

March 19, 2021

Twelfth Survey of *Sei-katsu-sha* Concerning COVID-19 (March 2021)

Degree of freedom of life is 56.8 points in March 2021
Rebounds after falling for months. Anxiety and activity restriction also ease

Hakuhodo Institute of Life and Living, a think tank of Hakuhodo Inc., in March 2021 conducted its twelfth “Survey of *Sei-katsu-sha* Concerning COVID-19” to understand *sei-katsu-sha*’s¹ attitudes and behaviors during the coronavirus. The survey was conducted March 4–8, 2021 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.

On February 8, Japan’s state of emergency was extended until March 7 for 10 prefectures, excluding Tochigi. This was followed by the coronavirus special measures law revision that introduced fines for noncompliance coming into effect on February 13, and the first COVID-19 vaccinations beginning on February 17. Meanwhile, infections started to decline and, on March 1, the state of emergency was lifted early in six of the 10 prefectures. However, the state of emergency was extended an additional two weeks in the remaining four prefectures, all in Greater Tokyo, where infections did not go as low as hoped by late February. It is against this background that the survey was conducted this time.

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 56.8 points, up 1.9 points since February. This ended three consecutive months of falling scores.

In items related to Degree of anxiety as a result of the spread of COVID-19, scores dropped across the board, including Feel anxious about the lack and uncertainty of information (62.2%, down 7.7 points) and Feel anxious about the government’s response (74.9%, down 6.5 points). Scores for Degree of activity restriction items, which had risen for three months in a row, also dropped across the board. The drop in Refrain from eating out (76.7%, down 5.7 points), was most noticeable, followed by Refrain from meeting friends and socializing (81.3% down 4.1 points) and Refrain from travel and leisure activities (86.5%, down 4.0 points).

In Degree of behavioral change, scores for items related to behaviors at home dropped, including Refrain from going out and enjoy pastimes I can do at home (69.9%, down 5.4 points) and I’m at home more, so I cook myself as much as possible (56.9%, down 3.8 points). At the same time, items related to outdoor behaviors increased, including I exercise outside where people don’t gather (44.5%, up 4.8 points) and Enjoy leisure activities outdoors where people don’t gather (43.4%, up 4.0 points).

It appears that *sei-katsu-sha*’s attitudes and behaviors are once again starting to return to outside after shifting from outside to inside from November last year.

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

¹ *Sei-katsu-sha* are more than simply consumers, just as people’s lives and lifestyles include more than just shopping. Hakuhodo introduced this term in the 1980s to emphasize its commitment to a comprehensive, 360-degree perspective on consumers’ lives.

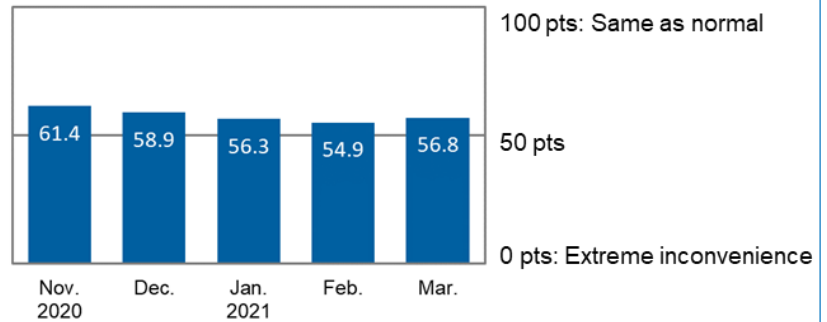
Freedom of life under the influence of COVID-19

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:

56.8 pts

Up 1.9 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 lack and uncertainty of information	62.2% (-7.7 pts)
Feel anxious about the government's response	74.9% (-6.5 pts)
Feel anxious about my and my family's health	67.4% (-6.0 pts)

Degree of activity restriction

Refrain from eating out	76.7% (-5.7 pts)
Refrain from meeting friends and socializing	81.3% (-4.1 pts)
Refrain from travel and leisure activities	86.5% (-4.0 pts)
Refrain from taking nonessential and nonurgent trips	82.1% (-3.9 pts)

Degree of behavioral change

Refrain from going out and enjoy pastimes I can do at home	69.9% (-5.4 pts)
I'm at home more, so I cook myself as much as possible	56.9% (-3.8 pts)
Refrain from going out and use net shopping and food delivery services instead	46.3% (-3.5 pts)
I exercise outside where people don't gather	44.5% (+4.8 pts)
Enjoy leisure activities outdoors where people don't gather	43.4% (+4.0 pts)

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

Degree of freedom of life up 1.9 points since February. Ends three consecutive months of declining scores

- By gender and age, increases stood out among females and those in their 40s and 50s. Also, perhaps in response to the lifting or not of the state of emergency, scores dropped slightly in Greater Tokyo, which remained under lockdown, whereas they increased in the Hanshin area, where it was lifted early.

In free responses, comments mentioning discoveries and beneficial aspects of life during the pandemic stood out, but serious concerns and stress due to the coronavirus becoming protracted were also mentioned

- From those who gave comparatively high Degree of freedom of life scores, there were voices giving positive perspectives and attitudes about today compared to prior to the pandemic, such as “My stress has dropped thanks to working from home, so I’d really like to give 120 points,” “I now appreciate everyday joys,” and “I’m unexpectedly enjoying my life.”
- From those who gave medium Degree of freedom of life scores, we see attitudes like “I don’t feel inconvenienced so much, as long as I take measures to prevent infection,” “You can find something to do at home if you look,” and comments indicating that compared to during the state of emergency last spring, anxiety is lower and people are not restricting their behavior this time, including, “Information is now readily available, so I’m not as anxious as before” “Shops are open,” and “I’m used to the pandemic now and don’t restrict my behavior much.”
- However, those who gave low Degree of freedom of life scores gave heartfelt responses mentioning such things as anxieties about their incomes and health; lack of freedom; fears about becoming infected and health management due to being in jobs where they can’t work from home; and wanting to earn money, but having family members against it. Some also mentioned feeling stressed by the pandemic becoming protracted, including, “I am at the end of my tether after a year living with restrictions,” and “I feel mentally fragile from having my husband home all the time, with no end in sight.”

■ Results by gender, age group and area

(Number of respondents)		Scores					(Pts) Change			
		Nov. 2020 survey	Dec. 2020 survey	Jan. 2021 survey	Feb. 2021 survey	Mar. 2021 survey	Nov. → Dec.	Dec. → Jan.	Jan. → Feb.	Feb. → Mar.
Overall	(1500)	61.4	58.9	56.3	54.9	56.8	-2.5	-2.6	-1.4	+1.9
Males	(755)	62.2	61.4	57.1	55.9	57.3	-0.8	-4.2	-1.2	+1.4
Females	(745)	60.7	56.5	55.6	53.9	56.3	-4.2	-0.9	-1.6	+2.3
20–29	(241)	59.4	55.2	54.5	51.9	52.0	-4.2	-0.8	-2.6	+0.1
30–39	(286)	61.0	58.6	56.1	56.1	55.8	-2.4	-2.5	-0.1	-0.2
40–49	(375)	61.4	61.3	55.6	54.4	57.9	-0.1	-5.7	-1.2	+3.4
50–59	(319)	61.4	58.1	57.6	53.6	58.3	-3.3	-0.5	-3.9	+4.7
60–69	(279)	63.6	60.3	57.8	58.4	58.7	-3.4	-2.5	+0.6	+0.2
Greater Tokyo (40 km radius)	(500)	59.7	59.5	56.9	55.7	55.6	-0.2	-2.6	-1.2	-0.1
Greater Nagoya (40 km radius)	(500)	61.5	59.0	57.1	54.1	55.3	-2.5	-1.9	-3.0	+1.2
Hanshin (30 km radius)	(500)	63.1	58.3	55.1	54.9	59.5	-4.8	-3.2	-0.1	+4.5

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)	40.3	35.6	24.1
Males	(755)	40.0	36.4	23.6
Females	(745)	40.5	34.8	24.7
20–29	(241)	31.1	36.9	32.0
30–39	(286)	39.9	34.6	25.5
40–49	(375)	41.9	35.5	22.7
50–59	(319)	42.3	36.4	21.3
60–69	(279)	44.1	34.8	21.1
Greater Tokyo (40 km radius)	(500)	38.8	34.6	26.6
Greater Nagoya (40 km radius)	(500)	36.4	38.2	25.4
Hanshin (30 km radius)	(500)	45.6	34.0	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)	I'd really like to give it 120 points. I don't normally go out much anyway, so I don't feel particularly stressed by staying at home. I'm not able to see my aging relatives at all (-10 points), but stress from my job has gone down thanks to how much easier work is due to working entirely from home (+30 points).	100 pts	Female, 27, Tokyo
		The things we have to pay attention to, like eating out and taking care in crowds, are few in number.	80 pts	Male, 49, Osaka Pref.
		While here have certainly been material detrimental effects, I'm now able to feel joy in little things, which I wasn't able to before when every day was so busy.	80 pts	Female, 35, Osaka Pref.
		I go out less and have fewer opportunities to meet friends, but I'm enjoying things individually while taking care not to get infected, so I'm unexpectedly enjoying my life.	80 pts	Female, 37, Aichi Pref.
		Certainly, I feel inconvenienced that I can no longer go out, but I feel more love for my family and am actually glad about it.	70 pts	Male, 55, Chiba Pref.

	Medium (41–60 pts)	Because I now know that it's relatively safe to do normal things like go shopping if you take measures against getting infected. I don't feel very inconvenienced.	60 pts	Male, 36, Tokyo
		Shopping is difficult due to my reduced income, so that's a minus, but if you do the basics of washing your hands, wearing a mask and avoiding the three Cs [closed spaces, crowded places, and close-contact settings] and stay home, you can find something to do at home if you look. I gave it this score thinking that enjoying those things while waiting for infections to go down is not so bad.	60 pts	Female, 56, Tokyo
		Information is now readily available, so I'm not as anxious as before.	60 pts	Male, 29, Aichi Pref.
		I'm under restrictions to some extent, but shops and restaurants are not closed like they were in the state of emergency last spring. If I take care, I can enjoy shopping and eating out without denying myself too much.	50 pts	Female, 44, Tokyo
		Compared to the first state of emergency, I don't feel the same sense of crisis and, perhaps because I've got used to the pandemic, I no longer particularly restrict my behavior. If it's nearby, I can go where I want to go and meet the people I want to meet. But the stress of having to wear a mask all the time is huge.	50 pts	Female, 27, Osaka Pref.
	Low (40 pts or lower)	I am used to the situation, but I can't get rid of inconveniences in terms of continued reduced income, my health and interactions with others.	40 pts	Male, 43, Aichi Pref.
		I work in a supermarket and can't work from home. I am at risk of becoming infected on the job, so need to take more care about managing my health than necessary. Also, the store gets crowded on weekends and national holidays. There are sometimes complaints from customers, so I also feel mental fatigue.	30 pts	Female, 55, Osaka Pref.
		I live in Greater Tokyo, so with the extension of the state of emergency, I can't move about. It also looks like I won't be able to go to Disney Sea as I'd planned to after the state of emergency was lifted, which is disappointing. Since our income has dropped, I wanted to get a job, but my husband was against it because he worried about the stigma if I caught COVID-19. In the end we decided only he would work. I have complicated emotions about being forced to put up with all this inconvenience in order not to infect older people.	20 pts	Female, 54, Saitama Pref.
		My pay has dropped significantly, my interests have been restricted and I've barely left the prefecture. This has been my life for a year. I'm just about at the end of my tether.	10 pts	Female, 26, Aichi Pref.
		I feel mentally fragile from having my husband home all the time, with no end in sight.	0 pts	Female, 41, Saitama Pref.

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

Scores for Degree of anxiety and Degree of activity restriction items down across the board

- In Degree of anxiety, scores dropped by at least 5 points for Feel anxious about the lack and uncertainty of information (62.2%, down 7.7 points), Feel anxious about the government's response (74.9%, down 6.5 points), Feel anxious about my and my family's health (67.4%, down 6.0 points) and Feel anxious about the situation abroad (64.7%, down 6.0 points).
- Degree of activity restriction scores, which had been rising for the last three months, began to fall across the board this month. The drop in Refrain from eating out (76.7%, down 5.7 points), was most noticeable, followed by Refrain from meeting friends and socializing (81.3%, down 4.1 points) and Refrain from travel and leisure activities (86.5%, down 4.0 points).

In Degree of behavioral change, items related to indoor activities drop and those related to outdoor activities rise

- In Degree of behavioral change, scores for items related to behaviors at home dropped, including Refrain from going out and enjoy pastimes I can do at home (69.9%, down 5.4 points) and I'm at home more, so I cook myself as much as possible (56.9%, down 3.8 points). At the same time, items related to outdoor behaviors increased, including I exercise outside where people don't gather (44.5%, up 4.8 points) and Enjoy leisure activities outdoors where people don't gather (43.4%, up 4.0 points).

■ Chronological change (Overall basis November 2020–March 2021)

		Scores					Change			
		Nov. 2020 survey	Dec. 2020 survey	Jan. 2021 survey	Feb. 2021 survey	Mar. 2021 survey	Nov. → Dec.	Dec. → Jan.	Jan. → Feb.	Feb. → Mar.
Agree + Somewhat agree										
Degree of anxiety	Feel anxious about the economy stalling	77.3	79.9	82.9	81.0	76.2	+2.6	+3.0	-1.9	-4.8
	Feel anxious about the government's response	66.5	75.6	81.3	81.4	74.9	+9.1	+5.7	+0.1	-6.5
	Feel anxious about my and my family's health	66.2	70.7	74.0	73.4	67.4	+4.5	+3.3	-0.6	-6.0
	Feel anxious about the situation abroad	70.0	69.7	72.4	70.7	64.7	-0.3	+2.7	-1.7	-6.0
	Feel anxious about the lack and uncertainty of information	61.1	67.1	72.3	69.9	62.2	+6.0	+5.2	-2.4	-7.7
	Feel anxious about my and my family's jobs and income	61.7	62.4	62.3	62.1	59.5	+0.7	-0.1	-0.2	-2.6
	Feel anxious about changes in my interpersonal relationships	43.5	44.7	47.8	48.8	46.3	+1.2	+3.1	+1.0	-2.5
Degree of activity restriction	Refrain from travel and leisure activities	72.2	81.1	86.7	90.5	86.5	+8.9	+5.6	+3.8	-4.0
	Refrain from taking nonessential and nonurgent trips	70.7	79.4	83.4	86.0	82.1	+8.7	+4.0	+2.6	-3.9
	Refrain from shaking hands, hugging and otherwise touching others	74.7	78.9	82.4	85.4	81.9	+4.2	+3.5	+3.0	-3.5
	Refrain from meeting friends and socializing	66.3	77.3	82.1	85.4	81.3	+11.0	+4.8	+3.3	-4.1
	Refrain from experiential entertainment (gigs, theater, movies, etc.)	70.5	77.4	81.3	84.9	81.2	+6.9	+3.9	+3.6	-3.7
	Refrain from eating out	61.9	71.1	75.7	82.4	76.7	+9.2	+4.6	+6.7	-5.7
	Refrain from nonessential and nonurgent shopping	62.3	71.5	76.6	78.9	75.2	+9.2	+5.1	+2.3	-3.7

Degree of behavioral change	Consistently wear a mask, wash my hands and take other precautions against infection	91.8	92.3	93.1	94.0	92.4	+0.5	+0.8	+0.9	-1.6
	Make sure to get sufficient exercise, nutrition and sleep	76.4	76.5	77.4	77.3	75.9	+0.1	+0.9	-0.1	-1.4
	Refrain from going out and enjoy pastimes I can do at home	59.2	66.5	73.8	75.3	69.9	+7.3	+7.3	+1.5	-5.4
	Keep a stock of anti-infection products and everyday necessities	65.3	68.5	69.9	71.4	69.6	+3.2	+1.4	+1.5	-1.8
	Use cashless payment options as much as possible	58.5	62.1	63.5	65.0	61.9	+3.6	+1.4	+1.5	-3.1
	I'm at home more, so I cook myself as much as possible	52.4	54.1	56.3	60.7	56.9	+1.7	+2.2	+4.4	-3.8
	Avoid using public transport and drive to places instead	47.1	52.5	52.9	50.5	50.8	+5.4	+0.4	-2.4	+0.3
	I'm home more, so I'm playing video games on my smartphone, computer, etc.	46.1	46.8	49.0	50.3	48.3	+0.7	+2.2	+1.3	-2.0
	Refrain from going out and use net shopping and food delivery services instead	37.6	44.7	47.4	49.8	46.3	+7.1	+2.7	+2.4	-3.5
	I'm home more, so I'm doing exercises I can do at home	40.3	44.1	43.9	47.3	45.5	+3.8	-0.2	+3.4	-1.8
	I'm home more, so I'm using video, music and other streaming services	42.7	44.3	46.8	46.3	45.5	+1.6	+2.5	-0.5	-0.8
	I exercise outside where people don't gather	38.3	40.7	40.5	39.7	44.5	+2.4	-0.2	-0.8	+4.8
	Enjoy leisure activities outdoors where people don't gather	41.2	43.7	40.7	39.4	43.4	+2.5	-3.0	-1.3	+4.0
	I'm home more, so I'm reading and posting on social media	35.8	37.6	39.7	38.3	41.2	+1.8	+2.1	-1.4	+2.9
	Commute to work/school during off-peak hours as much as possible	33.7	37.7	36.7	40.6	38.7	+4.0	-1.0	+3.9	-1.9
	Telework (work from home) as much as possible [Those with jobs*]	26.7	32.0	27.6	35.0	34.2	+5.3	-4.4	+7.4	-0.8
	Started/Am considering getting a side job because my income has dropped or looks likely to drop	27.1	30.1	29.1	28.2	30.1	+3.0	-1.0	-0.9	+1.9
	I'm home more, so I'm upgrading my home environment by updating the telecommunications environment, buying home appliances, etc.	28.3	29.8	28.9	29.3	29.0	+1.5	-0.9	+0.4	-0.3
	I'm home more, so I'm investing	20.5	23.3	23.6	24.7	26.9	+2.8	+0.3	+1.1	+2.2
	I'm putting the money I can't spend outside toward buying slightly better things	21.4	24.9	26.3	27.7	26.7	+3.5	+1.4	+1.4	-1.0
	I'm home more, so I'm making things by hand (handcrafts, home improvements, DIY, etc.)	24.9	27.5	26.3	27.8	26.4	+2.6	-1.2	+1.5	-1.4
	Started/Am considering getting a job, changing jobs or starting a business because my income has dropped or looks likely to drop	22.8	22.3	23.1	22.2	24.8	-0.5	+0.8	-0.9	+2.6
	I'm home more, so I'm buying things on flea market apps and net auctions	19.5	22.9	21.1	23.2	23.3	+3.4	-1.8	+2.1	+0.1
	I'm home more, so I'm posting and selling things on flea market apps and net auctions	19.7	23.6	22.8	23.5	22.5	+3.9	-0.8	+0.7	-1.0
	I'm supporting businesses and organizations that are not able to operate as normal	17.6	18.5	17.9	20.1	19.2	+0.9	-0.6	+2.2	-0.9
	I'm home more, so I'm studying online	16.8	19.0	16.6	19.5	18.7	+2.2	-2.4	+2.9	-0.8
	I'm home more, so I'm participating in online drinking parties and dinners	15.3	18.3	17.7	18.2	18.4	+3.0	-0.6	+0.5	+0.2

* Those with jobs: November n=1,045; December n=1,019; January n=1,085; February n=1,032; March n=1,075

 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. Large differences by age group are seen in some items

- The largest difference in scores between males and females was in Feel anxious about my and my family's health (males 63.7%, females: 71.1%, a difference of 7.4 points). By age group, differences in scores between those in their 20s and 60s stood out in Feel anxious about the situation abroad (20–29: 54.4%, 60–69: 69.9%, a difference of 15.5 points) and Feel anxious about changes in my interpersonal relationships (20–29: 57.3%, 60–69: 36.9%, a difference of 20.4 points).

In Degree of activity restriction, too, scores for all items are higher for females than males. By age group, scores for many items are low for those in their 20s

- The largest difference in scores by gender was in Refrain from shaking hands, hugging and otherwise touching others (males: 76.7%, females: 87.2%, a difference of 10.5 points). The difference in Refrain from meeting friends and socializing (males: 77.4%, females: 85.4%, a difference of 8.0 points) and Refrain from eating out (males: 72.7%, females: 80.7%, a difference of 8.0 points), among others, also stood out. By age group, scores were lowest for those in their 20s in six of the seven items, with differences in items like Refrain from nonessential and nonurgent trips (20–29: 76.8%, 60–69: 91.8%, a difference of 15.0 points) and Refrain from meeting friends and socializing (20–29: 72.2%, 60–69: 87.1%, a difference of 14.9 points) noticeable.

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

- Items related to use of the internet were highest among the youngest age group, including I'm home more, so I'm reading and posting on social media (20–29: 70.5%; 60–69: 19.7%, a difference of 50.8 points). Highest among the oldest age group was Make sure to get sufficient exercise, nutrition and sleep (20–29: 70.5%; 60–69: 82.8%, a difference of 12.3 points).
- By area, Avoid using public transport and drive to places instead was high in Greater Nagoya, and Telework as much as possible and Commute to work/school during off-peak hours as much as possible were high in Greater Tokyo.

■ Results by gender, age group and area

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)												
Degree of anxiety	Feel anxious about the economy stalling	76.2	74.3	78.1	69.3	76.2	78.9	79.3	74.9	76.4	76.0	76.2
	Feel anxious about the government's response	74.9	71.8	78.1	70.1	79.4	73.6	73.0	78.5	75.2	73.8	75.8
	Feel anxious about my and my family's health	67.4	63.7	71.1	63.9	68.2	69.1	67.7	67.0	67.6	67.0	67.6
	Feel anxious about the situation abroad	64.7	63.2	66.3	54.4	66.8	62.7	68.7	69.9	67.2	64.8	62.2
	Feel anxious about the lack and uncertainty of information	62.2	59.5	65.0	61.8	65.0	62.7	62.1	59.1	63.6	62.6	60.4
	Feel anxious about my and my family's jobs and income	59.5	58.5	60.5	58.5	62.9	63.7	63.6	46.6	60.6	57.8	60.2
	Feel anxious about changes in my interpersonal relationships	46.3	42.8	49.8	57.3	52.1	46.1	41.1	36.9	48.4	44.8	45.6
Degree of activity restriction	Refrain from travel and leisure activities	86.5	82.6	90.5	83.4	83.6	87.2	87.8	90.0	88.2	88.4	83.0
	Refrain from taking nonessential and nonurgent trips	82.1	79.2	85.1	76.8	77.6	80.8	83.4	91.8	84.8	83.2	78.4
	Refrain from shaking hands, hugging and otherwise touching others	81.9	76.7	87.2	75.1	80.4	83.5	81.5	87.8	84.8	81.4	79.6
	Refrain from meeting friends and socializing	81.3	77.4	85.4	72.2	79.0	82.7	83.7	87.1	83.4	82.4	78.2
	Refrain from experiential entertainment (gigs, theater, movies, etc.)	81.2	77.4	85.1	78.8	81.1	82.4	80.6	82.4	84.0	82.6	77.0
	Refrain from eating out	76.7	72.7	80.7	71.4	73.4	78.4	78.4	80.3	79.6	77.0	73.4
	Refrain from nonessential and nonurgent shopping	75.2	72.8	77.6	73.0	71.0	75.7	73.0	83.2	76.8	77.2	71.6

Degree of behavioral change	Consistently wear a mask, wash my hands and take other precautions against infection	92.4	90.3	94.5	87.6	92.0	94.9	90.3	96.1	92.2	93.0	92.0
	Make sure to get sufficient exercise, nutrition and sleep	75.9	73.8	78.1	70.5	74.8	75.2	75.9	82.8	79.8	73.2	74.8
	Refrain from going out and enjoy pastimes I can do at home	69.9	65.4	74.4	73.0	73.4	68.8	69.6	65.2	72.2	71.0	66.4
	Keep a stock of anti-infection products and everyday necessities	69.6	64.0	75.3	65.6	70.6	68.3	66.5	77.4	72.8	68.6	67.4
	Use cashless payment options as much as possible	61.9	62.4	61.3	59.3	62.6	62.7	59.9	64.5	64.2	63.4	58.0
	I'm at home more, so I cook myself as much as possible	56.9	43.6	70.3	59.3	62.9	52.8	51.1	60.6	60.0	55.4	55.2
	Avoid using public transport and drive to places instead	50.8	48.6	53.0	52.3	53.1	50.1	46.1	53.4	42.8	66.8	42.8
	I'm home more, so I'm playing video games on my smartphone, computer, etc.	48.3	50.3	46.2	68.5	54.9	47.2	41.7	33.0	47.6	50.4	46.8
	Refrain from going out and use net shopping and food delivery services instead	46.3	45.4	47.2	56.4	47.2	47.2	42.3	40.1	47.6	47.6	43.8
	I'm home more, so I'm doing exercises I can do at home	45.5	42.5	48.5	54.8	51.0	41.9	38.9	44.1	48.6	45.0	42.8
	I'm home more, so I'm using video, music and other streaming services	45.5	46.1	44.8	68.5	51.4	42.7	38.2	31.5	45.4	46.2	44.8
	I exercise outside where people don't gather	44.5	50.1	38.8	49.8	50.7	45.6	34.8	43.0	45.0	46.6	41.8
	Enjoy leisure activities outdoors where people don't gather	43.4	45.7	41.1	49.4	52.8	45.3	33.9	36.9	43.2	45.8	41.2
	I'm home more, so I'm reading and posting on social media	41.2	38.8	43.6	70.5	51.4	41.6	28.2	19.7	43.8	39.4	40.4
	Commute to work/school during off-peak hours as much as possible	38.7	41.6	35.8	45.2	35.7	36.5	38.6	39.4	46.2	32.4	37.6
	Telework (work from home) as much as possible [Those with jobs*]	34.2	40.2	25.8	36.4	34.1	34.4	31.1	36.9	43.8	29.0	30.0
	Started/Am considering getting a side job because my income has dropped or looks likely to drop	30.1	31.7	28.6	46.1	35.0	28.3	29.2	15.1	33.4	27.2	29.8
	I'm home more, so I'm upgrading my home environment by updating the telecommunications environment, buying home appliances, etc.	29.0	31.8	26.2	41.1	35.7	28.0	22.3	20.8	31.2	26.8	29.0
	I'm home more, so I'm investing	26.9	35.0	18.7	34.9	30.8	27.2	19.1	24.4	27.4	26.6	26.6
	I'm putting the money I can't spend outside toward buying slightly better things	26.7	27.2	26.3	40.2	26.9	23.2	23.2	23.7	26.8	26.8	26.6
	I'm home more, so I'm making things by hand (handcrafts, home improvements, DIY, etc.)	26.4	24.6	28.2	33.2	29.4	24.0	21.3	26.5	27.6	24.6	27.0
	Started/Am considering getting a job, changing jobs or starting a business because my income has dropped or looks likely to drop	24.8	28.6	20.9	35.7	32.5	24.5	21.6	11.5	24.4	22.8	27.2
	I'm home more, so I'm buying things on flea market apps and net auctions	23.3	25.3	21.3	35.3	27.3	22.4	20.7	13.3	24.2	23.8	22.0
	I'm home more, so I'm posting and selling things on flea market apps and net auctions	22.5	23.3	21.7	35.3	30.8	20.5	18.5	10.4	22.4	22.6	22.6
	I'm supporting businesses and organizations that are not able to operate as normal	19.2	21.1	17.3	24.5	19.2	19.7	14.1	19.7	20.6	19.0	18.0
	I'm home more, so I'm studying online	18.7	22.8	14.5	32.4	18.9	16.5	15.7	12.9	20.6	16.4	19.0
	I'm home more, so I'm participating in online drinking parties and dinners	18.4	21.5	15.3	34.0	19.6	17.6	13.8	10.0	21.6	16.4	17.2

* Those with jobs: n=1,075

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 for Activity restriction intentions once COVID-19 subsides largely unchanged

- Scores remained basically the same as last month, with Refrain from eating out, 50.2%, the item that dropped the most, only falling 1.7 points, and Refrain from meeting friends and socializing, 52.2%, the item that rose the most, only rising 1.5 points.

Scores for Behavioral change intentions once COVID-19 subsides also largely unchanged for the most part

- In items that rose, Read and post on social media (49.7%, up 5.5 points) and Invest (37.8%, up 4.0 points) stood out, with other items largely unchanged.
- Similarly, in items that dropped, only Use video, music and other streaming service (47.3%, down 3.0 points) stood out.

■ Chronological change (Overall basis November 2020–March 2021)

		(%)					(Pts)			
		Scores					Change			
		Nov. 2020 survey	Dec. 2020 survey	Jan. 2021 survey	Feb. 2021 survey	Mar. 2021 survey	Nov. → Dec.	Dec. → Jan.	Jan. → Feb.	Feb. → Mar.
Think I will + Think I will sometimes										
Activity restriction intentions	Refrain from shaking hands, hugging and otherwise touching others	64.1	67.5	63.9	63.9	64.7	+3.4	-3.6	±0	+0.8
	Refrain from taking nonessential and nonurgent trips	56.9	61.8	58.5	59.3	58.0	+4.9	-3.3	+0.8	-1.3
	Refrain from nonessential and nonurgent shopping	54.7	58.7	57.7	56.3	55.5	+4.0	-1.0	-1.4	-0.8
	Refrain from travel and leisure activities	50.7	56.1	54.1	52.5	52.6	+5.4	-2.0	-1.6	+0.1
	Refrain from meeting friends and socializing	51.0	57.6	54.3	51.0	52.5	+6.6	-3.3	-3.3	+1.5
	Refrain from experiential entertainment (gigs, theater, movies, etc.)	53.2	58.1	54.3	52.6	52.3	+4.9	-3.8	-1.7	-0.3
	Refrain from eating out	49.4	55.2	52.5	51.9	50.2	+5.8	-2.7	-0.6	-1.7
Behavioral change intentions	Consistently wear a mask, wash my hands and take other precautions against infection	83.7	86.3	83.7	83.5	82.8	+2.6	-2.6	-0.2	-0.7
	Make sure to get sufficient exercise, nutrition and sleep	81.9	84.9	84.4	85.0	82.3	+3.0	-0.5	+0.6	-2.7
	Keep a stock of anti-infection products and everyday necessities	67.8	73.0	71.4	69.5	71.0	+5.2	-1.6	-1.9	+1.5
	Use cashless payment options as much as possible	63.1	65.7	67.5	67.7	64.8	+2.6	+1.8	+0.2	-2.9
	Cook myself as much as possible	62.9	63.0	64.3	65.1	64.3	+0.1	+1.3	+0.8	-0.8
	Refrain from going out and enjoy pastimes I can do at home	56.1	61.4	59.5	57.1	57.1	+5.3	-1.9	-2.4	±0
	Enjoy leisure activities outdoors where people don't gather	51.5	53.7	52.4	50.8	53.4	+2.2	-1.3	-1.6	+2.6
	Do exercises I can do at home	50.5	52.5	52.4	52.2	51.0	+2.0	-0.1	-0.2	-1.2
	Read and post on social media	46.5	46.8	46.8	44.2	49.7	+0.3	±0	-2.6	+5.5

Avoid public transport and drive to places instead	44.8	50.4	48.9	47.1	49.6	+5.6	-1.5	-1.8	+2.5
Exercise outside where people don't gather	46.1	49.2	47.7	49.0	49.2	+3.1	-1.5	+1.3	+0.2
Play video games on my smartphone, computer, etc.	46.6	47.2	48.1	47.1	47.7	+0.6	+0.9	-1.0	+0.6
Use video, music and other streaming services	46.9	48.5	49.2	50.3	47.3	+1.6	+0.7	+1.1	-3.0
Refrain from going out and use net shopping and food delivery services instead	40.1	45.6	44.2	44.9	42.8	+5.5	-1.4	+0.7	-2.1
Upgrade my home environment by updating the telecommunications environment, buying home appliances, etc.	36.5	38.5	38.1	38.3	39.0	+2.0	-0.4	+0.2	+0.7
Commute to work/school during off-peak hours as much as possible	36.8	41.9	38.0	39.7	38.9	+5.1	-3.9	+1.7	-0.8
Invest	31.2	33.5	34.7	33.8	37.8	+2.3	+1.2	-0.9	+4.0
Start/Consider a second job	29.1	31.3	32.7	32.4	33.3	+2.2	+1.4	-0.3	+0.9
Make things by hand (handcrafts, home improvements, DIY, etc.)	31.9	34.9	34.0	34.3	33.2	+3.0	-0.9	+0.3	-1.1
Put the money I can't spend outside toward buying slightly better things	29.7	30.2	30.9	31.0	32.9	+0.5	+0.7	+0.1	+1.9
Telework (work from home) as much as possible [Those with jobs*]	27.2	34.5	30.5	31.7	32.4	+7.3	-4.0	+1.2	+0.7
Buy things on flea market apps and net auctions	24.9	29.2	28.4	27.5	29.5	+4.3	-0.8	-0.9	+2.0
Post and sell things on flea market apps and net auctions	24.8	28.1	27.5	27.2	28.6	+3.3	-0.6	-0.3	+1.4
Start/Consider getting a job, changing jobs or starting a business	24.0	26.3	27.7	26.9	28.0	+2.3	+1.4	-0.8	+1.1
Study online	21.8	26.7	24.8	25.1	25.5	+4.9	-1.9	+0.3	+0.4
Support businesses and organizations	23.8	25.1	23.0	25.1	25.1	+1.3	-2.1	+2.1	±0
Participate in online drinking parties and dinners	16.7	19.9	18.7	18.9	19.5	+3.2	-1.2	+0.2	+0.6

* Those with jobs: November n=1,045; December n=1,019; January n=1,085; February n=1,032; March n=1,075

 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 are higher for females than for males. By age group, scores are low for the 20s and 30s cohorts. There are no significant differences by area

- Scores for females were higher than scores for males across the board. By age group, scores were lowest among those in their 20s and 30s, with scores for those in their 30s lowest in six of the seven items.

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 considering a second job or change of jobs, among others, were highest among those in their 20s and 30s, while scores for Make sure to get sufficient exercise, nutrition and sleep, Keep a stock of anti-infection products and everyday necessities, and Use cashless payment options as much as possible were highest among those in their 60s.
- By area, the trend was generally in line with that of Degree of behavioral change (see p. 8), with differences in intentions about use of cars, commuting to work/school during off-peak hours and teleworking, among others, standing out. This month, Invest was slightly high in Greater Tokyo.

■ 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)
Think I will + Think I will sometimes (Number of respondents)												
Activity restriction intentions	Refrain from shaking hands, hugging and otherwise touching others	64.7	59.2	70.2	58.1	60.1	66.1	65.8	71.7	64.8	64.0	65.2
	Refrain from taking nonessential and nonurgent trips	58.0	55.2	60.8	56.4	49.7	57.3	61.1	65.2	57.8	58.6	57.6
	Refrain from nonessential and nonurgent shopping	55.5	53.9	57.2	54.8	47.6	55.7	58.9	60.2	55.6	56.0	55.0
	Refrain from travel and leisure activities	52.6	49.8	55.4	49.4	46.5	54.4	57.4	53.8	50.6	53.8	53.4
	Refrain from meeting friends and socializing	52.5	49.5	55.4	47.3	46.5	54.4	56.7	55.6	52.0	52.2	53.2
	Refrain from experiential entertainment (gigs, theater, movies, etc.)	52.3	50.9	53.8	49.0	47.9	52.5	56.1	55.2	49.0	53.2	54.8
	Refrain from eating out	50.2	46.1	54.4	47.7	45.1	50.4	55.2	51.6	52.0	49.6	49.0
Behavioral change intentions	Consistently wear a mask, wash my hands and take other precautions against infection	82.8	76.7	89.0	77.2	81.8	85.1	81.8	86.7	83.0	82.0	83.4
	Make sure to get sufficient exercise, nutrition and sleep	82.3	77.9	86.7	77.6	79.4	80.8	85.3	87.8	84.8	83.4	78.6
	Keep a stock of anti-infection products and everyday necessities	71.0	63.7	78.4	63.9	71.7	72.5	68.3	77.4	72.4	71.4	69.2
	Use cashless payment options as much as possible	64.8	63.8	65.8	63.1	61.5	67.5	61.4	69.9	65.8	66.2	62.4
	Cook myself as much as possible	64.3	49.9	78.9	65.6	66.4	63.7	61.4	65.2	65.4	65.2	62.4
	Refrain from going out and enjoy pastimes I can do at home	57.1	52.8	61.3	68.0	57.7	54.1	55.2	53.0	59.4	56.8	55.0

Enjoy leisure activities outdoors where people don't gather	53.4	50.2	56.6	53.5	57.3	55.7	48.6	51.6	54.6	55.0	50.6
Do exercises I can do at home	51.0	45.6	56.5	58.5	53.1	49.6	49.8	45.5	53.8	48.6	50.6
Read and post on social media	49.7	45.4	54.1	75.5	61.9	48.0	41.4	26.9	53.4	49.2	46.6
Avoid public transport and drive to places instead	49.6	48.9	50.3	49.4	50.0	48.0	47.0	54.5	41.2	64.0	43.6
Exercise outside where people don't gather	49.2	50.1	48.3	50.2	49.7	52.3	42.3	51.6	47.6	50.2	49.8
Play video games on my smartphone, computer, etc.	47.7	49.0	46.3	67.2	54.9	49.3	38.9	31.2	47.8	49.4	45.8
Use video, music and other streaming services	47.3	47.8	46.7	68.0	54.5	48.0	41.1	28.0	48.8	46.8	46.2
Refrain from going out and use net shopping and food delivery services instead	42.8	42.5	43.1	52.3	42.0	44.3	38.6	38.4	45.0	41.0	42.4
Upgrade my home environment by updating the telecommunications environment, buying home appliances, etc.	39.0	39.9	38.1	50.2	43.4	37.3	37.0	29.4	39.6	37.2	40.2
Commute to work/school during off-peak hours as much as possible	38.9	40.4	37.3	42.3	35.7	38.9	37.9	40.1	45.6	32.8	38.2
Invest	37.8	47.3	28.2	47.7	38.5	38.9	34.8	30.5	43.0	37.0	33.4
Start/Consider a second job	33.3	35.6	30.9	44.4	36.0	37.6	32.3	16.1	36.8	31.0	32.0
Make things by hand (handcrafts, home improvements, DIY, etc.)	33.2	29.0	37.4	38.6	36.4	30.9	30.1	31.9	32.4	34.8	32.4
Put the money I can't spend outside toward buying slightly better things	32.9	30.6	35.3	42.7	28.7	31.7	33.2	30.1	32.0	33.0	33.8
Telework (work from home) as much as possible [Those with jobs*]	32.4	38.1	24.3	37.0	30.8	32.5	29.9	33.3	41.6	28.1	27.5
Buy things on flea market apps and net auctions	29.5	30.3	28.6	40.7	31.5	30.1	29.5	16.8	29.4	30.2	28.8
Post and sell things on flea market apps and net auctions	28.6	27.2	30.1	44.8	31.1	28.0	26.3	15.4	28.4	28.8	28.6
Start/Consider getting a job, changing jobs or starting a business	28.0	30.9	25.1	38.6	35.0	30.7	25.1	11.5	31.4	27.0	25.6
Study online	25.5	28.7	22.3	41.5	29.0	23.7	21.6	15.1	27.8	22.4	26.4
Support businesses and organizations	25.1	25.3	25.0	31.5	20.3	23.5	22.6	29.7	27.8	23.8	23.8
Participate in online drinking parties and dinners	19.5	21.2	17.9	36.1	24.1	16.3	17.9	6.8	23.4	16.0	19.2

* Those with jobs: n=1,075

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: March 4 (Thu)–8 (Mon), 2021
February 1 (Mon)–3 (Wed), 2021
January 4 (Mon)–6 (Wed), 2021
December 3 (Thu)–7 (Mon), 2020
November 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 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

Eleventh Survey (Released February 19): <https://www.hakuhodo-global.com/news/eleventh-survey-of-sei-katsu-sha-concerning-covid-19-february-2021.html>

Tenth Survey (Released January 22): <https://www.hakuhodo-global.com/news/tenth-survey-of-sei-katsu-sha-concerning-covid-19-january-2021.html>

Ninth Survey (Released December 18): <https://www.hakuhodo-global.com/news/ninth-survey-of-sei-katsu-sha-concerning-covid-19-december-2020.html>

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:

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