

December 18, 2020

Ninth Survey of *Sei-katsu-sha* Concerning COVID-19 (December 2020)

Degree of freedom of life is 58.9 pts in December
Upward trend since September turns down again
Anxiety and activity restriction strengthen again

Hakuhodo Institute of Life and Living, a think tank of Hakuhodo Inc., in December 2020 conducted its ninth “Survey of *Sei-katsu-sha* Concerning COVID-19” to understand *sei-katsu-sha*’s attitudes and behaviors during the coronavirus. The survey was conducted December 3–7, 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 outline.

In early November, COVID-19 infections surged across Japan. The survey was conducted as the Metropolitan government raised Tokyo’s COVID-19 warning level and requested restaurants and bars to shorten their business hours, as travel to Sapporo and Osaka was excluded from the national government’s Go To Travel campaign to promote domestic tourism, and as the media each day reported record COVID-19 infections, sharply increasing numbers of patients with severe symptoms and a medical system under huge strain.

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 58.9 points, down 2.5 points since November, ending a three-month upward trend.

Scores for Degree of anxiety items were up in almost every item, in line with the increase in infection numbers. Notable were increases in the scores for Feel anxious about the government’s response (75.6%, up 9.1 points) and Feel anxious about the lack and uncertainty of information (67.1%, up 6.0 points). Scores for all Degree of activity restriction items increased. In particular, scores rose significantly for such items as Refrain from meeting friends and socializing (77.3%, up 11.0 points), Refrain from nonessential and nonurgent shopping (71.5%, up 9.2 points) and Refrain from eating out (71.1%, up 9.2 points).

Scores for nearly all Degree of behavioral change items increased, with scores for items related to refraining from going out and taking alternative actions rising, including Refrain from going out and enjoy pastimes I can do at home (66.5%, up 7.3 points), Refrain from going out and use net shopping and food delivery services instead (44.7%, up 7.1 points), Avoid using public transport and drive to places instead (52.5%, up 5.4 points), and Telework (work from home) as much as possible (32.0%, up 5.3 points).

It seems that *sei-katsu-sha*’s attitudes and behaviors, which had been shifting to “outside” since September, switched back to “inside.”

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

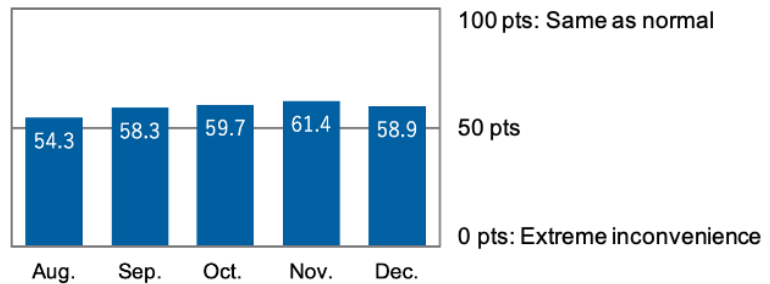
Freedom of life under the influence of COVID-19

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:

58.9 pts

Down 2.5 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 government's response	75.6% (+9.1 pts)
Feel anxious about the lack and uncertainty of information	67.1% (+6.0 pts)
Feel anxious about my and my family's health	70.7% (+4.5 pts)

Degree of activity restriction

Refrain from meeting friends and socializing	77.3% (+11.0 pts)
Refrain from nonessential and nonurgent shopping	71.5% (+9.2 pts)
Refrain from eating out	71.1% (+9.2 pts)
Refrain from travel and leisure activities	81.1% (+8.9 pts)

Degree of behavioral change

Refrain from going out and enjoy pastimes I can do at home	66.5% (+7.3 pts)
Refrain from going out and use net shopping and food delivery services instead	44.7% (+7.1 pts)
Avoid using public transport and drive to places instead	52.5% (+5.4 pts)
Telework (work from home) as much as possible	32.0% (+5.3 pts)

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

Degree of freedom of life scores, which had been rising, start falling again

- If life prior to the spread of the coronavirus was 100, freedom of life today scored an average 58.9 points, down 2.5 points since last month. By gender, age group and area, scores dropped among all cohorts. In particular, decreases in scores were large among females, those aged 20–29 and those in the Hanshin area.

In free responses, comments included anti-infection precautions being a burden, worries that things that have restarted could be suspended again at any time, and concern about the recent increase in infections

- Among those who gave comparatively high Freedom of life scores, comments included “Having to wear a mask and sanitize is a burden” and “Lots of things have restarted, but I can’t relax and I worry that things can be suspended again at any time.” Also, even with comments worrying about the recent surge in cases, there were also comments expressing irritation at others, such as “It doesn’t matter if I am dedicated to isolating when others are out carousing or out and about using Go To.”
- Among those who gave comparatively low Freedom of life scores, we see comments related to decreased incomes, the burden of making ends meet, tuition and other economic reasons. Here, too, we also see comments about being tired of anti-infection precautions.

■ Results by gender, age group and area

(Number of respondents)		Scores					Change			
		Aug.	Sep.	Oct.	Nov.	Dec.	Aug.	Sep.	Oct.	Nov.
		2019	2020	2020	2020	2020	→	→	→	→
		survey	survey	survey	survey	survey	Sep.	Oct.	Nov.	Dec.
		(Pts)	(Pts)	(Pts)	(Pts)	(Pts)	(Pts)	(Pts)	(Pts)	(Pts)
Overall	(1500)	54.3	58.3	59.7	61.4	58.9	+4.0	+1.4	+1.7	-2.5
Males	(755)	55.1	59.8	60.4	62.2	61.4	+4.7	+0.6	+1.7	-0.8
Females	(745)	53.6	56.8	58.9	60.7	56.5	+3.2	+2.2	+1.7	-4.2
20–29	(241)	49.6	56.7	56.6	59.4	55.2	+7.0	-0.1	+2.9	-4.2
30–39	(286)	53.6	57.8	59.0	61.0	58.6	+4.2	+1.2	+2.0	-2.4
40–49	(375)	54.4	57.6	62.0	61.4	61.3	+3.2	+4.4	-0.6	-0.1
50–59	(319)	55.8	59.7	59.1	61.4	58.1	+4.0	-0.6	+2.3	-3.3
60–69	(279)	57.5	59.6	60.7	63.6	60.3	+2.1	+1.1	+3.0	-3.4
Greater Tokyo (40 km radius)	(500)	53.7	57.2	59.0	59.7	59.5	+3.5	+1.8	+0.7	-0.2
Greater Nagoya (40 km radius)	(500)	54.6	57.2	60.7	61.5	59.0	+2.6	+3.5	+0.9	-2.5
Hanshin (30 km radius)	(500)	54.7	60.5	59.4	63.1	58.3	+5.8	-.1	+3.7	-4.8

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)	42.6	35.4	22.0
Males	(755)	46.4	35.0	18.7
Females	(745)	38.8	35.8	25.4
20–29	(241)	38.6	31.1	30.3
30–39	(286)	42.7	36.7	20.6
40–49	(375)	46.7	33.6	19.7
50–59	(319)	39.8	37.3	22.9
60–69	(279)	43.7	38.0	18.3
Greater Tokyo (40 km radius)	(500)	44.8	30.8	24.4
Greater Nagoya (40 km radius)	(500)	42.6	36.2	21.2
Hanshin (30 km radius)	(500)	40.4	39.2	20.4

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

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

Degree of freedom of life	High (61 pts or higher)	Luckily, it hardly affects me. As a freelancer, I can communicate with my clients using online tools, etc. I'm a homebody anyway, so I enjoy a pretty good life at home.	99 pts	Male, 33 Tokyo
		I now need to sanitize everything around me obsessively. I can no longer live if I don't sanitize both at home and outside. Having to wear a mask and sanitize is a huge burden.	90 pts	Female, 60 Osaka Pref.
		My activities outside the home have hardly changed since before the pandemic. The only thing is I no longer sit on the train at all. There are some required changes, like always wearing a mask when out, hence my score.	90 pts	Female, 59 Kanagawa Pref.
		I feel awkward about traveling and participating in events, it's hard to visit my parents, it's hard to breathe at the gym in a mask.	80 pts	Male, 33 Tokyo
		I have two small children, so I've somewhat got used to restrictions on activities such as eating out, traveling and spending time with others. I feel that things are not much different now under COVID-19. In consideration of the burden of always wearing a mask and sanitizing hands, I've given it 80 points.	80 pts	Female, 37 Aichi Pref.
	Medium (41–60 pts)	Lots of things have restarted, but the situation doesn't allow me to relax and enjoy them, and since I worry that they could be suspended again at any time, it's no fun.	60 pts	Male, 60 Tokyo
		Because I can no longer just go shopping in Osaka or take a trip somewhere nearby.	60 pts	Female, 55 Nara Pref.
		While I'm happy to no longer socialize with my colleagues, not being able to see my grandparents and friends is tough.	60 pts	Male, 28 Chiba Pref.
		All I can do to prevent the medical system from collapsing is to stay at home. But it doesn't matter if I am dedicated to self-isolating when others are out carousing or out and about using Go To and get infected.	50 pts	Female, 35 Aichi Pref.
		Infections are rising again and it looks like our activities will be restricted, so I'm worried I'll not be able to do the things I've planned.	50 pts	Female, 31 Osaka Pref.

Low (40 pts or lower)	Because my income is less than half what it was last year due to my workplace being on reduced hours and I'm struggling to pay my bills and make ends meet.	40 pts	Female, 33 Osaka Pref.
	Thanks to the pandemic, I can't carry out work as planned and my income has dropped to about one third what it was. The increasing number of people in need, not just in Japan but worldwide, makes me sad. I feel I'd like to help, but I don't have the wherewithal myself. I can no longer casually ask someone over, so I have hardly met anyone. I feel depressed when I think this will continue for several more years.	30 pts	Female, 40 Tokyo
	It's not just that my range of activity has narrowed. I'm a bit tired of taking precautions against infection no matter where I'm going. The reason I didn't give it zero is that I am going out for walks and whatnot for exercise. But I'm inconvenienced. I've decided for myself where I'll put the clothes I wore outside after I come home, and it's a pain. I turn the clothes I take off inside out. If I sat down when out for a meal, I take those clothes off, too. I wash my hands before taking my clothes off, and then wash them again afterwards. I choose to do this myself, but it's exhausting.	30 pts	Female, 60 Kanagawa Pref.
	My search for a part-time job to pay my tuition has been restricted, and, despite not being able to go to university as I'd like, I have to pay the tuition as normal just the same.	30 pts	Male, 21 Aichi Pref.
	Because I hate that there are restrictions on patron numbers and operating hours at the <i>izakaya</i> (pubs) and other places I'd like to go to.	0 pts	Male, 21 Osaka Pref.

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

Degree of anxiety scores up in six of seven items. Degree of activity restriction scores up across the board

- Scores rose in six of the seven Degree of anxiety items. Increases stood out in Feel anxious about the government's response (75.6%, up 9.1 points) and Feel anxious about the lack and uncertainty of information (67.1%, up 6.0 points).
- Scores for Degree of activity restriction items rose across the board. In particular, scores rose significantly for such items as Refrain from meeting friends and socializing (77.3%, up 11.0 points), Refrain from nonessential and nonurgent shopping (71.5%, up 9.2 points), Refrain from eating out (71.1%, up 9.2 points) and Refrain from travel and leisure activities (81.1%, up 8.9 points).

Degree of behavioral change scores rise for items related to restricting behavior, taking alternative actions

- In Degree of behavioral change, too, all but one item saw increased scores. In particular, scores increased in items related to refraining from going out and taking alternative actions, including Refrain from going out and enjoy pastimes I can do at home (66.5%, up 7.3 points), Refrain from going out and use net shopping and food delivery services instead (44.7%, up 7.1 points), Avoid using public transport and drive to places instead (52.5%, up 5.4 points), and Telework (work from home) as much as possible (32.0%, up 5.3 points).

■ Chronological change (Overall basis: August–December 2020)

		(%)					(Pts)			
		Scores					Change			
		Aug. survey	Sep. survey	Oct. survey	Nov. survey	Dec. survey	Aug. → Sep.	Sep. → Oct.	Oct. → Nov.	Nov. → Dec.
Agree + Somewhat agree										
Degree of anxiety	Feel anxious about the economy stalling	83.9	81.1	77.2	77.3	79.9	-2.8	-3.9	+0.1	+2.6
	Feel anxious about the government's response	82.9	73.1	69.2	66.5	75.6	-9.8	-3.9	-2.7	+9.1
	Feel anxious about my and my family's health	74.9	69.3	67.1	66.2	70.7	-5.6	-2.2	-0.9	+4.5
	Feel anxious about the situation abroad	76.3	71.0	68.4	70.0	69.7	-5.3	-2.6	+1.6	-0.3
	Feel anxious about the lack and uncertainty of information	72.7	66.6	61.5	61.1	67.1	-6.1	-5.1	-0.4	+6.0
	Feel anxious about my and my family's jobs and income	65.2	61.1	60.5	61.7	62.4	-4.1	-0.6	+1.2	+0.7
	Feel anxious about changes in my interpersonal relationships	47.2	47.0	45.3	43.5	44.7	-0.2	-1.7	-1.8	+1.2
Degree of activity restriction	Refrain from travel and leisure activities	87.7	83.5	78.7	72.2	81.1	-4.2	-4.8	-6.5	+8.9
	Refrain from taking nonessential and nonurgent trips	88.8	82.5	76.9	70.7	79.4	-6.3	-5.6	-6.2	+8.7
	Refrain from shaking hands, hugging and otherwise touching others	84.5	80.6	77.9	74.7	78.9	-3.9	-2.7	-3.2	+4.2
	Refrain from experiential entertainment (gigs, theater, movies, etc.)	83.8	79.8	76.1	70.5	77.4	-4.0	-3.7	-5.6	+6.9
	Refrain from meeting friends and socializing	84.5	80.1	74.9	66.3	77.3	-4.4	-5.2	-8.6	+11.0
	Refrain from nonessential and nonurgent shopping	80.5	74.4	67.0	62.3	71.5	-6.1	-7.4	-4.7	+9.2
	Refrain from eating out	79.3	75.7	69.3	61.9	71.1	-3.6	-6.4	-7.4	+9.2

Degree of behavioral change	Consistently wear a mask, wash my hands and take other precautions against infection	93.6	92.8	91.5	91.8	92.3	-0.8	-1.3	+0.3	+0.5
	Make sure to get sufficient exercise, nutrition and sleep	78.0	75.0	75.1	76.4	76.5	-3.0	+0.1	+1.3	+0.1
	Keep a stock of anti-infection products and everyday necessities	69.7	68.3	66.7	65.3	68.5	-1.4	-1.6	-1.4	+3.2
	Refrain from going out and enjoy pastimes I can do at home	73.1	70.0	64.3	59.2	66.5	-3.1	-5.7	-5.1	+7.3
	Use cashless payment options as much as possible	64.3	63.2	60.0	58.5	62.1	-1.1	-3.2	-1.5	+3.6
	I'm at home more, so I cook myself as much as possible	58.2	55.0	55.1	52.4	54.1	-3.2	+0.1	-2.7	+1.7
	Avoid using public transport and drive to places instead	53.1	50.3	47.9	47.1	52.5	-2.8	-2.4	-0.8	+5.4
	I'm home more, so I'm playing video games on my smartphone, computer, etc.	49.8	47.7	47.0	46.1	46.8	-2.1	-0.7	-0.9	+0.7
	Refrain from going out and use net shopping and food delivery services instead	48.7	44.1	37.5	37.6	44.7	-4.6	-6.6	+0.1	+7.1
	I'm home more, so I'm using video, music and other streaming services	47.3	45.1	43.2	42.7	44.3	-2.2	-1.9	-0.5	+1.6
	I'm home more, so I'm doing exercises I can do at home	47.0	44.8	42.4	40.3	44.1	-2.2	-2.4	-2.1	+3.8
	Enjoy leisure activities outdoors where people don't gather	37.7	38.9	43.2	41.2	43.7	+1.2	+4.3	-2.0	+2.5
	I exercise outside where people don't gather	38.9	37.7	39.9	38.3	40.7	-1.2	+2.2	-1.6	+2.4
	Commute to work/school during off-peak hours as much as possible	41.7	35.1	36.7	33.7	37.7	-6.6	+1.6	-3.0	+4.0
	I'm home more, so I'm reading and posting on social media	40.1	37.5	37.5	35.8	37.6	-2.6	±0	-1.7	+1.8
	Telework (work from home) as much as possible [Those with jobs*]	34.6	28.7	26.5	26.7	32.0	-5.9	-2.2	+0.2	+5.3
	Started/Am considering getting a side job because my income has dropped or looks likely to drop	29.5	26.3	28.5	27.1	30.1	-3.2	+2.2	-1.4	+3.0
	I'm home more, so I'm upgrading my home environment by updating the telecommunications environment, buying home appliances, etc.	29.3	28.0	27.1	28.3	29.8	-1.3	-0.9	+1.2	+1.5
	I'm home more, so I'm making things by hand (handcrafts, home improvements, DIY, etc.)	27.8	25.6	24.3	24.9	27.5	-2.2	-1.3	+0.6	+2.6
	I'm putting the money I can't spend outside toward buying slightly better things	24.8	25.7	24.1	21.4	24.9	+0.9	-1.6	-2.7	+3.5
	I'm home more, so I'm posting and selling things on flea market apps and net auctions	21.7	21.2	21.1	19.7	23.6	-0.5	-0.1	-1.4	+3.9
	I'm home more, so I'm investing	22.8	21.1	21.6	20.5	23.3	-1.7	+0.5	-1.1	+2.8
	I'm home more, so I'm buying things on flea market apps and net auctions	21.7	20.7	21.3	19.5	22.9	-1.0	+0.6	-1.8	+3.4
	Started/Am considering getting a job, changing jobs or starting a business because my income has dropped or looks likely to drop	23.3	21.8	21.5	22.8	22.3	-1.5	-0.3	+1.3	-0.5
	I'm home more, so I'm studying online	18.7	17.5	15.6	16.8	19.0	-1.2	-1.9	+1.2	+2.2
	I'm supporting businesses and organizations that are not able to operate as normal	18.9	19.0	17.3	17.6	18.5	+0.1	-1.7	+0.3	+0.9
	I'm home more, so I'm participating in online drinking parties and dinners	18.9	17.8	15.5	15.3	18.3	-1.1	-2.3	-0.2	+3.0

*Those with jobs: August n=1,022; September n=1,072; October n=1,041; November n=1,045; December n=1,019

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 higher for females than males across the board

- The largest difference in scores between males and females was in Feel anxious about my and my family's health (females: 77.2%, males: 64.2%, a difference of 13.0 points).

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

- The largest difference in scores between males and females was in Refrain from experiential entertainment (females: 83.2%; males: 71.7%, a difference of 11.5 points).
- The largest difference in scores between age groups was in Refrain from meeting friends and socializing (20–29: 66.0%; 60–69: 81.7%, a difference of 15.7 points), and Refrain from shaking hands, hugging and otherwise touching others (20–29: 68.5%; 60–69: 84.2%, a difference of 15.7 points). In Refrain from eating out, the difference was 14.7 points (20–29: 63.1%, 60–69: 77.8%).

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: 59.3%; 60–69: 18.3%, a difference of 41.0 points). There was also a difference of 32.6 points in Started/Am considering getting a side job because my income has dropped or looks likely to drop (20–29: 47.7%; 60–69: 15.1%).
- By area, differences in scores widened, with increases in the Greater Nagoya score for Avoid using public transport and drive to places instead increasing (61.8% last month; 69.0% this month, an increase of 7.2 points), and the Greater Tokyo score for Telework (work from home) as much as possible (34.8% last month, 42.2% this month, an increase of 7.4 points).

■ 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)
Agree + Somewhat agree (Number of respondents)		(1500)	(755)	(745)	(241)	(286)	(375)	(319)	(279)	(500)	(500)	(500)
Degree of anxiety	Feel anxious about the economy stalling	79.9	75.9	84.0	69.7	78.3	82.9	84.3	81.4	78.8	80.0	81.0
	Feel anxious about the government's response	75.6	69.8	81.5	66.8	79.7	76.8	75.5	77.4	72.2	76.8	77.8
	Feel anxious about my and my family's health	70.7	64.2	77.2	63.9	71.0	69.9	76.2	71.0	65.8	73.2	73.0
	Feel anxious about the situation abroad	69.7	67.4	71.9	59.3	66.1	73.6	70.5	76.0	68.6	71.6	68.8
	Feel anxious about the lack and uncertainty of information	67.1	62.6	71.5	66.0	68.5	67.2	65.5	68.1	66.2	68.8	66.2
	Feel anxious about my and my family's jobs and income	62.4	59.3	65.5	62.2	69.6	70.9	57.1	49.8	60.4	63.2	63.6
	Feel anxious about changes in my interpersonal relationships	44.7	41.3	48.2	42.7	50.7	45.9	39.8	44.4	43.8	46.6	43.8
Degree of activity restriction	Refrain from travel and leisure activities	81.1	75.9	86.3	74.7	77.6	85.3	79.9	85.7	79.6	81.8	81.8
	Refrain from taking nonessential and nonurgent trips	79.4	74.7	84.2	73.0	75.9	80.8	78.7	87.5	78.0	80.4	79.8
	Refrain from shaking hands, hugging and otherwise touching others	78.9	74.2	83.8	68.5	74.1	83.7	80.9	84.2	80.4	76.6	79.8
	Refrain from experiential entertainment (gigs, theater, movies, etc.)	77.4	71.7	83.2	69.7	74.5	79.5	78.7	82.8	75.6	78.2	78.4
	Refrain from meeting friends and socializing	77.3	72.5	82.1	66.0	75.2	82.7	77.4	81.7	76.2	79.2	76.4
	Refrain from nonessential and nonurgent shopping	71.5	67.8	75.2	65.6	71.3	73.1	69.9	76.3	70.2	72.2	72.0
	Refrain from eating out	71.1	68.1	74.1	63.1	67.1	72.0	73.7	77.8	71.8	70.6	70.8

Degree of behavioral change	Consistently wear a mask, wash my hands and take other precautions against infection	92.3	88.9	95.8	87.6	91.6	93.3	93.1	95.0	90.4	93.0	93.6
	Make sure to get sufficient exercise, nutrition and sleep	76.5	75.0	78.1	69.3	79.0	77.9	75.2	79.9	77.2	77.8	74.6
	Keep a stock of anti-infection products and everyday necessities	68.5	62.1	74.9	64.3	68.5	67.7	69.6	71.7	68.8	69.6	67.0
	Refrain from going out and enjoy pastimes I can do at home	66.5	62.6	70.3	69.3	67.1	68.5	63.9	63.4	65.6	65.8	68.0
	Use cashless payment options as much as possible	62.1	61.6	62.6	59.8	67.5	60.5	58.3	64.9	63.8	63.2	59.2
	I'm at home more, so I cook myself as much as possible	54.1	39.5	68.9	57.3	60.1	51.5	48.3	55.2	58.2	53.0	51.0
	Avoid using public transport and drive to places instead	52.5	50.5	54.5	48.1	52.4	54.9	49.8	55.9	42.4	69.0	46.0
	I'm home more, so I'm playing video games on my smartphone, computer, etc.	46.8	49.1	44.4	63.9	56.3	49.6	35.4	31.5	45.6	48.0	46.8
	Refrain from going out and use net shopping and food delivery services instead	44.7	43.0	46.4	53.5	44.4	46.9	38.9	41.2	46.0	44.2	44.0
	I'm home more, so I'm using video, music and other streaming services	44.3	46.4	42.3	67.2	51.4	41.3	36.1	30.8	47.8	41.6	43.6
	I'm home more, so I'm doing exercises I can do at home	44.1	42.3	46.0	46.5	48.3	44.0	38.6	44.4	44.2	46.4	41.8
	Enjoy leisure activities outdoors where people don't gather	43.7	44.5	42.8	50.6	52.1	46.1	34.5	36.2	43.6	45.4	42.0
	I exercise outside where people don't gather	40.7	44.0	37.3	44.0	49.0	42.1	32.9	36.2	40.0	42.8	39.2
	Commute to work/school during off-peak hours as much as possible	37.7	37.9	37.6	41.9	38.1	36.8	37.6	35.1	42.6	34.2	36.4
	I'm home more, so I'm reading and posting on social media	37.6	35.8	39.5	59.3	50.3	37.1	27.3	18.3	37.0	37.8	38.0
	Telework (work from home) as much as possible [Those with jobs*]	32.0	33.8	29.2	34.3	32.7	32.4	30.7	29.9	42.2	27.3	26.1
	Started/Am considering getting a side job because my income has dropped or looks likely to drop	30.1	32.6	27.7	47.7	35.0	30.1	25.7	15.1	31.0	31.0	28.4
	I'm home more, so I'm upgrading my home environment by updating the telecommunications environment, buying home appliances, etc.	29.8	30.1	29.5	41.9	37.4	27.5	26.3	18.6	32.6	28.6	28.2
	I'm home more, so I'm making things by hand (handcrafts, home improvements, DIY, etc.)	27.5	26.5	28.5	28.6	26.2	28.5	24.8	29.4	27.8	29.8	24.8
	I'm putting the money I can't spend outside toward buying slightly better things	24.9	24.5	25.4	32.8	30.8	19.2	22.3	22.9	26.6	24.8	23.4
	I'm home more, so I'm posting and selling things on flea market apps and net auctions	23.6	22.0	25.2	34.9	30.8	23.5	18.2	12.9	25.0	24.8	21.0
	I'm home more, so I'm investing	23.3	30.9	15.6	34.4	27.6	22.1	16.3	18.6	24.6	25.2	20.0
	I'm home more, so I'm buying things on flea market apps and net auctions	22.9	24.0	21.7	28.2	28.7	22.4	18.2	18.3	25.8	21.8	21.0
	Started/Am considering getting a job, changing jobs or starting a business because my income has dropped or looks likely to drop	22.3	25.3	19.3	33.6	26.6	23.7	18.2	11.1	24.0	20.2	22.8
	I'm home more, so I'm studying online	19.0	21.6	16.4	32.4	20.3	17.1	15.4	12.9	20.6	18.0	18.4
	I'm supporting businesses and organizations that are not able to operate as normal	18.5	20.0	17.0	23.2	23.1	14.7	15.0	19.0	19.6	20.4	15.6
	I'm home more, so I'm participating in online drinking parties and dinners	18.3	20.5	16.0	34.9	19.6	12.3	14.4	15.1	20.6	18.8	15.4

*Those with jobs: n=1,019

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

Scores increase across the board in Activity restriction intentions and Behavioral change intentions after COVID-19 has subsided

- In Activity restriction intentions, we see sharp increases in scores for Refrain from meeting friends and socializing (57.6%, up 6.6 points), Refrain from eating out (55.2%, up 5.8 points), and Refrain from travel and leisure activities (56.1%, up 5.4 points).
- In Behavioral change intentions, increases in scores were noticeable in Telework (work from home) as much as possible (34.5%, up 7.3 points), Avoid using public transport and drive to places instead (50.4%, up 5.6 points), Refrain from going out and use net shopping and food delivery services instead (45.6%, up 5.5 points), Refrain from going out and enjoy pastimes I can do at home (61.4%, up 5.3 points), Keep a stock of anti-infection products and everyday necessities (73.0%, up 5.2 points), and Commute to work/school during off-peak hours as much as possible (41.9%, up 5.1 points).
- It seems that intentions regarding refraining from going out, teleworking or commuting off-peak, and building up stores of anti-infection products even after COVID-19 has subsided are rising.

■ Chronological change (Overall basis: August–December 2020)

		(%)					(Pts)			
		Scores					Change			
		Aug. survey	Sep. survey	Oct. survey	Nov. survey	Dec. survey	Aug. → Sep.	Sep. → Oct.	Oct. → Nov.	Nov. → Dec.
Think I will + Think I will sometimes										
Activity restriction intentions	Refrain from shaking hands, hugging and otherwise touching others	69.9	64.6	66.3	64.1	67.5	-5.3	+1.7	-2.2	+3.4
	Refrain from taking nonessential and nonurgent trips	64.9	59.8	58.2	56.9	61.8	-5.1	-1.6	-1.3	+4.9
	Refrain from nonessential and nonurgent shopping	63.7	57.9	55.1	54.7	58.7	-5.8	-2.8	-0.4	+4.0
	Refrain from experiential entertainment (gigs, theater, movies, etc.)	61.7	54.3	54.9	53.2	58.1	-7.4	+0.6	-1.7	+4.9
	Refrain from meeting friends and socializing	58.6	51.6	51.1	51.0	57.6	-7.0	-0.5	-0.1	+6.6
	Refrain from travel and leisure activities	59.5	52.0	52.3	50.7	56.1	-7.5	+0.3	-1.6	+5.4
	Refrain from eating out	57.9	49.9	50.9	49.4	55.2	-8.0	+1.0	-1.5	+5.8
Behavioral change intentions	Consistently wear a mask, wash my hands and take other precautions against infection	84.3	83.2	83.2	83.7	86.3	-1.1	±0	+0.5	+2.6
	Make sure to get sufficient exercise, nutrition and sleep	84.1	84.0	83.0	81.9	84.9	-0.1	-1.0	-1.1	+3.0
	Keep a stock of anti-infection products and everyday necessities	73.1	71.0	69.9	67.8	73.0	-2.1	-1.1	-2.1	+5.2
	Use cashless payment options as much as possible	66.4	65.6	64.3	63.1	65.7	-0.8	-1.3	-1.2	+2.6
	Cook myself as much as possible	63.6	61.7	62.0	62.9	63.0	-1.9	+0.3	+0.9	+0.1
	Refrain from going out and enjoy pastimes I can do at home	60.7	56.6	56.5	56.1	61.4	-4.1	-0.1	-0.4	+5.3
	Enjoy leisure activities outdoors where people don't gather	51.2	51.7	51.7	51.5	53.7	+0.5	±0	-0.2	+2.2
	Do exercises I can do at home	53.7	51.7	50.7	50.5	52.5	-2.0	-1.0	-0.2	+2.0
	Avoid public transport and drive to places instead	50.3	47.1	46.7	44.8	50.4	-3.2	-0.4	-1.9	+5.6

Exercise outside where people don't gather	46.2	46.8	47.3	46.1	49.2	+0.6	+0.5	-1.2	+3.1
Use video, music and other streaming services	48.6	48.7	46.7	46.9	48.5	+0.1	-2.0	+0.2	+1.6
Play video games on my smartphone, computer, etc.	49.5	46.5	46.0	46.6	47.2	-3.0	-0.5	+0.6	+0.6
Read and post on social media	47.3	44.7	46.0	46.5	46.8	-2.6	+1.3	+0.5	+0.3
Refrain from going out and use net shopping and food delivery services instead	47.7	42.7	42.4	40.1	45.6	-5.0	-0.3	-2.3	+5.5
Commute to work/school during off-peak hours as much as possible	41.9	39.4	37.7	36.8	41.9	-2.5	-1.7	-0.9	+5.1
Upgrade my home environment by updating the telecommunications environment, buying home appliances, etc.	38.9	36.3	35.8	36.5	38.5	-2.6	-0.5	+0.7	+2.0
Make things by hand (handcrafts, home improvements, DIY, etc.)	35.7	32.5	31.3	31.9	34.9	-3.2	-1.2	+0.6	+3.0
Telework (work from home) as much as possible [Those with jobs*]	34.5	28.7	27.7	27.2	34.5	-5.8	-1.0	-0.5	+7.3
Invest	32.4	30.2	30.1	31.2	33.5	-2.2	-0.1	+1.1	+2.3
Start/Consider a second job	32.4	29.4	30.5	29.1	31.3	-3.0	+1.1	-1.4	+2.2
Put the money I can't spend outside toward buying slightly better things	31.7	29.6	30.6	29.7	30.2	-2.1	+1.0	-0.9	+0.5
Buy things on flea market apps and net auctions	25.7	26.8	26.5	24.9	29.2	+1.1	-0.3	-1.6	+4.3
Post and sell things on flea market apps and net auctions	26.4	26.2	25.7	24.8	28.1	-0.2	-0.5	-0.9	+3.3
Study online	24.6	24.1	22.3	21.8	26.7	-0.5	-1.8	-0.5	+4.9
Start/Consider getting a job, changing jobs or starting a business	27.3	25.3	25.3	24.0	26.3	-2.0	±0	-1.3	+2.3
Support businesses and organizations	24.5	23.1	22.8	23.8	25.1	-1.4	-0.3	+1.0	+1.3
Participate in online drinking parties and dinners	20.1	19.4	17.6	16.7	19.9	-0.7	-1.8	-0.9	+3.2

*Those with jobs: August n=1,022; September n=1,072; October n=1,041; November n=1,045; December n=1,019

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, scores for females higher than for males. By age group, scores low for the 20s and 30s cohorts

- In Activity restriction intentions, scores are higher for females than males in five of the seven items. By age group, scores are low for the 20–29 and 30–39 cohorts, with scores generally increasing the higher the age group. Trends are in line with those of 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 use of the internet and to work, including considering a second job or change of 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 off-peak and driving to places.

■ Results by gender, age group and area

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Enjoy leisure activities outdoors where people don't gather	53.7	53.2	54.2	52.7	64.0	53.6	47.3	51.6	52.8	54.6	53.8
Do exercises I can do at home	52.5	48.5	56.6	56.8	57.0	52.8	44.8	52.7	55.4	52.4	49.8
Avoid public transport and drive to places instead	50.4	49.4	51.4	41.1	52.4	54.7	48.9	52.3	41.2	63.4	46.6
Exercise outside where people don't gather	49.2	51.1	47.2	48.5	57.3	49.1	43.6	48.0	47.4	50.4	49.8
Use video, music and other streaming services	48.5	52.1	44.8	73.0	55.9	48.5	38.2	31.2	54.0	42.4	49.0
Play video games on my smartphone, computer, etc.	47.2	50.2	44.2	67.2	57.7	47.7	37.3	29.7	48.6	46.2	46.8
Read and post on social media	46.8	44.8	48.9	69.3	55.6	45.9	34.5	33.7	49.2	45.8	45.4
Refrain from going out and use net shopping and food delivery services instead	45.6	45.6	45.6	50.2	51.0	46.1	37.6	44.4	47.4	46.4	43.0
Commute to work/school during off-peak hours as much as possible	41.9	41.2	42.6	42.3	43.7	39.5	42.3	42.3	47.2	36.8	41.6
Upgrade my home environment by updating the telecommunications environment, buying home appliances, etc.	38.5	40.1	36.9	47.7	45.8	37.3	32.0	32.3	44.6	37.8	33.2
Make things by hand (handcrafts, home improvements, DIY, etc.)	34.9	32.3	37.6	36.9	36.4	30.4	34.2	38.7	38.2	36.6	30.0
Telework (work from home) as much as possible [Those with jobs*]	34.5	35.7	32.7	37.8	36.9	34.2	32.0	32.8	44.0	29.4	29.9
Invest	33.5	43.2	23.8	44.0	40.2	37.6	22.6	24.7	36.4	34.4	29.8
Start/Consider a second job	31.3	32.5	30.2	50.2	36.4	34.9	23.2	14.3	33.4	31.0	29.6
Put the money I can't spend outside toward buying slightly better things	30.2	29.4	31.0	36.1	37.4	25.6	26.0	28.7	32.8	30.6	27.2
Buy things on flea market apps and net auctions	29.2	30.2	28.2	36.9	35.0	26.7	26.3	23.3	33.0	28.6	26.0
Post and sell things on flea market apps and net auctions	28.1	25.6	30.7	41.9	36.4	26.7	22.6	16.1	32.2	26.4	25.8
Study online	26.7	30.7	22.6	42.7	30.8	24.3	20.1	19.4	31.2	25.2	23.6
Start/Consider getting a job, changing jobs or starting a business	26.3	27.9	24.6	44.4	32.2	26.4	18.2	13.6	29.4	23.4	26.0
Support businesses and organizations	25.1	25.6	24.6	31.1	28.7	19.7	23.5	25.1	26.8	26.8	21.6
Participate in online drinking parties and dinners	19.9	23.3	16.4	35.7	25.5	16.5	11.6	14.3	22.4	19.8	17.4

*Those with jobs: n=1,019

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: December 3 (Thu)–7 (Mon), 2020

November 5 (Thu)–9 (Mon), 2020

October 1 (Thu)–5 (Mon), 2020

September 3 (Thu)–7 (Mon), 2020

August 3 (Mon)–6 (Thu), 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

Eighth survey (Released November 20): <https://www.hakuhodo-global.com/news/eighth-survey-of-sei-katsu-sha-concerning-covid-19-november-2020.html>

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:

Corporate Public Relations Division

koho.mail@hakuhodo.co.jp