

July 19, 2021

## July 2021 Survey of *Sei-katsu-sha* Concerning COVID-19

**July Degree of freedom of life is 55.8 points, up for the second consecutive month**  
**Anxiety and activity restriction both continue to ease**

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

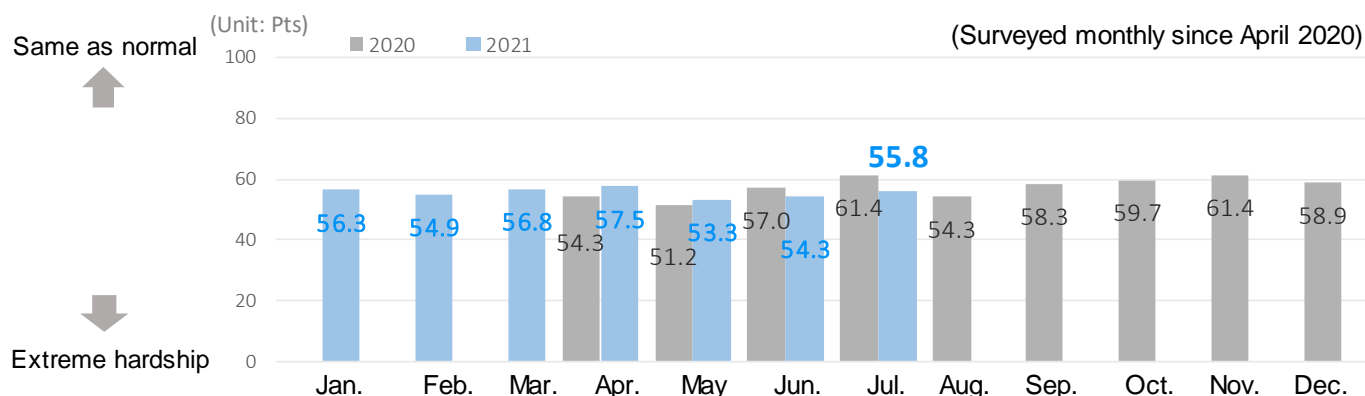
**Conditions prior to the survey:** States of emergency that were ongoing since the end of April were lifted on June 20 everywhere except in Okinawa Prefecture (Hokkaido, Tokyo, Aichi, Kyoto, Osaka, Hyogo and Fukuoka Prefectures moved to Pre-emergency Measures to Prevent the Spread of COVID-19. Saitama, Chiba and Kanagawa Prefectures remained under Pre-emergency Measures). However, even before the lifting of the states of emergency, the media was reporting every day that footfall was increasing in all regions and infections were rising again in Tokyo. Although vaccination of the elderly was progressing smoothly, new bookings for workplace vaccinations were suspended. In addition to mutant variants, increasing footfall and the rising caseload in Tokyo, the survey was conducted amid increasing information about the holding of the Olympic Games (Note: the decision to declare a fourth state of emergency in Tokyo was made on July 8, after the survey was conducted).

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

**July 2021: 55.8 pts**

Up 1.5 pts vs. last month  
Down 5.6 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 July 2021 was 55.8 points. The score was up 1.5 points vs. the previous month, marking the second consecutive month the rating has risen. It was down 5.6 points vs. July 2020 (in a survey conducted one month after the lifting of the first state of emergency).



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

**Degree of anxiety:** All scores down on last month. My and my family's health (66.7%, down 4.1 points) and Changes in my interpersonal relationships (43.9%, down 3.6 points) stand out. **Degree of activity restriction:** Almost all scores down on last month, including Eating out (74.8%, down 2.2 points), Experiential entertainment (78.9%, down 1.4 points). **Degree of activity implementation:** Items that increased vs. last month include Drive to places (52.5%, up 2.2 points) and Invest (27.8%, up 1.3 points); those that decreased include Read and post on social media (40.5%, down 2.0 points).

		Response rate Agree + Somewhat agree	Change vs. last month	Change vs. same month last year
<b>Degree of anxiety</b> Anxieties they feel	My and my family's health	66.7%	-4.1 pts	-4.0 pts
	Changes in my interpersonal relationships	43.9%	-3.6 pts	+0.4 pts
	My and my family's jobs and income	55.7%	-2.9 pts	-6.2 pts
<b>Degree of activity restriction</b> Behaviors they refrain from	Eating out	74.8%	-2.2 pts	±0.0 pts
	Experiential entertainment	78.9%	-1.4 pts	-2.4 pts
	Nonessential and nonurgent shopping	71.0%	-1.1 pts	-5.6 pts
<b>Degree of activity implementation</b> Behaviors they implement	Drive to places	52.5%	+2.2 pts	+2.2 pts
	Invest	27.8%	+1.3 pts	+6.2 pts
	Read and post on social media	40.5%	-2.0 pts	+4.3 pts

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

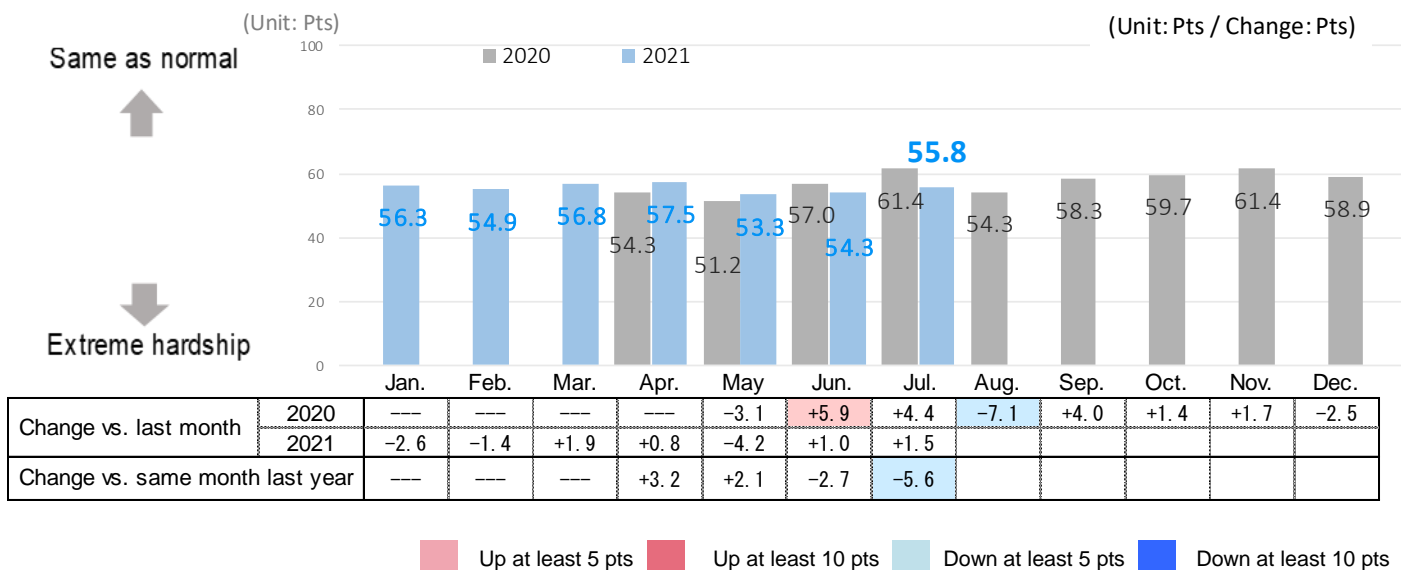
**Degree of freedom of life is 55.8 points in July. Up 1.5 points vs. the previous month, increasing for the second straight month**

The vaccine rollout beginning to progress smoothly among the elderly and others and the lifting of the states of emergency in late June are likely to have affected the rise in Degree of freedom of life score. However, at 5.6 points lower than the score last July (61.4 points), the score does not reach last year's level, when the Degree of freedom of life score was rising after the lifting of the first state of emergency.

**In free responses, many mention having become used to restrictions, not feeling especially inconvenienced and that things are not much different from normal. There was anticipation about the expanding vaccination rollout**

Comments from those who gave high Degree of freedom of life scores include positive sentiments like "Some things are inconvenient, but some things are actually better," and many mentioned "Things are not much different from normal," "I can't travel or eat out, but I don't feel my life is inconvenienced." There was also a small number of older respondents who mentioned being fully vaccinated. Among those who gave medium scores, while there were comments like "It impacts my life less," and "There are some inconvenient things, but nothing else really bothers me," there were also feelings that respondents hadn't been able to let go, such as "The emotional side of things is yet to be resolved," and "I can't enjoy life like before." One respondent mentioned having peace of mind now that her parents were fully vaccinated. Those who gave low Degree of freedom of life scores mentioned being sensitive and uneasy about things like how shopping baskets are used when they are shopping, and there were also heartbreaking comments from those in the food service industry and the like whose work had been affected, and one young person whose interests have been restricted commented about no longer knowing what the point of being alive is. One respondent also commented about feeling pressure to conform and get vaccinated.

### ■ Degree of freedom of life



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.

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

Degree of freedom of life	High (61 pts or higher)	Because while some things are inconvenient, I no longer have troublesome interactions to deal with and have more time to talk to my husband, so I think things are actually better. With less stress, things are great, so I want this lifestyle to continue.	100 pts	Female, 31, Tokyo
		Because I am now fully vaccinated.	90 pts	Male, 68, Hyogo Pref.
		Things are not much different from normal.	80 pts	Male, 54, Aichi Pref.
		The only things I really haven't been able to do are travel, visit my hometown and eat out. I can shop, albeit less frequently, and can get everyday necessities without them selling out. I can even go to the salon and sports club now. But timing wise, it's getting hotter and masks are a pain.	70 pts	Female, 59, Tokyo
		Because the rhythms of my work and everyday life are unchanged. I can't travel and have to avoid crowded places, but it's not as if I did those things very often anyway, so I don't feel particularly inconvenienced.	70 pts	Female, 34, Osaka Pref.
	Medium (41–60 pts)	Things have got better to the point where it impacts my life less, but since I can't see the people I used to see and can't freely go where I want, the emotional side of things is yet to be resolved.	60 pts	Male, 39, Osaka Pref.
		My parents are now fully vaccinated, so I have some peace of mind. But I'm still not going out with anyone other than family, and can't enjoy life like before.	60 pts	Female, 39, Hyogo Pref.
		The only things are I can't meet friends or go to drinking parties. I can still work as normal, so that's something to be thankful for.	50 pts	Male, 45, Saitama Pref.
		While it's inconvenient to have to wear a mask and avoid crowds, nothing else really bothers me.	50 pts	Male, 43, Aichi Pref.
		I can't just go out for a meal, I need to book to do anything and, although I've got used to working remotely, there are some things I need to go in to work for, which is irritating... Plus, I've put on weight.	50 pts	Female, 37, Aichi Pref.
	Low (40 pts or lower)	There are more inconveniences, like waiting to line up behind someone who meets my standards when shopping in places where you use a basket because I'm not comfortable with the cashier putting my purchases into a basket last used by someone in front of me who wasn't wearing a mask or didn't look clean. I don't want to take my mask off outside because I don't wear makeup under it and I'm worried about sweat. I worry about clientele, so the only time I've eaten out other than for lunch was at a hotel I was staying at. I can't drink. And I can't travel overseas.	30 pts	Female, 45, Tokyo
		The shops/restaurants I want to go to are either closed or have shortened their business hours, which is inconvenient. Getting vaccinated is supposed to be a choice, but the pressure to conform is unbelievable.	30 pts	Male, 56, Osaka Pref.
		Travel is my hobby and not being able to do anything is really stressful. My job, too, is mostly planning events, and everything was canceled last year, which nearly broke my heart. My kids are at the stage where they will mature emotionally and physically most, but I can't do anything for them. I'm just mad at the culprits who let COVID-19 spread and the government's response.	20 pts	Male, 36, Aichi Pref.
		Going to gigs to see bands was my hobby, but live houses have been bashed so much that most gigs have been canceled. It's no exaggeration to say that all my interests have been taken from me. Going to the movies was a hobby I did alone, but there are restrictions on that now, too, so I no longer know what the point of being alive is.	10 pts	Female, 26, Osaka Pref.
		I work in the food service industry, which has not been able to operate properly for a year. My work has become unstable and my income has dropped. My mental state has suffered due to the stress from work, etc. I think the strength of criticism against alcohol is over the top. Eating out was my hobby and I'm yet to discover new interests and ways to change my mood.	0 pts	Female, 28, Tokyo

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

### Degree of anxiety: All scores down on last month. All scores drop for the second consecutive month

My and my family's health (66.7%, down 4.1 points), Changes in my interpersonal relationships (43.9%, down 3.6 points) stand out.

### Degree of activity restriction: Except for one item, all scores are down for the second consecutive month

Drops in scores for Eating out (74.8%, down 2.2 points) and Experiential entertainment (78.9%, down 1.4 points), among other items, stood out. Only Nonurgent and nonessential trips (81.1%, up 0.6 points) rose.

### Degree of activity implementation: Some scores rise, some fall

Items that scored higher than last month include Drive to places (52.5%, up 2.2 points), Invest (27.8%, up 1.3 points) and Cook myself as much as possible (58.6%, up 1.3 points). Items that dropped since last month include Read and post on social media (40.5%, down 2.0 points).

**Behaviors that respondents gave higher intention scores than current scores:** Enjoy leisure activities outdoors where people don't gather (+10.3 points) and Make sure to get sufficient exercise, nutrition and sleep (+8.3 points), among others.

Conversely, they gave lower intention scores than current scores to Enjoy pastimes I can do at home (-16.2 points) and Consistently wear a mask, wash my hands and take other precautions against infection (-12.2 points).

## ■ Lifestyle attitudes and behaviors

(Unit: % / Change: Pts)

Degree of anxiety	Current: Anxieties they feel				
	May 2021 survey	Jun. 2021 survey	Jul. 2021 survey	Change vs. last month	Change vs. same month last year
The government's response	82.3	78.7	76.7	-2.0	+0.3
Economic stagnation	81.3	76.9	74.3	-2.6	-8.8
My and my family's health	71.9	70.8	66.7	-4.1	-4.0
The lack and uncertainty of information	67.1	66.8	65.2	-1.6	-2.4
The situation abroad	70.3	65.9	64.1	-1.8	-11.1
My and my family's jobs and income	60.7	58.6	55.7	-2.9	-6.2
Changes in my interpersonal relationships	47.8	47.5	43.9	-3.6	+0.4

(Unit: % / Change: Pts)

**Degree of activity restriction**

	Current: Behaviors they refrain from					Intention: Behaviors they intend to refrain from after COVID-19 subsides					Intention vs. Current (Most recent month)
	May 2021 survey	Jun. 2021 survey	Jul. 2021 survey	Change vs. last month	Change vs. same month last year	May 2021 survey	Jun. 2021 survey	Jul. 2021 survey	Change vs. last month	Change vs. same month last year	
Travel and leisure activities	88.8	84.9	84.5	-0.4	+0.3	51.2	46.7	48.2	+1.5	-11.7	-36.3
Nonessential and nonurgent trips	85.1	80.5	81.1	+0.6	-1.9	58.9	54.7	54.9	+0.2	-10.2	-26.2
Shaking hands, hugging and otherwise touching others	85.7	80.5	80.1	-0.4	+0.8	65.1	58.9	60.9	+2.0	-8.2	-19.2
Meeting friends and socializing	84.5	79.9	79.8	-0.1	+1.5	54.7	48.4	48.8	+0.4	-7.9	-31.0
Experiential entertainment (gigs, theater, movies, etc.)	84.9	80.3	78.9	-1.4	-2.4	53.9	46.7	49.6	+2.9	-13.1	-29.3
Eating out	80.5	77.0	74.8	-2.2	±0	51.4	47.7	47.3	-0.4	-9.6	-27.5
Nonessential and nonurgent shopping	77.6	72.1	71.0	-1.1	-5.6	56.3	51.7	51.7	±0	-11.8	-19.3

(Unit: % / Change: Pts)

**Degree of activity implementation**

	Current: Behaviors they implement					Intention: Behaviors they intend to implement after COVID-19 subsides					Intention vs. Current (Most recent month)
	May 2021 survey	Jun. 2021 survey	Jul. 2021 survey	Change vs. last month	Change vs. same month last year	May 2021 survey	Jun. 2021 survey	Jul. 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	94.2	92.5	92.9	+0.4	+1.2	83.8	81.0	80.7	-0.3	-4.3	-12.2
Make sure to get sufficient exercise, nutrition and sleep	77.5	74.9	73.7	-1.2	-0.8	83.8	83.0	82.0	-1.0	-1.7	+8.3
Enjoy pastimes I can do at home	77.1	71.6	70.3	-1.3	-0.8	57.9	53.7	54.1	+0.4	-7.2	-16.2
Keep a stock of anti-infection products and everyday necessities	73.1	68.9	67.8	-1.1	+1.0	71.8	67.9	67.3	-0.6	-5.7	-0.5
Use cashless payment options as much as possible	65.7	63.0	63.6	+0.6	+0.3	69.1	64.7	67.1	+2.4	-0.6	+3.5
Avoid shopping at crowded times and/or reduce frequency of shopping	68.8	60.1	60.0	-0.1	---	61.1	53.7	53.1	-0.6	---	-6.9
Cook myself as much as possible	60.6	57.3	58.6	+1.3	+1.5	66.9	63.3	64.0	+0.7	-1.0	+5.4
Use stores and facilities that take stringent anti-infection measures	61.9	58.4	58.0	-0.4	---	62.1	55.7	57.3	+1.6	---	-0.7
Drive to places	54.0	50.3	52.5	+2.2	+2.2	50.2	46.2	47.3	+1.1	-1.5	-5.2
Use video, music and other streaming services	49.5	48.9	49.0	+0.1	+1.7	49.6	49.6	50.4	+0.8	+1.1	+1.4
Use net shopping and food delivery services	52.1	47.5	47.9	+0.4	+2.0	47.0	42.3	42.8	+0.5	-1.5	-5.1
Play video games on my smartphone, computer, etc.	50.8	48.5	46.6	-1.9	-1.1	49.1	47.7	45.2	-2.5	-3.1	-1.4

Do exercises I can do at home	49.1	45.0	44.6	-0.4	-4.3	52.8	49.7	48.9	-0.8	-5.9	+4.3
Enjoy leisure activities outdoors where people don't gather	44.7	41.5	40.9	-0.6	+0.7	54.5	49.9	51.2	+1.3	-1.0	+10.3
Exercise outside where people don't gather	45.5	40.1	40.5	+0.4	-1.4	49.7	44.7	44.7	±0	-3.5	+4.2
Read and post on social media	41.9	42.5	40.5	-2.0	+4.3	48.1	46.9	45.9	-1.0	+1.5	+5.4
Commute to work/school during off-peak hours as much as possible	39.7	36.0	36.5	+0.5	-1.1	40.3	35.9	36.9	+1.0	-3.4	+0.4
Upgrade my home environment by updating the telecommunications environment, buying home appliances, etc.	34.6	32.2	31.6	-0.6	+3.6	39.3	36.0	36.6	+0.6	+0.4	+5.0
Telework (work from home) as much as possible [Those with jobs*]	32.2	31.2	31.1	-0.1	+1.1	32.3	29.7	30.5	+0.8	-1.7	-0.6
Second job (incl. considering one)	29.2	29.5	29.0	-0.5	+3.7	31.1	31.6	30.9	-0.7	+1.9	+1.9
Make things by hand (handcrafts, home improvements, DIY, etc.)	28.7	28.9	27.8	-1.1	+0.1	33.9	33.0	32.7	-0.3	-2.2	+4.9
Invest	26.2	26.5	27.8	+1.3	+6.2	35.0	34.3	35.7	+1.4	+4.6	+7.9
Buy slightly better things than normal	27.1	27.9	27.3	-0.6	+4.5	33.1	30.5	30.8	+0.3	+2.5	+3.5
Buy things on flea market apps and net auctions	22.9	24.5	24.7	+0.2	+2.4	27.8	29.1	28.5	-0.6	+1.4	+3.8
Post and sell things on flea market apps and net auctions	25.0	25.5	24.1	-1.4	+2.3	29.3	27.7	26.5	-1.2	+1.0	+2.4
Get a job, change jobs or start a business (incl. considering these)	22.7	23.4	22.9	-0.5	+0.5	24.5	26.4	24.9	-1.5	-0.2	+2.0
Support businesses and organizations	20.1	19.9	18.5	-1.4	+0.2	23.5	22.7	23.7	+1.0	-1.2	+5.2
Participate in online drinking parties and dinners	19.5	19.1	17.9	-1.2	-1.4	17.4	16.9	17.8	+0.9	-1.6	-0.1
Study online	18.9	18.2	17.5	-0.7	-0.4	23.1	21.9	22.4	+0.5	-1.9	+4.9
Move homes, carry out home improvements, live in multiple locations (incl. considering these)	16.3	15.8	16.8	+1.0	---	21.5	19.9	19.6	-0.3	---	+2.8

\* Those with jobs: May n=1,062 June n=1,059 July: n=1,078

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: July 1 (Thu)–5 (Mon), 2021  
(Survey conducted at the beginning of each month since 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: States of emergency declared for seven prefectures (until May 6)  
States of emergency expanded nationwide
- May: States of emergency lifted in 39 prefectures  
States of emergency lifted in Osaka, Hyogo and Kyoto Prefectures  
States 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:	States of emergency declared for Tokyo, Kanagawa, Chiba and Saitama, then expanded to 11 prefectures
February:	Decision made to extend the states of emergency until March 7
March:	States of emergency lifted in Osaka, Hyogo and Kyoto Prefectures, then in Tokyo, Kanagawa, Chiba and Saitama
April:	Application of Pre-emergency Measures to Prevent the Spread of COVID-19 gradually expanded Third states of emergency declared for Tokyo, Osaka, Hyogo and Kyoto Prefectures
May:	States of emergencies in Aichi, Fukuoka, Hokkaido, Okayama, Hiroshima and Okinawa Prefectures continued, extended or expanded Vaccination of the elderly continues, large-scale vaccination sites open (Tokyo, Osaka)
June:	Australian Olympic athletes arrive in Japan

### Developments at the time of this survey, in detail

June 5:	Elderly people who have received their first vaccination top 10 million
June 10:	Patients with severe symptoms number 942, dropping below 1,000 for the first time in 1.5 months
June 13:	Pre-emergency Measures lifted in Gunma, Ishikawa and Kumamoto Prefectures Support for holding the Tokyo Olympics and Paralympics included in the G7 Summit's joint statement
June 19:	Ugandan Olympic athlete tests positive at Narita Airport. The delegation, minus the infected athlete, travels to Izumisano
June 20:	All states of emergency lifted, except that in Okinawa Prefecture Hokkaido, Tokyo, Aichi, Kyoto, Osaka, Hyogo and Fukuoka Prefectures shift to Pre-emergency Measures Pre-emergency Measures continue in Chiba, Saitama and Kanagawa Prefectures Restrictions on the provision of alcohol ease in regions that shifted to Pre-emergency Measures, and alcohol can now be served until 7 pm
June 23:	Decision made to not provide alcohol at the Olympics
June 25:	New bookings for workplace vaccinations are suspended
July 1:	Tokyo records 673 new cases, marking the 12th consecutive day that cases exceed those of the same day the previous week

### 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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