

November 20, 2020

Eighth Survey of *Sei-katsu-sha* Concerning COVID-19 (November 2020)

Degree of freedom of life is 61.4 pts in November, up for the third consecutive month and equaling July's survey-high score

***Sei-katsu-sha* are shifting to "outside," while continuing precautions against infection**

Hakuhodo Institute of Life and Living, a think tank of Hakuhodo Inc., in November 2020 conducted its eighth "Survey of *Sei-katsu-sha* Concerning COVID-19" to understand *sei-katsu-sha*'s attitudes and behaviors during the coronavirus. The survey was conducted November 5–9, 2020 in the Greater Tokyo (Tokyo, Kanagawa, Chiba, Saitama and Ibaraki Prefectures), 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. See p.14 for the survey outlines.

The November survey was conducted after new infections had remained steady throughout October and as new COVID-19 infections began to surge at the beginning of November (prior to Tokyo raising its COVID-19 alert level), following the expansion of the Japanese government's Go To Travel campaign to promote domestic travel to include journeys to and from Tokyo.

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 61.4 points, up 1.7 points since October, marking the third straight month the figure has risen. The score equals that of July, which was the highest since the survey began in April.

While scores for Degree of anxiety as a result of the spread of the coronavirus were largely unchanged since last month, scores for Degree of activity restriction were down across the board for the third consecutive month. In particular, the drops in scores for Refrain from meeting friends and socializing (66.3%, down 8.6 points), Refrain from eating out (61.9%, down 7.4 points), and Refrain from travel and leisure activities (72.2%, down 6.5 points) were notable.

In Degree of behavioral change, changes in scores were small, with only Refrain from going out and enjoy pastimes I can do at home (59.2%, down 5.1 points) standing out. Meanwhile, the score for Consistently wear a mask, wash my hands and take other precautions against infection (91.8%, up 0.3 points) continues to be high.

It seems *sei-katsu-sha* are shifting their behavior to "outside," including eating out and enjoying travel and leisure activities, etc., even as they continue to take precautions against infection.

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

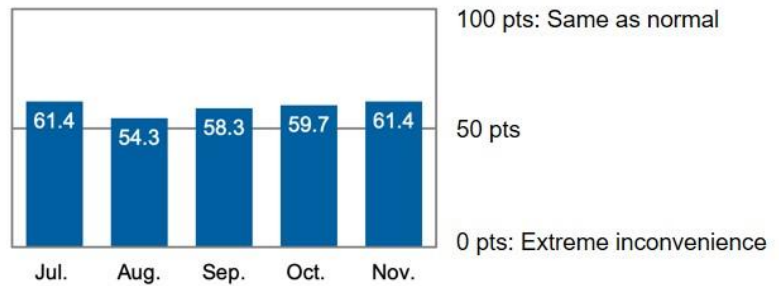
Freedom of life under the influence of COVID-19

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:

61.4 pts

Up 1.7 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	77.3% (+0.1 pt)
Feel anxious about the situation abroad	70.0% (+1.6 pts)
Feel anxious about the government's response	66.5% (-2.7 pts)

Degree of activity restriction

Refrain from meeting friends and socializing	66.3% (-8.6 pts)
Refrain from eating out	61.9% (-7.4 pts)
Refrain from travel and leisure activities	72.2% (-6.5 pts)

Degree of behavioral change

Consistently wear a mask, wash my hands and take other precautions against infection	91.8% (+0.3 pts)
Make sure to get sufficient exercise, nutrition and sleep	76.4% (+1.3 pts)
Refrain from going out and enjoy pastimes I can do at home	59.2% (-5.1 pts)
Commute to work/school during off-peak hours as much as possible	33.7% (-3.0 pts)
I'm at home more, so I cook myself as much as possible	52.4% (-2.7 pts)

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

Degree of freedom of life rises for the third consecutive month. Equals July score, the highest since the survey began in April

- 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 61.4 points, up 1.7 points since last month and marking the same score as July, which was the highest score since the survey began. By gender, scores were up slightly for both males and females. By age group, scores were up slightly, except for the 40–49 cohort, which showed a slight 0.6-point decrease.

In free responses, while we received such comments as “It’s inconvenient, but I’ve got used to it” and “I can now do things by taking precautions against infection,” we also heard comments along the lines of “I’m concerned about the difference between how others behave and act and myself”

- From those who gave comparatively high Degree of freedom of life scores, we received such comments as “It’s inconvenient, but I’ve got used to it,” “Masks and hygiene management are second nature now.” At the same time, we also received anxious comments, such as, “When I see people having a good time at company drinking parties and at bars and restaurants, I feel a difference in their degree of commitment compared to myself,” and “With the approach of winter, I wonder if things will go back to how they were earlier.”
- From those who gave relatively low Degree of freedom of life scores, comments citing economic reasons, including layoffs and reduced income, and those noting an inability to tune out concerns, such as “I am afraid just to go out,” stood out. Like comments above, we also saw comments mentioning concerns about the behavior of others along the lines of, “Even if I’m doing the right thing, I am concerned when others are not wearing masks.”

■ Results by gender, age group and area

(Number of respondents)		Scores					Change			
		Jul.	Aug.	Sep.	Oct.	Nov.	Jul.	Aug.	Sep.	Oct.
		2020 survey (Pts)	2020 survey (Pts)	2020 survey (Pts)	2020 survey (Pts)	2020 survey (Pts)	→ Aug. (Pts)	→ Sep. (Pts)	→ Oct. (Pts)	→ Nov. (Pts)
Overall	(1500)	61.4	54.3	58.3	59.7	61.4	-7.1	+4.0	+1.4	+1.7
Males	(755)	62.4	55.1	59.8	60.4	62.2	-7.3	+4.7	+0.6	+1.7
Females	(745)	60.4	53.6	56.8	58.9	60.7	-6.8	+3.2	+2.2	+1.7
20–29	(241)	62.0	49.6	56.7	56.6	59.4	-12.3	+7.0	-0.1	+2.9
30–39	(286)	60.2	53.6	57.8	59.0	61.0	-6.6	+4.2	+1.2	+2.0
40–49	(375)	60.2	54.4	57.6	62.0	61.4	-5.8	+3.2	+4.4	-0.6
50–59	(319)	61.9	55.8	59.7	59.1	61.4	-6.1	+4.0	-0.6	+2.3
60–69	(279)	63.2	57.5	59.6	60.7	63.6	-5.7	+2.1	+1.1	+3.0
Greater Tokyo (40 km radius)	(500)	59.7	53.7	57.2	59.0	59.7	-6.0	+3.5	+1.8	+0.7
Greater Nagoya (40 km radius)	(500)	61.4	54.6	57.2	60.7	61.5	-6.8	+2.6	+3.5	+0.9
Hanshin (30 km radius)	(500)	63.1	54.7	60.5	59.4	63.1	-8.4	+5.8	-1.1	+3.7

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

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.

■ 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	(1500)	47.9	33.9	18.1
Males	(755)	49.1	33.0	17.9
Females	(745)	46.7	34.9	18.4
20–29	(241)	43.2	36.1	20.7
30–39	(286)	48.3	31.8	19.9
40–49	(375)	47.7	35.7	16.5
50–59	(319)	48.3	32.9	18.8
60–69	(279)	51.6	33.0	15.4
Greater Tokyo (40 km radius)	(500)	45.8	32.4	21.8
Greater Nagoya (40 km radius)	(500)	47.6	34.6	17.8
Hanshin (30 km radius)	(500)	50.4	34.8	14.8



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

Degree of freedom of life	High (61 pts or higher)	It's inconvenient, but I've got used to it, and with the introduction of teleworking, my inconveniences have dropped, so it's actually a bonus.	100 pts	Female, 34 Osaka Pref.
		Life is gradually getting back to normal, but I still avoid nonessential, nonurgent trips and peak times, when crowding will be worse. Masks and hygiene management, which were a pain in the beginning, are now just part of life.	85 pts	Male, 57, Hyogo Pref.
		When COVID-19 was spreading, we were told to refrain from going out by the company and my child's school was closed, but now schools are again open as normal and my company no longer advises anything in particular about going out. Masks are required, but generally I'm now able to live almost like before.	80 pts	Female, 48 Aichi Pref.
		Things I was worried about before COVID-19, like my interactions with others and hygiene at restaurants and buffets, have improved, so thinking about positive changes around me, I gave a high score. However, there are also negative aspects, like work and taking public transport, wearing masks in the height of summer, the economic situation, and the like, so I didn't think it was 100 points.	80 pts	Female, 39 Chiba Pref.
		In early spring, I was isolating at home; in summer, I worked from home; and in fall, I've been commuting and working from home about 50:50. This is due to gradually changing circumstances.	65 pts	Female, 61 Tokyo
	Medium (41–60 pts)	Because I have to wear a mask and sanitize with alcohol when I go out, but also because influenza and colds are spreading less, and awareness of hygiene has increased.	60 pts	Female, 25 Aichi Pref.
		Masks are a pain and make it hard to breathe, I can't just get together with friends, and can't easily go to karaoke. On the other hand, with restrictions at cinemas, it's actually more comfortable, so some good things have come out of it. Even so, I would like to live as normal. I hope they look after those commuting with work from home, etc., so they're not unduly burdened and that children can play safely.	60 pts	Female, 27 Tokyo
		Because the impact of the coronavirus is getting worse with the approach of winter and things are going back to how they were earlier.	60 pts	Male, 23 Aichi Pref.
		A couple of months on from the lifting of the state of emergency, the bounds of what we can't do and my own internal restrictions are gradually easing. However, I still can't dine with people other than the family members I live with, and I am also turning down invitations. When I see people having a good time at company drinking parties and at bars and restaurants, I feel a difference in their degree of commitment compared to myself.	50 pts	Female, 35 Kanagawa Pref.
		Because even though I consistently wash my hands, gargle and wear a mask, I still worry that I or a family member will become infected.	50 pts	Male, 59 Osaka Pref.

Low (40 pts or lower)	I am refraining from travel and eating out, and no matter where I am, I am worried about COVID-19 and constantly under stress. I go out as little as possible; just to shop and the like.	30 pts	Male, 42 Aichi Pref.
	I lost my job and my income is less than half it was from this month.	20 pts	Male, 44 Osaka Pref.
	I quit my job so my income dropped. My favorite artists have all canceled their gigs (I had tickets). My mother developed dementia during the pandemic.	10 pts	Female, 53 Tokyo
	I am afraid just to go out. No matter how careful I am, there are many people not wearing masks, etc. Given my age, many of my friends live with their aging parents, so I can't even see them. It's very inconvenient.	0 pts	Female, 51 Aichi Pref.
	I was let go from the job I had wanted for the longest time and finally got, and my efforts to get another job since then have not been going well.	0 pts	Female, 29 Kanagawa Pref.

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

There are no significant changes in Degree of anxiety. Scores for all Degree of activity restriction items drop since the October survey

- In Degree of anxiety, scores for all items dropped in the previous (October) survey, but this time, there were no significant changes.
- Scores for all Degree of activity restriction items continued to trend downward for the third month in a row. In particular, the size of the drops in scores for Refrain from meeting friends and socializing (66.3%, down 8.6 points), Refrain from eating out (61.9%, down 7.4 points), and Refrain from travel and leisure activities (72.2%, down 6.5 points) were notable.

In Degree of behavioral change, Consistently take precautions against infection remains high

- In Degree of behavioral change, changes in scores were small, with only Refrain from going out and enjoy pastimes I can do at home (59.2%, down 5.1 points) standing out. Conversely, scores for items related to taking precautions against infection remain high: Consistently wear a mask, wash my hands and take other precautions against infection (91.8%, up 0.3 points), Make sure to get sufficient exercise, nutrition and sleep (76.4%, up 1.3 points) and Keep a stock of anti-infection products and everyday necessities (65.3%, down 1.4 points), among others.

■ Chronological change (Overall basis: July–November 2020)

		(%)					(Pts)			
		Scores					Change			
		Jul. survey	Aug. survey	Sep. survey	Oct. survey	Nov. survey	Jul. → Aug.	Aug. → Sep.	Sep. → Oct.	Oct. → Nov.
Agree + Somewhat agree										
Degree of anxiety	Feel anxious about the economy stalling	83.1	83.9	81.1	77.2	77.3	+0.8	-2.8	-3.9	+0.1
	Feel anxious about the situation abroad	75.2	76.3	71.0	68.4	70.0	+1.1	-5.3	-2.6	+1.6
	Feel anxious about the government's response	76.4	82.9	73.1	69.2	66.5	+6.5	-9.8	-3.9	-2.7
	Feel anxious about my and my family's health	70.7	74.9	69.3	67.1	66.2	+4.2	-5.6	-2.2	-0.9
	Feel anxious about my and my family's jobs and income	61.9	65.2	61.1	60.5	61.7	+3.3	-4.1	-0.6	+1.2
	Feel anxious about the lack and uncertainty of information	67.6	72.7	66.6	61.5	61.1	+5.1	-6.1	-5.1	-0.4
	Feel anxious about changes in my interpersonal relationships	43.5	47.2	47.0	45.3	43.5	+3.7	-0.2	-1.7	-1.8
Degree of activity restriction	Refrain from shaking hands, hugging and otherwise touching others	79.3	84.5	80.6	77.9	74.7	+5.2	-3.9	-2.7	-3.2
	Refrain from travel and leisure activities	84.2	87.7	83.5	78.7	72.2	+3.5	-4.2	-4.8	-6.5
	Refrain from taking nonessential and nonurgent trips	83.0	88.8	82.5	76.9	70.7	+5.8	-6.3	-5.6	-6.2
	Refrain from experiential entertainment (gigs, theater, movies, etc.)	81.3	83.8	79.8	76.1	70.5	+2.5	-4.0	-3.7	-5.6
	Refrain from meeting friends and socializing	78.3	84.5	80.1	74.9	66.3	+6.2	-4.4	-5.2	-8.6
	Refrain from nonessential and nonurgent shopping	76.6	80.5	74.4	67.0	62.3	+3.9	-6.1	-7.4	-4.7
	Refrain from eating out	74.8	79.3	75.7	69.3	61.9	+4.5	-3.6	-6.4	-7.4

Degree of behavioral change	Consistently wear a mask, wash my hands and take other precautions against infection	91.7	93.6	92.8	91.5	91.8	+1.9	-0.8	-1.3	+0.3
	Make sure to get sufficient exercise, nutrition and sleep	74.5	78.0	75.0	75.1	76.4	+3.5	-3.0	+0.1	+1.3
	Keep a stock of anti-infection products and everyday necessities	66.8	69.7	68.3	66.7	65.3	+2.9	-1.4	-1.6	-1.4
	Refrain from going out and enjoy pastimes I can do at home	71.1	73.1	70.0	64.3	59.2	+2.0	-3.1	-5.7	-5.1
	Use cashless payment options as much as possible	63.3	64.3	63.2	60.0	58.5	+1.0	-1.1	-3.2	-1.5
	I'm at home more, so I cook myself as much as possible	57.1	58.2	55.0	55.1	52.4	+1.1	-3.2	+0.1	-2.7
	Avoid using public transport and drive to places instead	50.3	53.1	50.3	47.9	47.1	+2.8	-2.8	-2.4	-0.8
	I'm home more, so I'm playing video games on my smartphone, computer, etc.	47.7	49.8	47.7	47.0	46.1	+2.1	-2.1	-0.7	-0.9
	I'm home more, so I'm using video, music and other streaming services	47.3	47.3	45.1	43.2	42.7	±0	-2.2	-1.9	-0.5
	Enjoy leisure activities outdoors where people don't gather	40.2	37.7	38.9	43.2	41.2	-2.5	+1.2	+4.3	-2.0
	I'm home more, so I'm doing exercises I can do at home	48.9	47.0	44.8	42.4	40.3	-1.9	-2.2	-2.4	-2.1
	I exercise outside where people don't gather	41.9	38.9	37.7	39.9	38.3	-3.0	-1.2	+2.2	-1.6
	Refrain from going out and use net shopping and food delivery services instead	45.9	48.7	44.1	37.5	37.6	+2.8	-4.6	-6.6	+0.1
	I'm home more, so I'm reading and posting on social media	36.2	40.1	37.5	37.5	35.8	+3.9	-2.6	±0	-1.7
	Commute to work/school during off-peak hours as much as possible	37.6	41.7	35.1	36.7	33.7	+4.1	-6.6	+1.6	-3.0
	I'm home more, so I'm upgrading my home environment by updating the telecommunications environment, buying home appliances, etc.	28.0	29.3	28.0	27.1	28.3	+1.3	-1.3	-0.9	+1.2
	Started/Am considering getting a side job because my income has dropped or looks likely to drop	25.3	29.5	26.3	28.5	27.1	+4.2	-3.2	+2.2	-1.4
	Telework (work from home) as much as possible [Those with jobs*]	30.0	34.6	28.7	26.5	26.7	+4.6	-5.9	-2.2	+0.2
	I'm home more, so I'm making things by hand (handcrafts, home improvements, DIY, etc.)	27.7	27.8	25.6	24.3	24.9	+0.1	-2.2	-1.3	+0.6
	Started/Am considering getting a job, changing jobs or starting a business because my income has dropped or looks likely to drop	22.4	23.3	21.8	21.5	22.8	+0.9	-1.5	-0.3	+1.3
	I'm putting the money I can't spend outside toward buying slightly better things	22.8	24.8	25.7	24.1	21.4	+2.0	+0.9	-1.6	-2.7
	I'm home more, so I'm investing	21.6	22.8	21.1	21.6	20.5	+1.2	-1.7	+0.5	-1.1
	I'm home more, so I'm posting and selling things on flea market apps and net auctions	21.8	21.7	21.2	21.1	19.7	-0.1	-0.5	-0.1	-1.4
	I'm home more, so I'm buying things on flea market apps and net auctions	22.3	21.7	20.7	21.3	19.5	-0.6	-1.0	+0.6	-1.8
	I'm supporting businesses and organizations that are not able to operate as normal	18.3	18.9	19.0	17.3	17.6	+0.6	+0.1	-1.7	+0.3
	I'm home more, so I'm studying online	17.9	18.7	17.5	15.6	16.8	+0.8	-1.2	-1.9	+1.2
	I'm home more, so I'm participating in online drinking parties and dinners	19.3	18.9	17.8	15.5	15.3	-0.4	-1.1	-2.3	-0.2

*Those with jobs: July n=1,055; August n=1,022; September n=1,072; October n=1,041; November n=1,045

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

In Degree of anxiety, scores are higher for females than males across the board

- There was a large 13.5-point difference in scores for males and females in Feel anxious about my and my family's health (73.0% for females, 59.5% for males).

In Degree of activity restriction, too, scores for all items are higher for females than males. Differences by age group are also noticeable, with scores higher the older the age group

- There was a large 10.2-point difference in scores for males and females in Refrain from experiential entertainment (75.6% for females, 65.4% for males).
- There was a large difference between age groups in Refrain from taking nonessential and nonurgent trips (20–29: 61.8%, 60–69: 81.7%, a difference of 19.9 points). In Refrain from eating out, the difference was 17.4 points (20–29: 53.9%, 60–69: 71.3%). In Refrain from meeting friends and socializing, the difference was 16.7 points (20–29: 56.8%, 60–69: 73.5%).

In Degree of behavioral change scores, differences between age groups and areas stand out

- Items related to use of the internet returned large differences in scores between age groups, including I'm home more, so I'm reading and posting on social media (20–29: 55.6%; 60–69: 20.8%, a difference of 34.8 points). Additionally, differences in scores between the 20s and 60s cohorts for items related to work also stood out: Started/Am considering getting a side job because my income has dropped or looks likely to drop (20–29: 39.0%; 60–69: 12.9%, a difference of 26.1 points), Started/Am considering getting a job, changing jobs or starting a business because my income has dropped or looks likely to drop (20–29: 30.3%; 60–69: 11.5%, a difference of 18.8 points). By area, differences were notable again this month in Avoid using public transport and drive to places instead, Commute to work/school during off-peak hours as much as possible, and Telework as much as possible.

■ 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)
Agree + Somewhat agree (Number of respondents)												
Degree of anxiety	Feel anxious about the economy stalling	77.3	75.0	79.6	71.4	77.6	81.1	81.5	72.0	76.2	77.6	78.0
	Feel anxious about the situation abroad	70.0	68.9	71.1	62.7	66.8	70.4	75.9	72.4	74.4	68.4	67.2
	Feel anxious about the government's response	66.5	62.3	70.9	61.0	66.8	68.5	69.6	64.9	63.8	69.2	66.6
	Feel anxious about my and my family's health	66.2	59.5	73.0	64.7	62.9	64.3	68.7	70.6	65.2	66.8	66.6
	Feel anxious about my and my family's jobs and income	61.7	60.5	63.0	63.1	68.9	62.9	63.9	49.1	62.4	61.2	61.6
	Feel anxious about the lack and uncertainty of information	61.1	56.0	66.3	63.5	65.4	64.8	58.3	53.0	59.6	61.4	62.4
	Feel anxious about changes in my interpersonal relationships	43.5	40.9	46.0	46.9	49.0	45.1	39.5	37.3	44.4	43.2	42.8
Degree of activity restriction	Refrain from shaking hands, hugging and otherwise touching others	74.7	71.1	78.3	66.0	72.4	73.3	79.0	81.4	74.6	73.6	75.8
	Refrain from travel and leisure activities	72.2	68.9	75.6	66.8	68.9	73.3	73.4	77.4	71.6	72.8	72.2
	Refrain from taking nonessential and nonurgent trips	70.7	68.6	72.9	61.8	66.8	69.6	72.7	81.7	71.0	71.0	70.2
	Refrain from experiential entertainment (gigs, theater, movies, etc.)	70.5	65.4	75.6	66.8	68.5	68.5	71.2	77.4	69.6	72.0	69.8
	Refrain from meeting friends and socializing	66.3	63.4	69.1	56.8	63.6	66.1	69.6	73.5	68.2	66.4	64.2
	Refrain from nonessential and nonurgent shopping	62.3	60.5	64.0	58.9	57.3	60.5	65.5	68.8	63.8	60.0	63.0
	Refrain from eating out	61.9	59.9	64.0	53.9	57.7	60.8	64.9	71.3	63.2	59.2	63.4

Degree of behavioral change	Consistently wear a mask, wash my hands and take other precautions against infection	91.8	88.2	95.4	88.4	88.1	90.9	94.7	96.4	91.4	93.0	91.0
	Make sure to get sufficient exercise, nutrition and sleep	76.4	74.7	78.1	74.3	74.8	76.3	74.3	82.4	77.0	73.6	78.6
	Keep a stock of anti-infection products and everyday necessities	65.3	57.7	72.9	63.5	57.3	69.3	65.5	69.2	66.4	61.2	68.2
	Refrain from going out and enjoy pastimes I can do at home	59.2	55.6	62.8	60.6	62.6	57.6	56.4	59.9	60.6	58.0	59.0
	Use cashless payment options as much as possible	58.5	56.8	60.3	52.7	56.6	58.4	61.1	62.7	59.6	58.2	57.8
	I'm at home more, so I cook myself as much as possible	52.4	37.9	67.1	49.8	55.6	52.5	48.6	55.6	54.2	52.8	50.2
	Avoid using public transport and drive to places instead	47.1	44.4	49.9	41.5	47.9	49.1	46.4	49.5	38.8	61.8	40.8
	I'm home more, so I'm playing video games on my smartphone, computer, etc.	46.1	43.7	48.6	57.3	56.3	50.7	35.4	32.3	47.4	46.6	44.4
	I'm home more, so I'm using video, music and other streaming services	42.7	43.6	41.9	58.5	47.9	45.3	32.0	32.6	43.8	42.6	41.8
	Enjoy leisure activities outdoors where people don't gather	41.2	41.2	41.2	46.5	41.6	42.4	35.7	40.9	40.6	44.0	39.0
	I'm home more, so I'm doing exercises I can do at home	40.3	36.8	43.9	45.2	41.3	40.0	33.2	43.7	43.0	40.2	37.8
	I exercise outside where people don't gather	38.3	41.7	34.8	38.6	39.5	40.5	28.8	44.4	37.4	39.6	37.8
	Refrain from going out and use net shopping and food delivery services instead	37.6	37.2	38.0	38.6	42.0	40.3	31.3	35.8	38.0	40.6	34.2
	I'm home more, so I'm reading and posting on social media	35.8	31.4	40.3	55.6	44.4	36.5	25.4	20.8	35.0	36.6	35.8
	Commute to work/school during off-peak hours as much as possible	33.7	36.7	30.6	35.7	31.8	36.5	33.9	29.7	42.8	27.8	30.4
	I'm home more, so I'm upgrading my home environment by updating the telecommunications environment, buying home appliances, etc.	28.3	26.8	29.8	36.1	32.9	30.9	18.8	24.0	29.4	27.6	27.8
	Started/Am considering getting a side job because my income has dropped or looks likely to drop	27.1	30.7	23.5	39.0	34.6	29.9	20.7	12.9	26.2	28.6	26.6
	Telework (work from home) as much as possible [Those with jobs*]	26.7	30.9	20.6	23.2	28.6	29.8	27.5	20.1	34.8	20.5	24.3
	I'm home more, so I'm making things by hand (handcrafts, home improvements, DIY, etc.)	24.9	20.5	29.3	24.9	25.9	24.0	22.9	27.2	26.8	25.2	22.6
	Started/Am considering getting a job, changing jobs or starting a business because my income has dropped or looks likely to drop	22.8	25.3	20.3	30.3	30.1	25.9	16.9	11.5	26.4	21.0	21.0
	I'm putting the money I can't spend outside toward buying slightly better things	21.4	20.5	22.3	25.7	20.6	23.2	14.7	23.7	20.8	22.4	21.0
	I'm home more, so I'm investing	20.5	25.6	15.3	24.9	23.4	22.4	16.9	15.1	20.8	21.2	19.4
	I'm home more, so I'm posting and selling things on flea market apps and net auctions	19.7	20.1	19.3	28.2	28.7	20.0	12.9	10.8	19.6	20.4	19.2
	I'm home more, so I'm buying things on flea market apps and net auctions	19.5	20.8	18.1	24.1	24.1	22.1	14.7	12.5	18.8	21.8	17.8
	I'm supporting businesses and organizations that are not able to operate as normal	17.6	17.7	17.4	19.5	22.0	15.5	13.2	19.4	16.6	18.4	17.8
	I'm home more, so I'm studying online	16.8	19.1	14.5	23.7	19.2	17.3	13.2	11.8	18.8	17.6	14.0
	I'm home more, so I'm participating in online drinking parties and dinners	15.3	16.6	14.0	22.0	19.6	14.7	11.3	10.4	15.2	16.4	14.2

*Those with jobs: n=1,045

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

It seems that people are loosening restrictions on their activities while continuing precautions against infection

- In Activity restriction intentions, all items were down only slightly since last month, with Refrain from shaking hands, hugging and otherwise touching others the largest drop, at 2.2 points. However, comparing July and November Activity restriction intentions, scores were down across the board. Items with large differences include Refrain from experiential entertainment (July: 62.7%, November: 53.2%, a difference of 9.5 points), Refrain from travel and leisure activities (July: 59.9%, November: 50.7%, a difference of 9.2 points) and Refrain from nonessential and nonurgent shopping (July: 63.5%, November: 54.7%, a difference of 8.8 points).
- In Behavioral change intentions, there was virtually no change from the previous month, with Refrain from going out and use net shopping and food delivery services instead (40.1%) the largest drop, at 2.3 points.
- Scores for infection precaution-related items remained high, including Consistently wear a mask, wash my hands and take other precautions against infection (83.7%, up 0.5 points), Make sure to get sufficient exercise, nutrition and sleep (81.9%, down 1.1 points) and Keep a stock of anti-infection products and everyday necessities (67.8%, down 2.1 points).

■ Chronological change (Overall basis: July–November 2020)

		(%)					(Pts)			
		Scores					Change			
		Jul. survey	Aug. survey	Sep. survey	Oct. survey	Nov. survey	Jul. → Aug.	Aug. → Sep.	Sep. → Oct.	Oct. → Nov.
Think I will + Think I will sometimes										
Activity restriction intentions	Refrain from shaking hands, hugging and otherwise touching others	69.1	69.9	64.6	66.3	64.1	+0.8	-5.3	+1.7	-2.2
	Refrain from taking nonessential and nonurgent trips	65.1	64.9	59.8	58.2	56.9	-0.2	-5.1	-1.6	-1.3
	Refrain from nonessential and nonurgent shopping	63.5	63.7	57.9	55.1	54.7	+0.2	-5.8	-2.8	-0.4
	Refrain from experiential entertainment (gigs, theater, movies, etc.)	62.7	61.7	54.3	54.9	53.2	-1.0	-7.4	+0.6	-1.7
	Refrain from meeting friends and socializing	56.7	58.6	51.6	51.1	51.0	+1.9	-7.0	-0.5	-0.1
	Refrain from travel and leisure activities	59.9	59.5	52.0	52.3	50.7	-0.4	-7.5	+0.3	-1.6
	Refrain from eating out	56.9	57.9	49.9	50.9	49.4	+1.0	-8.0	+1.0	-1.5
Behavioral change intentions	Consistently wear a mask, wash my hands and take other precautions against infection	85.0	84.3	83.2	83.2	83.7	-0.7	-1.1	±0	+0.5
	Make sure to get sufficient exercise, nutrition and sleep	83.7	84.1	84.0	83.0	81.9	+0.4	-0.1	-1.0	-1.1
	Keep a stock of anti-infection products and everyday necessities	73.0	73.1	71.0	69.9	67.8	+0.1	-2.1	-1.1	-2.1
	Use cashless payment options as much as possible	67.7	66.4	65.6	64.3	63.1	-1.3	-0.8	-1.3	-1.2
	Cook myself as much as possible	65.0	63.6	61.7	62.0	62.9	-1.4	-1.9	+0.3	+0.9
	Refrain from going out and enjoy pastimes I can do at home	61.3	60.7	56.6	56.5	56.1	-0.6	-4.1	-0.1	-0.4

Enjoy leisure activities outdoors where people don't gather	52.2	51.2	51.7	51.7	51.5	-1.0	+0.5	±0	-0.2
Do exercises I can do at home	54.8	53.7	51.7	50.7	50.5	-1.1	-2.0	-1.0	-0.2
Use video, music and other streaming services	49.3	48.6	48.7	46.7	46.9	-0.7	+0.1	-2.0	+0.2
Play video games on my smartphone, computer, etc.	48.3	49.5	46.5	46.0	46.6	+1.2	-3.0	-0.5	+0.6
Read and post on social media	44.4	47.3	44.7	46.0	46.5	+2.9	-2.6	+1.3	+0.5
Exercise outside where people don't gather	48.2	46.2	46.8	47.3	46.1	-2.0	+0.6	+0.5	-1.2
Avoid public transport and drive to places instead	48.8	50.3	47.1	46.7	44.8	+1.5	-3.2	-0.4	-1.9
Refrain from going out and use net shopping and food delivery services instead	44.3	47.7	42.7	42.4	40.1	+3.4	-5.0	-0.3	-2.3
Commute to work/school during off-peak hours as much as possible	40.3	41.9	39.4	37.7	36.8	+1.6	-2.5	-1.7	-0.9
Upgrade my home environment by updating the telecommunications environment, buying home appliances, etc.	36.2	38.9	36.3	35.8	36.5	+2.7	-2.6	-0.5	+0.7
Make things by hand (handcrafts, home improvements, DIY, etc.)	34.9	35.7	32.5	31.3	31.9	+0.8	-3.2	-1.2	+0.6
Invest	31.1	32.4	30.2	30.1	31.2	+1.3	-2.2	-0.1	+1.1
Put the money I can't spend outside toward buying slightly better things	28.3	31.7	29.6	30.6	29.7	+3.4	-2.1	+1.0	-0.9
Start/Consider a second job	29.0	32.4	29.4	30.5	29.1	+3.4	-3.0	+1.1	-1.4
Telework (work from home) as much as possible [Those with jobs*]	32.2	34.5	28.7	27.7	27.2	+2.3	-5.8	-1.0	-0.5
Buy things on flea market apps and net auctions	27.1	25.7	26.8	26.5	24.9	-1.4	+1.1	-0.3	-1.6
Post and sell things on flea market apps and net auctions	25.5	26.4	26.2	25.7	24.8	+0.9	-0.2	-0.5	-0.9
Start/Consider getting a job, changing jobs or starting a business	25.1	27.3	25.3	25.3	24.0	+2.2	-2.0	±0	-1.3
Support businesses and organizations	24.9	24.5	23.1	22.8	23.8	-0.4	-1.4	-0.3	+1.0
Study online	24.3	24.6	24.1	22.3	21.8	+0.3	-0.5	-1.8	-0.5
Participate in online drinking parties and dinners	19.4	20.1	19.4	17.6	16.7	+0.7	-0.7	-1.8	-0.9

*Those with jobs: July n=1,055; August n=1,022; September n=1,072; October n=1,041; November n=1,045



Up at least 5 pts



Up at least 10 pts



Down at least 5 pts



Down at least 10 pts

Reference material 5: Behavioral intentions once COVID-19 subsides

In Activity restriction intentions, by gender, scores for females are larger than for males. By age group, low scores among the 20s and 30s cohorts stand out

- In Activity restriction intentions, scores were higher for females than males across the board. By age group, scores were low for the 20–29 and 30–39 age groups, with scores increasing the higher the age group. Trends were in line with those in Degree of activity restriction (see p.8).

In Behavioral change intentions, differences in scores across age groups and areas stand out

- By age group, scores for items related to the internet and to considering a second job or changing jobs were high amongst the 20s and 30s cohorts. By area, trends were in line with those in Degree of behavioral change (see p.8), with notable differences in such items as teleworking, commuting to work/school during off-peak hours and driving to places.

■ Results by gender, age group and area

(%)

		Overall	Gender		Age group					Area		
			Males	Females	20–29	30–39	40–49	50–59	60–69	Greater Tokyo (40 km radius)	Greater Nagoya (40 km radius)	Hanshin (30 km radius)
Think I will + Think I will sometimes (Number of respondents)		(1500)	(755)	(745)	(241)	(286)	(375)	(319)	(279)	(500)	(500)	(500)
Activity restriction intentions	Refrain from shaking hands, hugging and otherwise touching others	64.1	60.1	68.1	52.3	59.4	65.3	68.3	72.4	62.0	64.6	65.6
	Refrain from taking nonessential and nonurgent trips	56.9	53.8	60.1	49.8	52.8	54.4	61.4	65.6	57.4	56.4	57.0
	Refrain from nonessential and nonurgent shopping	54.7	50.6	58.8	49.4	50.3	53.1	57.4	62.7	54.4	53.6	56.0
	Refrain from experiential entertainment (gigs, theater, movies, etc.)	53.2	52.3	54.1	44.4	48.6	56.5	56.7	57.0	51.6	54.0	54.0
	Refrain from meeting friends and socializing	51.0	48.6	53.4	42.7	48.6	50.4	55.5	56.3	52.0	50.2	50.8
	Refrain from travel and leisure activities	50.7	47.7	53.8	43.2	49.0	49.9	54.9	55.6	51.0	51.4	49.8
	Refrain from eating out	49.4	47.3	51.5	43.2	48.3	48.3	53.6	52.7	52.0	46.2	50.0
Behavioral change intentions	Consistently wear a mask, wash my hands and take other precautions against infection	83.7	78.9	88.6	78.0	80.8	84.8	85.3	88.5	83.0	83.4	84.8
	Make sure to get sufficient exercise, nutrition and sleep	81.9	79.1	84.8	77.6	81.8	81.9	79.6	88.5	85.0	78.8	82.0
	Keep a stock of anti-infection products and everyday necessities	67.8	58.0	77.7	61.0	68.2	69.1	66.8	72.8	67.2	67.0	69.2
	Use cashless payment options as much as possible	63.1	60.3	66.0	56.8	61.2	61.6	65.5	69.9	65.0	62.4	62.0
	Cook myself as much as possible	62.9	45.7	80.3	58.1	64.7	60.8	60.2	71.0	61.2	64.4	63.0
	Refrain from going out and enjoy pastimes I can do at home	56.1	50.5	61.9	63.5	56.6	54.9	52.7	54.8	57.8	56.4	54.2

Enjoy leisure activities outdoors where people don't gather	51.5	47.7	55.3	52.7	53.1	54.1	42.9	54.8	52.4	50.8	51.2
Do exercises I can do at home	50.5	43.6	57.4	51.5	54.9	49.6	46.4	50.9	52.6	48.6	50.2
Use video, music and other streaming services	46.9	47.2	46.6	63.9	51.4	48.3	40.1	33.3	49.2	44.4	47.0
Play video games on my smartphone, computer, etc.	46.6	45.4	47.8	59.8	59.4	49.6	36.7	29.4	46.0	47.8	46.0
Read and post on social media	46.5	40.7	52.3	67.6	55.9	45.9	38.9	28.0	48.6	44.2	46.6
Exercise outside where people don't gather	46.1	46.0	46.3	46.5	49.7	46.1	37.6	52.0	47.4	45.0	46.0
Avoid public transport and drive to places instead	44.8	40.3	49.4	38.6	42.0	42.4	50.5	49.8	35.0	55.6	43.8
Refrain from going out and use net shopping and food delivery services instead	40.1	37.1	43.1	41.9	45.1	40.8	36.7	36.2	41.8	40.4	38.0
Commute to work/school during off-peak hours as much as possible	36.8	37.2	36.4	32.8	38.1	39.2	36.1	36.6	42.6	30.8	37.0
Upgrade my home environment by updating the telecommunications environment, buying home appliances, etc.	36.5	34.2	38.8	42.3	44.1	36.3	28.8	32.6	40.4	34.4	34.6
Make things by hand (handcrafts, home improvements, DIY, etc.)	31.9	26.5	37.3	34.0	30.1	31.2	29.8	35.1	33.8	29.8	32.0
Invest	31.2	37.6	24.7	37.8	35.3	33.3	25.7	24.7	32.0	32.4	29.2
Put the money I can't spend outside toward buying slightly better things	29.7	25.7	33.7	37.3	27.3	29.9	23.2	32.6	32.8	25.8	30.4
Start/Consider a second job	29.1	31.7	26.4	41.1	40.9	30.7	21.6	12.9	30.0	28.4	28.8
Telework (work from home) as much as possible [Those with jobs*]	27.2	31.2	21.3	20.2	28.1	29.1	30.6	24.5	35.1	21.1	24.9
Buy things on flea market apps and net auctions	24.9	25.3	24.6	29.5	30.1	30.1	19.4	15.1	27.0	24.6	23.2
Post and sell things on flea market apps and net auctions	24.8	24.1	25.5	34.9	30.8	29.1	18.2	11.8	24.0	24.4	26.0
Start/Consider getting a job, changing jobs or starting a business	24.0	25.0	23.0	35.7	30.4	26.9	18.8	9.3	27.4	21.4	23.2
Support businesses and organizations	23.8	21.6	26.0	24.1	25.5	21.9	21.9	26.5	25.2	22.6	23.6
Study online	21.8	23.3	20.3	27.8	25.2	24.8	17.2	14.3	25.2	19.4	20.8
Participate in online drinking parties and dinners	16.7	16.8	16.6	24.9	22.4	16.3	12.2	9.7	16.0	17.2	17.0

*Those with jobs: n=1,045

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 outbreak 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)

Survey periods: November 5 (Thu)–9 (Mon), 2020

October 1 (Thu)–5 (Mon), 2020

September 3 (Thu)–7 (Mon), 2020

August 3 (Mon)–6 (Thu), 2020

July 2 (Thu)–6 (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 allocations: 500 respondents per territory, allocated based on the population demographics (gender/age group) of the territory

Sample sizes: 1,500 per 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	1,500

Survey method: Internet survey

Conducted by: H. M. Marketing Research, Inc.

Reference

Seventh survey (Released October 15): <https://www.hakuhodo-global.com/news/seventh-survey-of-sei-katsu-sha-concerning-covid-19-october-2020.html>

Sixth survey (Released September 17): <https://www.hakuhodo-global.com/news/sixth-survey-of-sei-katsu-sha-concerning-covid-19-september-2020.html>

Fifth survey (Released August 20): <https://www.hakuhodo-global.com/news/fifth-survey-of-Sei-katsu-sha-concerning-covid-19-august-2020.html>

Fourth survey (Released July 16): <https://www.hakuhodo-global.com/news/fourth-survey-of-Sei-katsu-sha-concerning-covid-19-july-2020.html>

Third survey (Released June 18): <https://www.hakuhodo-global.com/news/third-survey-of-Sei-katsu-sha-concerning-covid-19-june-2020.html>

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

First survey (Released 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).

Media contacts:

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