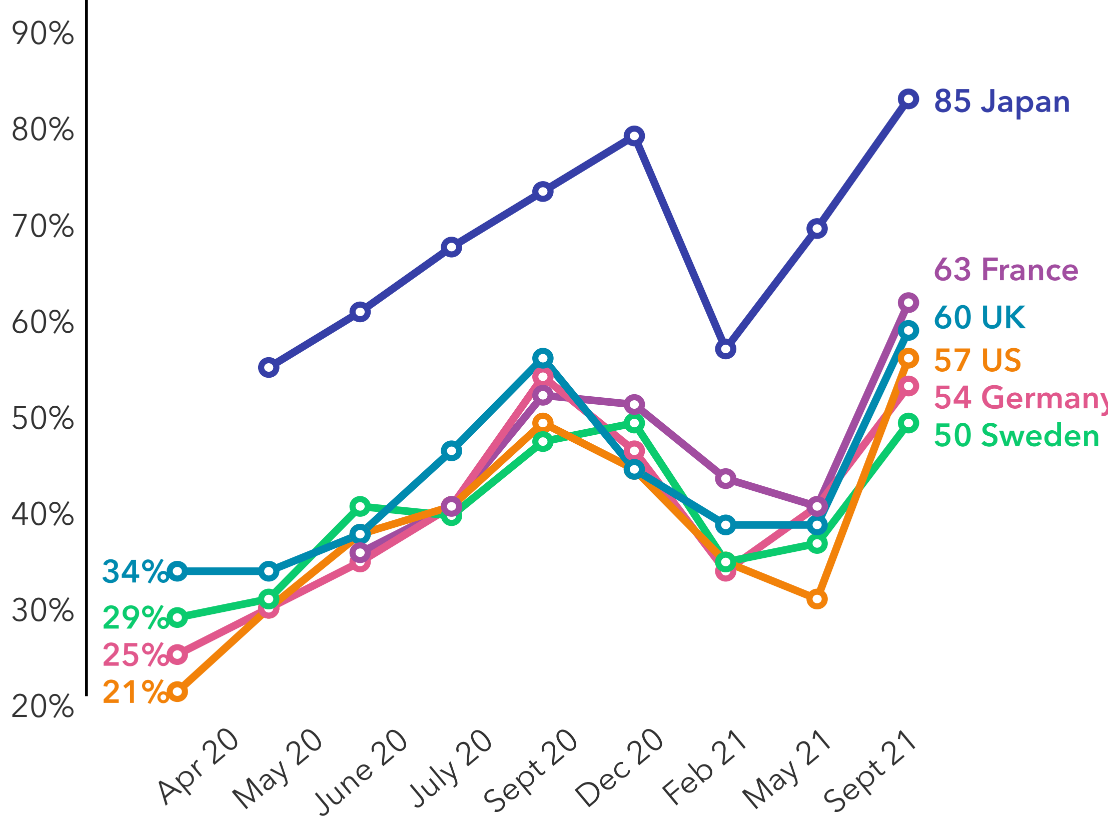
The impact on the economy



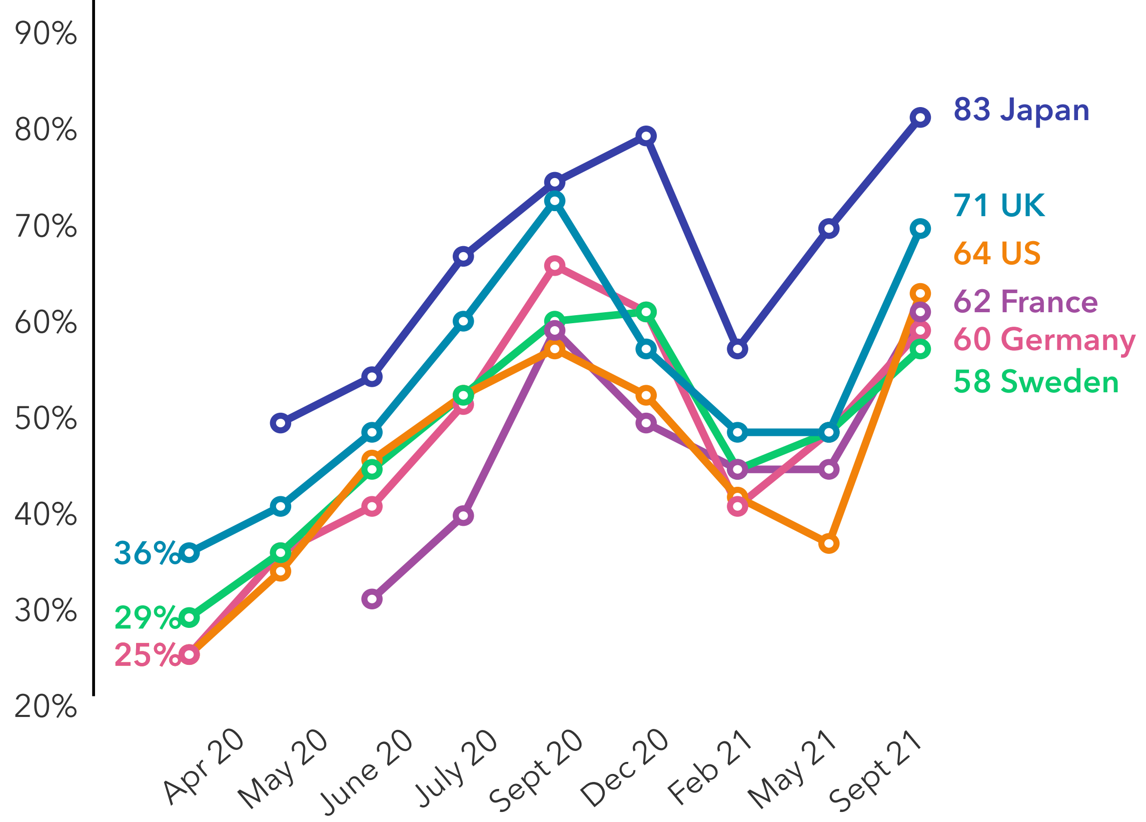
The impact on travel and holidays



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

Significant increases in expected length of time people expect the impact of the pandemic to be felt – after a fall earlier this year

- **There has been a considerable increase across all countries in the perceived length of the pandemic and its impacts since the start of the year.** Although there was a fall in the expected duration at the beginning of the year, with the circulation of the DELTA variant and winter approaching, optimism has declined across the board as people reassess the anticipated duration.
- **The UK has had a consistently high expectation of the duration of the impact on businesses, the country, society and the economy.** Almost 9 in 10 now believe the effects on these four aspects will last more than a year.
- Despite the easing of many travel restrictions across the world and some resurgence of international travel over the summer, all countries have increases in the number of people who believe the impacts will go beyond 12 months from now. **The US saw the greatest increase, with close to a third more respondents seeing a long-lasting impact on travel now than in May.**
- Since the beginning of the pandemic, **Japan has consistently had the highest number of respondents who see an impact on their household finances and lives beyond the year.** The significant increase in respondents we saw between February and May continues, with a 14% increase for household finances and 12% increase on lives. Notably, **22% more Japanese citizens see an impact on their household finances than in the next closest country, France.**

93 %

The proportion of Japanese people who think the pandemic will still impact businesses and how they function more than a year from now.

9 IN 10

The number of people in the UK who think the pandemic will have an impact on their country in more than a year's time.

- In May, the US was the exception to the global trend of an increasing number of people expecting long-term impacts of the pandemic. In this latest set of responses, **the US is now more aligned with the rest of the world, particularly in relation to the economy** with 75% of US adults now expecting effects beyond the year.
- Although anticipation of the effects lasting more than a year has increased since the beginning of the year, the **expectation of at least another year's worth of impact is similar across all questions and countries to this time last year.** This shows a recurrence of caution ahead of the winter months.
- Given the significant increases across all metrics and countries, narratives signaling an end to the pandemic and its impacts will need to be revisited to match public feeling and anticipate further impacts over the winter months.

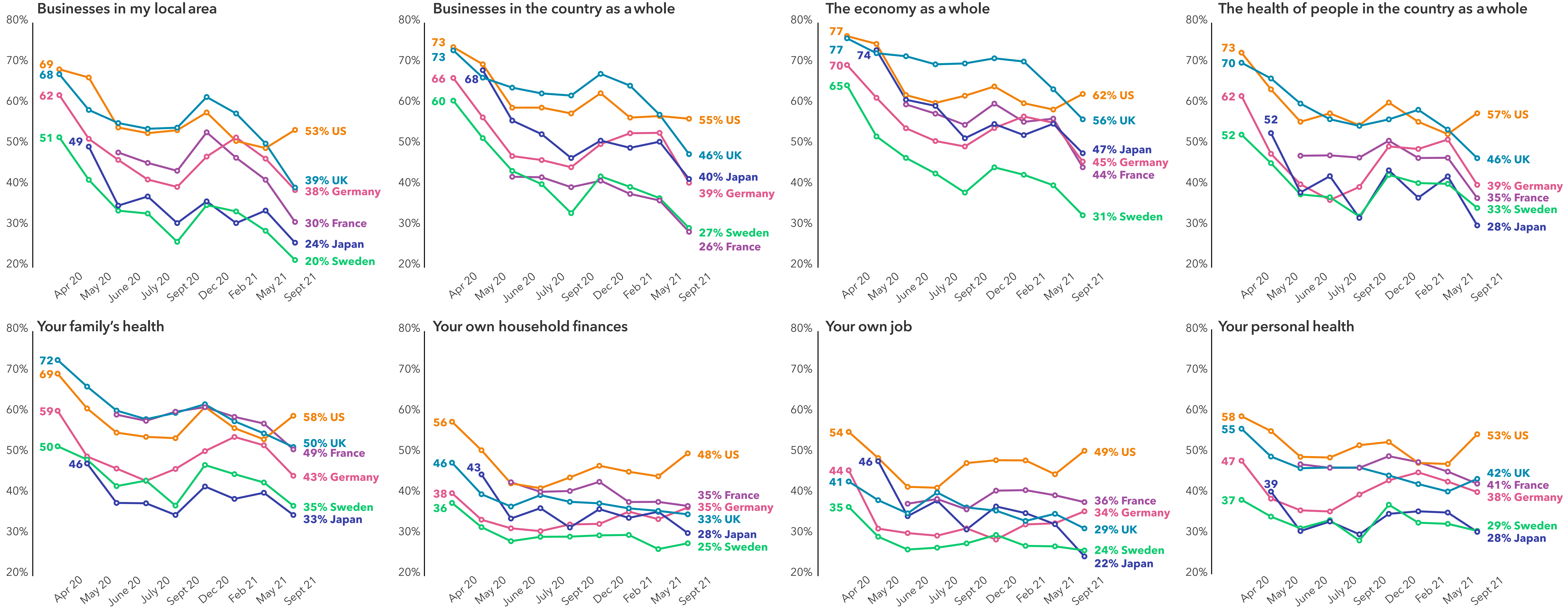
25 POINTS

The increase since May in the proportion of US adults who say that the impact on the economy will be felt more than 12 months from now.

13 Levels of concern

Overall concern about the impact of the coronavirus is down, but the US is still reeling from its DELTA wave

% saying 'very concerned'



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 Levels of concern

Concern about the overall impact of the virus continues to decline, with most nations showing greater optimism for the future of business and the economy as a whole

- Overall, **most countries continue to be less concerned about the virus.** This is particularly true of levels of concern for the economy and business in the country as a whole.
- **However, the US is an outlier compared to most countries, with overall levels of concern generally increasing in September.** The US has seen the most significant increase in both levels of concern for one's personal health and the health of the nation.
- In particular, the US is the exception when it comes to levels of concern for the economy. **In all nations bar the US, there has been a decline in the levels of concern about the economy.** This trend in the US is being driven at the margins by middle-income middle-aged Americans, particularly those who are self-employed and the one in four who worry about their own job. Republicans are on average 4 points more likely to show concern than Democrats.
- **Looking back to the start of the pandemic, levels of concern are down about 20 points on average across metrics and across countries.** Then, 72% of Brits were very concerned about the virus' impact on their family's health; that figure is now 50%. Then, 65% of people in Sweden were very concerned about the virus' impact on the economy; that figure is now less than half, at 31%. These are still high numbers, but nothing like the high levels of fear documented at the start of this survey.
- While levels of concern in Japan have consistently been at the lower end of the spectrum of countries, **Japan has seen a marked decline in overall levels of concern since May**, possibly due to the success of the Tokyo Olympics during the summer months. In particular Japan has seen a spike of optimism and clear decline in the public levels of concern for business in the country as a whole and business in one's local area.
- While the **German public are also much more optimistic about the future of businesses in their local area** and the wider economy (with the proportion concerned decreasing from 51% then to 45% now), **they are increasingly concerned about their personal household finances and the security of their own job.**
- Looking broadly, while there has been a clear decrease generally in the concern levels when it comes to the economy and the future of businesses, concern levels around health do remain high, usually at or above the 30% mark when it comes to the health of people in the country as a whole, and around 40% for the impact on the health of one's family. **While there is gradually more optimism and less concern about the future of business and the economy, there remains a high level of concern around health – with plenty of scope to grow again as we go into winter in all these countries.**

57%

The percentage of Americans that are still concerned about the health of the nation on whole.

34 POINTS

The fall in the proportion of Swedes who are concerned about the impact of the pandemic on the economy as a whole.

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FOR FURTHER INFORMATION, PLEASE CONTACT:

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