

April 16, 2021

April 2021 Survey of *Sei-katsu-sha* Concerning COVID-19

**April Degree of freedom of life is 57.5 points, up for the second consecutive month
Degree of activity restriction also eases for the second month in a row**

Hakuhodo Institute of Life and Living, a think tank of Hakuhodo Inc., in April 2021 conducted its “Survey of *Sei-katsu-sha* Concerning COVID-19” to understand *sei-katsu-sha*’s attitudes and behaviors during the coronavirus. The survey was conducted April 1–5, 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. 8 for the survey outline.

Conditions prior to the survey being conducted: The number of cases in Tokyo and nearby prefectures Kanagawa, Chiba and Saitama did not fall as much as hoped and, even after the state of emergency was lifted on March 21, restaurants and bars continued to be requested to shorten their business hours, and people asked not to gather for seasonal events such as cherry blossom viewing parties and parties to farewell and welcome new colleagues. Infections were creeping up in regional centers like Sendai and Yamagata, and mutant variants were spreading around Japan.

Of the six prefectures where the state of emergency was lifted early on March 1, Osaka, Kyoto and Hyogo Prefectures, all in the Kansai region, were seeing cases skyrocket again. On April 1, the decision was made to apply the Pre-emergency Measures to Prevent the Spread of COVID-19 for the first time, in six cities in Osaka Hyogo and Miyagi Prefectures (April 5–May 5). It was against the background of this flurry of activity that the survey was conducted.

Degree of freedom of life under the influence of COVID-19

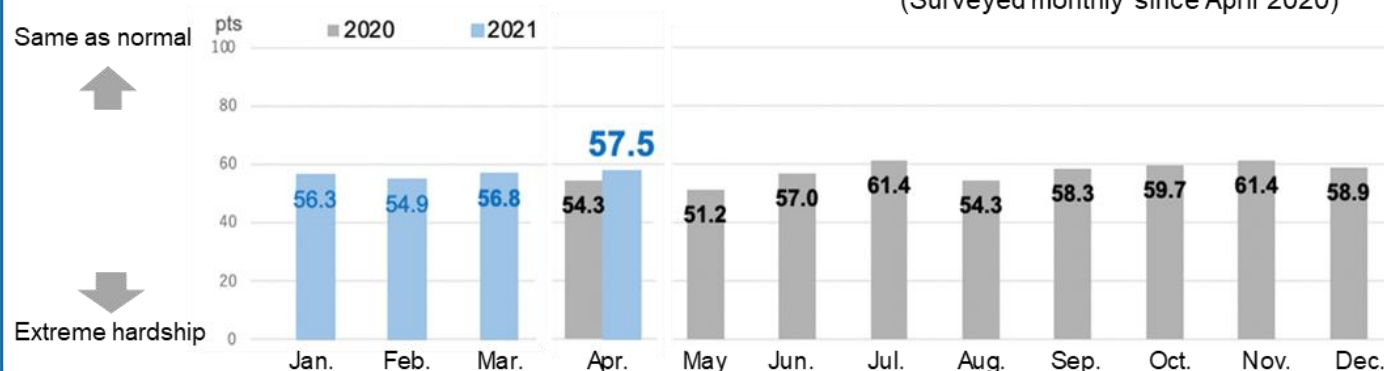
April 2021: 57.5 pts

Up 0.8 pts vs. last month

Up 3.2 pts vs. the same month last year

When we asked respondents how they would rate the degree of freedom of their lives if their normal lives prior to the spread of COVID-19 rated 100 points, the score for April 2021 was 57.5 points. This was up 0.8 points vs. the previous month, marking the second consecutive month the rating has risen. The score was 3.2 points higher than that of the same month last year.

(Surveyed monthly since April 2020)



While values have been calculated to two decimal places in the survey, figures have been rounded to the nearest tenth in this article. Any discrepancies are due to rounding.

Attitudes and behavior under the influence of COVID-19

In Degree of anxiety, there were no significant changes other than The situation abroad (68.2% up 3.5 points). However, scores for all Degree of activity restriction items decreased for the second consecutive month. The drop in Nonessential and nonurgent shopping (70.9%, down 4.3 points) stood out. Degree of activity implementation scores were largely unchanged. The only real changes were in Use cashless payment options as much as possible (64.9%, up 3.0 points) and Telework as much as possible (30.7%, down 3.5 points).

		Response rate Agree + Somewhat agree	Change vs. last month	Change vs. same month last year
Degree of anxiety Anxieties they feel	The situation abroad	68.2%	+3.5 pts	-15.3 pts
	The government's response	76.1%	+1.2 pts	-10.8 pts
	Economic stagnation	77.3%	+1.1 pts	-13.9 pts
Degree of activity restriction Behaviors they refrain from	Nonessential and nonurgent shopping	70.9%	-4.3 pts	-13.3 pts
	Travel and leisure activities	84.3%	-2.2 pts	-4.4 pts
	Meeting friends and socializing	79.1%	-2.2 pts	-6.0 pts
Degree of activity implementation Behaviors they implement	Use cashless payment options as much as possible	64.9%	+3.0 pts	N/A
	Post and sell things on flea market apps and net auctions	24.8%	+2.3 pts	+6.5 pts
	Telework (work from home) as much as possible [Those with jobs*]	30.7%	-3.5 pts	+7.2 pts

Degree of freedom of life under the influence of COVID-19

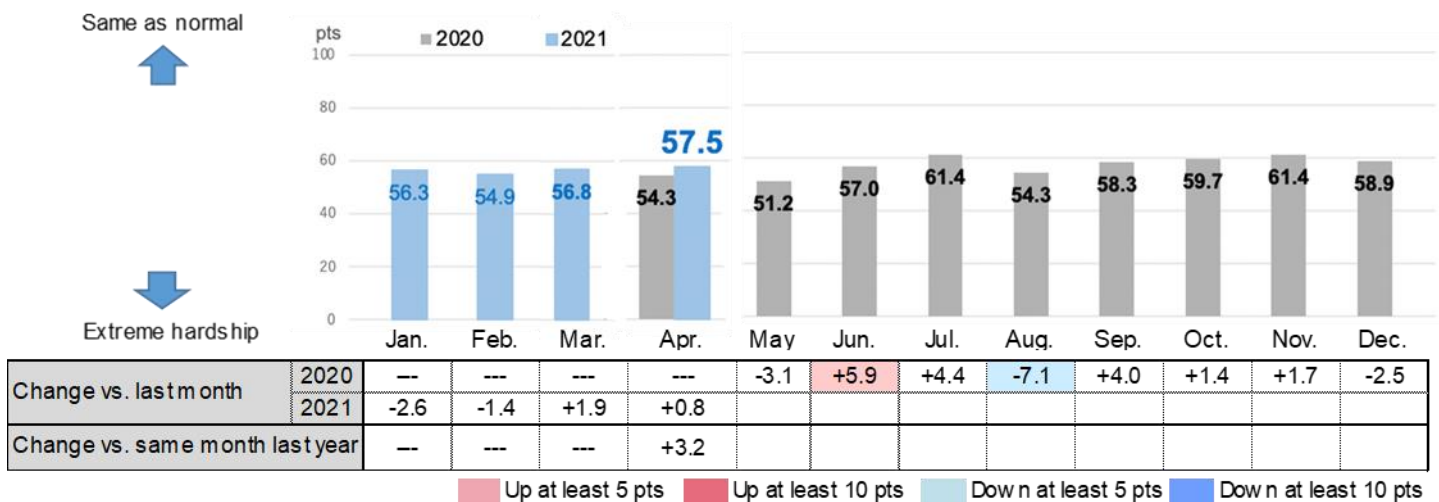
Degree of freedom of life is up 0.8 points since last month, rising for the second month in a row. The score is 3.2 points higher than the same month last year

Looking at past Degree of freedom of life data, the lowest score so far, 51.2 points, was in the survey conducted in May last year under the first state of emergency. While fluctuating in line with conditions, the score has remained consistently above this level ever since. Even though the number of cases is significantly higher this spring than last spring, the Degree of freedom of life score is rising, likely thanks to the availability of information about the virus, normalization of anti-infection behaviors like mask wearing and sanitizing, and experience.

In free responses, the current situation “also has benefits” and “I’m used to it.” The unpleasantness of masks, concerns about mutant strains, and longing for the vaccine are also widespread

Comments from those who gave high Degree of freedom of life scores included: “There are downsides, but also benefits,” “I’m in favor of the various changes to values,” and “I make sure to enjoy life.” Comments from those who gave medium Degree of life scores include “I’m used to it now,” but also, “I’m restricting because it would inconvenience my workplace if I caught it.” Those who gave low Degree of freedom of life scores mentioned debilitating effects on their work or income and heavy burdens, such as caring for family members. One young woman mentioned “the hardship of having my here and now stolen from me.” Irrespective of Degree of freedom of life score, we also received comments about the uncomfortableness of masks (due to higher temperatures, etc.), anxieties about mutant strains, and longing for the vaccine.

■ Degree of freedom of life



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■ Reason for Degree of freedom of life score (Selected responses)

Degree of freedom of life	High (61 pts or higher)	There are some things that became difficult, but since starting to work from home I have more time for myself. It feels like the advantages and disadvantages balance out.	100 pts	Female, 50, Tokyo
		Other than fall and winter, it's a pain to wear a mask. When the temperature rises, in particular, you could easily get heat stroke.	95 pts	Female, 56, Osaka Pref.
		I live with a family member with an underlying condition and feel stressed because I can't just go out anymore, but I no longer have to go to drinking parties I never really enjoyed, so that's a relief.	80 pts	Male, 35, Osaka Pref.
		If I had to say, yes, it's hard, and I'm not in a position to work from home, so some things just can't be helped. But values are collapsing in many ways, so I'm relieved about some surprising things.	70 pts	Female, 52, Aichi Pref.
		I am restricted, but I make sure to enjoy the weekends with my parents regardless. I now enjoy slightly more pricey food and slightly more expensive wine, so I'm enjoying myself even in the pandemic.	70 pts	Female, 38, Tokyo
	Medium (41–60 pts)	I'm being ultra careful not to get infected and restricting my activities. It's better than when we were under the state of emergency.	60 pts	Male, 45, Hyogo Pref.
		Because I'm unhappy that I've not been vaccinated yet.	60 pts	Male, 38, Aichi Pref.
		I have some things I'm not happy about, but as I'm used to it now, it's neither good or bad, so I gave it 50 points.	50 pts	Female, 50, Tokyo
		Because I'm used to it now, though I was stressed when it started spreading.	50 pts	Male, 26, Chiba Pref.
		Because I'm restricting my activities as it would inconvenience my workplace if I caught it.	50 pts	Female, 37, Osaka Pref.
	Low (40 pts or lower)	My hobby was traveling, so it's really tough. I work in the airline industry and performance in the sector continues to be visibly poor, and I'm really worried about my job. It's late when I finish work, and it's really inconvenient that bars and restaurants close early.	40 pts	Female, 25, Kanagawa Pref.
		I'm happy to be able to interact with family now, spending more time with my family and video calling with my host mother from when I studied abroad. So it's true that I have more time when I feel at ease. Though we used to say people are rich to the extent they interact with others, I compare myself with others less now because I'm not meeting people. But I resent not being able to go out with my beloved grandmother and having my here and now taken from me. I feel extremely hard done by from having the things I value most taken from me.	30 pts	Female, 25, Osaka Pref.
		With mutant strains spreading and no clear timeframe for getting vaccinated yet, I'm anxious.	30 pts	Male, 65, Osaka Pref.
		Because for the first time, in my 50s, I'm experiencing the worst situation in my life. The main things that brought me here are a massive drop in income, being strongly recommended to take early retirement, and severe symptoms of depression due to power harassment that got me recognized as a disabled person.	5 pts	Male, 51, Aichi Pref.
		I can't meet my friends. My far away sisters and my nieces and nephews can't come to visit my mother. I have to take my mother shopping by car. I currently work from home, but help wanted ads for normal jobs have fallen off a cliff, so I can't get a job as a regular employee.	0 pts	Female, 52, Tokyo

Attitudes and behaviors under COVID-19 (current) and behaviors once COVID-19 subsides (intention)

Degree of anxiety: In change vs. last month, only The situation abroad (68.2%, up 3.5 points) stands out. In change vs. the same month last year, all items are down. This is especially so for Lack and uncertainty of information (down 19.4 points).

Degree of activity restriction: In change vs. last month, scores for all items drop for the second consecutive month. Nonessential and nonurgent shopping (70.9%, down 4.3 points), in particular, stands out.

In change vs. the same month last year, relatively doable items dropped significantly, particularly Nonessential and nonurgent shopping (down 13.3 points).

In behaviors respondents think they will refrain from after COVID-19 subsides, intention scores for all items were lower than current scores. The difference was particularly large for Travel and leisure activities (-29.1 points) and Meeting friends and socializing (-24.2 points).

Degree of activity implementation: In change vs. last month, only Use cashless payment options (64.9%, up 3.0 points) and Telework (30.7%, down 3.5 points) stand out.

In change vs. the same month last year, increases in Second job (up 15.2 points), Invest (up 9.4 points) and Keep a stock of anti-infection products and everyday necessities (up 9.0 points), among others, stood out. Decreases in Make sure to get sufficient exercise, nutrition and sleep (down 6.8 points) and Enjoy pastimes I can do at home (down 6.7 points) also stood out.

Behaviors that respondents gave higher intention scores than current scores included Enjoy leisure activities outdoors where people don't gather (+10.0 points) and Invest (+9.1 points). Meanwhile respondents gave lower intention scores to Enjoy pastimes I can do at home (-10.0 points) and Consistently wear a mask, wash my hands and take other precautions against infection (-9.7 points).

■ Lifestyle attitudes and behaviors

Unit: % / Change: Pts

Degree of anxiety	Current: Anxieties they feel				
	Feb. 2021 survey	Mar. 2021 survey	Apr. 2021 survey	Change vs. last month	Change vs. same month last year
Economic stagnation	81.0	76.2	77.3	+1.1	-13.9
The government's response	81.4	74.9	76.1	+1.2	-10.8
My and my family's health	73.4	67.4	68.3	+0.9	-9.9
The situation abroad	70.7	64.7	68.2	+3.5	-15.3
The lack and uncertainty of information	69.9	62.2	62.9	+0.7	-19.4
My and my family's jobs and income	62.1	59.5	59.1	-0.4	-10.5
Changes in my interpersonal relationships	48.8	46.3	46.1	-0.2	---

Degree of activity restriction	Current: Behaviors they refrain from					Intention: Behaviors they intend to refrain from after COVID-19 subsidies					Intention vs. Current (Most recent month)
	Feb. 2021 survey	Mar. 2021 survey	Apr. 2021 survey	Change vs. last month	Change vs. same month last year	Feb. 2021 survey	Mar. 2021 survey	Apr. 2021 survey	Change vs. last month	Change vs. same month last year	
	Travel and leisure activities	90.5	86.5	84.3	-2.2	-4.4	52.5	52.6	55.2	+2.6	
Nonessential and nonurgent trips	86.0	82.1	80.5	-1.6	-8.8	59.3	58.0	60.4	+2.4	---	-20.1
Shaking hands, hugging and otherwise touching others	85.4	81.9	80.1	-1.8	---	63.9	64.7	65.8	+1.1	---	-14.3
Experiential entertainment (gigs, theater, movies, etc.)	84.9	81.2	79.5	-1.7	-7.2	52.6	52.3	55.7	+3.4	---	-23.8
Meeting friends and socializing	85.4	81.3	79.1	-2.2	-6.0	51.0	52.5	54.9	+2.4	---	-24.2
Eating out	82.4	76.7	74.9	-1.8	-7.8	51.9	50.2	53.4	+3.2	---	-21.5
Nonessential and nonurgent shopping	78.9	75.2	70.9	-4.3	-13.3	56.3	55.5	56.7	+1.2	---	-14.2

Degree of activity implementation	Current: Behaviors they implement					Intention: Behaviors they intend to implement after COVID-19 subsidies					Intention vs. Current (Most recent month)
	Feb. 2021 survey	Mar. 2021 survey	Apr. 2021 survey	Change vs. last month	Change vs. same month last year	Feb. 2021 survey	Mar. 2021 survey	Apr. 2021 survey	Change vs. last month	Change vs. same month last year	
	Consistently wear a mask, wash my hands and take other precautions against infection	94.0	92.4	91.7	-0.7	+0.9	83.5	82.8	82.0	-0.8	
Make sure to get sufficient exercise, nutrition and sleep	77.3	75.9	72.7	-3.2	-6.8	85.0	82.3	79.7	-2.6	---	+7.0
Keep a stock of anti-infection products and everyday necessities	71.4	69.6	69.5	-0.1	+9.0	69.5	71.0	68.9	-2.1	---	-0.6
Enjoy pastimes I can do at home	75.3	69.9	67.9	-2.0	-6.7	57.1	57.1	57.9	+0.8	---	-10.0
Use cashless payment options as much as possible	65.0	61.9	64.9	+3.0	---	67.7	64.8	67.1	+2.3	---	+2.2
Avoid shopping at crowded times and/or reduce frequency of shopping	---	---	61.3	---	---	---	---	60.6	---	---	-0.7
Cook myself as much as possible	60.7	56.9	57.9	+1.0	---	65.1	64.3	63.4	-0.9	---	+5.5
Use stores and facilities that take stringent anti-infection measures	---	---	55.9	---	---	---	---	57.7	---	---	+1.8
Drive to places	50.5	50.8	51.1	+0.3	+4.2	47.1	49.6	47.8	-1.8	---	-3.3
Play video games on my smartphone, computer, etc.	50.3	48.3	48.3	±0	-1.0	47.1	47.7	46.5	-1.2	---	-1.8
Use video, music and other streaming services	46.3	45.5	46.5	+1.0	+1.8	50.3	47.3	48.9	+1.6	---	+2.4
Use net shopping and food delivery services	49.8	46.3	45.7	-0.6	+6.8	44.9	42.8	45.7	+2.9	---	±0
Enjoy leisure activities outdoors where people don't gather	39.4	43.4	45.5	+2.1	+7.3	50.8	53.4	55.5	+2.1	---	+10.0
Do exercises I can do at home	47.3	45.5	44.2	-1.3	---	52.2	51.0	48.8	-2.2	---	+4.6
Exercise outside where people don't gather	39.7	44.5	41.1	-3.4	---	49.0	49.2	49.5	+0.3	---	+8.4

Read and post on social media	38.3	41.2	39.3	-1.9	+4.3	44.2	49.7	45.7	-4.0	---	+6.4
Commute to work/school during off-peak hours as much as possible	40.6	38.7	36.7	-2.0	+2.3	39.7	38.9	38.7	-0.2	---	+2.0
Telework (work from home) as much as possible [Those with jobs*]	35.0	34.2	30.7	-3.5	+7.2	31.7	32.4	31.7	-0.7	---	+1.0
Second job (incl. considering one)	28.2	30.1	30.1	±0	+15.2	32.4	33.3	32.7	-0.6	---	+2.6
Upgrade my home environment by updating the telecommunications environment, buying home appliances, etc.	29.3	29.0	29.9	+0.9	+8.3	38.3	39.0	38.1	-0.9	---	+8.2
Buy slightly better things than normal	27.7	26.7	27.9	+1.2	---	31.0	32.9	31.9	-1.0	---	+4.0
Make things by hand (handcrafts, home improvements, DIY, etc.)	27.8	26.4	25.9	-0.5	---	34.3	33.2	33.2	±0	---	+7.3
Invest	24.7	26.9	25.7	-1.2	+9.4	33.8	37.8	34.8	-3.0	---	+9.1
Buy things on flea market apps and net auctions	23.2	23.3	25.3	+2.0	+7.7	27.5	29.5	29.3	-0.2	---	+4.0
Post and sell things on flea market apps and net auctions	23.5	22.5	24.8	+2.3	+6.5	27.2	28.6	29.7	+1.1	---	+4.9
Get a job, change jobs or start a business (incl. considering these)	22.2	24.8	23.5	-1.3	---	26.9	28.0	27.1	-0.9	---	+3.6
Support businesses and organizations	20.1	19.2	19.8	+0.6	---	25.1	25.1	24.1	-1.0	---	+4.3
Participate in online drinking parties and dinners	18.2	18.4	19.6	+1.2	---	18.9	19.5	19.7	+0.2	---	+0.1
Study online	19.5	18.7	18.6	-0.1	+4.3	25.1	25.5	25.9	+0.4	---	+7.3
Move homes, carry out home improvements, live in multiple locations (incl. considering these)	---	---	16.2	---	---	---	---	21.7	---	---	+5.5

* Those with jobs: February n=1,032; March n=1,075 April n=1,074

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

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

Survey outline

■ Question items (question text)

Degree of 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 hardship 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(s) for your rating. (Free response)

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

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)

Behavior after COVID-19 subsides (Intention)

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)

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

April 2020–March 2021

	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

From April 2021

(People)

	20–29	30–39	40–49	50–59	60–69	Total
Males	122	143	187	169	136	757
Females	118	139	183	164	139	743
Total	240	282	370	333	275	1,500

Survey method: Internet survey

Survey period: April 1 (Thu)–5 (Mon), 2021

(Survey conducted at the beginning of each month starting March 2020)

Planning/Analysis: Hakuodo Institute of Life and Living

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

Reference: Major developments in society during the survey periods

2020

April: State of emergency announced for seven prefectures (until May 6)

State of emergency expanded nationwide

May: State of emergency lifted in 39 prefectures

State of emergency lifted in Osaka, Hyogo and Kyoto Prefectures

State of emergency lifted in all 47 prefectures, including Tokyo, Kanagawa, Chiba, Saitama and Hokkaido

June: Tokyo Alert system for signaling warning information commences operation

September: Bookings for the Go To Travel campaign commence in Tokyo

October: Bookings for the Go To Eat campaign commence

November: The Prime Minister announces temporary suspension of the Go To Travel campaign (Bookings for areas where the coronavirus was surging)

Suspension of the Go To Eat campaign in 10 prefectures, including Tokyo and Osaka Prefecture

December: Suspension of the Go To Travel campaign in Tokyo

Suspension of the Go To Travel campaign nationwide

2021

- January: Second state of emergency announced for Tokyo, Kanagawa, Chiba and Saitama
State of emergency expanded to 11 prefectures
- February: Decision made to extend the state of emergency until March 7

Recent developments in detail

- March 1: State of emergency lifted in Osaka, Hyogo and Kyoto Prefectures
- March 5: Start of vaccination of medical professionals in Tokyo
- March 7: State of emergency in Tokyo, Kanagawa, Chiba and Saitama extended for two weeks (until March 21), decision made to continue to request bars and restaurant to shorten their business hours
- March 20: Decision made to exclude overseas spectators from attending the Tokyo Olympics and Paralympics
- March 21: State of emergency lifted in Tokyo, Kanagawa, Chiba and Saitama
- March 22: Cherry blossoms reach full bloom in Tokyo
- March 24: Decision made to continue to request bars and restaurants in Tokyo, Kanagawa, Chiba and Saitama Prefectures to shorten their business hours until April 21
- April 1: Application of Pre-emergency Measures to Prevent the Spread of COVID-19 announced for six cities in Osaka, Hyogo and Miyagi Prefectures (April 5–May 5)

Notes:

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

Previous news releases (from the April 2020 release) can be found at the URL below.
<https://www.hakuhodo-global.com/news>

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