

June 18, 2020

Third Survey of *Sei-katsu-sha* Concerning COVID-19 (June 2020)

Degree of freedom of life up around 6 pts since last month 57.0 pts, following the lifting of the state of emergency

Anxieties about health and the economy ease, as has restricting eating out and shopping

***Sei-katsu-sha*'s behavior gradually shifting from "at home" to "outside"**

Hakuhodo Institute of Life and Living, a think tank of Hakuhodo Inc., in June 2020 conducted its third "Survey of *Sei-katsu-sha* Concerning COVID-19" to understand *sei-katsu-sha*'s attitudes and behaviors as the new coronavirus has spread. The survey was conducted June 4–8, 2020 in the Greater Tokyo, Greater Nagoya (Aichi, Mie and Gifu Prefectures) and Hanshin (Osaka, Kyoto, Hyogo and Nara Prefectures) areas, targeting 1,500 males and females aged 20–69. Some questionnaire items have been surveyed since March. See p14 for the survey outlines.

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 57.0 points. Coming on the heels of the government lifting the state of emergency on May 25, this is an increase of 5.9 points since the May survey.

We also asked about 41 items respondents may be feeling anxious about, activities they may be restricting and behaviors they may have changed as a result of the spread of COVID-19. In Degree of anxiety, scores for such items as Feel anxious about the economy stalling (83.0%) remain high, but were lower than in the May survey. In Degree of activity restriction, many items, including Refrain from eating out (83.8%), dropped significantly since the May survey. In Degree of behavioral change, change was uneven, with Refrain from going out and enjoy pastimes I can do at home (77.3%) dropping, while Enjoy leisure activities outdoors where people don't gather (38.9%) rose.

These changes suggest that restrictions on behavior are easing slightly as anxiety lessens, and *sei-katsu-sha* are gradually shifting their activities from at home to outside.

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

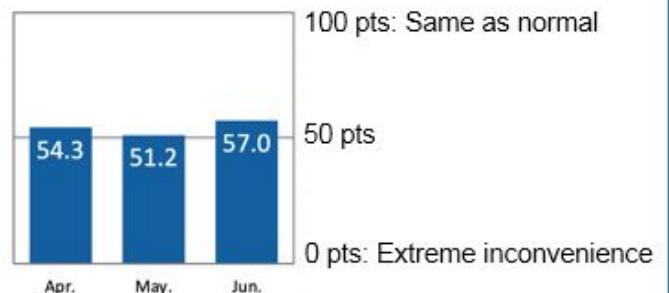
Freedom of life under the influence of COVID-19

Q: If your normal life prior to the spread of COVID-19 is 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:

57.0 pts

Up 5.9 pts compared to last month



Values have been calculated to two decimal places, however figures in this report have been rounded to the nearest tenth. Any discrepancies are due to rounding.

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)

Agree +Somewhat agree (Change since previous month)

Degree of anxiety	Feel anxious about the economy stalling	83.0% (-7.2 pts)
	Feel anxious about my and my family's health	67.9% (-6.0 pts)
Degree of activity restriction	Refrain from eating out	83.8% (-7.2 pts)
	Refrain from nonessential and nonurgent shopping	83.6% (-7.0 pts)
Degree of behavioral change	Refrain from going out and enjoy pastimes I can do at home	77.3% (-9.6 pts)
	Enjoy leisure activities outdoors where people don't gather	38.9% (+6.4 pts)

Behavior after COVID-19 stabilizes (Excerpt)

Q: Will you engage in the following behaviors in the future even if concerns about becoming infected with COVID-19 have subsided? For each, select the option that best matches your intentions.

(Single response: Think I will, Think I will sometimes, Think I won't much, Think I won't)

		Behavior intentions after COVID-19 is stabilized Think I will + Think I will sometimes	Reference Current behavior Agree +Somewhat agree
Hygiene & health behaviors	Consistently wear a mask, wash my hands and take other precautions against infection	85.8%	93.2%
	Refrain from shaking hands, hugging and otherwise touching others	72.4%	82.0%
Online behaviors	Telework (work from home) as much as possible (Base: Those with jobs n=1,052)	32.7%	36.7%
	Participate in online drinking parties and dinners	21.2%	21.3%

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

Degree of freedom of life up significantly since May

- In Degree of freedom of life under the influence of COVID-19, if life prior to the spread of the coronavirus was 100, life today scored an average 57.0 points, up 5.9 points since April. The government announcing the lifting of the state of emergency on May 25 appears to have influenced the rise in Degree of freedom scores. By gender, age group and area, rises were seen in across every segment, although at 55.0 points, the score for Greater Tokyo was slightly less than those for the other areas.

Reason for high Degree of freedom scores: Because they don't need to encounter people?

- When we asked respondents to write freely about the reason for their degree of freedom of life scores, among those that gave comparatively high scores, responses along the lines of decreased contact with others and maintaining distance from others being preferable, anyway, stood out. Conversely, many of those who gave lower scores pointed to less work and income, the restrictions and stresses of considering others when out and the unpleasantness of wearing masks in the summer.

■ Results by gender, age group and area

		Scores			Change	
		April 2020 survey (Pts)	May 2020 survey (Pts)	June 2020 survey (Pts)	April → May (Pts)	May → June (Pts)
Overall	(1,500)	54.3	51.2	57.0	-3.1	+5.9
Males	(755)	55.3	50.3	57.1	-5.0	+6.8
Females	(745)	53.2	52.1	56.9	-1.2	+4.9
20–29	(241)	53.3	49.4	57.7	-3.9	+8.3
30–39	(286)	52.7	51.0	56.6	-1.7	+5.6
40–49	(375)	52.8	52.0	56.1	-0.8	+4.1
50–59	(319)	55.2	50.8	56.9	-4.5	+6.1
60–69	(279)	57.6	52.2	58.3	-5.5	+6.1
Tokyo (40 km radius)	(500)	52.0	50.5	55.0	-1.5	+4.4
Greater Nagoya (40 km radius)	(500)	57.9	52.1	57.5	-5.8	+5.3
Hanshin (30 km radius)	(500)	52.9	50.9	58.7	-2.0	+7.8

Up at least 5 pts
Up at least 10 pts
Down at least 5 pts
Down at least 10 pts

■ Distribution of high, medium and low degree of freedom of life scores

		Distribution of high, medium and low scores		
		High (61 pts or higher) (%)	Medium (41–60 pts) (%)	Low (40 pts or lower) (%)
Overall	(1,500)	39.3	37.5	23.1
Males	(755)	39.6	35.8	24.6
Females	(745)	39.1	39.3	21.6
20–29	(241)	41.1	34.0	24.9
30–39	(286)	36.7	39.2	24.1
40–49	(375)	37.6	41.3	21.1
50–59	(319)	42.0	32.6	25.4
60–69	(279)	39.8	39.4	20.8
Tokyo (40 km radius)	(500)	36.6	36.4	27.0
Greater Nagoya (40 km radius)	(500)	39.4	38.8	21.8
Hanshin (30 km radius)	(500)	42.0	37.4	20.6

Values have been calculated to two decimal places, however figures in this report have been rounded to the nearest tenth. Any discrepancies are due to rounding.

■ Reason for freedom of life score (Free response; selected responses)

Degree of freedom of life	High (61 points or higher)	I'm a homemaker and my husband is required to commute to work as normal, so other than my child not going to school, my life has hardly changed. I think taking it easy as a family at home from time to time is a good thing. I'm not fond of meeting people, so I was really glad when things like parent meetings at school couldn't be held.	98 pts	Female, 45 Saitama Pref.
		This inconvenient life is not particularly taxing; I have less work to do and am home more, so it's actually rather pleasant.	90 pts	Male, 49 Aichi Pref.
		I'm refraining from going to the hair salon, so I deducted 10 points. But I'm glad that gatherings I didn't want to go to like memorial services for the dead and my husband's nephew and niece's weddings had to be canceled due to the coronavirus. I can get away with just a quick greeting to those annoying middle-aged women that always trap me in conversation when I'm out shopping.	90 pts	Female, 60 Osaka Pref.
		My opportunities to meet people face-to-face might have dropped, but I've made an effort to actively participate in online events, so my everyday life is full. I didn't really prioritize conversations with people to begin with.	80 pts	Male, 27 Tokyo
		Life is gradually getting back to normal and now I just think it would be good if we could move freely between prefectures. Anti-infection measures like social distancing and not talking in a loud voice suit me fine.	70 pts	Female, 60 Osaka Pref.
	Medium (41–60 points)	I'm worried about my current employment and want to change jobs, but hiring might drop. Even though I want to look for a marriage partner, I don't have new face-to-face encounters any more. Even though I live on the border between prefectures, I can't travel between prefectures.	60 pts	Female, 35 Aichi Pref.
		I don't normally go out much, so I'm not especially bothered, but the general atmosphere that you have to wear a mask and shouldn't eat out is oppressive.	60 pts	Male, 63 Tokyo
		Because even though the world might be getting back to normal after self-isolation was lifted, I know I can't just go somewhere crowded like I did before. And because we still can't travel across prefectures, so I can't visit my hometown.	60 pts	Female, 40 Osaka Pref.
		With work from home being recommended, I can spend my commute time with my family and on myself, but my income has dropped, so I can't have the balanced life I had before, financially.	50 pts	Male, 36 Kanagawa Pref.
		My classes are online now and income from my part-time job has dropped, but I am home more and have more free time.	50 pts	Female, 20 Aichi Pref.
	Low (40 points or lower)	Masks are a real pain as summer gets closer. I don't like the heat and sweat a lot at the best of times, and think I'm going to get sick from wearing a mask.	30 pts	Male, 53 Osaka Pref.
		Multiple people in my family are teleworking, so they're using the living room, too. I can't watch TV at times I would normally be able to, and have to take others into consideration every time I want to vacuum or clean. Our telecommunications environment is not the best, so I worry about time even just using the microwave.	30 pts	Female, 64 Kanagawa Pref.
		I can't go shopping for clothes or go the hair salon for fear of COVID-19. I'm pregnant, but all I have is complaints: My husband is forbidden from coming to my pre-natal checkups, my pre-natal classes have been canceled, my husband won't be allowed at the birth, I won't be allowed visitors while in hospital, and I can't even travel in the stable period of my pregnancy.	10 pts	Female, 34 Aichi Pref.
		Even if I want to work, jobs have dropped right off. Without money, I can't do anything.	10 pts	Male, 35 Osaka Pref.
		I can't go anywhere, and even if I do, I have to wear a mask and sanitize. I'm in the service industry, so am at risk of infection every day, and wearing masks and goggles at work is really uncomfortable.	0 pts	Female, 27 Gifu Pref.

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

Degree of anxiety scores decline further since May, Degree of activity restriction scores also start easing

- In Degree of anxiety, scores declined overall in June. Items other than Feel anxious about changes in my interpersonal relationships have gradually fallen since they peaked in April.
- In Degree of activity restriction, the items that we have asked about in each survey were all lower, but remain in the 80% range, topped by Refrain from taking nonessential and nonurgent trips (88.9%).

Gradual shift in *sei-katsu-sha*'s behavior from "at home" to "outside"





- In Degree of behavioral change, score changes were uneven. Refrain from going out and enjoy pastimes I can do at home dropped 9.6 points to 77.3% from May, and Refrain from going out and use net shopping and food delivery services instead dropped 8.4 points to 51.1%. At the same time, Enjoy leisure activities outdoors where people don't gather increased 6.4 points to 38.9%, and other scores suggest that *sei-katsu-sha* are gradually shifting their activities from at home to outside.

■ Chronological change (Overall basis: March–June 2020)

		Scores				Change		
		March survey (1500)	April survey (1500)	May survey (1500)	June survey (1500)	March → April (Pts)	April → May (Pts)	May → June (Pts)
Degree of anxiety	Agree + Somewhat agree (Number of respondents)							
	Feel anxious about the economy stalling	83.2	91.2	90.2	83.0	+8.0	-1.0	-7.2
	Feel anxious about the government's response	---	86.9	81.1	77.4	---	-5.8	-3.7
	Feel anxious about the situation abroad	---	83.5	78.5	74.7	---	-5.0	-3.8
	Feel anxious about my and my family's health	70.7	78.2	73.9	67.9	+7.5	-4.3	-6.0
	Feel anxious about the lack and uncertainty of information	74.1	82.3	77.9	67.9	+8.2	-4.4	-10.0
	Feel anxious about my and my family's jobs and income	58.1	69.6	63.9	61.9	+11.5	-5.7	-2.0
Degree of activity restriction	Feel anxious about changes in my interpersonal relationships	---	---	44.6	44.7	---	---	+0.1
	Refrain from taking nonessential and nonurgent trips	72.5	89.3	94.2	88.9	+16.8	+4.9	-5.3
	Refrain from travel and leisure activities	69.1	88.7	92.9	88.8	+19.6	+4.2	-4.1
	Refrain from experiential entertainment (gigs, theater, movies, etc.)	---	86.7	91.0	85.4	---	+4.3	-5.6
	Refrain from meeting friends and socializing	59.9	85.1	89.7	84.5	+25.2	+4.6	-5.2
	Refrain from eating out	61.1	82.7	91.0	83.8	+21.6	+8.3	-7.2
	Refrain from nonessential and nonurgent shopping	64.5	84.2	90.6	83.6	+19.7	+6.4	-7.0
Degree of behavioral change	Refrain from shaking hands, hugging and otherwise touching others	---	---	---	82.0	---	---	---
	Consistently wear a mask, wash my hands and take other precautions against infection	84.1	90.8	95.6	93.2	+6.7	+4.8	-2.4
	Refrain from going out and enjoy pastimes I can do at home	58.7	74.6	86.9	77.3	+15.9	+12.3	-9.6
	Make sure to get sufficient exercise, nutrition and sleep	---	79.5	79.5	77.0	---	±0	-2.5
	Keep a stock of anti-infection products and everyday necessities	50.7	60.5	67.1	67.3	+9.8	+6.6	+0.2
	Use cashless payment options as much as possible	---	---	---	62.6	---	---	---
	I'm at home more, so I cook myself as much as possible	---	---	65.1	59.9	---	---	-5.2

Avoid using public transport and drive to places instead	---	46.9	57.0	52.8	---	+10.1	-4.2
I'm home more, so I'm doing exercises I can do at home	---	---	55.9	52.1	---	---	-3.8
Refrain from going out and use net shopping and food delivery services instead	24.7	38.9	59.5	51.1	+14.2	+20.6	-8.4
I'm home more, so I'm playing video games on my smartphone, computer, etc.	---	49.3	55.3	48.4	---	+6.0	-6.9
I'm home more, so I'm using video, music and other streaming services	---	44.7	50.9	46.5	---	+6.2	-4.4
I exercise outside where people don't gather	---	---	45.3	43.3	---	---	-2.0
Commute to work/school during off-peak hours as much as possible	25.5	34.4	43.0	42.5	+8.9	+8.6	-0.5
I'm home more, so I'm reading and posting on social media	---	35.0	42.3	40.5	---	+7.3	-1.8
Enjoy leisure activities outdoors where people don't gather	---	38.2	32.5	38.9	---	-5.7	+6.4
Telework (work from home) as much as possible [Those with jobs]	18.2	23.5	41.3	36.7	+5.3	+17.8	-4.6
I'm home more, so I'm making things by hand (handcrafts, home improvements, DIY, etc.)	---	---	31.2	31.5	---	---	+0.3
I'm home more, so I'm upgrading my home environment by updating the telecommunications environment, buying home appliances, etc.	---	21.6	22.9	26.9	---	+1.3	+4.0
Started/Am considering a side job because my income has dropped or looks likely to drop	---	14.9	23.9	26.8	---	+9.0	+2.9
I'm putting the money I can't spend outside toward buying slightly better things	---	---	20.9	22.7	---	---	+1.8
Started/Am considering getting a job, changing jobs or starting a business because my income has dropped or looks likely to drop	---	---	18.1	22.3	---	---	+4.2
I'm home more, so I'm investing	---	16.3	17.7	21.9	---	+1.4	+4.2
I'm home more, so I'm participating in online drinking parties and dinners	---	---	18.6	21.3	---	---	+2.7
I'm home more, so I'm posting and selling things on flea market apps and net auctions	---	18.3	19.1	21.1	---	+0.8	+2.0
I'm home more, so I'm buying things on flea market apps and net auctions	---	17.6	19.5	20.3	---	+1.9	+0.8
I'm supporting businesses and organizations that are not able to operate as normal	---	---	19.7	20.3	---	---	+0.6
I'm home more, so I'm studying online	---	14.3	18.9	18.6	---	+4.6	-0.3

Those with jobs:
 March n=1,042
 April n=1,051
 May n=1,074
 June n=1,052

 Up at least 5 pts
 Up at least 10 pts
 Down at least 5 pts
 Down at least 10 pts

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

Scores for women higher than for men in all Degree of anxiety and Degree of activity restriction items

- In the June survey, scores for all items in Degree of anxiety and Degree of activity restriction were higher for women than for men.
- In particular, the score for Feel anxious about my and my family's health was 14.2 points higher for women (75.0%) than for men (60.8%). We believe that the difference in Degree of anxiety scores is linked to the difference in Degree of activity restriction scores, and that the scores by gender suggest that women see things and behave slightly more cautiously.

Differences in Degree of behavioral change scores across age groups and areas stand out

- In Degree of behavioral change, there was a huge gap scores for different age groups in items related to internet use behaviors, including I'm home more, so I'm participating in online drinking parties and dinners, which was 42.3% for the 20–29 cohort compared to 11.1% for the 60–69 cohort. By area, differences in scores for such items as Avoid using public transport and drive to places instead and Telework as much as possible were comparatively larger.

Results by gender, age group and area

		Overall (1,500)	Gender		Age group					Area		
			Males (755)	Females (745)	20-29 (241)	30-39 (286)	40-49 (375)	50-59 (319)	60-69 (279)	Greater Tokyo (40 km radius) (500)	Greater Nagoya (40 km radius) (500)	Hanshin (30 km radius) (500)
Agree + Somewhat agree (Number of respondents)		(1,500)	(755)	(745)	(241)	(286)	(375)	(319)	(279)	(500)	(500)	(500)
Degree of anxiety	Feel anxious about the economy stalling	83.0	80.4	85.6	76.3	81.5	85.1	85.6	84.6	85.2	82.8	81.0
	Feel anxious about the government's response	77.4	73.2	81.6	75.1	74.5	77.6	78.7	80.6	78.0	75.8	78.4
	Feel anxious about the situation abroad	74.7	71.0	78.5	70.1	71.3	73.6	78.4	79.6	76.6	75.0	72.6
	Feel anxious about my and my family's health	67.9	60.8	75.0	70.1	65.7	65.9	66.1	72.8	70.4	67.2	66.0
	Feel anxious about the lack and uncertainty of information	67.9	61.7	74.2	71.8	68.2	68.5	64.9	67.0	71.0	65.8	67.0
	Feel anxious about my and my family's jobs and income	61.9	61.5	62.4	66.8	69.2	62.7	63.6	47.3	63.2	62.4	60.2
	Feel anxious about changes in my interpersonal relationships	44.7	43.7	45.8	46.1	48.3	42.7	43.3	44.4	46.4	44.8	43.0
Degree of activity restriction	Refrain from taking nonessential and nonurgent trips	88.9	85.2	92.6	87.6	88.5	89.1	88.4	90.7	91.0	88.8	86.8
	Refrain from travel and leisure activities	88.8	84.9	92.8	88.0	88.1	90.9	87.8	88.5	92.6	87.4	86.4
	Refrain from experiential entertainment (gigs, theater, movies, etc.)	85.4	80.7	90.2	87.6	84.3	86.7	85.9	82.4	89.2	82.6	84.4
	Refrain from meeting friends and socializing	84.5	78.7	90.3	81.7	81.5	88.3	83.1	86.4	87.6	83.0	82.8
	Refrain from eating out	83.8	78.3	89.4	83.4	79.0	86.1	82.4	87.5	87.8	81.6	82.0
	Refrain from nonessential and nonurgent shopping	83.6	79.2	88.1	80.1	81.1	86.4	83.7	85.3	88.2	82.6	80.0
	Refrain from shaking hands, hugging and otherwise touching others	82.0	78.1	85.9	82.6	77.6	82.4	83.7	83.5	83.6	80.2	82.2
Degree of behavioral change	Consistently wear a mask, wash my hands and take other precautions against infection	93.2	90.5	96.0	91.7	89.5	94.1	95.0	95.0	95.8	91.6	92.2
	Refrain from going out and enjoy pastimes I can do at home	77.3	72.2	82.4	85.1	79.0	78.9	74.3	69.9	79.2	76.0	76.6
	Make sure to get sufficient exercise, nutrition and sleep	77.0	73.9	80.1	73.9	75.2	77.1	78.7	79.6	78.4	77.2	75.4
	Keep a stock of anti-infection products and everyday necessities	67.3	64.4	70.2	63.5	65.7	68.8	69.3	67.7	67.8	67.8	66.2
	Use cashless payment options as much as possible	62.6	61.2	64.0	58.1	61.5	61.6	69.3	61.3	67.8	60.8	59.2

I'm at home more, so I cook myself as much as possible	59.9	43.3	76.8	65.6	63.3	58.1	57.7	56.6	64.2	57.4	58.2
Avoid using public transport and drive to places instead	52.8	51.4	54.2	50.2	51.7	53.3	53.6	54.5	44.0	68.8	45.6
I'm home more, so I'm doing exercises I can do at home	52.1	48.3	55.8	61.8	53.5	50.9	45.1	51.6	56.8	51.6	47.8
Refrain from going out and use net shopping and food delivery services instead	51.1	47.4	54.9	59.8	57.0	50.4	48.9	41.2	56.0	49.2	48.2
I'm home more, so I'm playing video games on my smartphone, computer, etc.	48.4	47.7	49.1	69.3	59.4	48.0	37.0	32.6	48.4	50.8	46.0
I'm home more, so I'm using video, music and other streaming services	46.5	49.0	43.9	71.0	53.8	40.3	41.1	32.3	52.2	44.8	42.4
I exercise outside where people don't gather	43.3	47.5	38.9	49.4	45.5	41.3	40.1	41.9	44.4	45.0	40.4
Commute to work/school during off-peak hours as much as possible	42.5	43.7	41.2	48.1	42.0	44.0	40.8	38.0	49.6	36.2	41.6
I'm home more, so I'm reading and posting on social media	40.5	37.6	43.4	71.0	49.0	35.7	30.7	22.9	42.4	40.2	38.8
Enjoy leisure activities outdoors where people don't gather	38.9	41.9	35.8	46.5	47.2	36.0	34.2	33.0	35.4	44.2	37.0
Telework (work from home) as much as possible [Those with jobs]	36.7	39.5	32.5	39.4	39.9	33.7	36.9	34.6	47.8	29.7	31.7
I'm home more, so I'm making things by hand (handcrafts, home improvements, DIY, etc.)	31.5	27.3	35.7	32.4	30.4	32.3	30.7	31.5	32.2	36.0	26.2
I'm home more, so I'm upgrading my home environment by updating the telecommunications environment, buying home appliances, etc.	26.9	28.5	25.4	41.9	31.5	25.6	24.1	14.3	31.8	24.4	24.6
Started/Am considering a side job because my income has dropped or looks likely to drop	26.8	28.1	25.5	41.9	35.3	24.5	22.9	12.5	29.4	27.4	23.6
I'm putting the money I can't spend outside toward buying slightly better things	22.7	23.4	22.0	29.5	24.1	23.7	19.1	18.3	24.0	22.8	21.4
Started/Am considering getting a job, changing jobs or starting a business because my income has dropped or looks likely to drop	22.3	24.8	19.7	29.9	33.2	20.0	18.2	12.2	25.2	21.8	19.8
I'm home more, so I'm investing	21.9	30.7	12.9	27.0	25.5	19.7	21.3	17.2	25.2	23.6	16.8
I'm home more, so I'm participating in online drinking parties and dinners	21.3	23.7	18.9	42.3	24.8	16.8	16.6	11.1	25.2	21.6	17.2
I'm home more, so I'm posting and selling things on flea market apps and net auctions	21.1	22.1	20.1	28.2	28.3	20.0	19.4	11.1	22.6	20.2	20.6
I'm home more, so I'm buying things on flea market apps and net auctions	20.3	22.4	18.3	28.6	27.6	18.1	17.6	11.8	21.2	21.6	18.2
I'm supporting businesses and organizations that are not able to operate as normal	20.3	19.2	21.5	21.6	20.3	21.6	18.8	19.4	23.2	19.2	18.6
I'm home more, so I'm studying online	18.6	21.2	16.0	33.6	20.6	14.7	15.0	12.9	20.6	18.4	16.8

At least 5 pts higher than overall figure
 At least 10 pts higher than overall figure
 At least 5 pts lower than overall figure
 At least 10 pts lower than overall figure
 (%)

Reference material 4: Behavioral intentions once COVID-19 subsides

In Behavioral intentions, hygiene and health behaviors score high

- When we asked respondents whether they intend to continue doing the survey's Degree of activity restriction and Degree of behavioral change items after concerns about becoming infected by COVID-19 have subsided, anti-infection hygiene and health behaviors such as Consistently wear a mask, wash my hands and take other precautions against infection (85.8%), Make sure to get sufficient exercise, nutrition and sleep (83.1%) and Refrain from shaking hands, hugging and otherwise touching others (72.4%) received comparatively high scores.

Intention of continuing online drinking parties scores in the 20% range, huge variation in Teleworking scores by area

- Compared to the items above, scores for Study online (24.5%), Participate in online drinking parties and dinners (21.2%), and other behaviors using the internet received comparatively low scores. The scores for these items also varied greatly between age groups.
- There was a huge difference in scores between areas for Telework (work from home) as much as possible, with the Greater Tokyo score 43.2% compared to around 27% for other areas.

Results by gender, age group and area

		Overall (1500)	Gender		Age group					Area		
			Males (755)	Females (745)	20–29 (241)	30–39 (286)	40–49 (375)	50–59 (319)	60–69 (279)	Greater Tokyo (40 km radius) (500)	Greater Nagoya (40 km radius) (500)	Hanshin (30 km radius) (500)
Think I will + Think I will sometimes (Number of respondents)												
Activity restriction intentions	Refrain from shaking hands, hugging and otherwise touching others	72.4	67.4	77.4	59.8	67.5	77.1	79.9	73.5	74.6	71.6	71.0
	Refrain from taking nonessential and nonurgent trips	71.1	67.0	75.2	64.3	66.4	74.1	74.0	74.2	73.2	71.6	68.4
	Refrain from nonessential and nonurgent shopping	69.2	64.5	74.0	62.2	63.6	72.0	73.7	72.0	73.4	69.0	65.2
	Refrain from experiential entertainment (gigs, theater, movies, etc.)	64.5	60.5	68.6	55.2	61.5	69.3	68.0	65.2	66.4	64.6	62.6
	Refrain from travel and leisure activities	63.6	57.6	69.7	56.8	60.1	68.3	68.0	61.6	66.4	62.8	61.6
	Refrain from meeting friends and socializing	62.3	57.1	67.5	51.9	58.4	68.3	66.8	62.0	65.8	61.6	59.4
	Refrain from eating out	62.0	56.6	67.5	54.8	59.1	66.9	63.3	63.1	65.4	60.0	60.6
Behavioral change intentions	Consistently wear a mask, wash my hands and take other precautions against infection	85.8	81.7	89.9	81.7	82.9	87.5	88.4	87.1	86.2	85.6	85.6
	Make sure to get sufficient exercise, nutrition and sleep	83.1	79.7	86.6	77.6	81.1	84.3	84.3	87.1	85.2	82.0	82.2
	Keep a stock of anti-infection products and everyday necessities	72.3	66.5	78.3	72.6	71.0	74.7	71.2	71.7	73.8	74.4	68.8
	Use cashless payment options as much as possible	66.3	64.8	67.8	60.6	62.6	69.9	70.5	65.2	71.2	66.0	61.6
	Cook myself as much as possible	64.4	44.9	84.2	67.2	65.0	64.8	60.5	65.2	67.4	60.6	65.2
	Refrain from going out and enjoy pastimes I can do at home	63.9	56.8	71.0	68.9	65.4	64.3	62.7	58.8	65.8	63.2	62.6
	Do exercises I can do at home	55.3	47.2	63.5	57.7	56.3	56.0	50.2	57.0	57.8	53.8	54.2
	Enjoy leisure activities outdoors where people don't gather	53.1	50.1	56.1	53.5	56.6	52.8	50.8	52.0	53.8	55.8	49.6

Exercise outside where people don't gather	50.2	49.3	51.1	53.1	52.8	49.1	42.6	55.2	50.8	52.4	47.4
Avoid using public transport and drive to places instead	50.1	47.5	52.8	45.6	51.4	50.9	52.0	49.5	39.8	65.8	44.8
Use video, music and other streaming services	48.7	50.3	47.0	70.5	53.5	45.3	43.9	34.8	53.4	48.0	44.6
Read and post on social media	48.0	42.6	53.4	73.0	59.1	45.9	37.3	30.1	48.8	48.6	46.6
Play video games on my smartphone, computer, etc.	47.8	45.4	50.2	65.6	59.4	48.5	35.7	33.3	48.8	49.6	45.0
Refrain from going out and use net shopping and food delivery services instead	47.1	43.0	51.3	46.9	52.4	50.9	43.6	40.9	50.4	47.2	43.8
Commute to work/school during off-peak hours as much as possible	42.8	43.2	42.4	44.8	39.5	44.3	41.7	43.7	50.4	39.2	38.8
Make things by hand (handcrafts, home improvements, DIY, etc.)	36.5	29.1	44.0	32.8	36.4	40.0	35.1	36.9	38.6	37.2	33.8
Upgrade my home environment by updating the telecommunications environment, buying home appliances, etc.	36.5	35.4	37.7	43.6	40.6	37.9	31.3	30.5	39.8	35.2	34.6
Telework (work from home) as much as possible [Those with jobs]	32.7	35.0	29.2	31.8	34.0	30.3	32.9	36.8	43.2	27.1	27.0
Start/Consider a second job	29.5	30.1	29.0	43.6	40.2	28.3	23.5	15.1	33.4	28.4	26.8
Invest	29.4	37.6	21.1	36.1	31.1	28.5	26.0	26.9	34.0	27.4	26.8
Put the money I can't spend outside toward buying slightly better thing	28.6	27.8	29.4	32.0	30.1	27.2	27.6	27.2	29.2	27.2	29.4
Post and sell things on flea market apps and net auctions	25.7	23.3	28.1	37.8	34.6	24.8	19.7	14.0	26.4	24.8	25.8
Buy things on flea market apps and net auctions	25.5	26.6	24.4	34.9	31.8	24.3	22.6	16.1	24.2	27.0	25.4
Support businesses and organizations	25.5	23.4	27.7	27.8	25.9	24.0	25.1	25.8	26.0	23.4	27.2
Study online	24.5	26.5	22.6	36.9	26.2	24.5	19.1	18.3	27.4	23.6	22.6
Start/Consider getting a job, changing jobs or starting a business	24.5	24.6	24.4	39.8	32.2	22.9	19.4	11.5	27.4	23.0	23.2
Participate in online drinking parties and dinners	21.2	22.9	19.5	37.8	28.0	16.5	16.9	11.1	24.6	21.8	17.2

At least 5 pts higher than overall figure

At least 10 pts higher than overall figure

At least 5 pts lower than overall figure

At least 10 pts lower than overall figure

(%)

Reference material 5: What they want to focus on in their lives next month

Scores for 21 of 24 items up as people become more enthusiastic about their lives

- When we asked what respondents would like to focus on next month (July) under the influence of COVID-19, the top three responses were Sleep/Rest (84.9%), Health (82.3%) and Contact with family members (71.7%).
- Comparing scores over time, scores for 21 of 24 items in the June survey were higher than in the May survey. Increases in scores stood out in items like Sleep/Rest, Household chores, and Posting information on the internet, which had not increased much at the time of the May survey, indicating that enthusiasm toward lifestyle behaviors has grown in general since the April survey.

■ Chronological change (Overall basis: April–June 2020)

Want to focus on + Somewhat want to focus on (Number of respondents)	Scores			Change	
	April survey (1,500)	May survey (1,500)	June survey (1,500)	April → May (Pts)	May → June (Pts)
Sleep/Rest	74.9	72.1	84.9	-2.8	+12.8
Health	73.1	77.1	82.3	+4.0	+5.2
Contact with family members	59.4	70.3	71.7	+10.9	+1.4
Household chores	55.9	57.5	71.1	+1.6	+13.6
Eating/Drinking	55.8	68.5	70.1	+12.7	+1.6
Shopping	44.1	63.7	67.7	+19.6	+4.0
Hobbies/Leisure	44.9	67.7	66.5	+22.8	-1.2
Savings/Investment	44.8	57.2	64.8	+12.4	+7.6
Collecting info. from the internet	43.1	47.1	63.5	+4.0	+16.4
Collecting info. from mass media	53.1	47.1	61.1	-6.0	+14.0
Watching/Viewing entertainment content	44.5	54.2	59.1	+9.7	+4.9
Work	43.9	58.5	58.4	+14.6	-0.1
Fashion/Appearance	34.6	48.3	55.4	+13.7	+7.1
Contact with friends, girlfriend/boyfriend	32.8	58.8	55.1	+26.0	-3.7
Environmental conservation	29.8	37.9	55.1	+8.1	+17.2
Beauty	35.0	41.5	49.6	+6.5	+8.1
Learning/Education	28.3	35.9	40.3	+7.6	+4.4
Second jobs	25.2	30.5	38.0	+5.3	+7.5
Posting info. on the internet	24.5	27.9	38.0	+3.4	+10.1
Gift-giving	16.4	23.0	34.0	+6.6	+11.0
Contributing to social causes	15.7	23.8	32.7	+8.1	+8.9
Childcare	25.2	25.7	31.9	+0.5	+6.2
Contact with the local community	14.8	26.4	30.5	+11.6	+4.1
Nursing care	9.3	12.6	23.2	+3.3	+10.6

	Up at least 5 pts
	Up at least 10 pts
	Down at least 5 pts
	Down at least 10 pts

(%)

(Pts)

Reference material 6: What they want to focus on in their lives next month

Enthusiasm about life in the next month highest among women and younger age groups

- When we asked what respondents would like to focus on in their lives next month (July) under the influence of COVID-19, by gender, scores for women were higher than those for men in 19 of 24 items, including Sleep/Rest, Health, and Contact with family members.
- By age group, scores for many items, including Shopping, Hobbies/Leisure, Investing, and Second job, were higher for younger age groups and lower for the middle-aged and older cohorts.
- By area, the differences were not as large as the differences by gender and by age group.

Results by gender, age group and area

Want to focus on + Somewhat want to focus on (Number of respondents)	Overall (1,500)	Gender		Age group					Area		
		Males (755)	Females (745)	20-29 (241)	30-39 (286)	40-49 (375)	50-59 (319)	60-69 (279)	Greater Tokyo (40 km radius) (500)	Greater Nagoya (40 km radius) (500)	Hanshin (30 km radius) (500)
Sleep/Rest	84.9	79.2	90.7	83.8	87.8	83.7	85.6	83.9	85.0	84.4	85.4
Health	82.3	76.7	87.9	81.7	80.4	81.1	82.8	85.7	81.6	81.0	84.2
Contact with family members	71.7	64.5	78.9	71.0	74.8	71.5	69.6	71.7	70.0	72.0	73.0
Household chores	71.1	59.3	83.0	73.4	75.5	70.4	69.0	67.7	71.0	67.4	74.8
Eating/Drinking	70.1	62.0	78.4	73.0	72.7	68.8	70.2	66.7	71.8	65.6	73.0
Shopping	67.7	61.2	74.4	78.4	68.2	68.3	64.6	60.9	65.2	66.0	72.0
Hobbies/Leisure	66.5	67.4	65.5	75.1	70.6	65.1	62.4	61.3	63.2	67.0	69.2
Savings/Investment	64.8	64.1	65.5	74.3	74.5	69.9	59.6	45.9	64.0	64.0	66.4
Collecting info. from the internet	63.5	62.1	65.0	70.5	67.1	63.2	62.7	55.2	64.2	62.0	64.4
Collecting info. from mass media	61.1	55.5	66.7	59.8	64.3	55.7	64.6	62.0	60.0	61.8	61.4
Watching/Viewing entertainment content	59.1	57.0	61.3	75.1	68.5	52.3	54.2	50.5	60.8	54.4	62.2
Work	58.4	62.8	54.0	67.6	61.5	62.1	61.1	39.1	61.0	57.6	56.6
Fashion/Appearance	55.4	43.0	67.9	66.0	64.7	52.5	52.0	44.4	55.8	54.4	56.0
Contact with friends, girlfriend/ boyfriend	55.1	51.0	59.3	71.4	63.6	48.3	48.9	48.7	53.2	54.6	57.6
Environmental conservation	55.1	47.0	63.2	50.2	52.8	53.9	60.8	56.6	54.8	53.2	57.2
Beauty	49.6	32.7	66.7	63.9	60.8	47.7	44.2	34.4	51.2	47.4	50.2
Learning/Education	40.3	40.8	39.9	53.9	43.4	42.1	35.1	29.0	40.4	37.8	42.8
Second jobs	38.0	35.6	40.4	55.6	53.5	36.8	32.0	15.4	39.0	38.0	37.0
Posting info. on the internet	38.0	38.8	37.2	51.9	43.0	32.5	34.8	31.9	37.6	38.8	37.6
Gift-giving	34.0	28.9	39.2	42.7	42.3	29.3	27.9	31.2	32.2	33.4	36.4
Contributing to social causes	32.7	31.8	33.6	36.1	36.0	30.4	33.2	28.7	33.0	30.8	34.2
Childcare	31.9	31.3	32.6	30.7	51.4	41.1	18.5	16.1	28.0	34.2	33.6
Contact with the local community	30.5	30.1	31.0	28.2	36.4	29.9	31.0	26.9	28.6	30.0	33.0
Nursing care	23.2	24.0	22.4	24.1	23.1	20.5	24.1	25.1	22.8	22.0	24.8

At least 5 pts higher than overall figure
 At least 10 pts higher than overall figure
 At least 5 pts lower than overall figure
 At least 10 pts lower than overall figure
 (%)

Reference material 7: Social systems they think will be necessary even after COVID-19 has subsided

Highest score for Stricter control and permission for inbound/outbound passengers

- When we asked what social systems respondents thought would need to be expanded or made a habit even after concern about becoming infected with COVID-19 had subsided, Stricter control and entry permission for inbound/outbound passengers (86.5%) received the highest score. That was followed by Teleworking (84.5%) and Staggered commuting (83.7%), and these were the only three among 15 items to receive scores in the 80% range.

Scores for all items higher for women than men, scores for Staggered commuting and Abolition of affixing seals high in Greater Tokyo

- By gender, scores for all 15 items were higher for women than men. In particular, differences were marked in scores for items related to work, such as Teleworking, Staggered commuting, and Second jobs, and scores for items related to physical distancing, such as Social distancing, and Package drop deliveries.
- By area, there were large differences between Greater Tokyo and Greater Nagoya in Staggered commuting and Abolition of affixing seals.

Results by gender, age group and area

	Overall (1,500)	Gender		Age group					Area		
		Males (755)	Females (745)	20-29 (241)	30-39 (286)	40-49 (375)	50-59 (319)	60-69 (279)	Greater Tokyo (40 km radius) (500)	Greater Nagoya (40 km radius) (500)	Hanshin (30 km radius) (500)
Necessary + Somewhat necessary (Number of respondents)	(1,500)	(755)	(745)	(241)	(286)	(375)	(319)	(279)	(500)	(500)	(500)
Stricter control and entry permission for inbound/outbound passengers	86.5	81.7	91.4	82.6	86.0	88.0	86.8	88.2	87.4	84.8	87.4
Teleworking	84.5	79.1	89.9	86.7	86.4	83.7	85.6	80.3	87.8	80.8	84.8
Staggered commuting	83.7	78.5	89.0	82.6	81.1	84.8	84.0	85.7	89.2	78.2	83.8
Online medical examinations and treatment	75.8	72.3	79.3	77.6	75.9	77.1	74.9	73.5	79.8	73.8	73.8
Online learning	75.7	72.1	79.5	81.3	74.5	76.5	76.2	70.6	77.8	74.0	75.4
Mask wearing when dealing with customers	75.3	71.0	79.6	76.8	76.2	78.1	76.5	67.7	76.8	74.8	74.2
Social distancing	75.0	68.9	81.2	71.4	78.3	76.0	78.1	69.9	75.2	74.4	75.4
Abolition of affixing seals	72.8	72.6	73.0	70.1	71.3	74.4	73.7	73.5	78.4	66.6	73.4
Package drop deliveries	71.3	64.9	77.7	74.7	76.2	72.3	71.5	61.6	75.8	68.6	69.4
Provision of location information to COVID-19 case tracing apps	70.1	66.4	73.8	64.7	69.9	68.5	74.9	71.3	68.8	69.0	72.4
Shorter business hours	66.7	60.1	73.3	63.1	69.2	67.5	67.7	64.9	70.0	63.0	67.0
Plastic drapes to prevent droplet transmission	64.7	59.2	70.3	64.7	67.5	62.7	70.2	58.4	66.2	63.6	64.4
Stricter health checks (temperature, etc.) when entering stores and facilities	63.7	60.4	67.1	64.7	65.0	65.1	64.9	58.4	65.2	63.8	62.2
Second jobs	63.5	58.1	69.0	73.0	72.0	68.0	59.9	44.8	65.4	66.0	59.2
September start to the academic year	43.3	38.4	48.3	42.7	40.6	43.2	41.7	48.7	42.4	42.0	45.6

At least 5 pts higher than overall figure
At least 10 pts higher than overall figure
At least 5 pts lower than overall figure
At least 10 pts lower than overall figure
 (%)

Survey outlines

■ 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? (Give a figure from 0–100)
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)

Behavioral intentions after COVID-19 subsides

Will you engage in the following behaviors in the future even if concerns about becoming infected with COVID-19 have subsided?

For each, select the option that best matches your intentions. (Single response: Think I will, Think I will sometimes, Think I won't much, Think I won't)

What they would like to focus on next month

To what degree do you want to focus on the following activities next month (July)?

For each item, select the response that best matches your thoughts. (Single response: Want to focus on it, Somewhat want to focus on it, Don't want to focus on it much, Don't want to focus on it/Not applicable)

Social systems they think will be necessary even after COVID-19 has subsided

For the items below, do you think expanding the social environments, systems and structures or making them habits is necessary even if concerns about becoming infected with COVID-19 have subsided?

For each, select the option that best matches your thoughts. (Single response: Necessary, Somewhat necessary, Not very necessary, Not necessary)

Survey periods:	June 4 (Thu)–8 (Mon), 2020 May 7 (Thu)–11 (Mon), 2020 April 2 (Thu)–6 (Mon), 2020 (prior to the government declaration of a state of emergency) March 5 (Thu)–9 (Mon), 2020
Territories:	(1) Greater Tokyo (40 km radius) (Tokyo, Kanagawa, Chiba, Saitama, Ibaraki Prefectures) (2) Greater Nagoya (40 km radius) (Aichi, Mie, Gifu Prefectures) (3) Hanshin (30 km radius) (Osaka, Kyoto, Hyogo, Nara Prefectures)
Respondents:	Males and females aged 20–69
Target allocation:	500 respondents per territory, allocated based on the population demographics (gender/age group) of the territory
Sample size:	1,500 in total

April, May & June surveys

	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	1,500

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	1,500

Survey method:	Internet survey
Conducted by:	H. M. Marketing Research, Inc.

Reference

Second survey (Announced May 21): <https://www.hakuhodo-global.com/news/second-survey-of-sei-katsu-sha-concerning-covid-19-may-2020.html>

First survey (Announced April 20): <https://www.hakuhodo-global.com/news/first-survey-of-sei-katsu-sha-concerning-covid-19.html>

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

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