

Citizens in the World's Leading Economies Want a Fast Recovery Post-Pandemic

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Introduction and summary

At the successful conclusion of the recent G-7 summit in Cornwall, United Kingdom, President Joe Biden and other leaders of the world's advanced economies agreed to a common set of objectives to address the coronavirus pandemic and spur global economic rebuilding. The final communique signed by those leaders included coordinated action on vaccine distribution; economic recovery; global corporate taxation and fair trade; climate change; and a unified response to China's rising authoritarian power. Although the specific policies to carry out these agreements remain to be hashed out in greater detail, world leaders have sketched out an important strategy for rapid, thorough, fair, and ecologically sustainable economic growth post-pandemic.

Since the actions of the G-7 must be promoted within specific national political contexts, it is important to know how citizens in these countries are likely to respond to the goals outlined at the Cornwall summit. A comprehensive multination poll conducted by Global Progress and YouGov just prior to the start of the summit—of the G-7 nations and Australia provides a wealth of useful data on what citizens in the world's leading economies think about post-pandemic economic recovery and politics. In short, citizens want a fast recovery from the pandemic but are divided on how governments should get there and worry about future challenges from emerging technology and rising inequality.

This large-scale study interviewed a total of 11,433 adults and was conducted from May 13, 2021, to May 24, 2021, in nationally representative samples in the United States, the United Kingdom, Germany, France, Australia, Italy, Canada, and Japan.¹

Final shared goals of G-7 leaders

In their joint communique released June 13, 2021,² G-7 leaders agreed to the following goals:

- End the pandemic and prepare for the future by driving an intensified international effort, starting immediately, to vaccinate the world by getting as many safe vaccines to as many people as possible as fast as possible. Total G7 commitments since the start of the pandemic provide for a total of over two billion vaccine doses, with the commitments since we last met in February 2021, including here in Carbis Bay, providing for one billion doses over the next year. At the same time we will create the appropriate frameworks to strengthen our collective defences against threats to global health by: increasing and coordinating on global manufacturing capacity on all continents; improving early warning systems; and support science in a mission to shorten the cycle for the development of safe and effective vaccines, treatments and tests from 300 to 100 days.
- Reinvigorate our economies by advancing recovery plans that build on the \$12 trillion of support we have put in place during the pandemic. We will continue to support our economies for as long as is necessary, shifting the focus of our support from crisis response to promoting growth into the future, with plans that create jobs, invest in infrastructure, drive innovation, support people, and level up so that no place or person, irrespective of age, ethnicity or gender is left behind. This has not been the case with past global crises, and we are determined that this time it will be different.
- Secure our future prosperity by championing freer, fairer trade within a reformed trading system, a more resilient global economy, and a fairer global tax system that reverses the race to the bottom. We will collaborate to ensure future frontiers of the global economy and society, from cyber space to outer space, increase the prosperity and

wellbeing of all people while upholding our values as open societies. We are convinced of the potential of technological transformation for the common good in accordance with our shared values.

- Protect our planet by supporting a green revolution that creates jobs, cuts emissions and seeks to limit the rise in global temperatures to 1.5 degrees. We commit to net zero no later than 2050, halving our collective emissions over the two decades to 2030, increasing and improving climate finance to 2025; and to conserve or protect at least 30 percent of our land and oceans by 2030. We acknowledge our duty to safeguard the planet for future generations.
- Strengthen our partnerships with others around the world. We will develop a new partnership to build back better for the world, through a step change in our approach to investment for infrastructure, including through an initiative for clean and green growth. We are resolved to deepen our current partnership to a new deal with Africa, including by magnifying support from the International Monetary Fund for countries most in need to support our aim to reach a total global ambition of \$100 billion.
- Embrace our values as an enduring foundation for success in an ever-changing world. We will harness the power of democracy, freedom, equality, the rule of law and respect for human rights to answer the biggest questions and overcome the greatest challenges. We will do this in a way that values the individual and promotes equality, especially gender equality, including by supporting a target to get 40 million more girls into education and with at least \$2¾ billion for the Global Partnership for Education.

Overall, the research finds that most citizens in advanced economies have learned important lessons coming out of the pandemic about the vulnerabilities of their societies and the need for governments to do more to prepare for future calamities and bolster domestic economies. Majorities of citizens in these leading nations agree that inequality is too high and want to live in fairer societies going forward. Above all, people want fast action to get people back to work, to improve wages, and to increase overall economic security for workers and families. However, citizens are also split politically on how best to achieve these goals and on how much government action may be required to carry out improvements. And importantly, social distrust is pronounced across nations—along with concerns about social media-fueled divisions and the state of democracy in many countries—suggesting a hard road ahead for coordinated efforts at economic renewal.

Citizens across G-7 nations, however, express strong support for a Biden-style agenda of national investments in infrastructure, health care, and renewable energy to help make their societies fairer, more sustainable, and more competitive in the world. Likewise, majorities of people in G-7 nations uniformly back increased taxation on multinational companies, large online retailers, and the wealthiest few to help pay for these rebuilding efforts. This suggests a way forward for both developing and financing a future economic growth agenda in these countries.

The remainder of this report will highlight the most important results from the study—comparatively and in aggregate—across the eight nations polled.

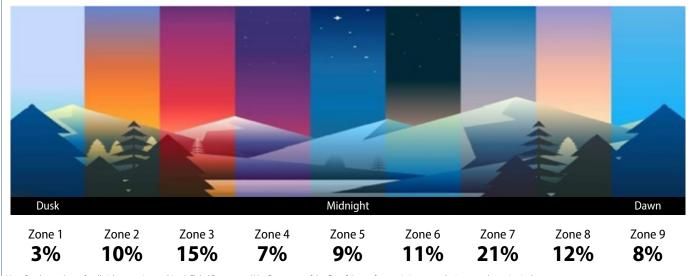
People are hopeful—but do not yet fully believe—that nations are beating COVID-19

The study presented respondents with a schematic showing "dusk to dawn"—with dusk representing the beginning of the pandemic, midnight the worst part of the crisis, and dawn the recovery from the crisis—and asked them to locate their country's present position on the spectrum.³

As seen in Figure 1, 52 percent of people across all nations surveyed report that their respective country has reached somewhere after midnight (the worst point), of which 8 percent believe their nation has fully reached a dawn of recovery. Optimism about recovery is greatest in the United States, with 57 percent of Americans saying the United States is past the worst point of the pandemic—including 15 percent who say it is in recovery. Japan has the lowest amount of optimism, where almost 3 in 4 citizens feel their country is approaching or at the worst point of the pandemic.

FIGURE 1 The dawn of recovery is still a way off in many nations

Q. Please look at the picture, which is meant to represent the COVID-19 pandemic. Dusk is the beginning of the pandemic, midnight is the worst part of the crisis, and dawn is recovery from the crisis. In your opinion, where is your country right now?



Note: Results are shown for all eight countries combined. Global Progress and YouGov are grateful to Data Sciences for permission to use the image and question in the survey. Source: Global Progress and YouGov survey of 11,433 adults, on file with author. Fieldwork was undertaken between May 13–24, 2021. The survey was carried out online. National sample sizes include: United States (N=2,291), United Kingdom (N=2,026), Germany (N=2,005), France (N=1,055), Australia (N=1,034), Italy (N=1,010), Canada (N=1,008), and Japan (N=1,004). Optimism about the pandemic is higher than average in the United Kingdom, Germany, and Australia and lower than average in Canada, Italy, and France.

Additional measures of hope or pessimism about the pandemic asked respondents how likely it is that there will be another pandemic on the scale of COVID-19 in the next 10 years and how likely it is that COVID-19 itself will mutate and return in the next decade. As seen in Figure 2, 6 in 10 citizens across all eight nations surveyed are afraid that it is likely that another pandemic will occur within the next 10 years, and more than half are worried that COVID-19 will mutate and return during this period.



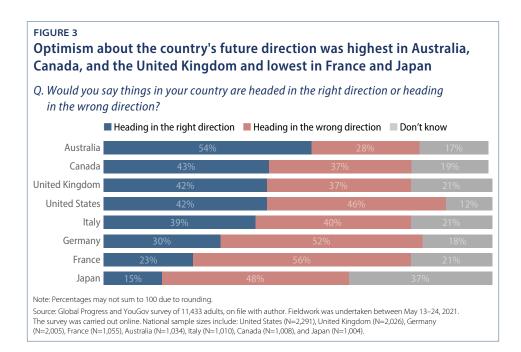
Q. How likely, if at all, do you think it is that the following will happen in the next 10 years? Likely Unlikely Don't know Another pandemic on the scale of COVID-19 France Australia Japan Germany Canada United Kingdom Italv United States Total COVID-19 will mutate and return in the next 10 years Japan Australia France Canada Germany United Kingdom Italy United States Total Source: Global Progress and YouGov survey of 11,433 adults, on file with author. Fieldwork was undertaken between May 13-24, 2021. The survey was carried out online. National sample sizes include: United States (N=2,291), United Kingdom (N=2,026), Germány (N=2,005), France

(N=1,055), Australia (N=1,034), Italy (N=1,010), Canada (N=1,008), and Japan (N=1,004).

Majorities of citizens in all eight nations express concern about a likely new pandemic hitting them in the next decade, with concern ranging from a low of 54 percent of adults in the United States to a high of 73 percent of adults in France. Less than half of citizens in the United States and Italy say it is likely that COVID-19 will mutate and return in the next decade, whereas slight majorities of citizens in the six other nations believe that a COVID-19 mutation is likely to happen. The greatest worry about the return of the virus exists among Japanese citizens, at 65 percent.

Looking at the wider context of optimism and pessimism, the authors find a variety of conflicting attitudes about the direction of these respective nations.

For example, as seen in Figure 3, Australians express the greatest degree of optimism about their country, with 54 percent saying Australia is headed in the right direction compared with 28 percent who feel it is heading in the wrong direction (17 percent of those surveyed did not know). Optimism exceeds pessimism in Canada as well, where 43 percent say their country is heading in the right direction compared with 37 percent in the wrong direction, and the United Kingdom, where 42 percent say it is heading in the right direction compared with 37 percent in the right direction compared with 37 percent in the right direction. In contrast, slight pluralities of citizens in the United States and Italy, and a majority of Germans, say their countries are going in the wrong direction, while pessimism is greatest among the French and Japanese.



On other measures, the study finds that optimism again stands out in Australia, Canada, and the United States. For example, 42 percent of Australians and 40 percent of Americans believe that younger generations "have had it better off" than older generations. Conversely, Italy and France are far more pessimistic about the situation of their young people, with 55 percent of Italians and 52 percent of French saying that young people "have had it worse off" than older generations.

Likewise, in another question, nearly two-thirds of Americans believe their country will rank among the three most successful countries in the future, followed by people in Australia (51 percent) and Canada (43 percent) who think similarly about their countries.

Citizens across the G-7 have learned important lessons from the pandemic

The study presented respondents with a list of possible lessons that might be learned following the COVID-19 pandemic and asked people to what extent—if at all—each item should be a lesson learned by society.

Emerging from the pandemic, people seem to want more cooperative societies and more proactive governments. As seen in Figure 4, the top lesson citizens across the eight nations want their societies to learn is that "countries need to work together to stop pandemics," with 59 percent saying they want societies to learn this lesson to a greater extent and another 24 percent to some extent. Roughly similar proportions of citizens also believe it is important for "governments to act quickly" in the future and for "governments to prepare for the possibility of pandemics."

FIGURE 4 Lessons learned from the pandemic

Q. To what extent, if at all, do you think each of the following should or should not be a lesson society learns from the COVID-19 pandemic?

	Some exter	nt Great extent
Countries need to work together to stop pandemics	24	59
The need for governments to act quickly	23	59
The need for governments to prepare for the possibility of pandemics	28	55
The importance and contributions of key workers	28	53
The need to look out for one another at times of crisis	31	51
The importance of a safety net at times of crisis	32	50
How vulnerable our normal way of life can be	32	48
The need to listen to scientific experts	31	46
The need for countries to be able to provide for themselves at times of crisis	35	45
The need for government intervention to support the economy	35	42
The need to listen to ordinary citizens	34	42
It is possible for more people to work more remotely	39	35

Note: Results are shown for all eight countries combined.

Source: Global Progress and YouGov survey of 11,433 adults, on file with author. Fieldwork was undertaken between May 13–24, 2021. The survey was carried out online. National sample sizes include: United States (N=2,291), United Kingdom (N=2,026), Germany (N=2,005), France (N=1,055), Australia (N=1,034), Italy (N=1,010), Canada (N=1,008), and Japan (N=1,004).

A second tier of lessons focuses on the "need to look out for one another at times of crisis" and on the importance of "key workers" and "the safety net" during times of crisis. Although still important in total, less than half of citizens in these eight nations believe to a greater extent that it is important to learn that "countries are able to provide for themselves"; "how vulnerable our normal way of life can be"; or that it is "possible for more people to work remotely."

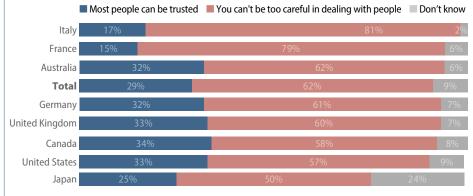
Widespread social distrust among people may impede the adoption of lessons learned

To carry out some of these lessons, people will first need to be able and willing to work together within and across nations to achieve common ends. But how likely is this to occur? Unfortunately, in one of the more striking results, the study finds that the social trust necessary for cooperative action is sorely lacking in many nations.

As seen in Figure 5, 62 percent of adults in these eight nations overall believe that generally speaking, "you can't be too careful in dealing with people," compared with 29 percent who feel that "most people can be trusted." Distrust outpaces trust in every country tested, with strong majorities of citizens in seven of the nations surveyed saying they distrust other people, along with a plurality of citizens in Japan.



Q. Generally speaking, would you say that most people can be trusted or that you can't be too careful in dealing with people? (Please select the option that BEST describes your opinion, even if neither is perfect.)



Source: Global Progress and YouGov survey of 11,433 adults, on file with author. Fieldwork was undertaken between May 13–24, 2021 The survey was carried out online. National sample sizes include: United States (N=2,291), United Kingdom (N=2,026), Germany (N=2,005), France (N=1,055), Australia (N=1,034), Italy (N=1,010), Canada (N=1,008), and Japan (N=1,004).

Despite talk of a new communitarian spirit rising in the aftermath of the pandemic, it appears that citizens remain skeptical of one another even as they desire more cooperative action to better prepare themselves ahead of future crises and take care of each other in the aftermath.

Distrust of others is most elevated in Italy (81 percent) and France (79 percent) notably the two nations with the lowest levels of optimism about their countries and around 60 percent in the United States, Canada, the United Kingdom, Germany, and Australia.

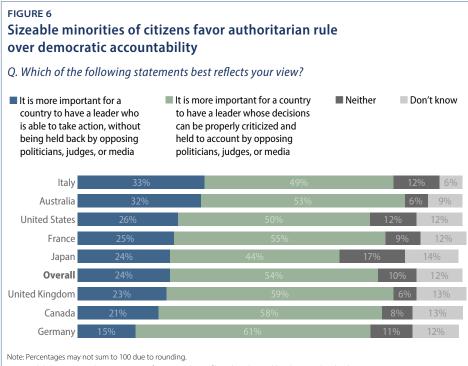
Sizable blocs favor an authoritarian model of governance over democratic accountability

Faith in democracy was not restored by government responses to the pandemic. The study presented respondents with two competing statements about democracy and asked them which comes closer to their own view. Overall, approximately one-quarter of people across all eight nations surveyed favor a strongman model of governance: "It is more important for a country to have a leader who is able to take action, without being held back by opposing politicians, judges or media." Conversely, 54 percent of citizens across these nations back a more democratic ideal: "It is more important for a country to have a leader whose decisions can be properly criticized and held to account by opposing politicians, judges or media." (see Figure 6)

Support for the authoritarian model ranges from a low of 15 percent in Germany to a high of 33 percent in Italy. Around one-quarter of citizens in the United States, Japan, France, and the United Kingdom back a strongman theory of government over a more democratic one.

This finding makes sense given the large numbers of people who feel that democracy itself—defined as citizens electing officials to make decisions for people—is not working well in their country: 41 percent of citizens across these nations feel democracy is working badly in their country, with only 47 percent saying democracy is working well.

Both trends—rising doubts about democracy and sizable support for authoritarian alternatives—are alarming findings for defenders of democracy globally.

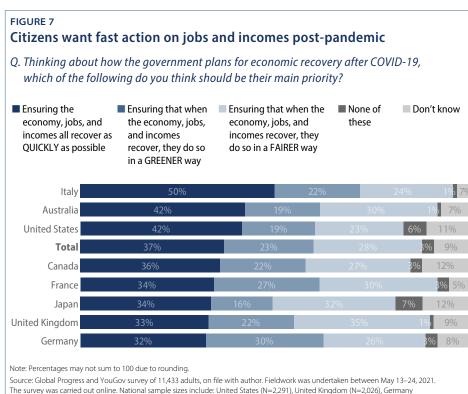


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Citizens want to see their economies, jobs, and incomes recover quickly

Presented with three options about a "quicker, greener, or fairer" recovery, a plurality of citizens in seven of the eight nations examined—and 37 percent of adults across all nations polled—said the main priority for governments should be acting as quickly as possible to ensure jobs and incomes get back to full strength. (see Figure 7)

Preference for quick action over other priorities is highest in Italy (50 percent), the United States (42 percent), and Australia (42 percent). Preference for a fairer recovery is highest in the United Kingdom (35 percent), and preference for a greener recovery is highest in Germany (30 percent).

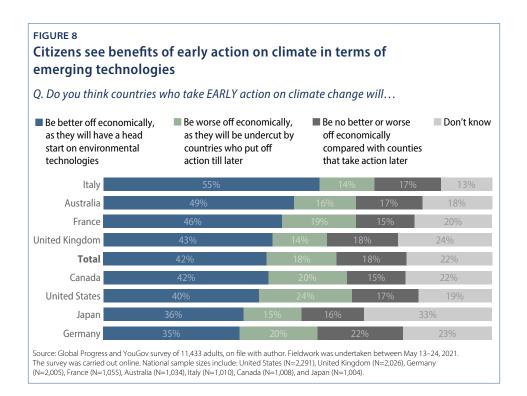


(N=2,005), France (N=1,055), Australia (N=1,034), Italy (N=1,010), Canada (N=1,008), and Japan (N=1,004).

While a quick recovery remained a priority for many citizens, fairness in society is important too: Nearly 7 in 10 people across leading economies believe that the difference between rich and poor in their country is too large, and less than one-fifth feel it is about right.

In terms of greener sentiments, support for climate action is muted somewhat by substantial portions of populations—ranging from one-third of those surveyed in Japan to nearly half in France—believing that there is "little or nothing" their country can do to make a difference on climate without other large nations such as China and India joining in. Notable percentages of people in G-7 nations also express concern that steps to combat climate change are more likely to destroy jobs, with concerns about possible job losses highest among Americans (35 percent) and lowest among Japanese (14 percent).

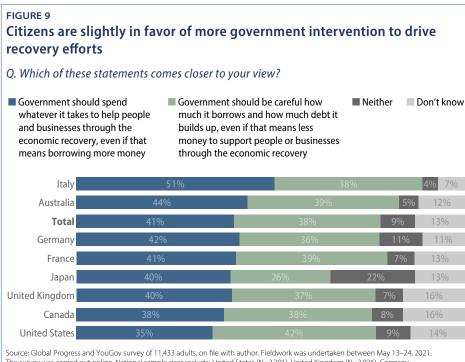
At the same time, significant percentages of citizens across these nations recognize the advantages of taking early action on climate change. As seen in Figure 8, 42 percent of citizens overall believe that countries that take early action will be "better off economically, as they will have a head start on environmental technologies," compared with around one-fifth who feel countries will be worse off or no better and no worse off from early action.



Although these three goals—quicker, fairer, or greener action—need not be in conflict, the desire for fast action to restore jobs and wages underpins citizens' willingness to do more domestically and globally to get economies back on track post-pandemic.

G-7 citizens split on government intervention, but favor higher taxes on large companies and the wealthy

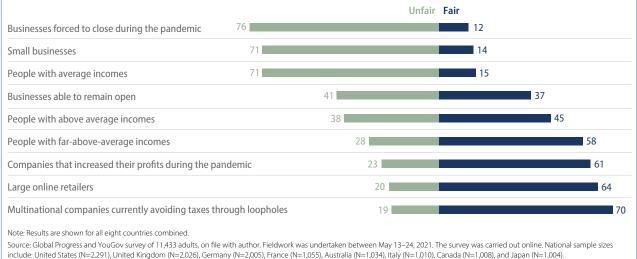
Citizens are effectively split down the middle when it comes to perspectives on government intervention. The study finds that by a 41 percent to 38 percent margin across all eight nations, citizens agree that their "government should spend whatever it takes to help people and businesses through the economic recovery, even if that means borrowing more money" over the alternative that "government should be careful how much it borrows and how much debt it builds up, even if that means less money to support people or businesses through the economic recovery." (see Figure 9)



Source: Global roughess and roughess and roughest and rou

FIGURE 10 Citizens back higher taxes on multinational companies and the wealthy

Q. Thinking about how governments should raise money to fund spending on the economic recovery, do you think it would be fair or unfair to increase taxes on...



Respondents' preference for spending whatever it takes over watching spending is greater among voters in Italy (51 percent compared with 38 percent), Australia (44 percent compared with 39 percent), Germany (42 percent compared with 36 percent), and Japan (40 percent compared with 26 percent). It is lower in the United States (35 percent compared with 42 percent) and Canada (split evenly at 38 percent).

Notably, given G-7 discussions about a global corporate tax regime, the study finds that strong majorities of citizens across all eight nations believe that it is fair to raise taxes on multinational corporations and the wealthy to help pay for recovery but that it is unfair to do so on small businesses and people with average incomes.

As seen in Figure 10, more than 7 in 10 people think it would be unfair to raise taxes on people with average incomes and small businesses or others forced to close during the pandemic. In contrast, 70 percent of people across nations say it is fair to tax multinational companies more in order to fund spending on economic recovery, and around 6 in 10 citizens think similarly about increased taxation on large online retailers, companies that profited during the pandemic, and people with far above-average incomes.

Majority of G-7 citizens believe social media has made society more divided

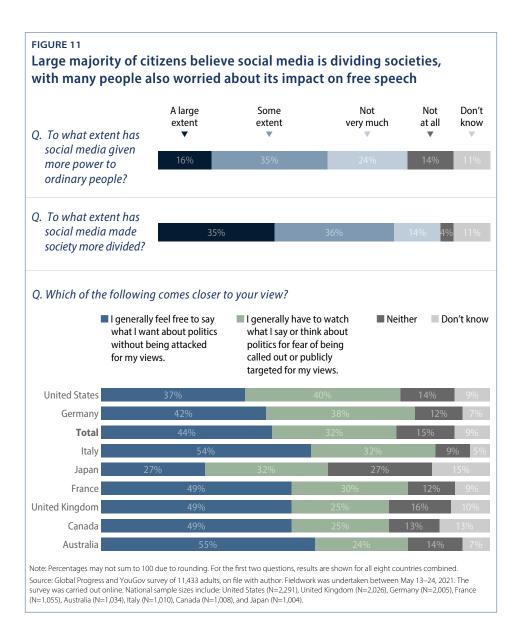
Citizens recognize the powerful effect of social media. On the positive side of the rise of social media in contemporary life, 51 percent of citizens across all eight nations believe that social media has given "more power to ordinary people" to a large extent or to some extent, compared with 38 percent who believe it has done very little or nothing at all to empower ordinary people. On the negative side of this trend, a full 71 percent of citizens across these nations report that social media has "made society more divided" to a large extent or to some extent.

These effects extend to perspectives on free speech. As seen in Figure 11, around one-third of citizens overall report that they must watch what they say or think about politics for fear of being called out or publicly targeted for their views, compared with around 4 in 10 who generally feel free to say what they want about politics without being attacked for their views.

The United States stands out noticeably on this measure, with 40 percent of Americans saying that they must watch what they say or think about politics, compared with 37 percent who feel free to express themselves. On the other end, majorities of Italians (54 percent) and Australians (55 percent) report feeling more free than cautious when speaking about politics.

Citizens worry about the effect of artificial intelligence and other technologies on jobs and wages

As technology continues to shape work and personal life across societies, the benefits of these changes are now being weighed against potential costs to people's livelihoods. Looking forward, how do citizens view new technologies and other future trends? The study finds that few people in these nations perceive positive effects from rising artificial intelligence (AI) and other technological innovations.



Respondents expressed significant fears about losing their jobs or parts of their income due to these changes. For example, by a 49 percent-to-19 percent margin, people across all eight countries say these technologies will have a negative impact on the availability of jobs. Likewise, by a 38 percent-to-19 percent margin, people perceive negative over positive impacts on the amount of money people will earn from AI and emerging technologies.

Many people are concluding that if they don't lose their job due to technology, they are still likely to lose income as a result of these changes.

Majorities of citizens in Germany (51 percent) and the United Kingdom (55 percent) worry about negative effects on jobs from new technologies, with concern above 40 percent in all eight nations. Concerns about the impact of new technologies on wages is consistent across all nations, with approximately 4 in 10 people in each country expecting negative impacts from technology—slightly fewer in Japan at about one-third.

Majorities of G-7 citizens view China as more of a threat than an opportunity

Most citizens across all eight nations (53 percent) feel that China's position in world affairs poses more of a threat than an opportunity to their own country. Perceptions of China as a threat are greater in Australia (65 percent) and Japan (63 percent) and lower in Italy (44 percent) and Germany (45 percent). China's position is not seen as more of an opportunity than a threat by citizens in any of the eight surveyed nations.

On another measure, nearly two-thirds of respondents say they would personally be uncomfortable taking a Chinese-developed vaccine for COVID-19.

Despite concerns about China, citizens are likely to place China at the top of the list of countries most likely to lead the future. Presented with a list of countries—including China, India, Russia, and Brazil—32 percent of people selected China as most "likely to be successful in the next few decades," with 22 percent choosing the United States and 8 percent selecting the European Union as most likely to do well going forward.

In light of President Biden's meeting with Russian President Vladimir Putin after the G-7, it is interesting to note that Russia also stands out as more of a threat than an opportunity to people in the United Kingdom (59 percent) and the United States (53 percent).

President Biden's 'build back better' ideas garner widespread support

Finally, the study presented respondents with a description of President Biden's recovery and investment ideas, described below, and asked them whether they would support or oppose a similar plan in their country (with slightly different wording used in the U.S. survey):

President Biden has said he will spend \$2 trillion on infrastructure, health care, renewable energy, paid in large part by a tax on corporate profits, with an aim to make the U.S. economy more environmentally friendly, fairer, and more globally competitive. To what extent would you support or oppose your country's government following a similar approach?

Interestingly, two-thirds of citizens in Canada and Australia—and more than 7 in 10 people in France, Germany, the United Kingdom, and Italy—say they would support such investments in their own countries. Driven by large partisan divisions, support is lower in the United States at 55 percent, with 90 percent of Biden voters supporting his plans and around one-fifth among Trump voters. Recent Center for American Progress data, however, show that 4 in 10 Republicans back President Biden's American Rescue Plan, which was passed into law earlier this year, suggesting some inroads with voters not in his partisan camp.⁴

Conclusion

These findings provide important challenges and opportunities for governments going forward. On the one hand, citizens in leading G-7 nations clearly see a role for government in preventing future pandemics, stopping economic crises from harming their countries, and coordinating with other nations on common challenges. On the other hand, people in many leading economies are split somewhat on the scope of desired reforms on issues related to government intervention, and particularly on climate action.

However, with a concentrated effort on rapid and widely shared economic recovery serving as the primary goal of political action, people can be brought on board in support of large public investments and rebuilding policies consistent with the early steps of the Biden administration.

As leaders of the G-7 nations seek to build on their cooperation and renewed goodwill in Cornwall, they would be wise to examine these data about the lessons the public has learned from the pandemic and devise strong steps for successful recovery and rebuilding consistent with public values. Without this support at home, international cooperation to tackle the biggest global challenges on public health, inequality, and global warming will be hard to sustain.

About the authors

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Endnotes

- 1 This research was conducted by YouGov on behalf of Global Progress. The total sample size was 11,433 adults. Fieldwork was undertaken from May 13, 2021, to May 24, 2021. The survey was carried out online. National sample sizes included: United States (N=2,291), United Kingdom (N=2,026), Germany (N=2,005), France (N=1,055), Australia (N=1,034), Italy (N=1,010), Canada (N=1,008), and Japan (N=1,004). These samples are nationally and politically representative in all countries apart from Japan and Australia, where they are just nationally representative.
- 2 Executive Office of the President, "Carbis Bay G7 Summit Communique," Press release, June 13, 2021, available at https://www.whitehouse.gov/briefing-room/statementsreleases/2021/06/13/carbis-bay-g7-summit-communique/.
- 3 Global Progress and YouGov are grateful to Data Sciences for permission to use this image and question in the survey.

4 See John Halpin, "How Americans Envision a More Perfect Union: A Common Path Forward for the Country" (Washington: Center for American Progress, 2021), available at https://www.americanprogress.org/issues/politics-andelections/reports/2021/05/26/499742/americans-envisionperfect-union/.

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And we believe an effective government can earn the trust of the American people, champion the common good over narrow self-interest, and harness the strength of our diversity.

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