

April 20, 2020

## First Survey of *Sei-katsu-sha* Concerning COVID-19

If freedom of life in normal times is 100, life today scores 54.3 points  
“The economy stalling” (91.2%) is the top thing people are anxious about

Hakuhodo Institute of Life and Living, a think tank of Hakuhodo Inc., in April 2020 conducted “Survey of *Sei-katsu-sha* Concerning COVID-19” to understand *sei-katsu-sha*’s attitudes and behaviors as the new coronavirus has been spreading recently.

When we asked *sei-katsu-sha* to rate their freedom of life under current circumstances if their normal life prior to the spread of COVID-19 rated 100 points, the result was 54.3 points.

The highest scoring item among 30 items covering anxieties, activity restrictions and behavioral changes that have occurred as a result of the spread of COVID-19, Feel anxious about the economy stalling came out top, at 91.2%. In terms of activities and behaviors, various activities were being restricted, with Refrain from travel and leisure activities (88.7%), Refrain from meeting friends and socializing (85.1%) and similar items receiving high scores. Conversely, scores for Refrain from going out and use net shopping and food delivery services instead (38.9%) and Telework (work from home) as far as possible (23.5%) [Base: Those with jobs], were comparatively low.

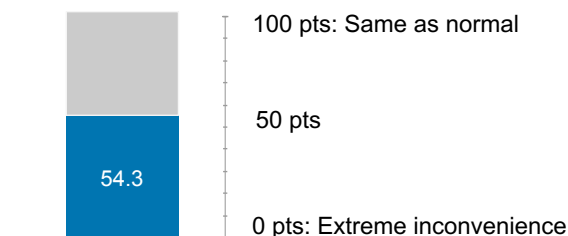
This survey will be conducted regularly for the time being (The survey content may be changed depending on circumstances).

### Freedom of life under the influence of COVID-19

Q: If your normal life prior to the spread of COVID-19 rates 100 points, and extreme inconvenience due to the spread of the virus rates 0, how would you rate the degree of freedom of your current life?

If normal life rates 100 points, the current degree of life freedom is:

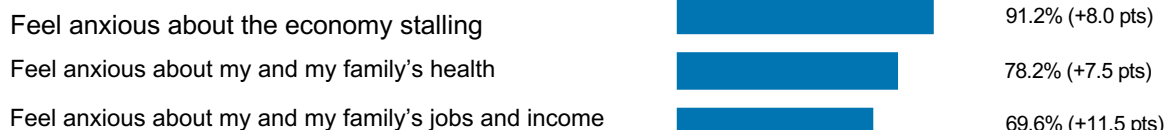
**54.3** points



### Attitudes and behavior under the influence of COVID-19 (Excerpt)

Q: Below is a series of opinions given as a result of the spread of COVID-19. For each, select the opinion that best matches your feelings and/or behavior. (Single response: Agree, Somewhat agree, Somewhat disagree, Disagree)

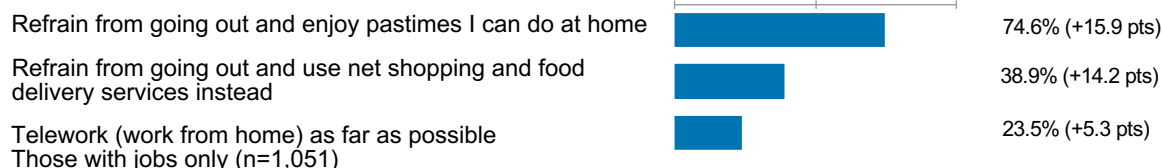
#### Degree of anxiety



#### Degree of activity restriction



#### Degree of behavioral change



# Reference material 1: Freedom of life under the influence of COVID-19

- Giving normal life prior to the spread of COVID-19 a score of 100 points, the average score for freedom of life under the influence of COVID-19 came in at 54.3 points, with the score for males, 55.3, slightly higher than the score for females, 53.2.
- By age group, the score for the 60–69 age group was highest at 57.6 points. Possible reasons include that many in this age group have already retired and no longer venture far from home, meaning that their lives are less affected than younger age groups.
- When asked to give the reason for their freedom of life score, among those who gave relatively high scores, many mentioned that there was not much change for them since they don't normally go out much anyway. Conversely, among those that gave low scores, many pointed to restricted opportunities to meet friends and socialize and feeling stressed from not being able to go outside.

## ■ Results by gender and age group

	(Number of respondents)								
	Total (1,500)	Males (755)	Females (745)	20–29 (241)	30–39 (286)	40–49 (375)	50–59 (319)	60–69 (279)	
Degree of freedom of life	54.3	55.3	53.2	53.3	52.7	52.8	55.2	57.6	

## ■ Distribution of high, medium and low scores

		(Points)								
		Total (1,500)	Males (755)	Females (745)	20–29 (241)	30–39 (286)	40–49 (375)	50–59 (319)	60–69 (279)	
Degree of freedom of life	High (61 points or higher)	33.8	37.2	30.3	34.4	30.4	30.4	37.6	36.9	
	Medium (41–60 points)	36.6	34.6	38.7	34.0	39.2	37.6	32.6	39.4	
	Low (40 points or lower)	29.6	28.2	31.0	31.5	30.4	32.0	29.8	23.7	

## ■ Reason for freedom of life score (free answer)

Degree of freedom of life	High (61 points or higher)	Reason	Points	Gender and Prefecture
High (61 points or higher)	High (61 points or higher)	I live alone in a three-bedroom home and with the space to create a room to my liking, have managed to create a theater room, so I can have fun at home without ever going out.	100 points	Male, 20 Aichi Pref.
		I normally don't go to crowded places and work in an industry unsuited to working from home. I have always commuted by car, so my life has basically not changed. If this situation drags on, there might be some impact on the business trips I normally take from fall to winter.	95 points	Male, 53 Nara Pref.
		I would normally take a train to go out around once every month or two and the only change is that that is now zero, so it's not so inconvenient. Plus, the situation in my city is not as tense as Tokyo, so going shopping locally hasn't changed much.	80 points	Female, 60 Chiba Pref.
		I like reading and doing other things at home, so even though I have fewer invitations from acquaintances, I have more time for myself at home. But I am a bit concerned because we don't know how long this will last.	80 points	Male, 27 Osaka Pref.
		I am on maternity leave and wasn't going out a lot anyway, so there's not much change, but I am anxious that I can't buy (don't buy) everyday necessities when I need them.	70 points	Female, 31 Osaka Pref.
	Medium (41–60 points)	Lots of places are closed and my activities are restricted. TV is all Coronavirus news and I'm sick of it.	60 points	Female, 25 Aichi Pref.
		My child's kindergarten is closed, I can't go out at the weekend and can't get together with friends, so I feel very much inconvenienced compared to normal, but I'm still able to maintain my basic life and health.	60 points	Female, 41 Kanagawa Pref.
		I'm refraining from going out, don't commute as I work from home, and can't watch any of my favorite sports at the weekend, like Japan Rugby Top League and Super Rugby.	55 points	Male, 61 Chiba Pref.
		I'm not in good shape because I can't go to the gym. I live alone so if I don't see my friends, I don't have anyone I can meet directly.	50 points	Female, 64 Tokyo
		Meals with friends have all been canceled, so I am very restricted other than my job.	50 points	Male, 44 Osaka Pref.
Low (40 points or lower)	With the kids home all day because their schools are closed, they fight more from the stress, and I get angry more now too from having to mediate. I feel helpless not knowing what lies ahead and don't feel I can rely on the government, and can't escape the stress of it all.	40 points	Female, 45 Kanagawa Pref.	
	I'm getting fewer shifts than expected at my part-time job, so my income is down and I can't shop online, even though it's safe. I don't have the money, so I couldn't make any "nonessential, nonurgent trips" anyway.	35 points	Female, 43 Osaka Pref.	
	I'm not able to go out. I was scheduled to start a new job, but wasn't able to do that. I can't even socialize with my friends or eat out. I've also had entertainment like watching sports and going to movies taken away from me so my plans have changed immensely.	30 points	Male, 26 Osaka Pref.	
	I'm at home all the time and can't move around so can't even exercise, plus the restrictions on things I like doing are severe and the stress is starting to get to me.	20 points	Male, 37 Kanagawa Pref.	
	Even though my income is down I have to keep riding packed trains and aside from anxiety about getting infected, I have to curtail all sorts of things in my own time and the stress is building. It's affecting all aspects of my life.	10 points	Male, 35 Tokyo	

## Reference material 2: Attitudes and behavior under the influence of COVID-19

- In attitudes and behavior under the influence of COVID-19, among the 30 items surveyed, the Degree of anxiety item Feel anxious about the economy stalling received the highest score, 91.2%.
- By gender and age, among Degree of anxiety and Degree of activity restriction items, two trends were observed: scores for females tended to be higher than scores for males and scores for older age groups tended to be higher than scores for younger age groups. Conversely, in Degree of behavioral change, many items related to use of online and digital services, such as I'm at home more, so use video, music and other streaming services, saw higher scores among younger than older age groups.
- Of the 30 items surveyed, the 15 items that were also surveyed in March all received higher scores in the April survey. In particular, the values for Degree of activity restriction were markedly higher, indicating that attitudes to refraining from various activities have increased in this one-month period.

### Results by gender and age group

(Number of respondents)

		Overall (1,500)	Males (755)	Females (745)	20–29 (241)	30–39 (286)	40–49 (375)	50–59 (319)	60–69 (279)
Degree of anxiety	Feel anxious about the economy stalling	91.2	89.1	93.3	82.2	88.8	93.6	94.4	94.6
	Feel anxious about the government's response	86.9	81.9	92.1	80.9	85.7	88.5	89.0	88.9
	Feel anxious about the situation abroad	83.5	81.2	85.9	71.4	80.4	87.5	86.5	88.5
	Feel anxious about the lack and uncertainty of information	82.3	78.0	86.6	77.2	81.8	86.9	79.9	83.5
	Feel anxious about my and my family's health	78.2	72.6	83.9	73.9	72.7	76.3	83.1	84.6
	Feel anxious about my and my family's jobs and income	69.6	67.8	71.4	71.0	70.6	72.8	70.5	62.0
Degree of activity restriction	Refrain from taking nonessential and nonurgent trips	89.3	85.0	93.7	80.5	87.8	91.7	91.8	92.5
	Refrain from travel and leisure activities	88.7	84.0	93.4	81.7	85.0	90.7	90.3	93.9
	Refrain from experiential entertainment (gigs, theater, movies, etc.)	86.7	81.9	91.7	82.2	84.6	87.5	88.4	90.0
	Refrain from meeting friends and socializing	85.1	78.8	91.4	74.7	82.2	88.5	87.1	90.0
	Refrain from nonessential and nonurgent shopping	84.2	80.7	87.8	75.9	81.8	87.2	85.3	88.5
	Refrain from eating out	82.7	75.9	89.5	76.8	78.7	84.0	84.0	88.5
Degree of behavioral change	Started consistently wearing a mask, washing my hands and taking other precautions against infection	90.8	85.6	96.1	83.4	86.7	95.2	90.6	95.7
	Make sure to get sufficient exercise, nutrition and sleep	79.5	76.4	82.6	72.2	81.5	79.5	79.3	83.9
	Refrain from going out and enjoy pastimes I can do at home instead	74.6	70.1	79.2	74.7	77.6	75.5	71.2	74.2
	Keep a stock of anti-infection products and everyday goods	60.5	54.8	66.2	56.4	59.4	62.7	57.7	65.2
	I'm at home more, so play video games on my smartphone, computer, etc.	49.3	49.0	49.7	69.3	58.7	48.8	38.9	35.1
	Avoid using public transport and drive to places instead	46.9	42.0	51.8	46.9	49.3	47.5	42.0	49.1
	I'm at home more, so use video, music and other streaming services	44.7	47.5	41.7	69.3	52.4	41.9	35.4	29.7
	Refrain from going out and use net shopping and food delivery services instead	38.9	36.0	41.7	41.5	40.2	40.0	35.1	38.0
	Enjoy leisure activities outdoors where people don't gather	38.2	36.3	40.1	39.8	43.0	38.1	29.5	41.9
	I'm at home more, so read and post on social media	35.0	31.7	38.4	59.3	44.8	35.2	22.9	17.6
	Commute to work/school during off-peak hours as far as possible	34.4	36.2	32.6	36.9	36.4	34.4	34.5	30.1
	Telework (work from home) as far as possible [Base: Those with jobs] n=1,051	23.5	27.4	17.5	26.6	21.3	23.3	24.4	22.2
	I'm at home more, so I'm upgrading my home environment by updating the telecommunications environment, buying home appliances, etc.	21.6	25.3	17.9	33.2	25.5	24.5	14.4	11.8
	I'm at home more, so am posting and selling things on flea market apps and net auctions	18.3	20.7	15.8	29.5	24.1	17.9	12.5	9.7
	I'm at home more, so I'm buying things on flea market apps and net auctions	17.6	19.6	15.6	27.8	19.6	18.4	14.4	9.3
	I'm at home more, so I'm investing	16.3	24.8	7.7	22.0	20.6	16.5	11.0	12.5
I'm at home more, so I have a second job	14.9	18.0	11.7	30.3	19.2	12.8	9.1	6.5	
I'm at home more, so am studying online	14.3	17.9	10.7	25.7	17.8	13.6	10.3	6.5	

Key (%)

At least 5 points higher than the average

At least 5 points lower than the average

# Reference material 3: Attitudes and behavior under the influence of COVID-19

■ Chronological change (Overall basis: March and April 2020) Agree + Somewhat agree

(Number of respondents)

		March survey (1,500)	April survey (1,500)	Difference (April - March)
Degree of anxiety	Feel anxious about the economy stalling	83.2	91.2	+8.0
	Feel anxious about the government's response	---	86.9	---
	Feel anxious about the situation abroad	---	83.5	---
	Feel anxious about the lack and uncertainty of information	74.1	82.3	+8.2
	Feel anxious about my and my family's health	70.7	78.2	+7.5
	Feel anxious about my and my family's jobs and income	58.1	69.6	+11.5
Degree of activity restriction	Refrain from taking nonessential and nonurgent trips	72.5	89.3	+16.8
	Refrain from travel and leisure activities	69.1	88.7	+19.6
	Refrain from experiential entertainment (gigs, theater, movies, etc.)	---	86.7	---
	Refrain from meeting friends and socializing	59.9	85.1	+25.2
	Refrain from nonessential and nonurgent shopping	64.5	84.2	+19.7
	Refrain from eating out	61.1	82.7	+21.6
Degree of behavioral change	Started consistently wearing a mask, washing my hands and taking other precautions against infection	84.1	90.8	+6.7
	Make sure to get sufficient exercise, nutrition and sleep	---	79.5	---
	Refrain from going out and enjoy pastimes I can do at home	58.7	74.6	+15.9
	Keep a stock of anti-infection products and everyday necessities	50.7	60.5	+9.8
	I'm at home more, so play video games on my smartphone, computer, etc.	---	49.3	---
	Avoid using public transport and drive to places instead	---	46.9	---
	I'm at home more, so use video, music and other streaming services	---	44.7	---
	Refrain from going out and use net shopping and food delivery services instead	24.7	38.9	+14.2
	Enjoy leisure activities outdoors where people don't gather	---	38.2	---
	I'm at home more, so read and post on social media	---	35.0	---
	Commute to work/school in off-peak hours as far as possible	25.5	34.4	+8.9
	Telework (work from home) as far as possible [Base: Those with jobs March n=1,042, April n=1,051]	18.2	23.5	+5.3
	I'm at home more, so I'm upgrading my home environment by updating the telecommunications environment, buying home appliances, etc.	---	21.6	---
	I'm at home more, so I'm posting and selling things on flea market apps and net auctions	---	18.3	---
	I'm at home more, so I'm buying things on flea market apps and net auctions	---	17.6	---
	I'm at home more, so I'm investing	---	16.3	---
	I'm at home more, so I have a second job	---	14.9	---
	I'm at home more, so I'm studying online	---	14.3	---

(%) (pt)

## Survey outline

### ■ Question items (question text)

#### Freedom of life under the influence of COVID-19

If your normal life prior to the spread of COVID-19 rates 100 points, and extreme inconvenience due to the spread of the virus rates 0, how would you rate the degree of freedom of your current life?  
Also give the reason for your rating. (Free response)

#### Attitudes and behavior under the influence of COVID-19

Below is a series of opinions given as a result of the spread of COVID-19. For each, select the opinion that best matches your feelings and/or behavior.  
(Single response: Agree, Somewhat agree, Somewhat disagree, Disagree)

**Survey period:** March 5 (Thu)–9 (Mon), 2020  
April 2 (Thu)–6 (Mon), 2020 (prior to the government declaration of a state of emergency)

**Territories:** (1) 40 km radius of the center of Tokyo, (2) 40 km radius of Nagoya,  
(3) 30 km radius of Osaka-Kobe

**Respondents:** Males and females aged 20–69

#### Target allocation proportions:

500 respondents per territory, allocated based on the population demographics (gender/age group) of that territory

**Sample size:** 1,500 in total

#### March survey

	20–29	30–39	40–49	50–59	60–69	Total
Males	124	147	190	154	140	755
Females	119	143	186	150	147	745
Total	243	290	376	304	287	1500

#### April survey

	20–29	30–39	40–49	50–59	60–69	Total
Males	122	145	190	161	137	755
Females	119	141	185	158	142	745
Total	241	286	375	319	279	1500

**Survey method:** Internet survey

#### Research organization:

H. M. Marketing Research, Inc.

Note:  
This survey will be conducted regularly for the time being (The survey content may be changed depending on circumstances).

Media contacts:  
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