

“How the COVID-19 Crisis is Perceived”

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Platform for Social Innovation

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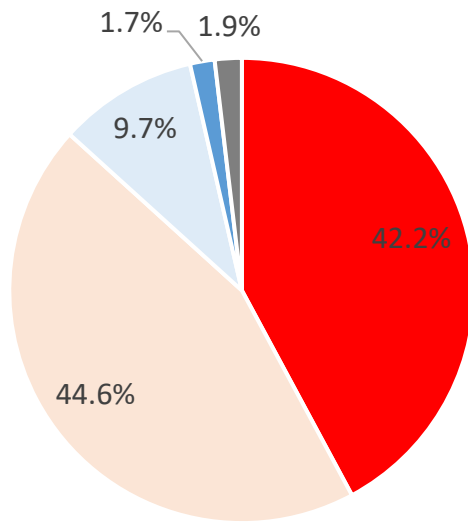
Perception on the Government Response

Methodology

- Research Body: Yamaneko Research Institute, Inc., Platform for Social Innovation
- Research Execution: Nikkei Research Inc.
- Methodology: Internet Panel Survey
- Sample Size: N=2098 (Post data cleaning)
- 18-19y: 212, 20's: 312, 30's: 320, 40's: 323, 50's: 325, 60's: 315, 70's and above: 291
- Research Period: April 27-28, 2020
- The survey results were adjusted based on demographic data as of October 2019 to ensure realistic age representation. Responses pertaining to profiles of the respondents, or age-based segment analysis are not adjusted.
 - Contradictions in the respondents' answers were used for data cleaning, resulting in a N=2,098 sample size for the various analysis
 - Ensure that household income \geq individual income
 - Ensure respondents did not mechanically choose the same answer
 - Consistency regarding employments status (Q3, Q12, and Q13)

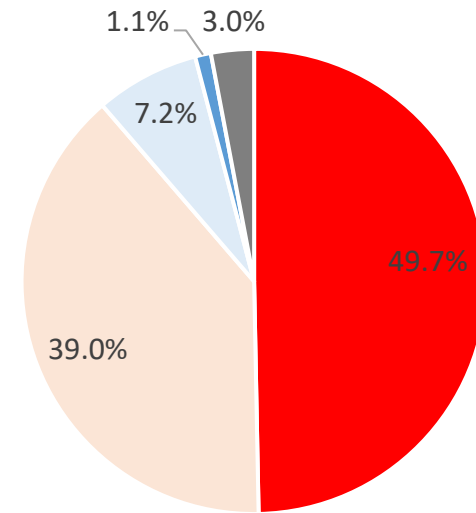
Close to 90% of the respondents are concerned about the health effects of COVID-19

Q: Are you concerned about the effects of COVID-19 to your personal health?



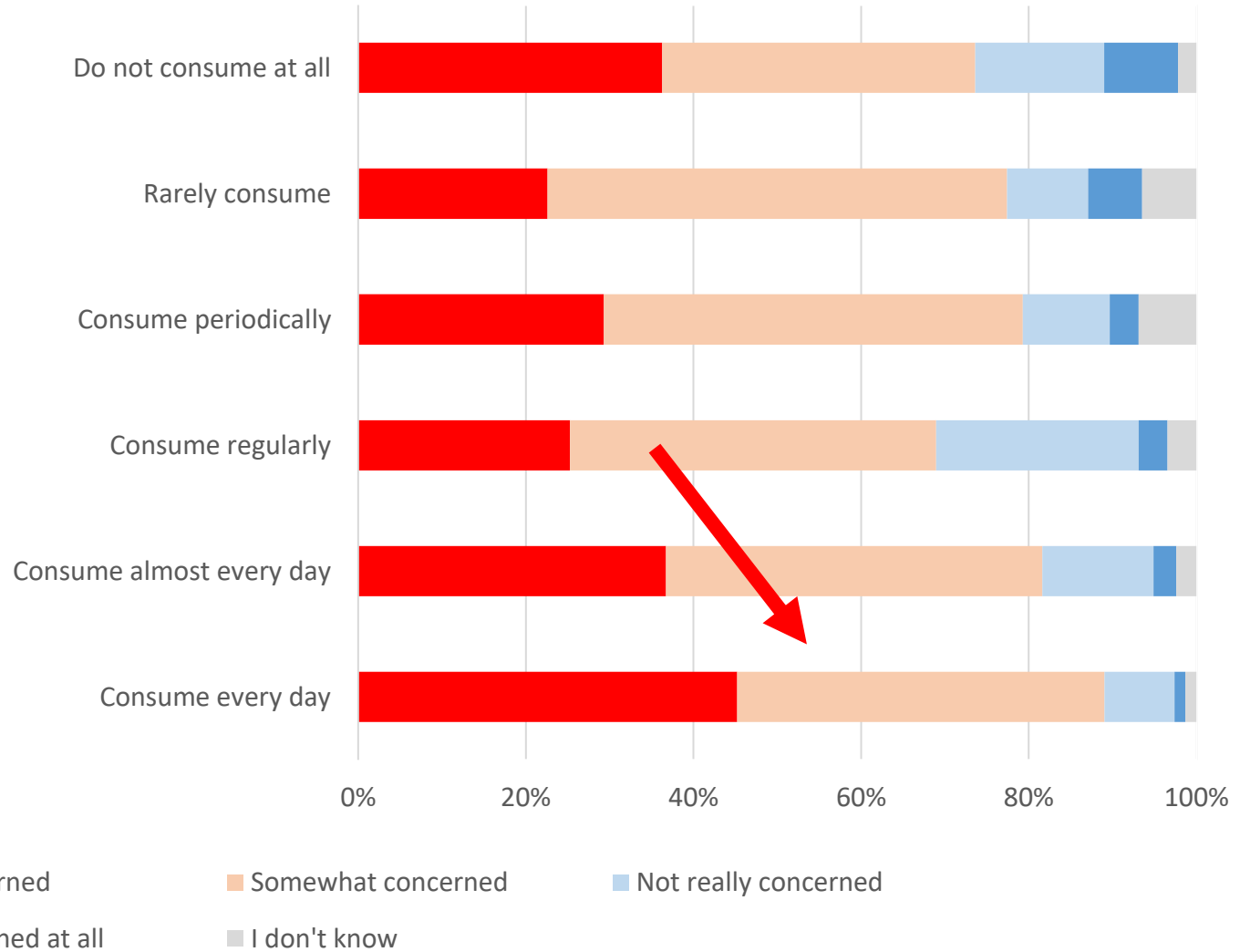
■ Very concerned
 ■ Somewhat concerned
 ■ Not really concerned
■ Not concerned at all
 ■ I don't know

Q: Are you concerned about the effects of COVID-19 to your family's health?

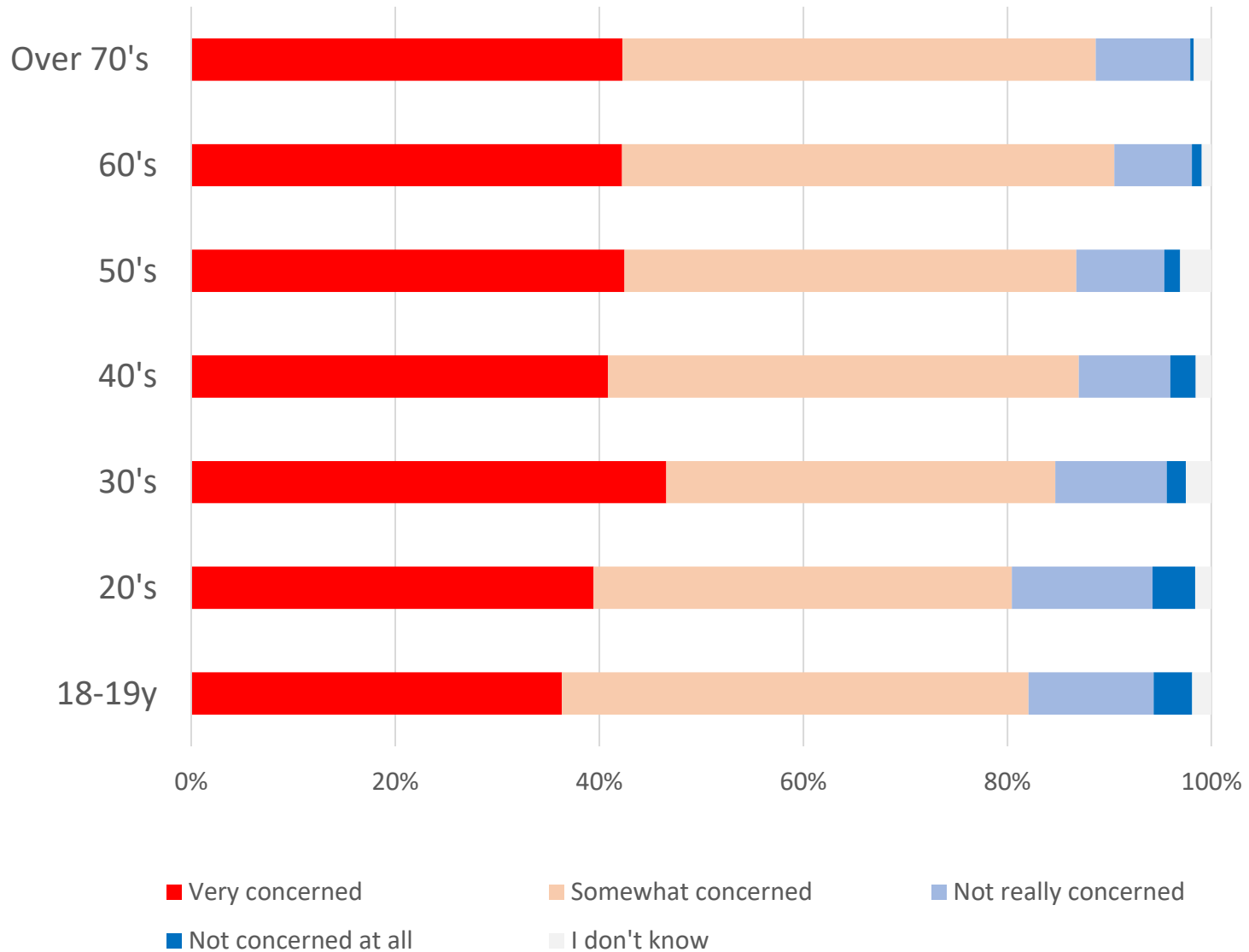


■ Very concerned
 ■ Somewhat concerned
 ■ Not really concerned
■ Not concerned at all
 ■ I don't know

Concern for COVID-19's health effects increase in line with higher consumption of Television...

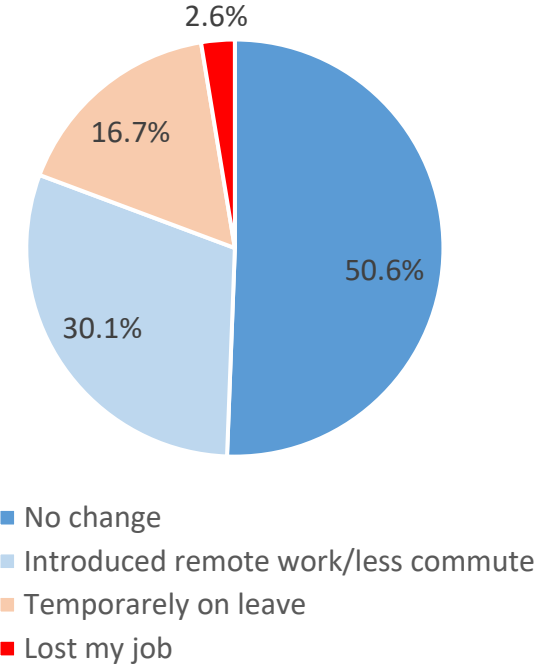


... but do not necessarily differ across age demographics

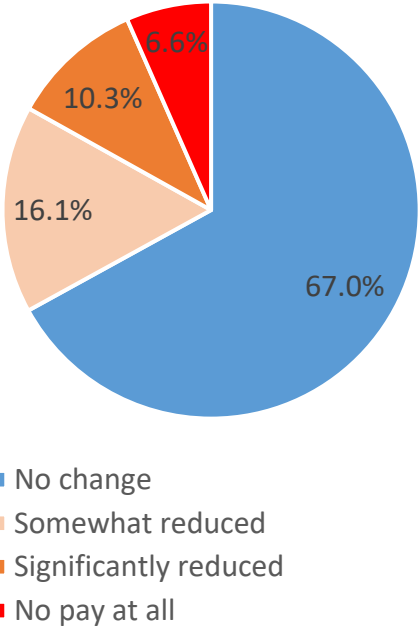


Less than a third of workers have been able to move to a new style of working...

Q: How has your working style changed?

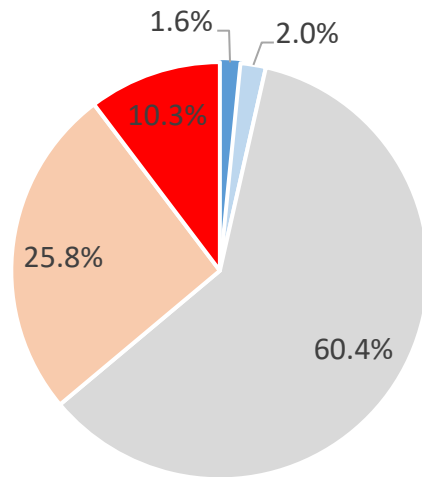


Q: How has your personal compensation changed?



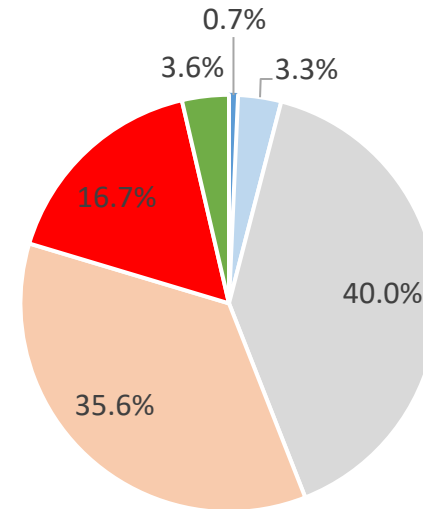
More than 35% of households have already seen a reduction in their income while more than 50% are expecting it

Q: How has your household's income been affected?



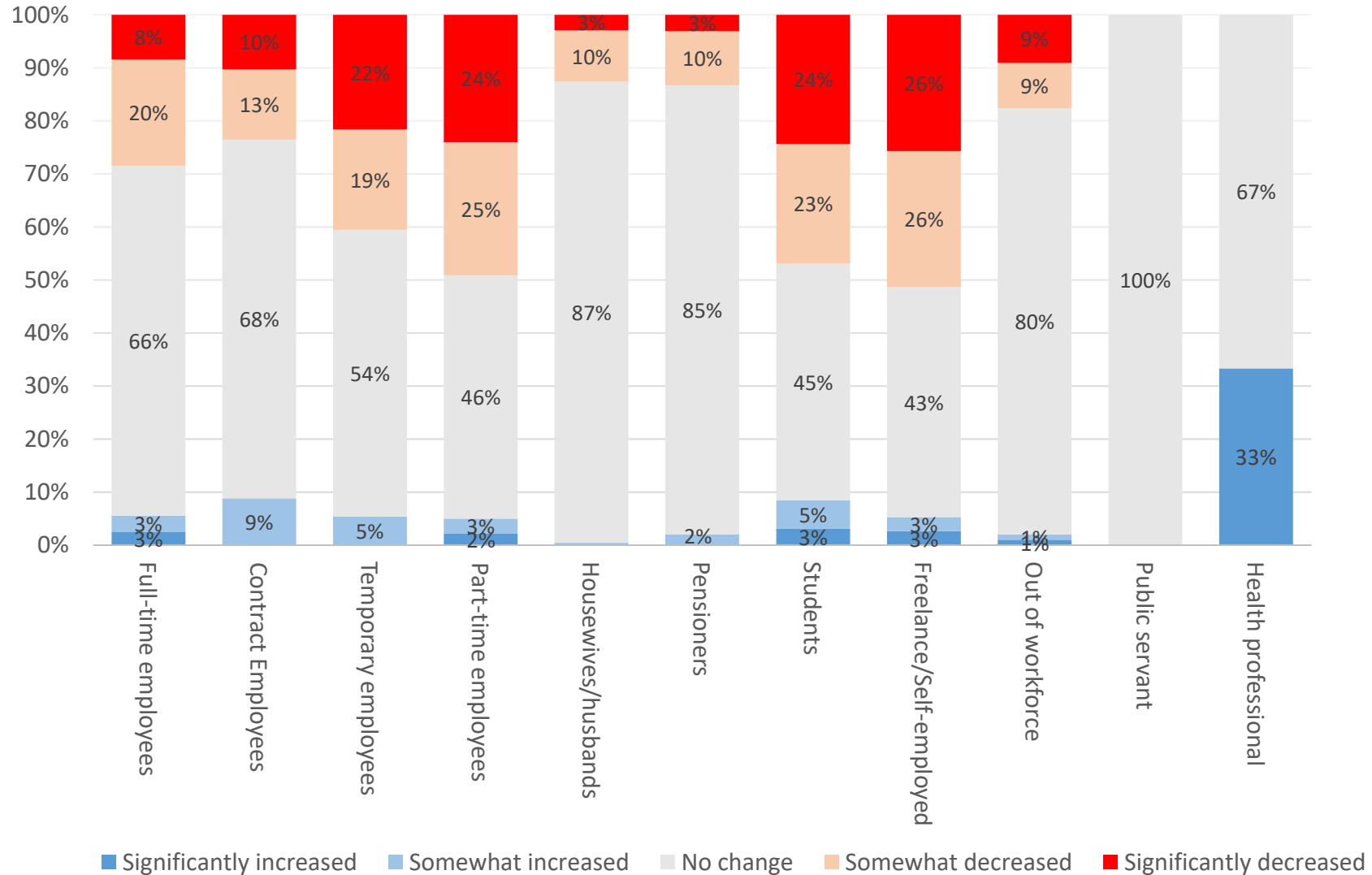
- Significantly increase
- Somewhat increase
- No change
- Somewhat decrease
- Significantly decrease

Q: How do you expect your income to change over time?

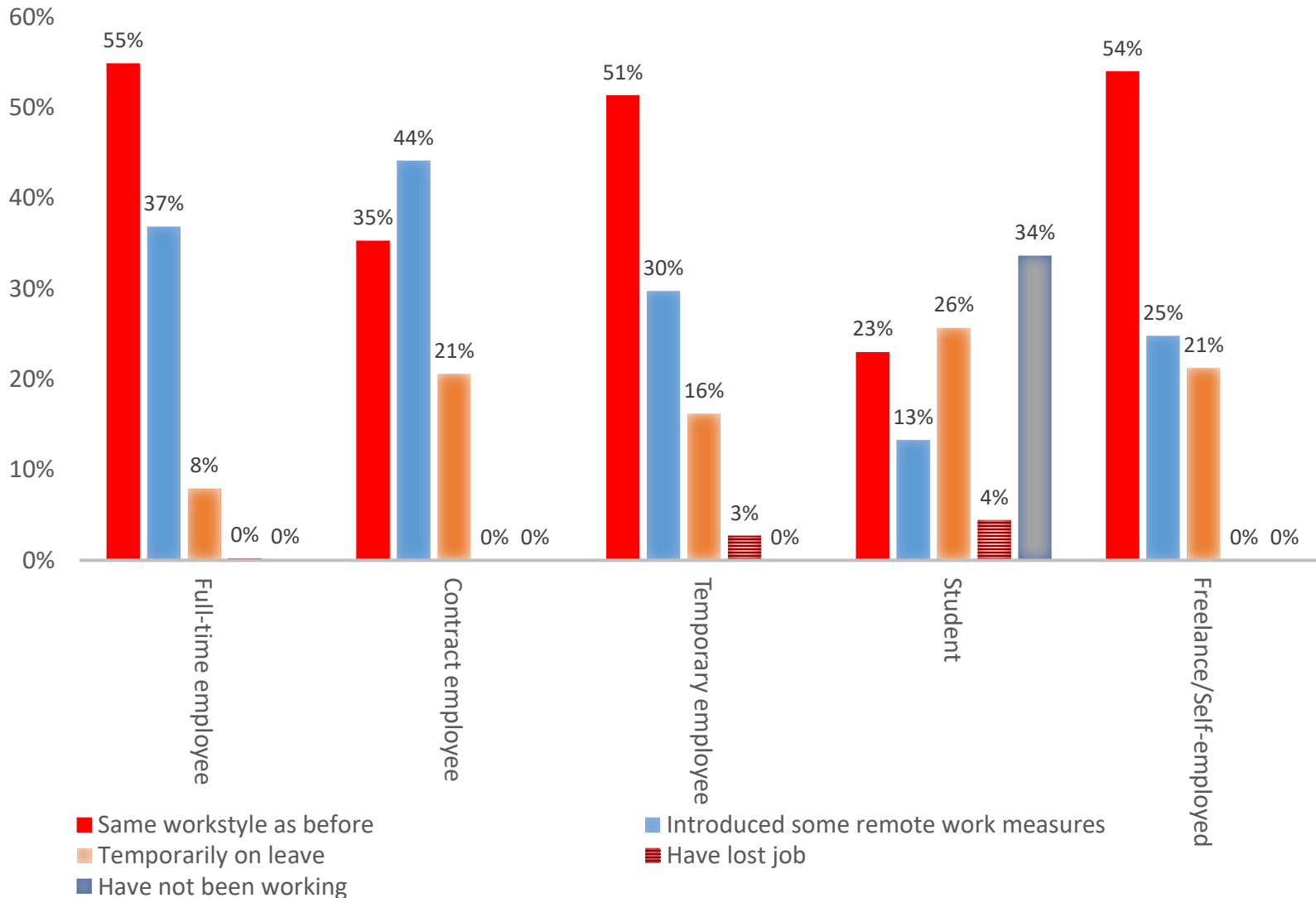


- Significantly increase
- Somewhat increase
- No change
- Somewhat decrease
- Significantly decrease
- I don't know

As expected, reduction of income is especially acute for temporarily workers, the self-employed, and students.

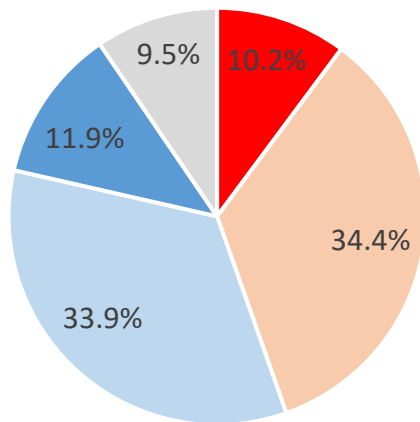


Around 20% temporary and contract workers are currently out of work, and unemployment is on the rise



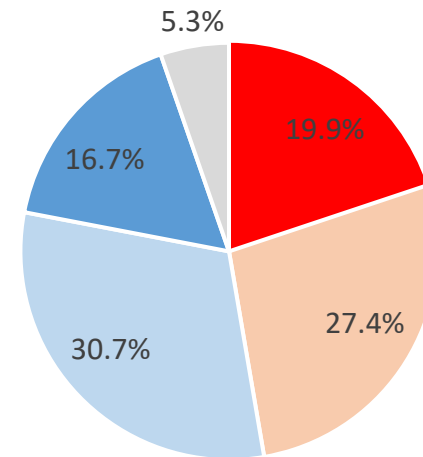
Consequently, 45% of respondents are suffering economically, and 47% of workers fear losing their job

Q: Which of the following best represents your economic status?



■ Seeverely suffering
 ■ Somewhat suffering
 ■ Not really suffering
■ Not suffering at all
 ■ I don't know

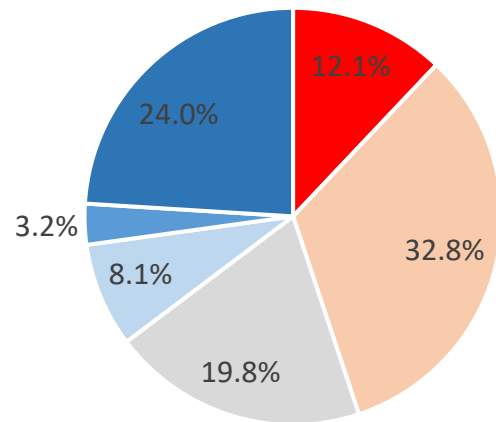
Q: Which of the following best represents prospects regarding your job?



■ Very worried
 ■ Somewhat worried
 ■ Not really worried
■ Not worried at all
 ■ I don't know

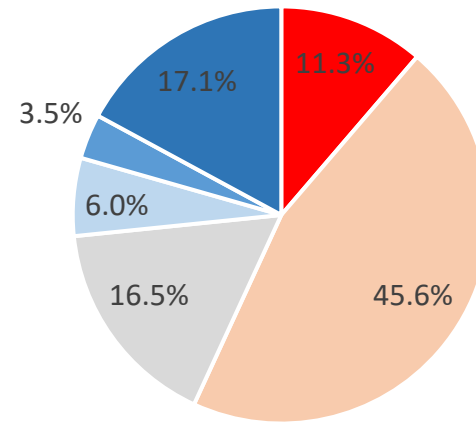
The most respondents believe the government should lift the State of Emergency Declaration in one more month

Q: How much longer do you think you can bare the current “self-refrain” status under the State of Emergency declaration?



■ Untill May 6
 ■ 1 more month
 ■ 3 more months
■ 6 more months
 ■ 12 more months
 ■ As long as necessary

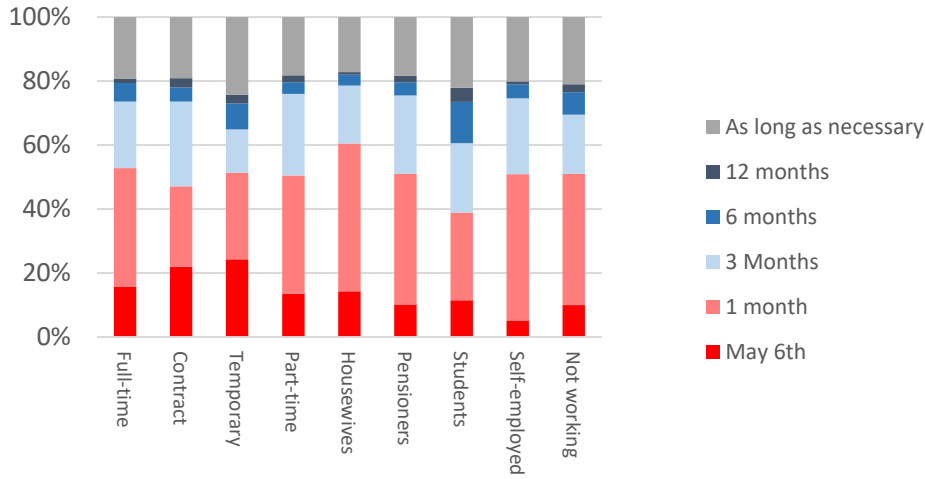
Q: When do you think the State of Emergency should be lifted?
(Question was asked on April 27-28)



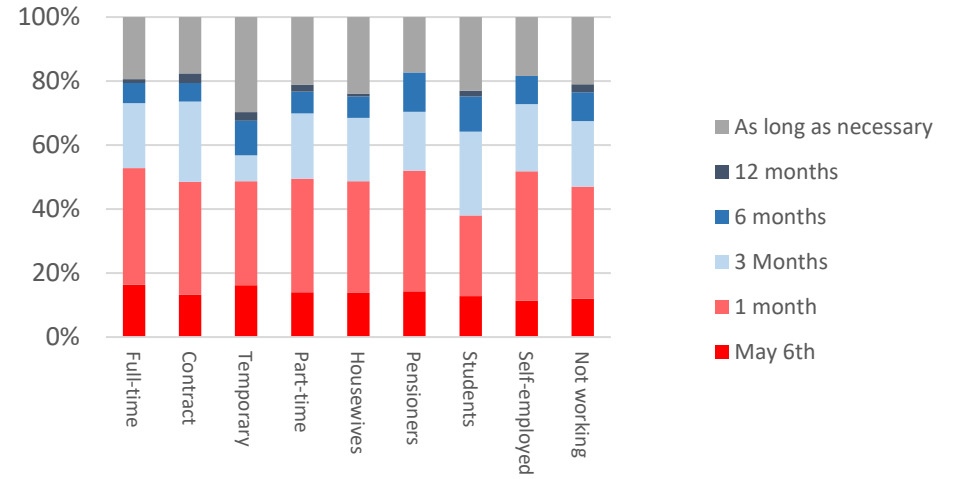
■ Untill May 6
 ■ 1 more month
 ■ 3 more months
■ 6 more months
 ■ 12 more months
 ■ As long as necessary

... 1 month seems to be the most popular period across industries

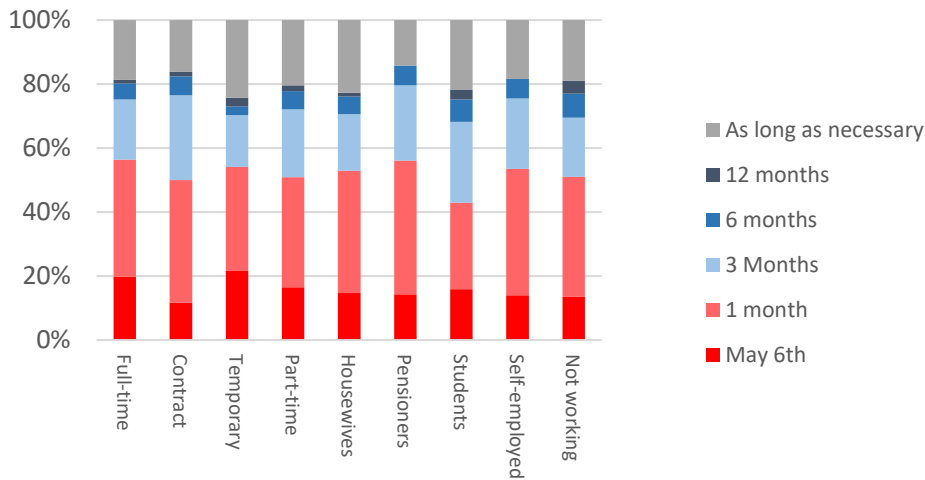
Q: Schools



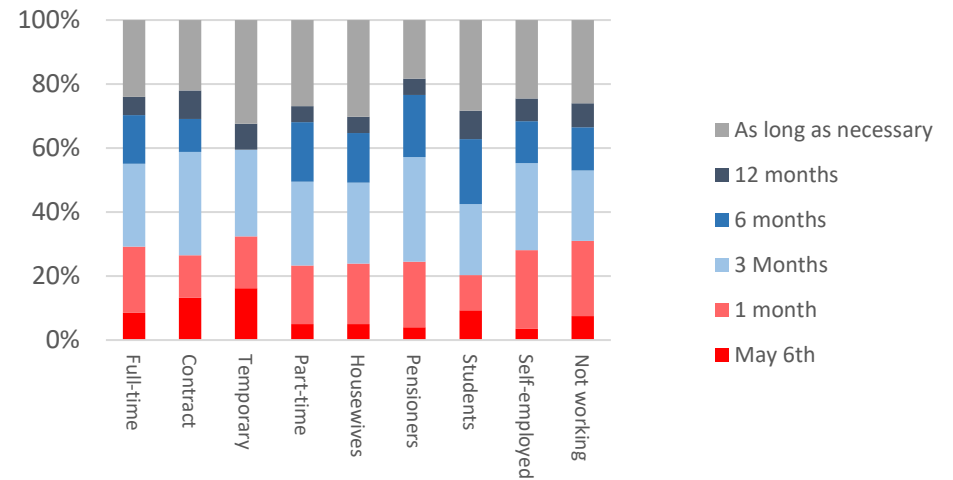
Q : Restaurants



Q: Other commercial facilities

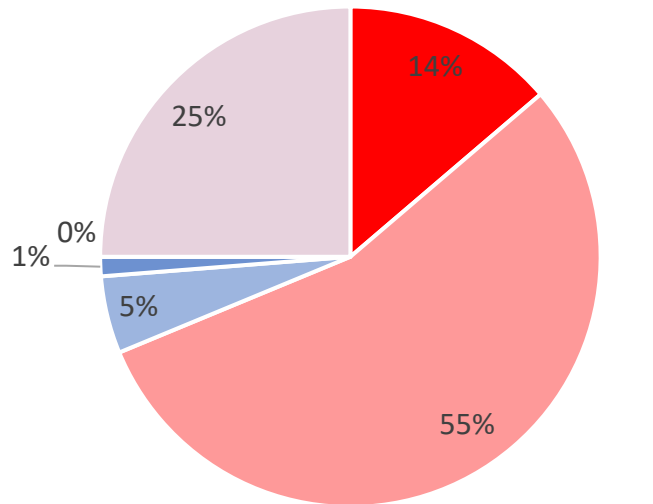


Q: Travel



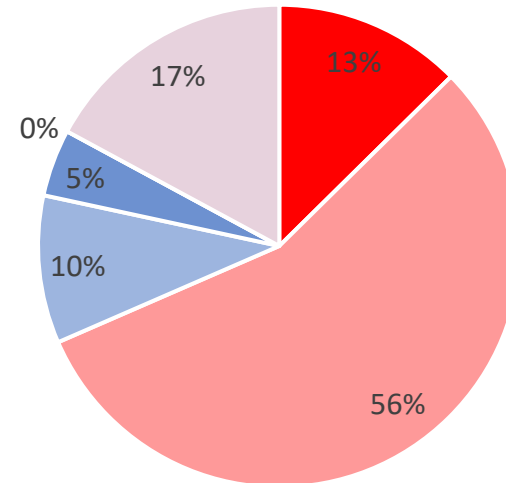
70% of housewives/husbands in their 20's to 40's believe school closures should end within 1 month

Q: How much longer do you think you can bare the current "self-refrain" status under the State of Emergency declaration?



- Untill May 6
- 1 more month
- 3 more months
- 6 more months
- 12 more months
- As long as necessary

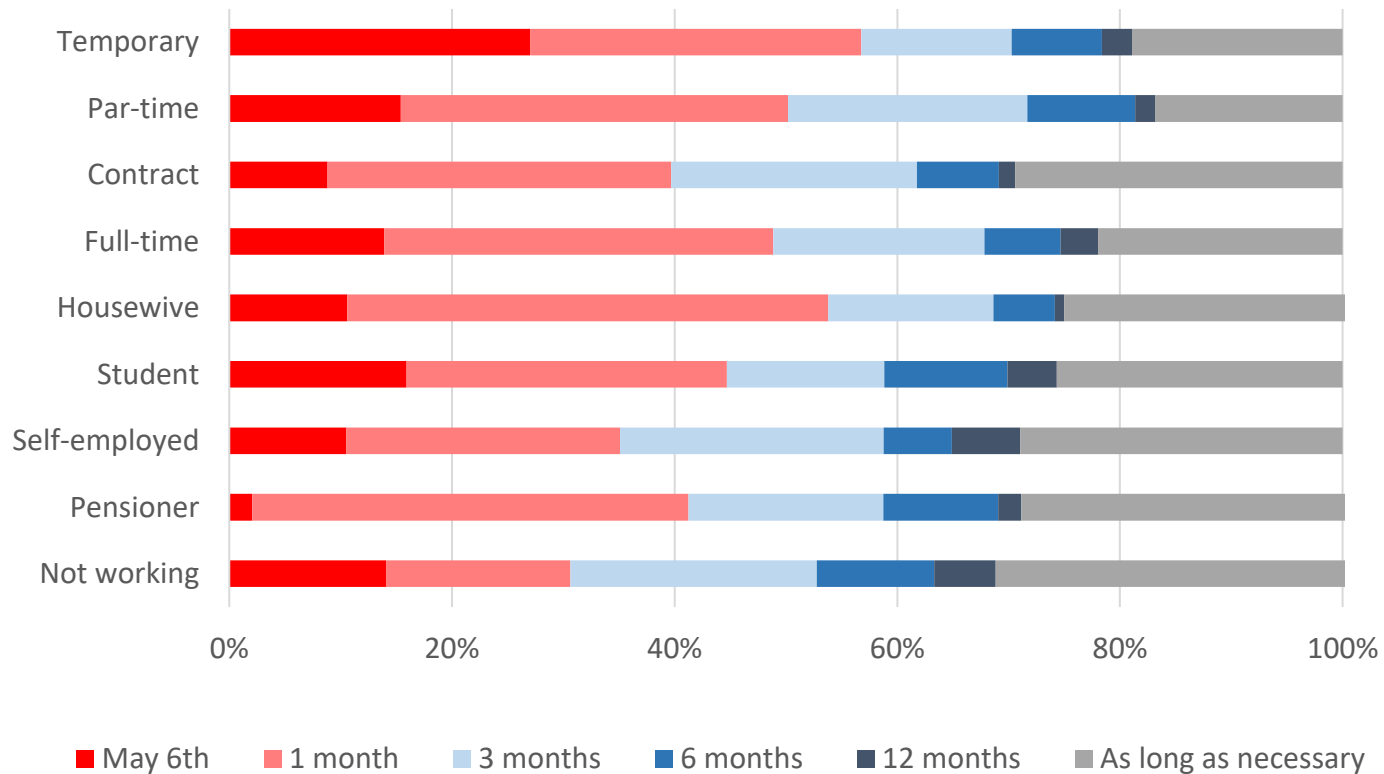
Q: When do you think schools should reopen?
(Question was asked on April 27-28)



- Untill May 6
- 1 more month
- 3 more months
- 6 more months
- 12 more months
- As long as necessary

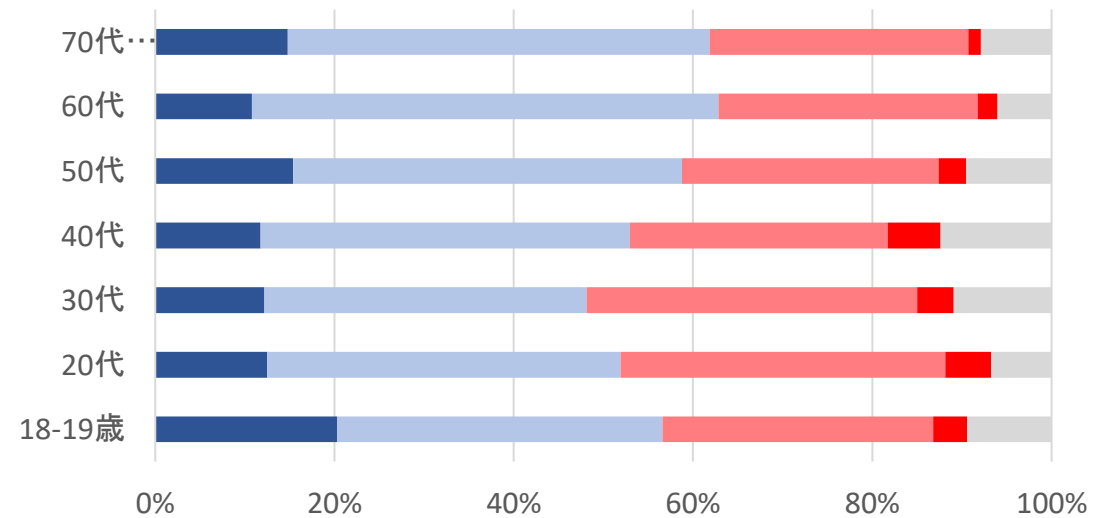
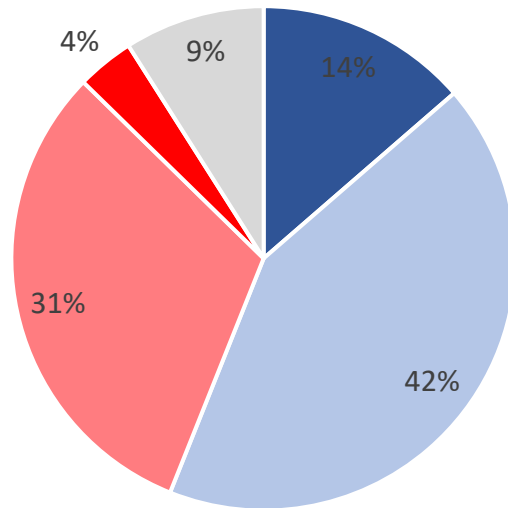
People with unstable working status tend to want to reopen the economy, while pensioners tend to be more cautious

Q: How much longer do you think you can bare the current “self-refrain” status under the State of Emergency declaration?



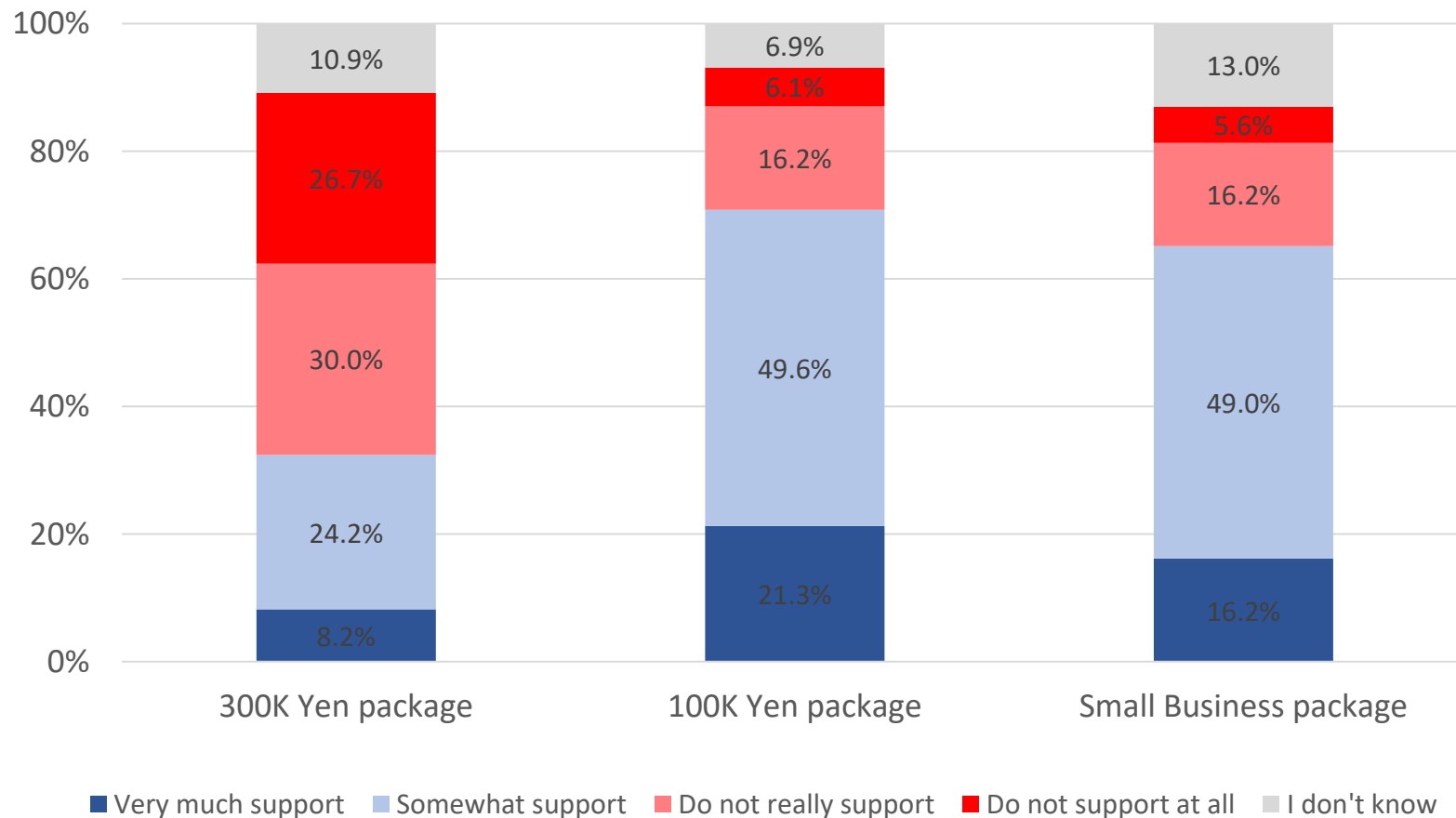
The perceived optimal balance between health concerns and the economy does not differ across age segments

Q: How should the quarantine (e.g. “self-refraining measures”) be balanced against concerns to the economy?

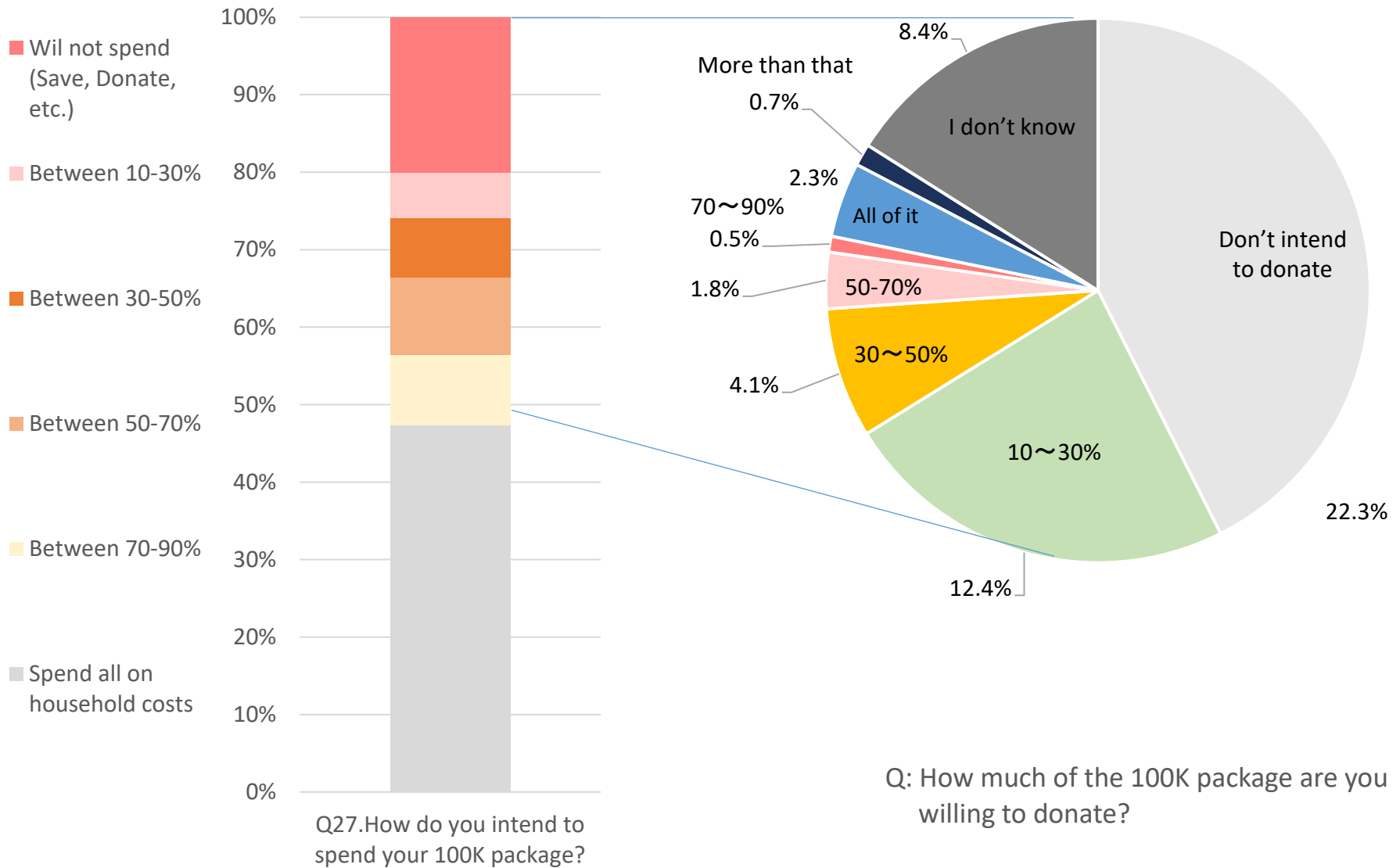


- No matter the effect to the economy if it can save one life
- Some damage to the economy is fine to save lives
- Efforts to save lives should be balanced with concerns for the economy
- The economy could effect more lives thus quarintines should be avoided
- I don't know

The 300K Yen support package towards low income households are unpopular, while the 100K Yen package towards all citizens has more than 70% support

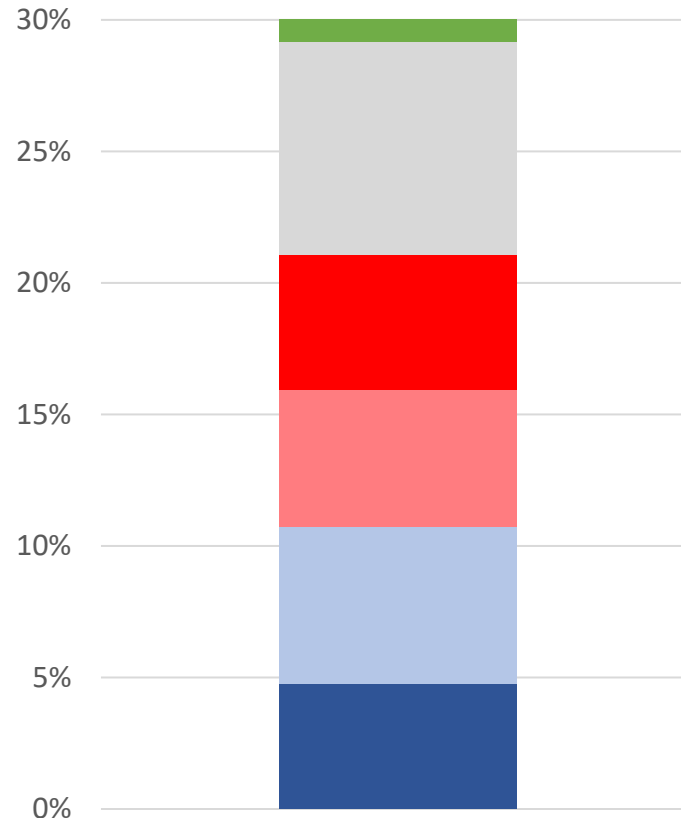


Nearly 50% intend to spend the support package on household costs, 20% are interested to donate, and 5% want to donate a majority of it



Of the 30% or so who consider donating part(all) of their package, many are not sure where to donate

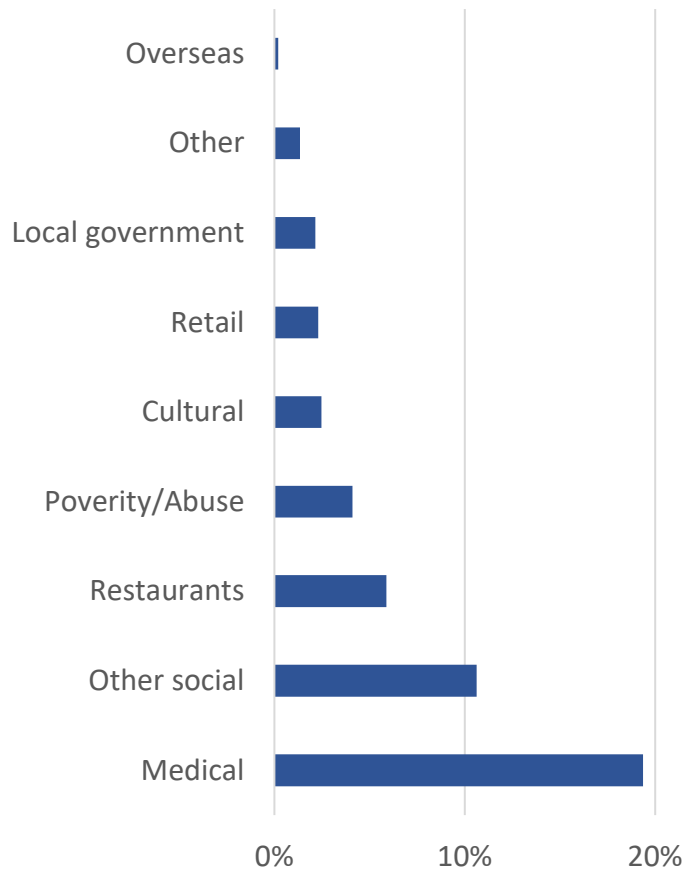
- Others
- I'm not certain how to allocate
- Towards organizations in my community
- Towards organizations featured on the Internet/SNS
- Towards organizations featured on TV
- Towards known established organizations



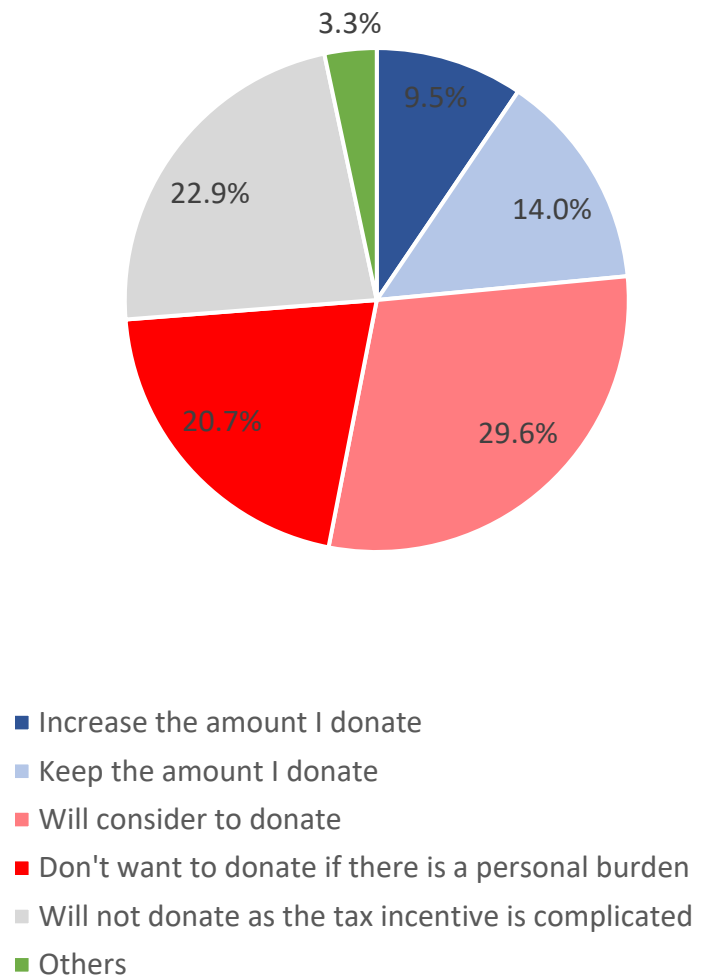
Q: How do you intend to allocate your donations?

Medical organizations top the list on where to donate. About 30% will additionally concern to donate if there is a tax incentive

Q: Where you want to donate?

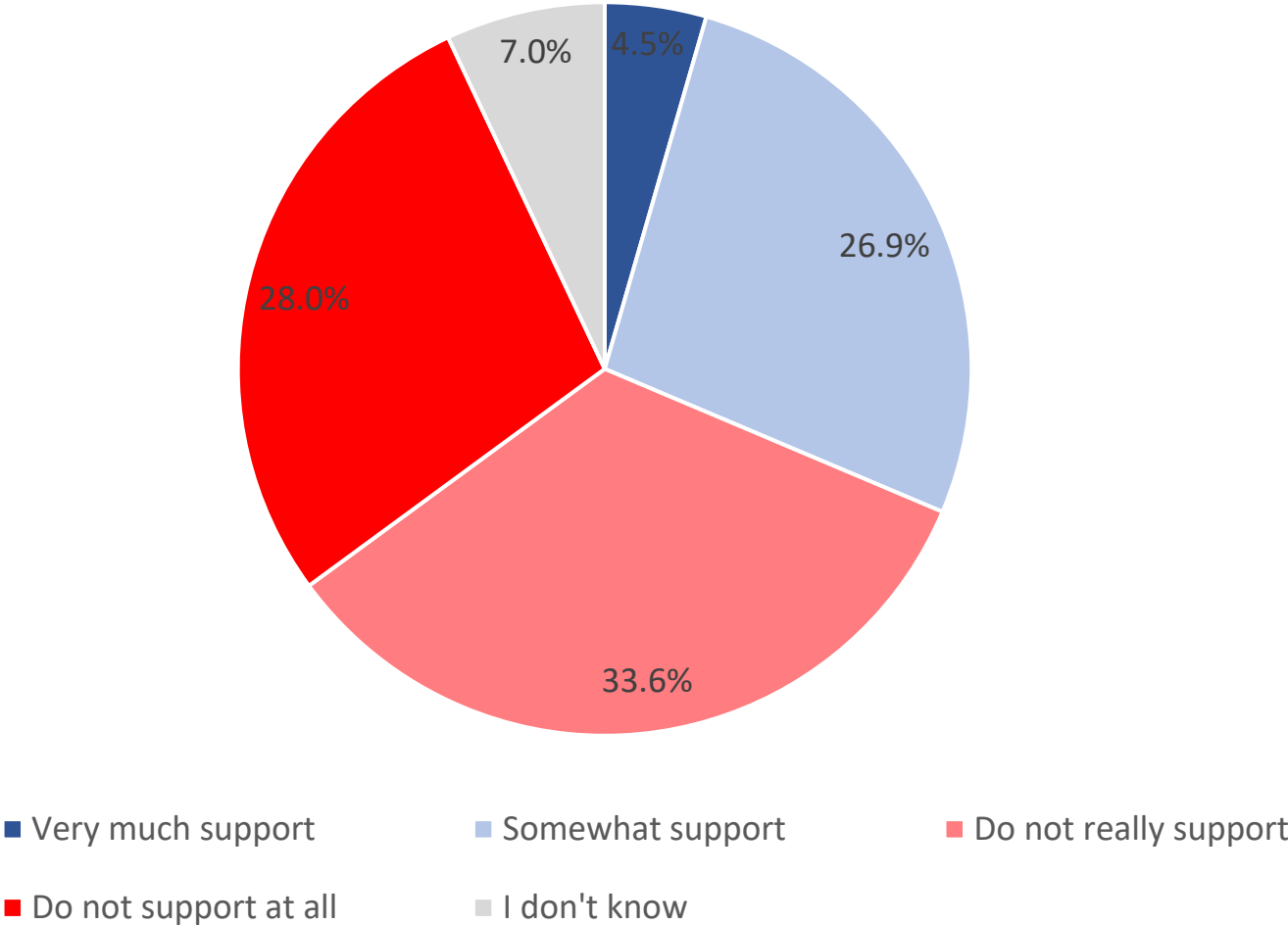


Q: Would you consider donating if there was a tax incentive?



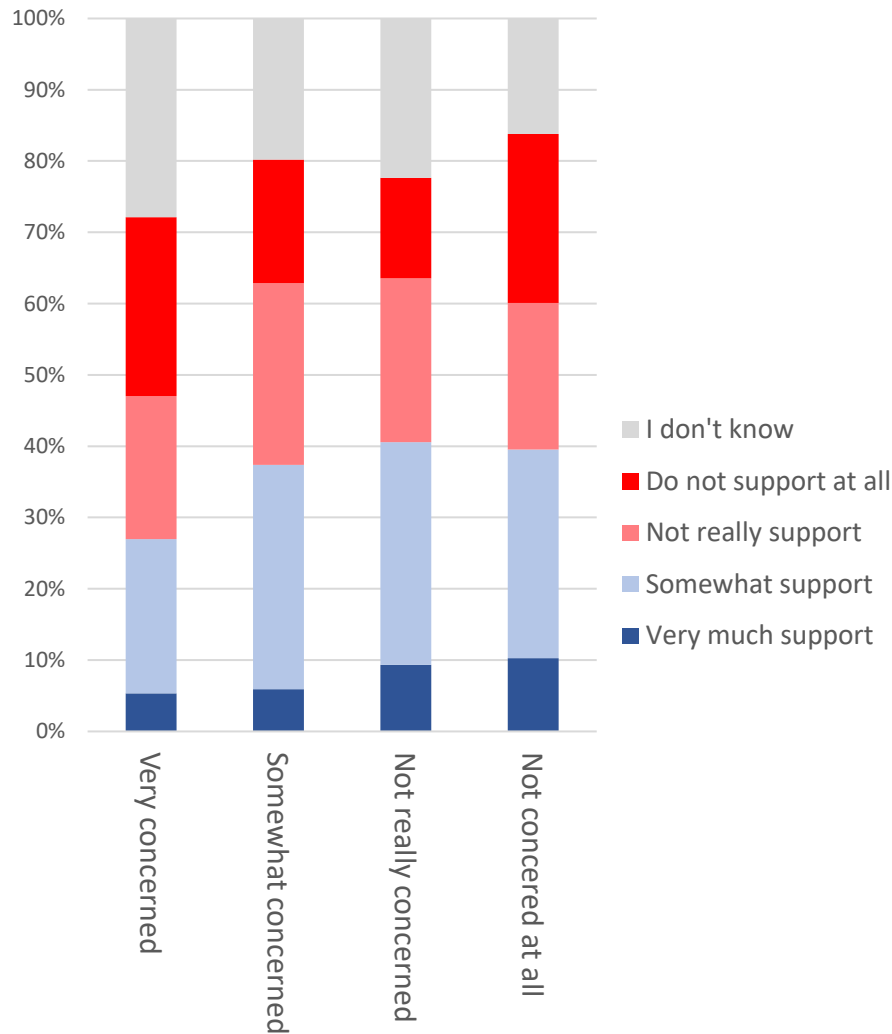
Only around 30% of respondents support Abe Administration's COVID-19 response

Q: How do you support Abe Administration's COVID-19 response?

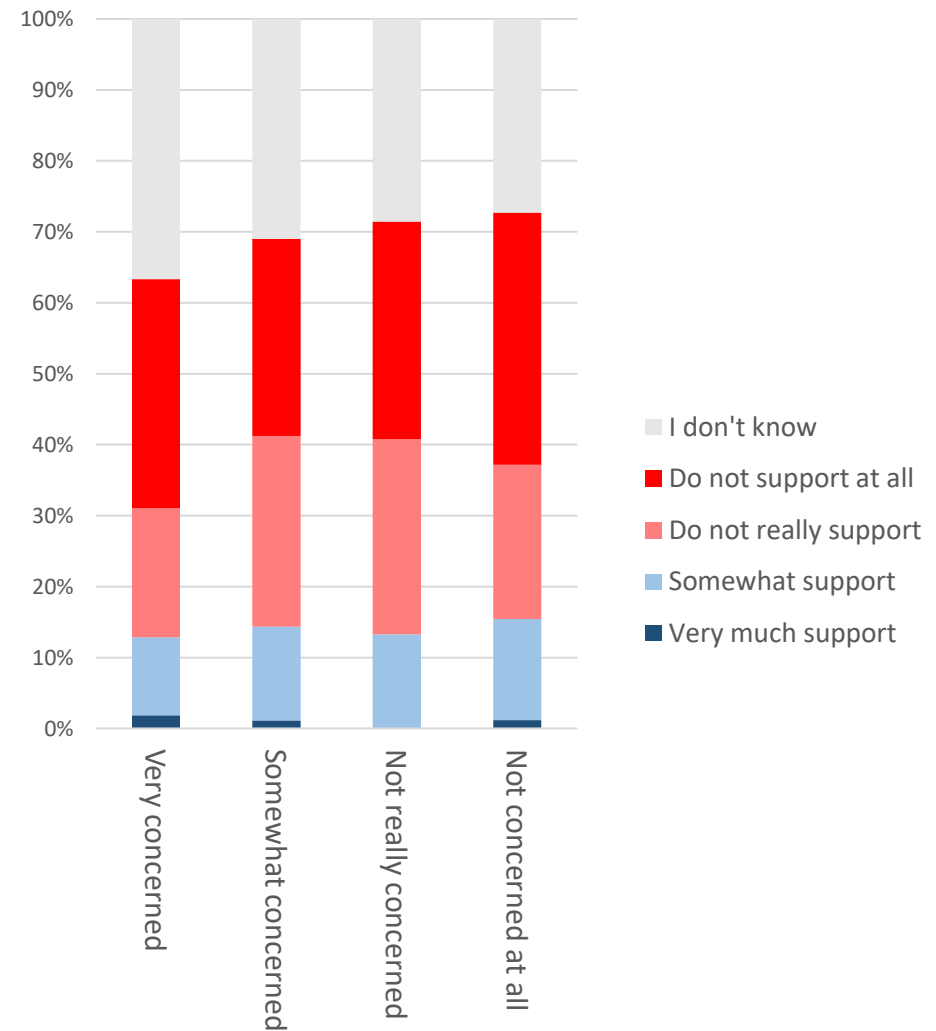


Employment concerns tend to lower support towards the Administration, but don't necessarily lead to support towards the Opposition

Q: Support towards the LDP
(By employment concern categories)



Q: Support towards CDP
(By employment concern categories)



Conclusion

- Close to 90% are concerned of their own health with regard to COVID-19. this trend is consistent across age demographics while people who watch more TV tend to be more concerned.
- Over a third of households have already seen a decrease in their income, and more than half expect a decrease in the future. A third of part-time workers have lost their pay entirely, and 40% of the self-employed experience a significant decrease of their income.
- Between 20-30% of non-full-time workers are temporarily on leave, and half of all workers have concerns towards their future employment. A prolonged “self-restrain” period to the economy is likely to cause mass unemployment.
- Perception towards when to reopen the economy affected more based on employment status rather than age. Nearly 60% believe the economy should be reopened within 1 month.
- In addition to addressing the health concerns, the government and media should take immediate action to reopen the economy within a month.



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