

**Kekst CNC Webinar**

**Japan amidst COVID-19: Findings from  
the 4th edition of the international  
tracking survey by Kekst CNC**

**Tokyo, 30 July 2020**



# Methodology



Polling conducted by KEKST CNC, nationally representative sample of



**1,000  
adults**

in the UK



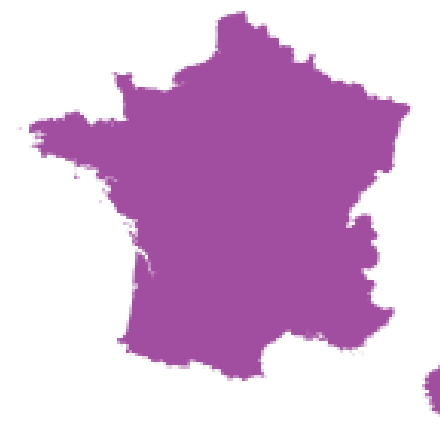
**1,000  
adults**

in Sweden



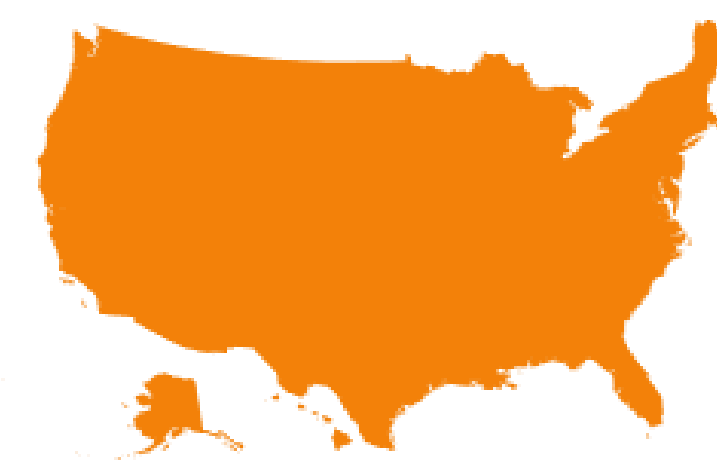
**1,000  
adults**

in Germany



**1,000  
adults**

in France



**1,000  
adults**

in the U.S.



**1,000  
adults**

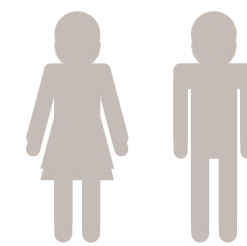
in Japan

Fieldwork of wave 4 took place on  
10th July - 15th July 2020

Fieldwork of wave 1 took place on  
30th March – 3rd April

Fieldwork of wave 2 took place on  
27th April – 1st May

Fieldwork of wave 3 took place on  
1st June – 5th June



Quotas and weights on **gender, age,  
and region** in each country

Margins of error of +/-  
**3.3%**  
for all markets



# Global Results: Six key findings

1

## A Long Haul

We are entering a new phase of the crisis, with people expecting to have to live with coronavirus for a long time to come

2

## Prepare for Worse

Fear of a second spike is growing and, as cases rise, the focus is swinging back to health in some countries

3

## Out of Proportion

People think coronavirus is more widespread, and more deadly, than official figures show

4

## Politics in Trouble

In most countries, governments, health organizations and country leaders are getting lower ratings for their performance than in the past

5

## Mask Up

Compulsory mask-wearing is popular in almost all countries, and political and corporate leadership on masks has a big impact

6

## Good to be Back

Returning to work has been a good experience in most countries for those employees back at their regular workplaces



# Japan Results: Six key findings

1

## Strong Fear of Recession

Japan is only country besides the UK where “Avoiding recession” gained in importance over “Limiting the spread” despite strong fears of a second wave

2

## Highest Economic Concerns

Japanese have the highest fears losing their jobs and companies, and the largest groups expecting a prolonged negative impact on the economy and their own life

3

## Little Respect for Institutions

Japanese stand out among all countries by giving their central institutions by far the most negative ratings for their crisis handling

4

## Abe remains below Trump

Prime Minister Abe receives the most negative rating for his crisis performance, even 13 percentage points below US President Trump

5

## Focus on Mask Wearing

Japanese eclipse counterparts in all other surveyed countries with respect to actual and expected compulsory mask-wearing in public

6

## Teleworking Remains Popular

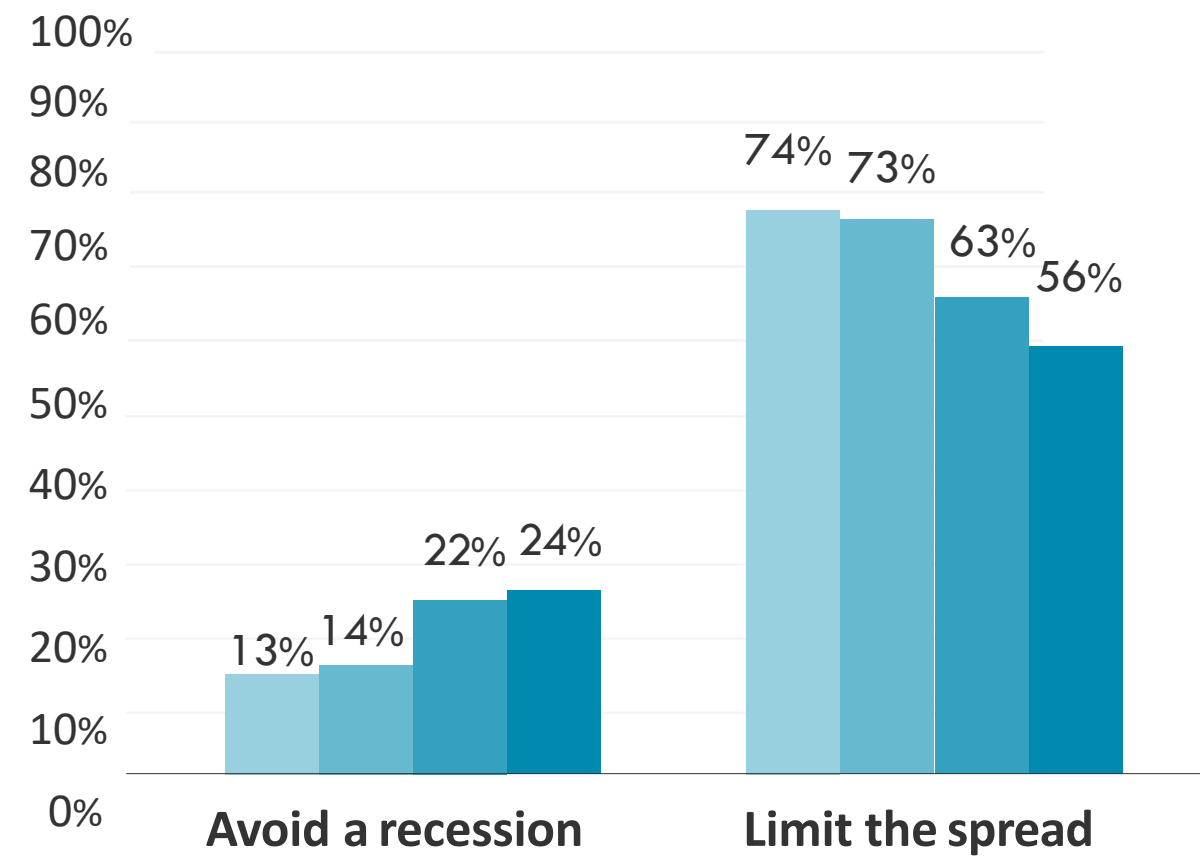
Among those who have returned to their workplace, the Japanese overall experience has been the least positive – but not yet negative

# 1 Government decisions

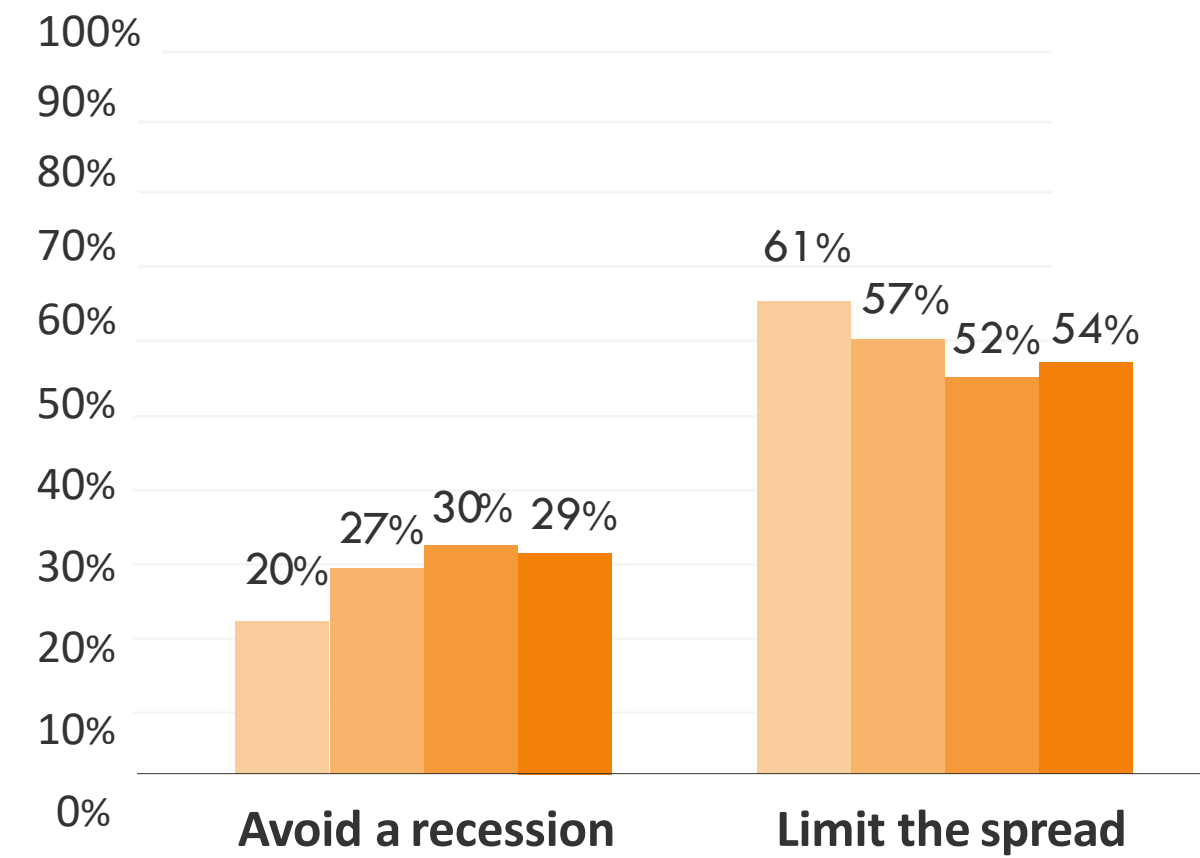


Most countries are becoming more focused on limiting the spread of the virus, but the UK and Japan move towards the economy

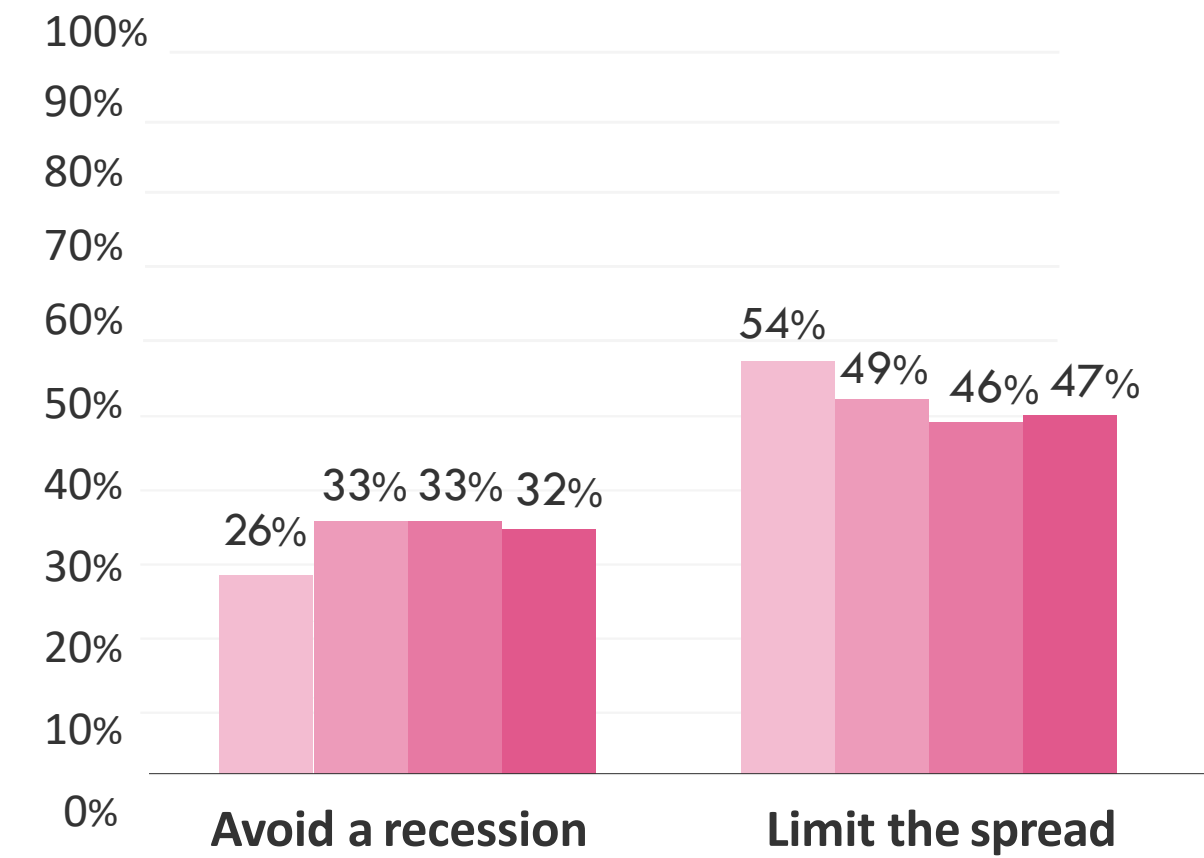
## UK



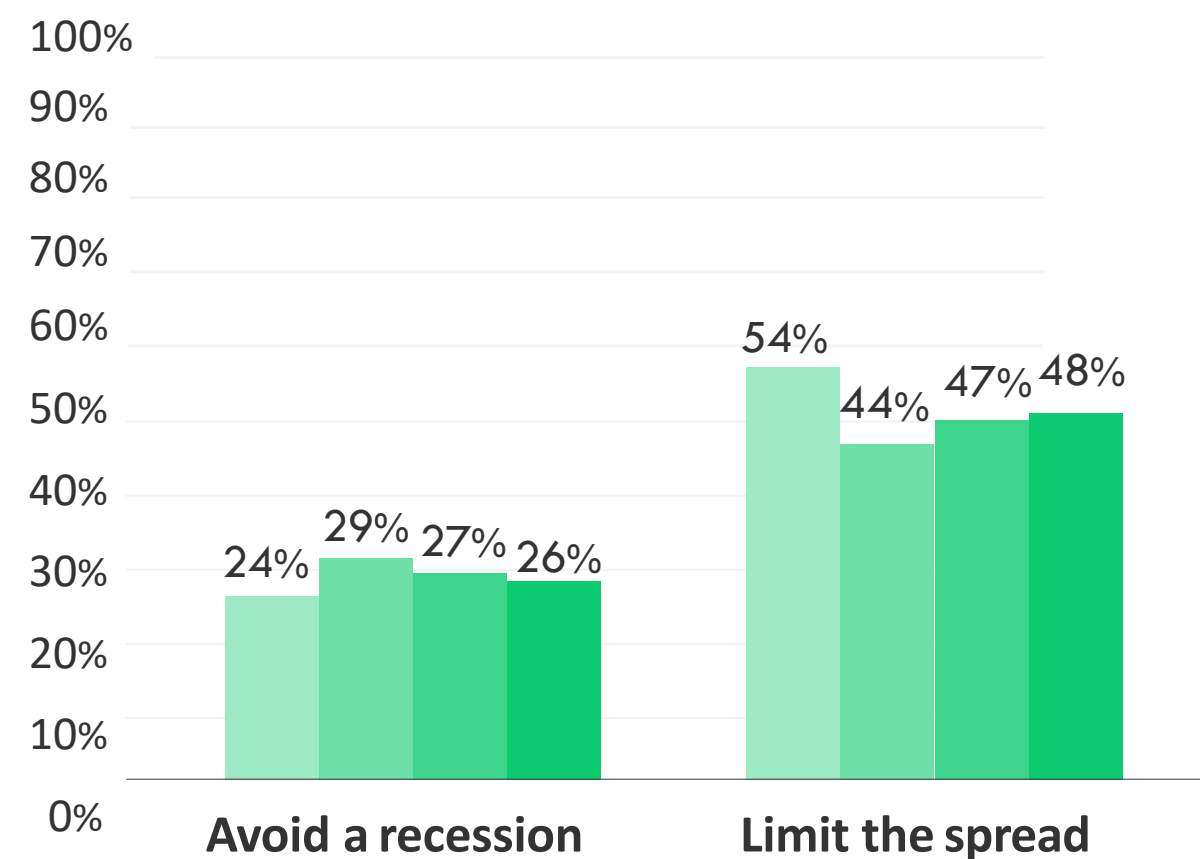
## U.S.



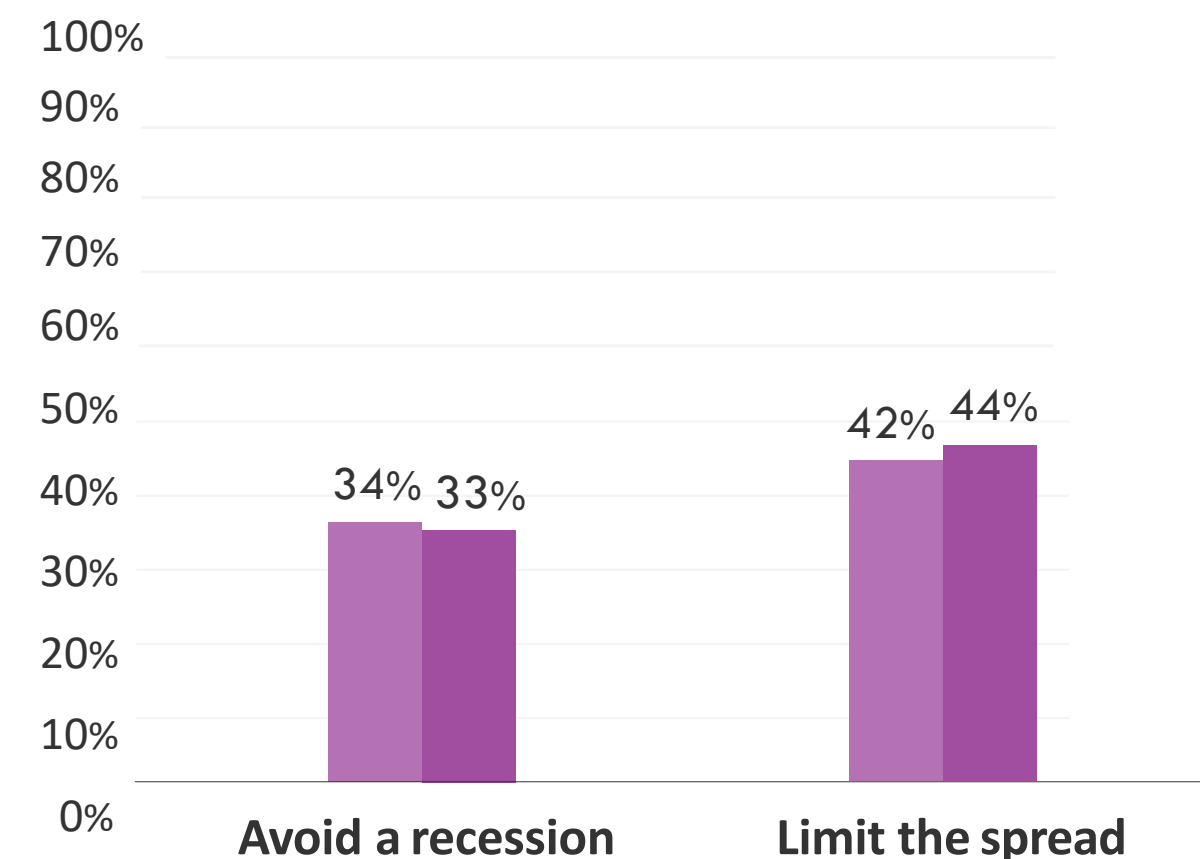
## Germany



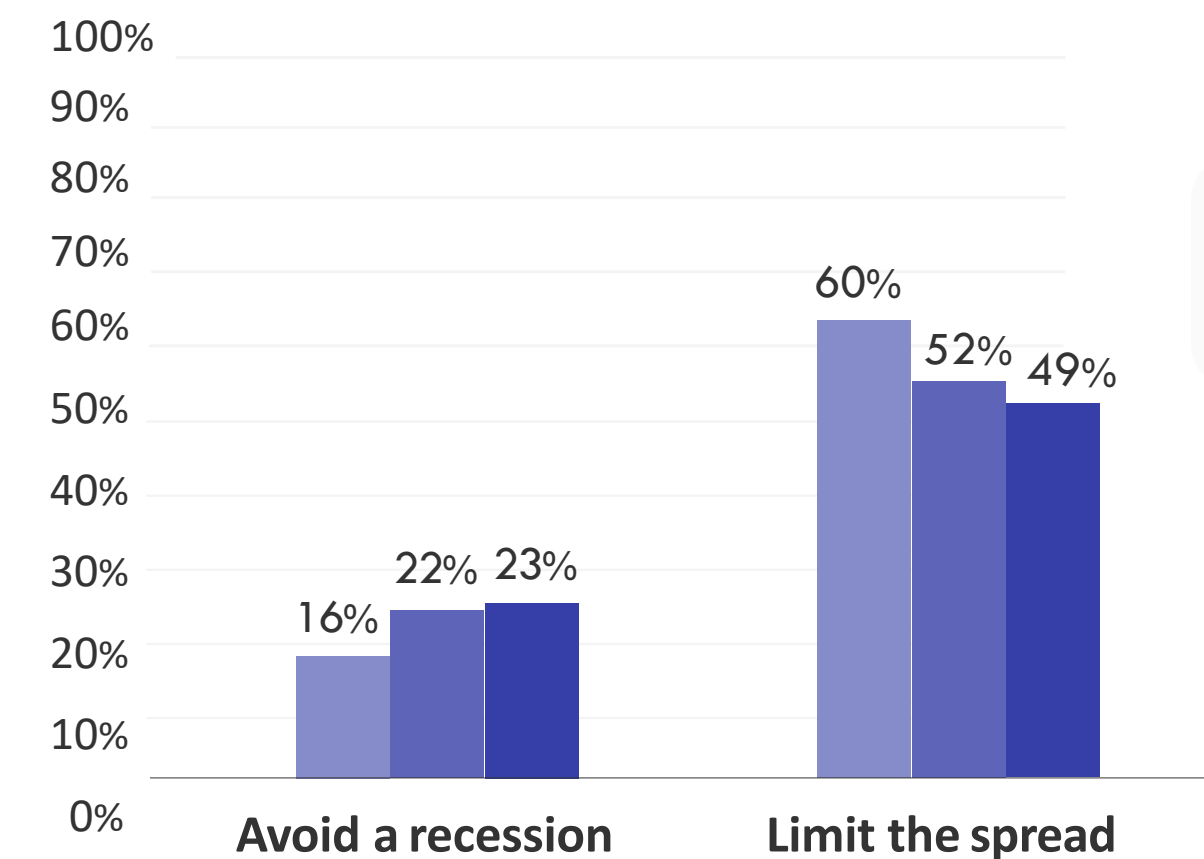
## Sweden



## France



## Japan

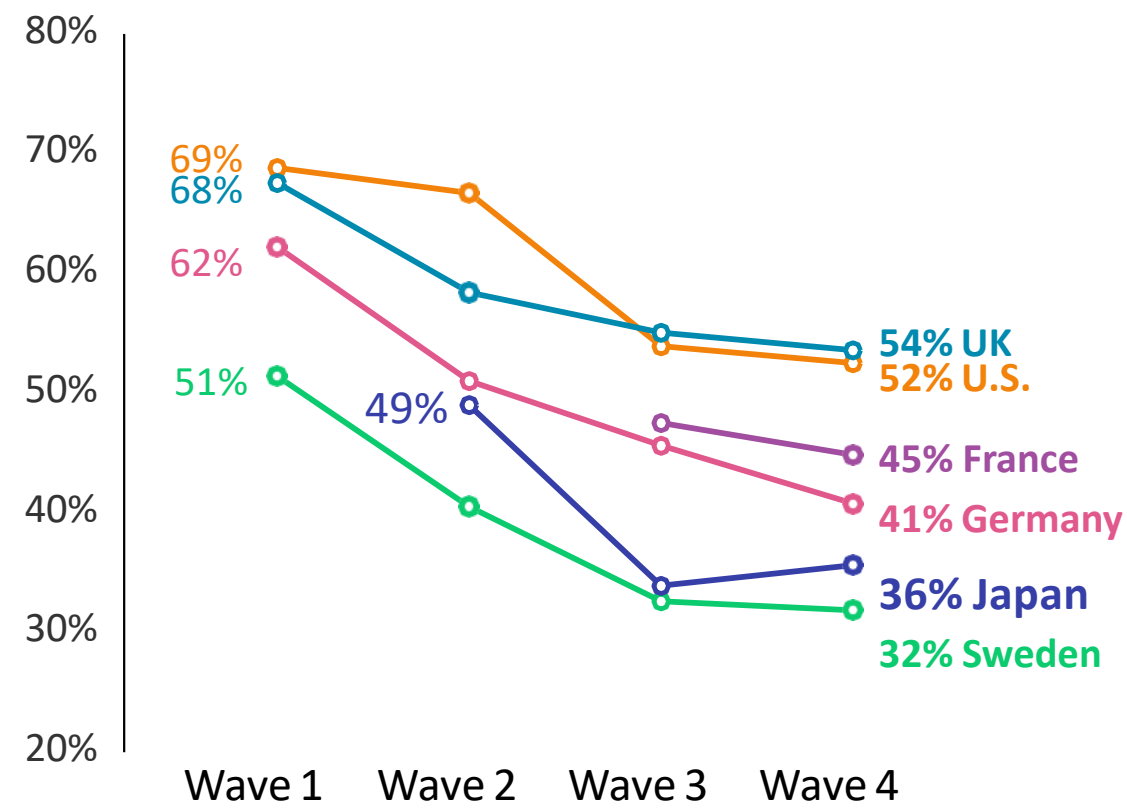


# 2 Levels of concern

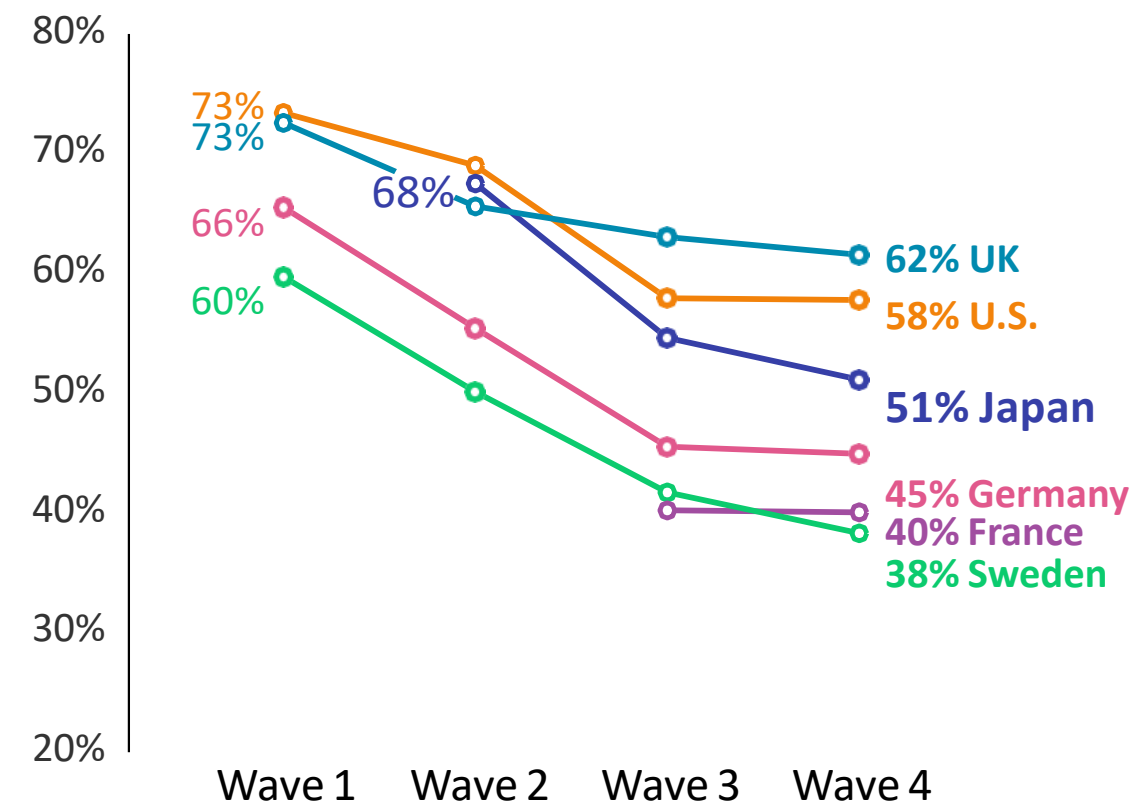


## Concern about the impact of the virus is stabilising

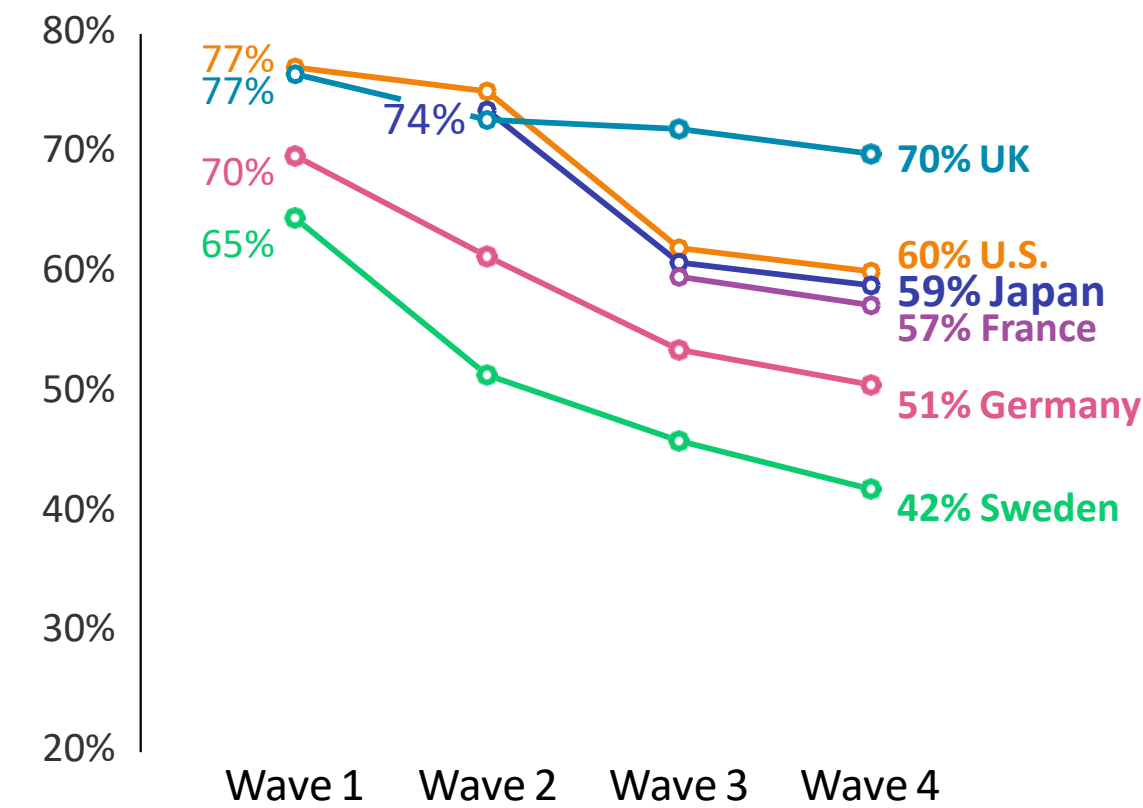
Businesses in my local area



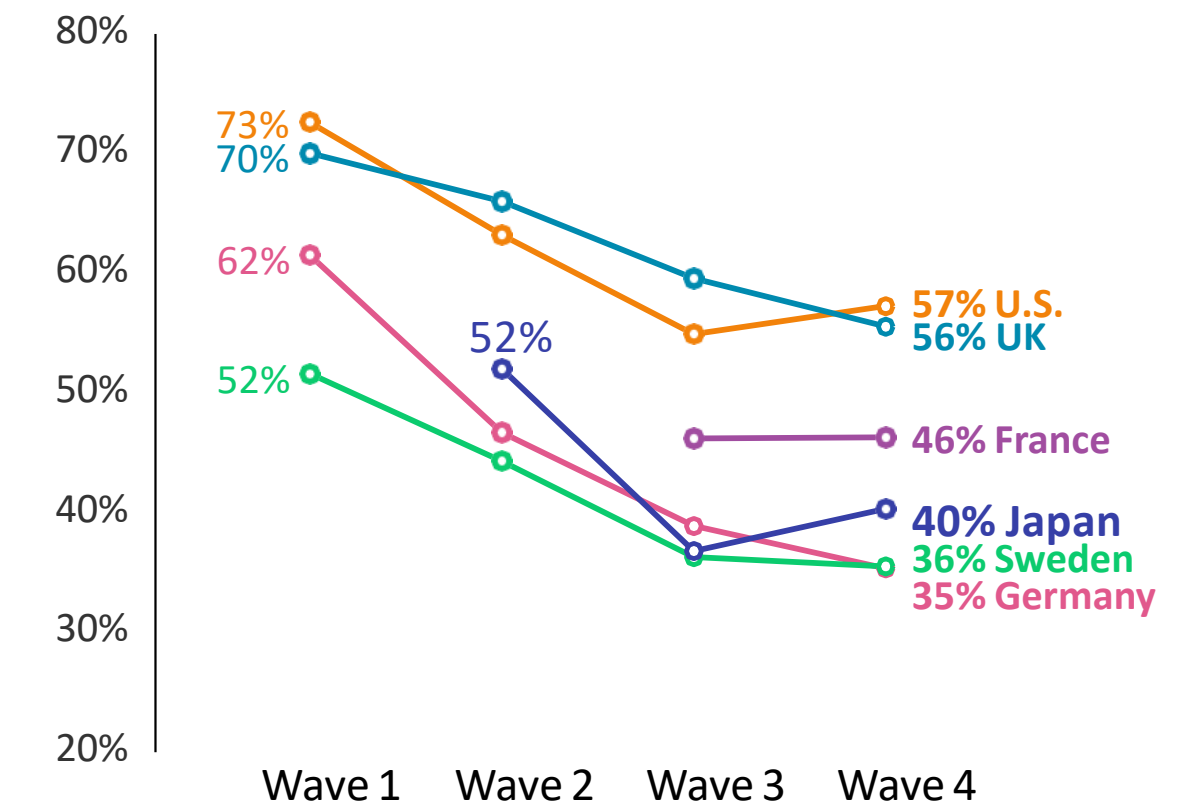
Businesses in the country as a whole



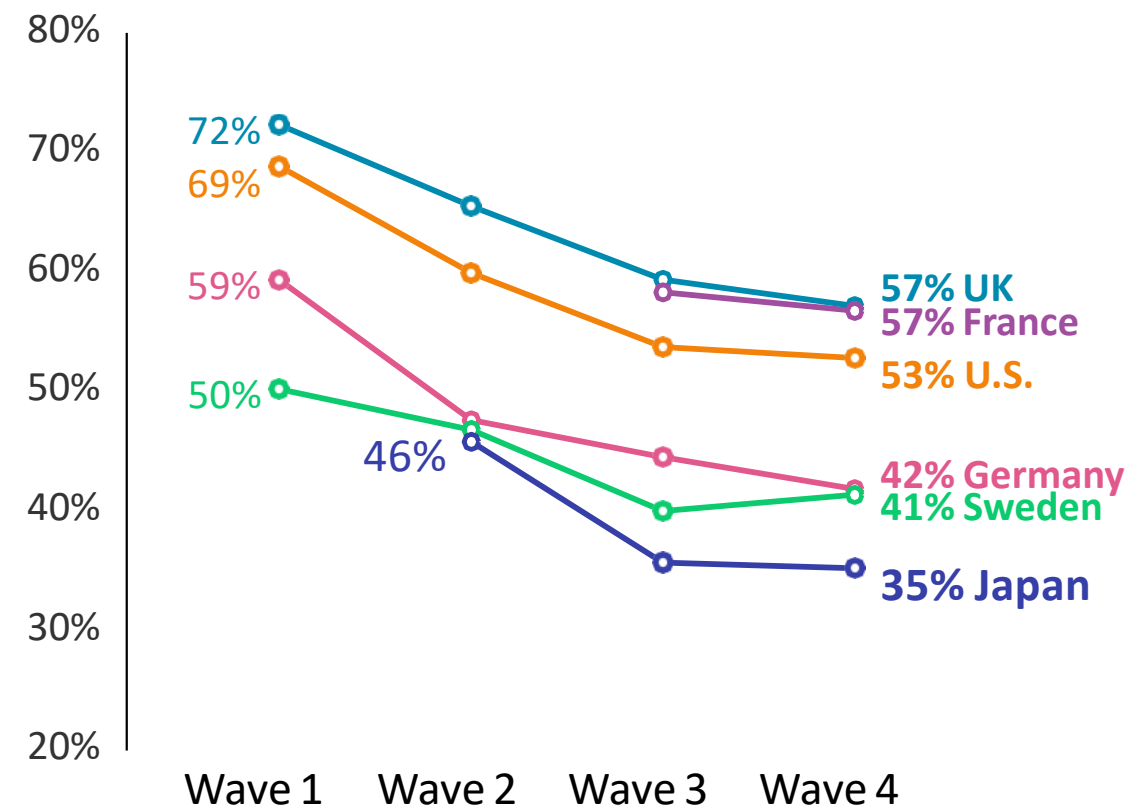
The economy as a whole



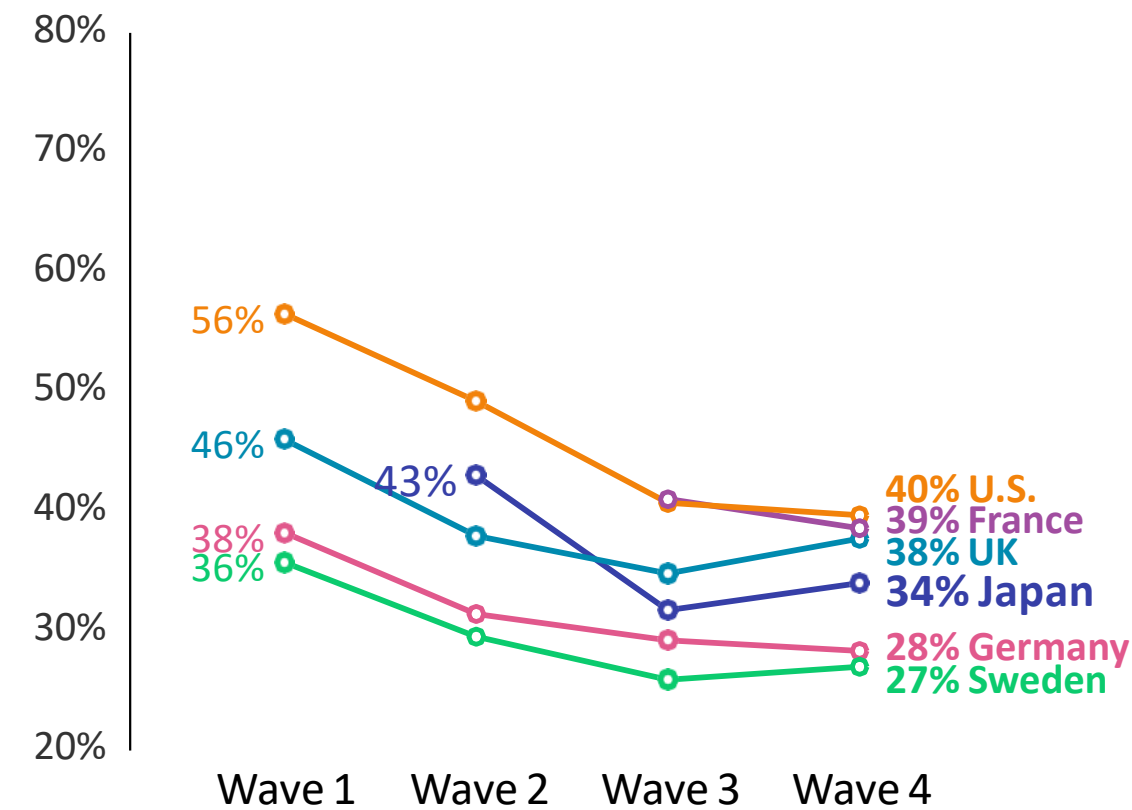
The health of people in the country as a whole



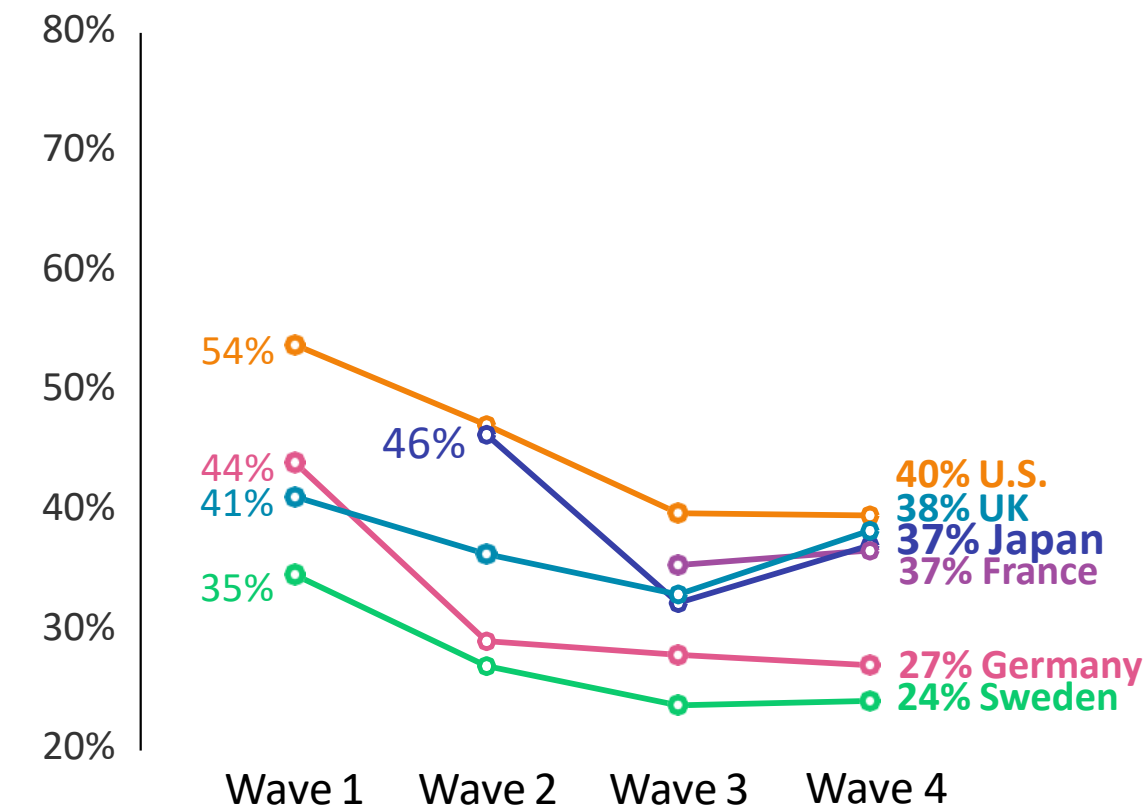
Your family's health



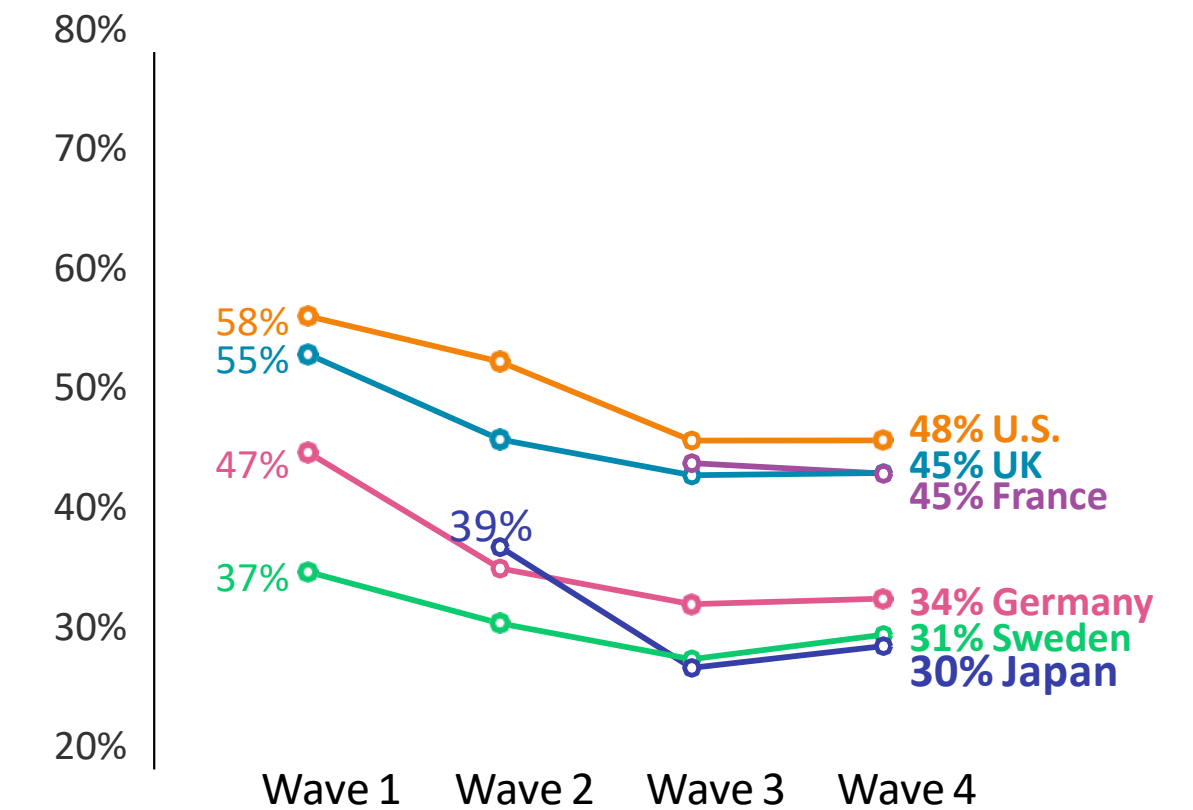
Your own household finances



Your own job



Your personal health



Respondents across all countries were asked to rate on a scale of 1-10 how concerned they are about the impact of the coronavirus on a number of things. Any response ranking at 8 or above is described as someone being "very concerned" about an issue.

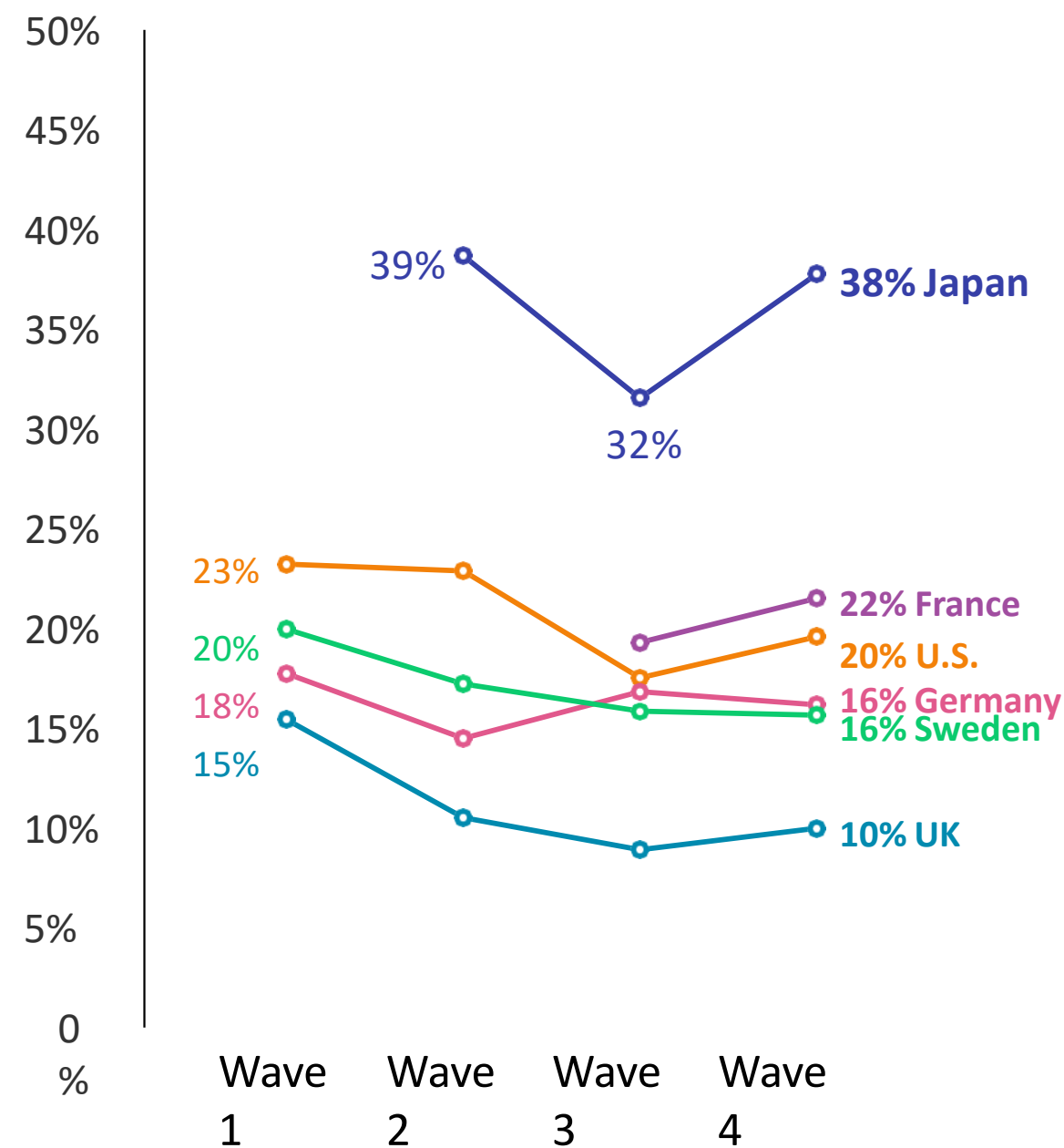


# 3 The labour market during the crisis

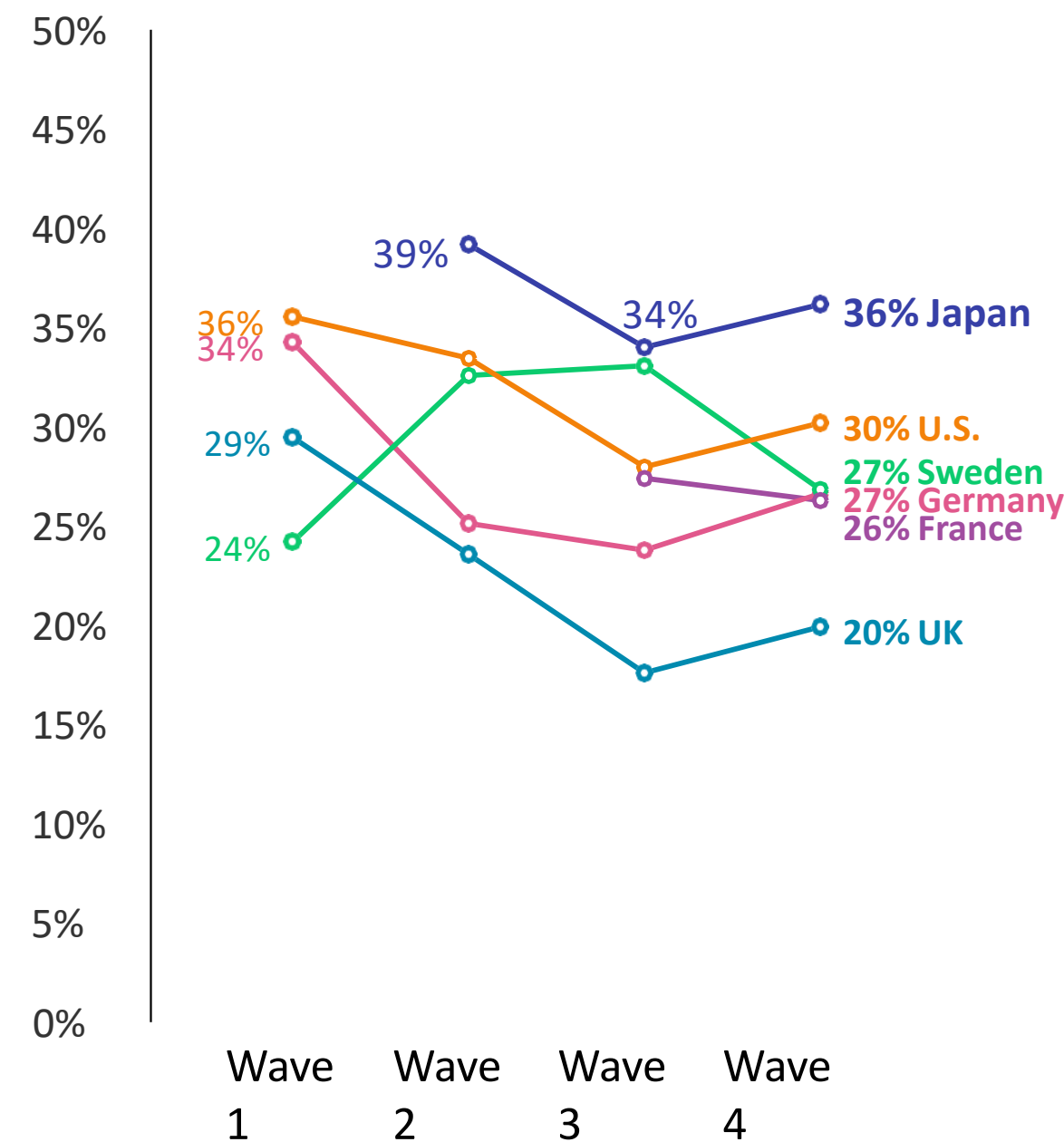


As economic effects bite, up to a third of people are concerned their company will collapse – British employees remain the most optimistic despite one of the most negative economic forecasts

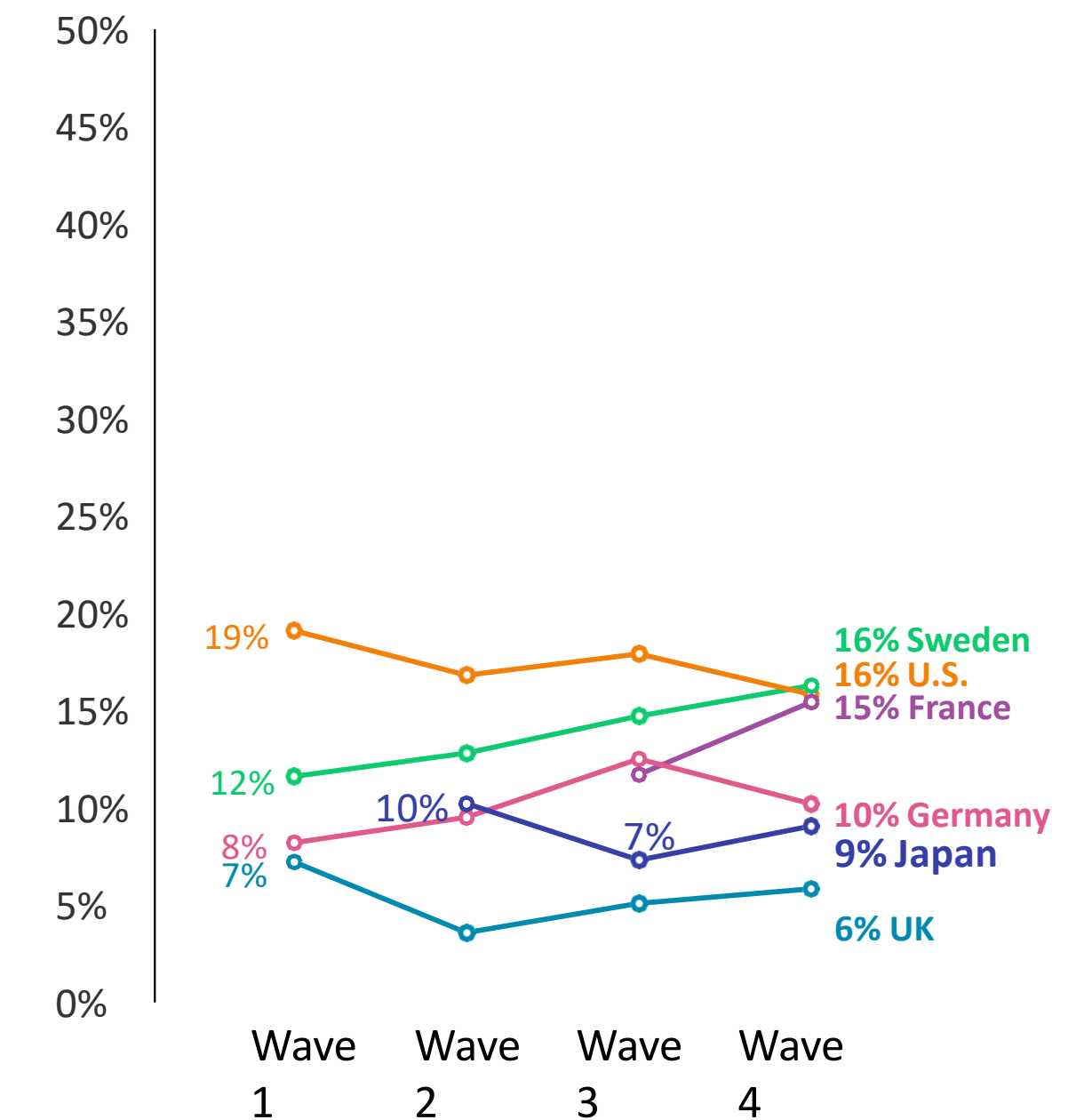
I expect to lose my job



I am worried that my company might collapse



I have already lost my job

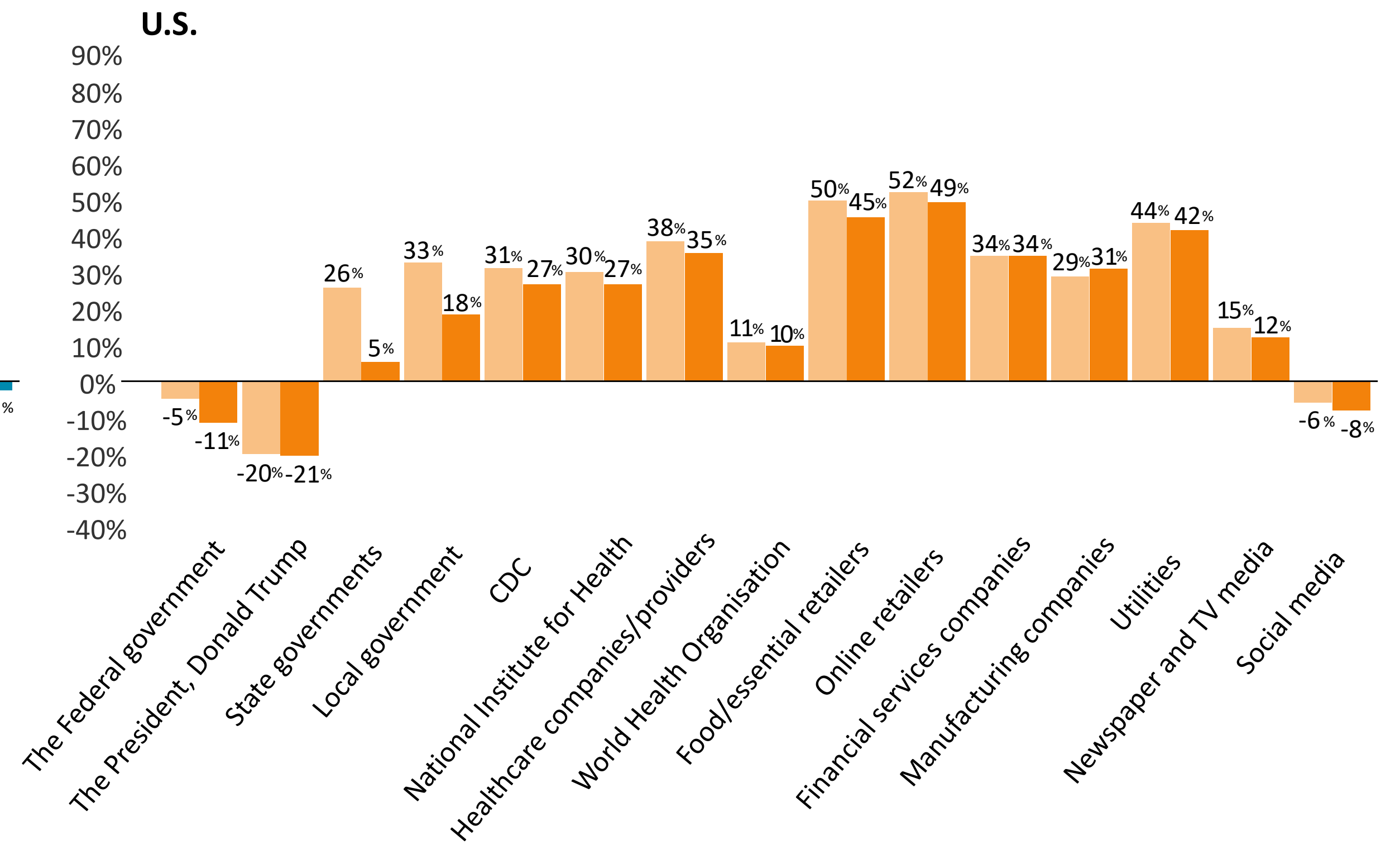
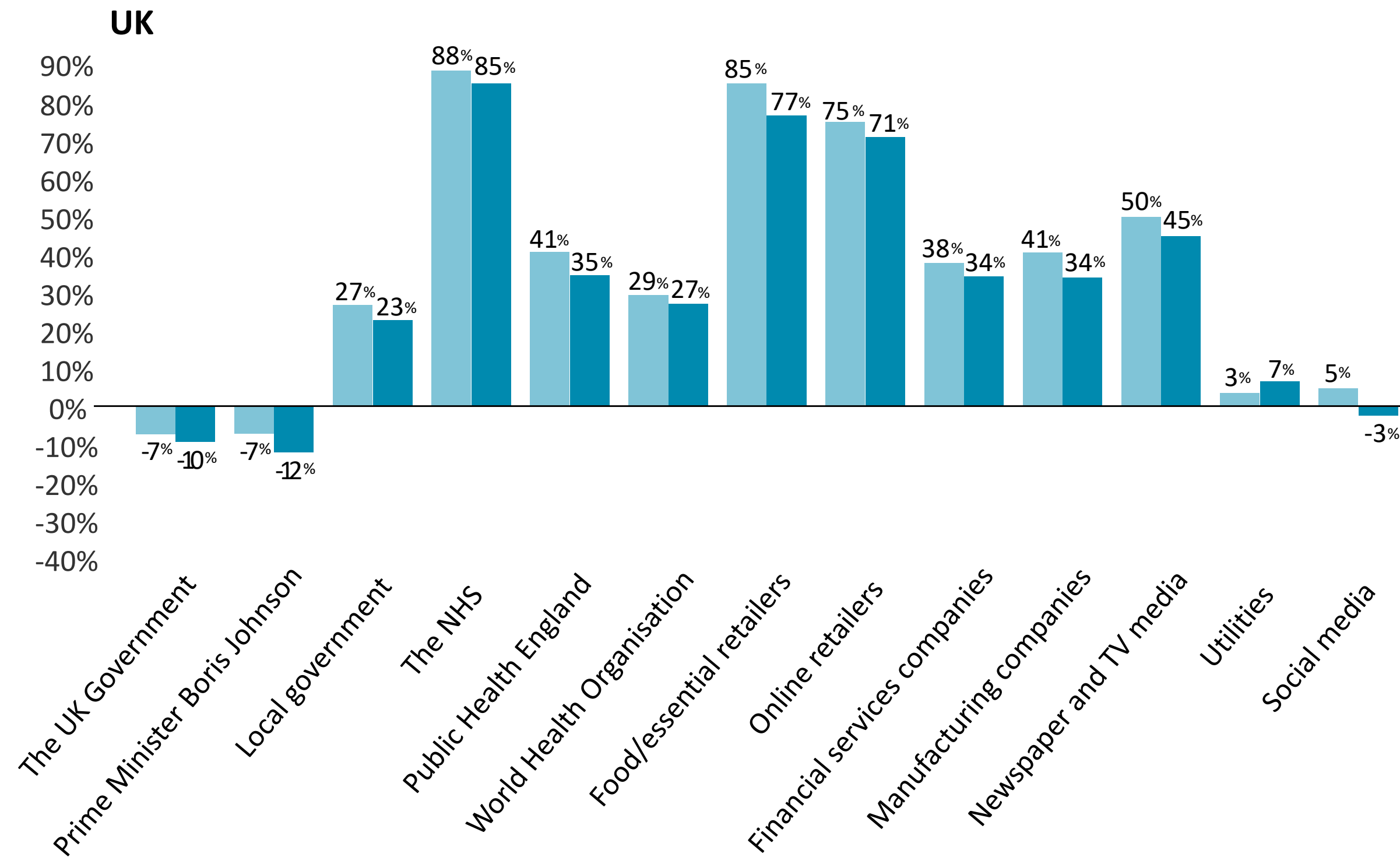


Respondents across all countries were asked whether they agreed or disagreed with a set of statements referring to their own employment and job. All statements here are filtered just by those who said they are working full-time or part-time, apart from “I have already lost my job” which is presented for all respondents.

# 4 Performance of institutions



**Overall decline in satisfaction with performance of most governmental and private actors compared to the last survey – the same trend in the UK, the U.S., Germany and Sweden**



Respondents across all countries were asked whether they thought a number of institutions had done well or badly in responding to the coronavirus. Displayed is the net 'well' score in each country.

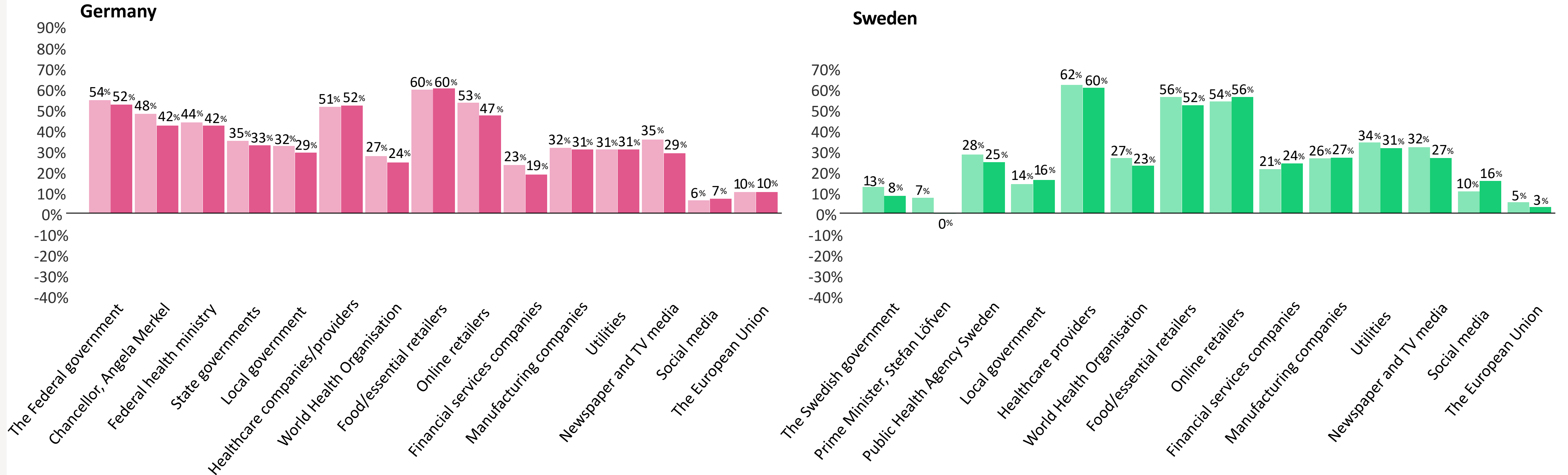




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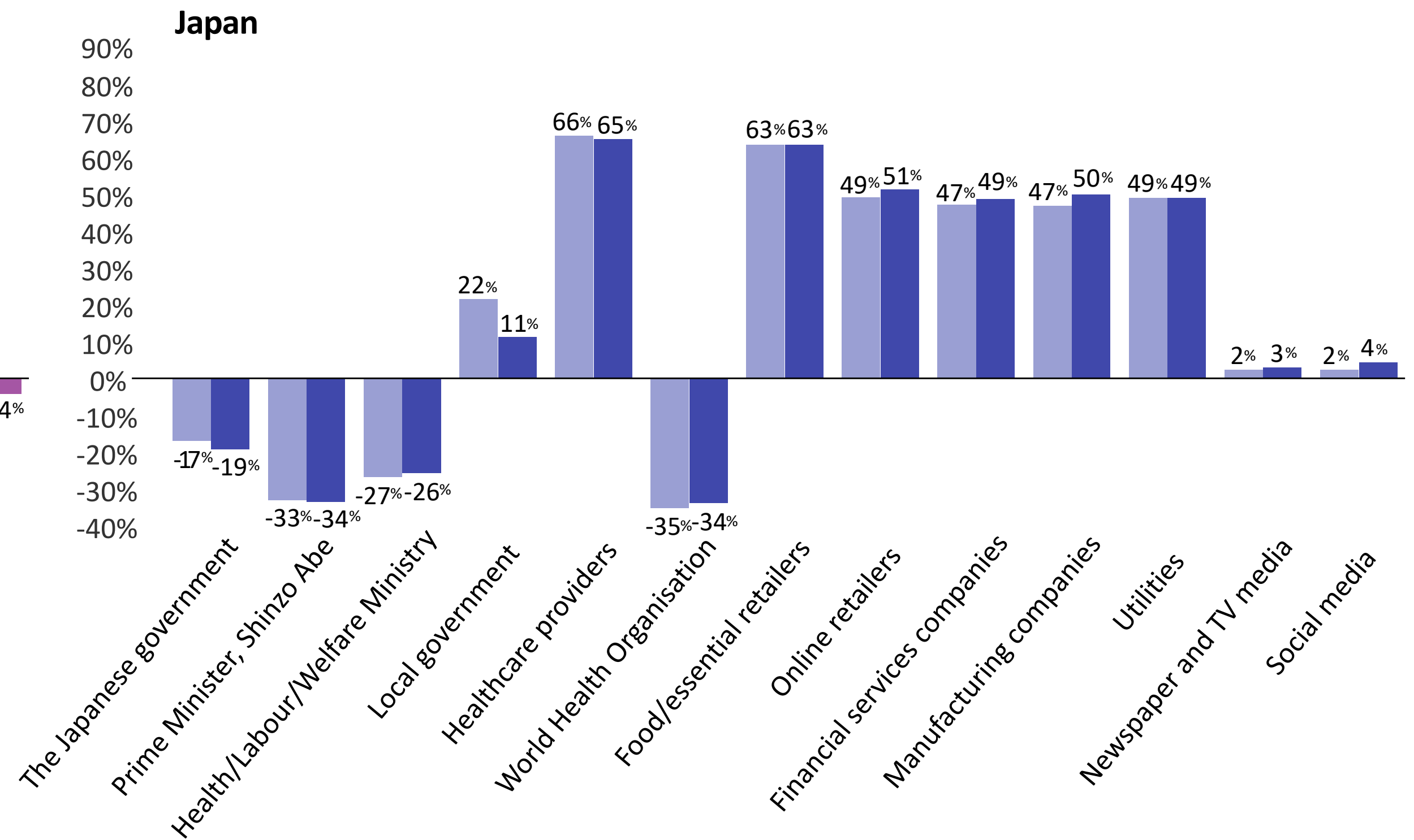
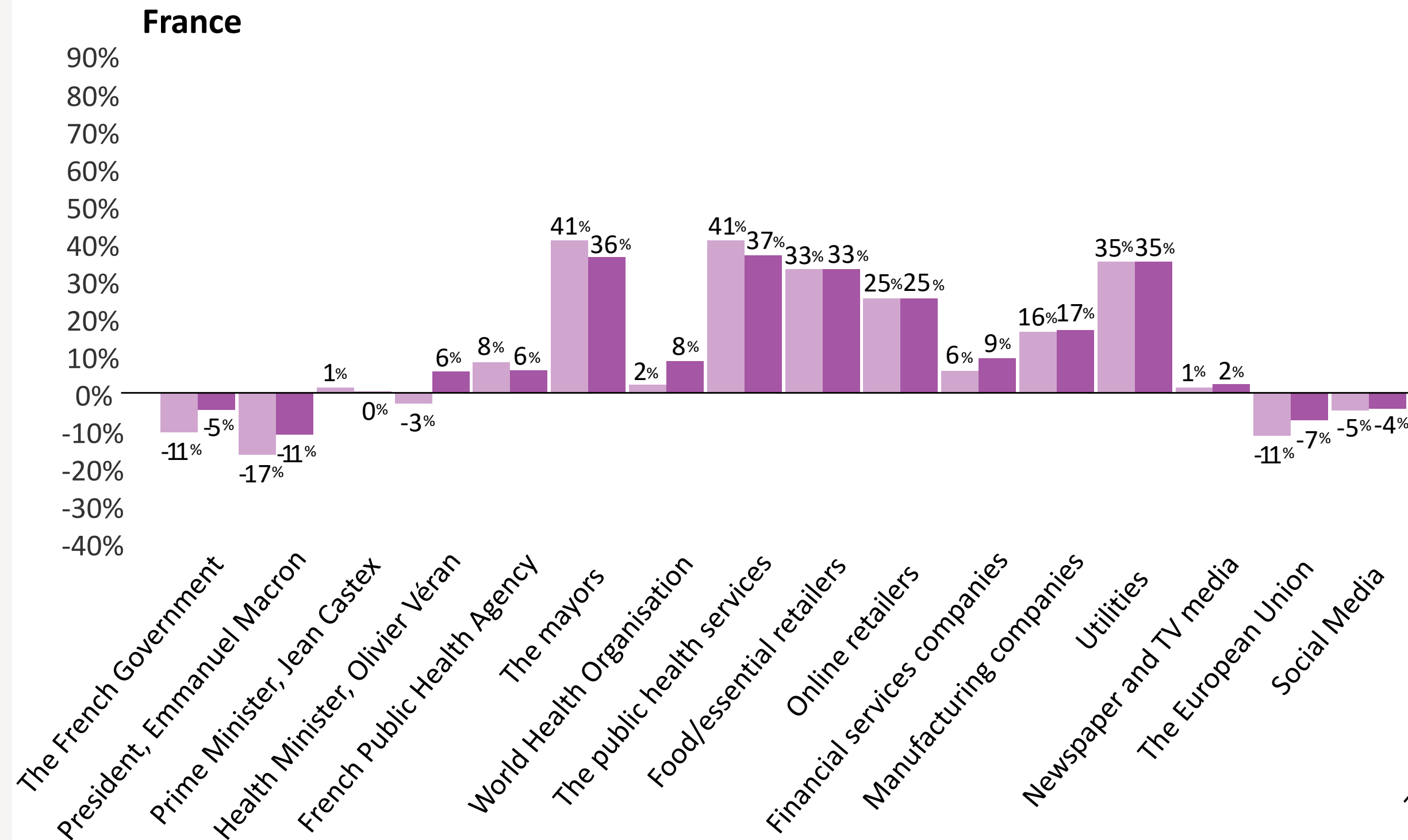
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# 4 Performance of institutions



France bucks the trend with a less negative evaluation of the performance of governmental institutions, Japan shows same disastrous evaluation of governmental institutions while most private institutions stay on high positive level.



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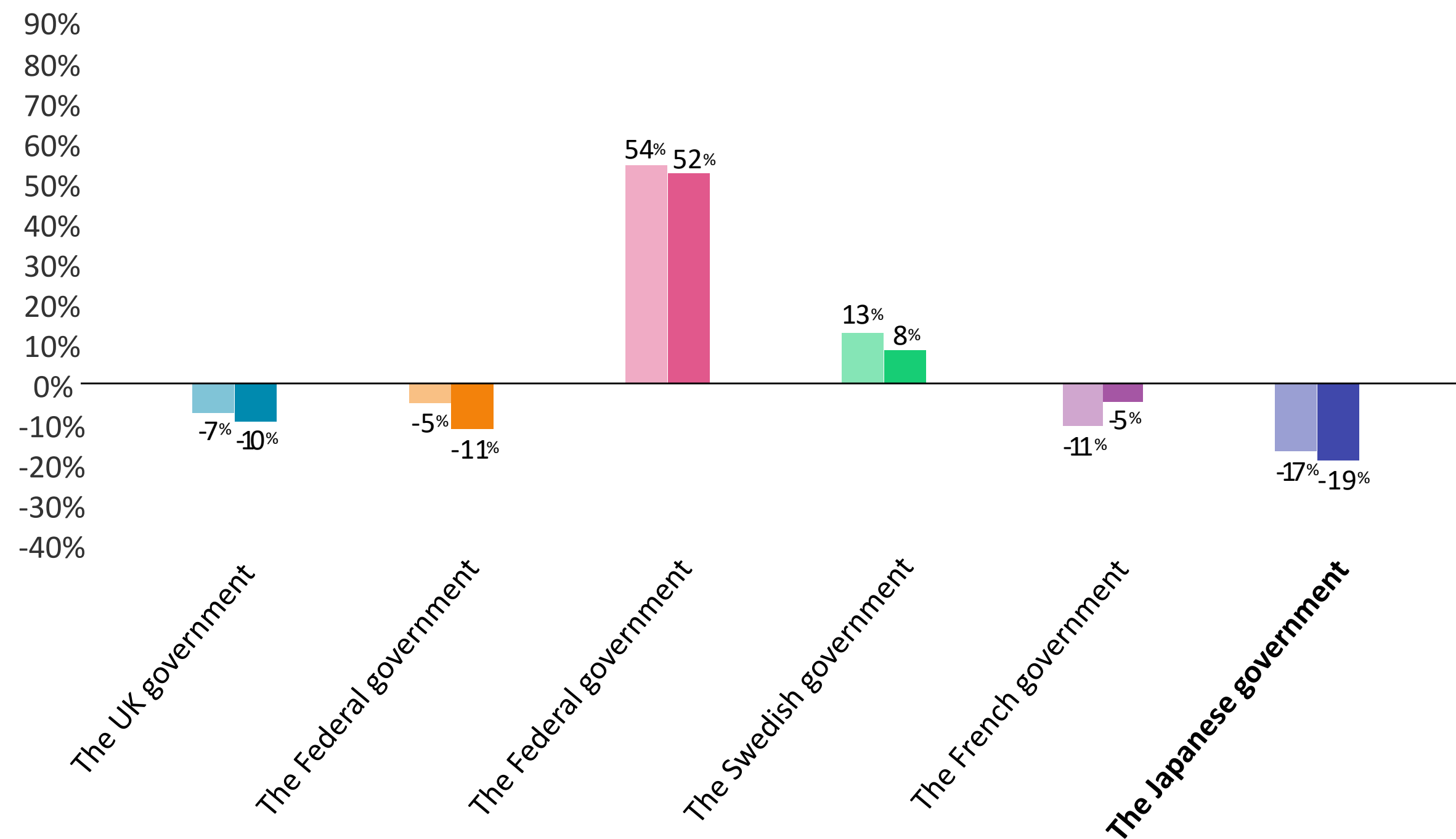


# 4 Performance of institutions

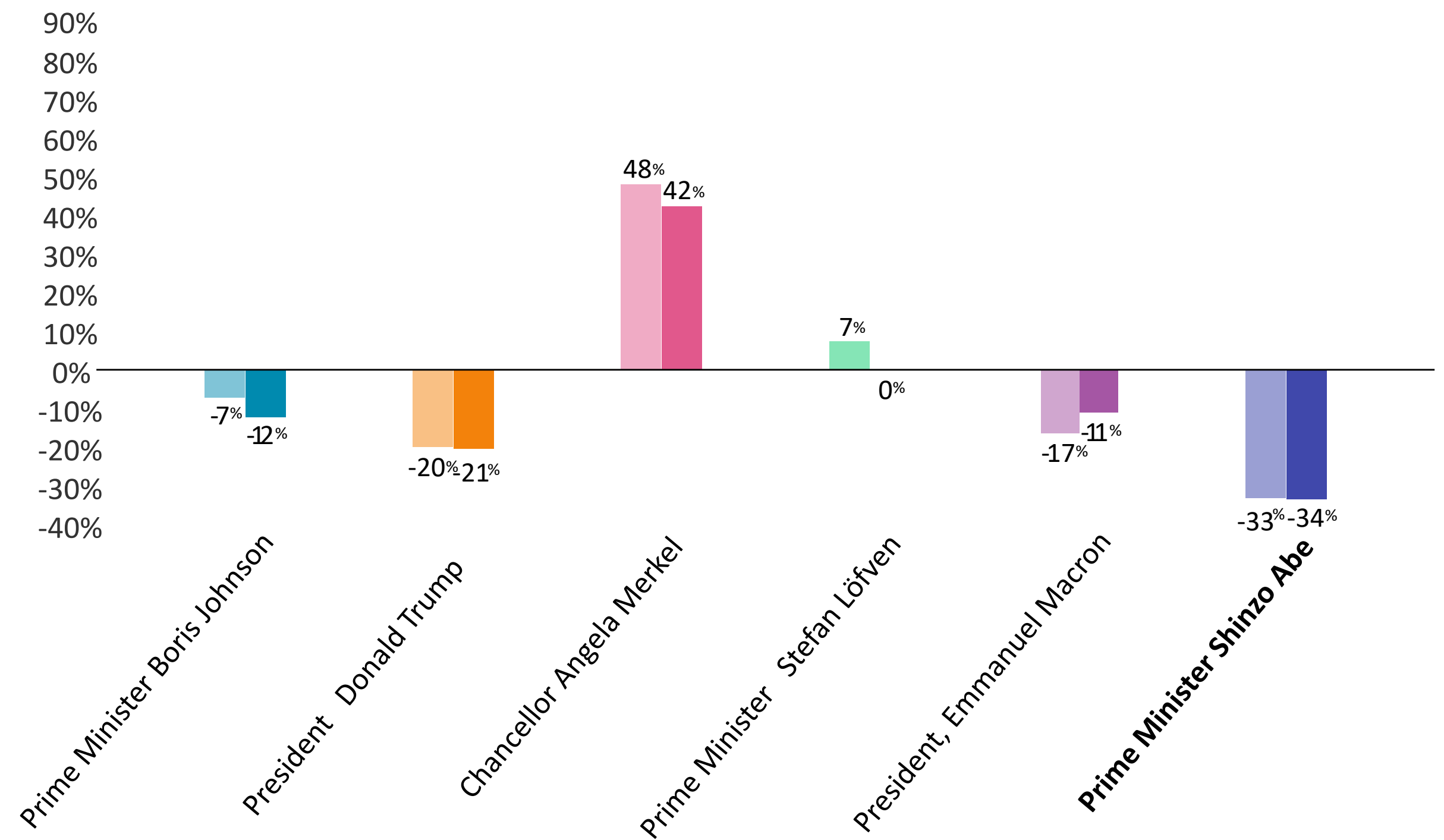


The Japanese government and Prime Minister Shinzo Abe receive clearly lower evaluations than their counterparts in all other countries

Central Government



Country Head



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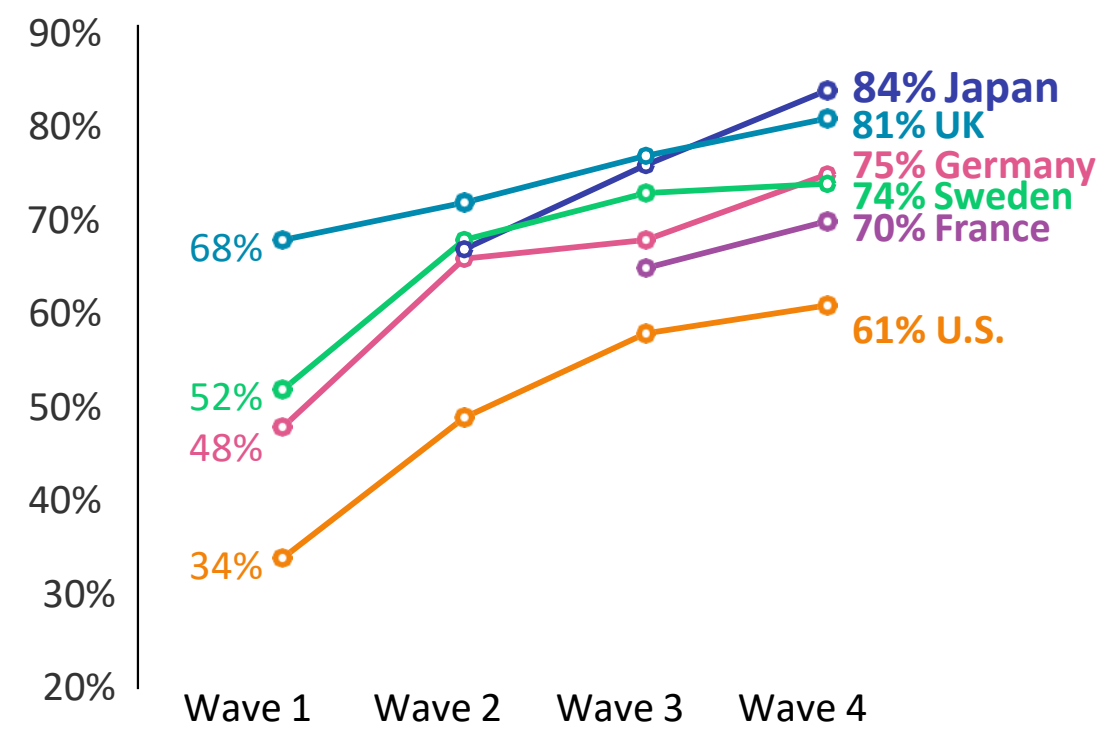


# 5 Expected duration

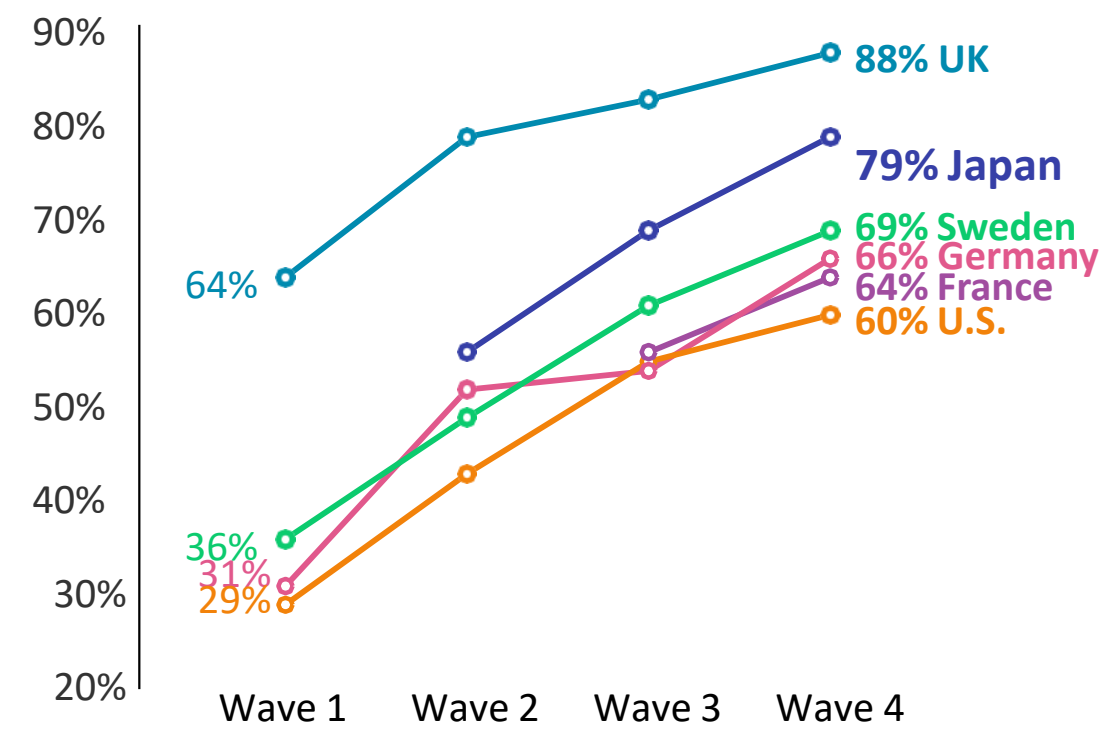


People expect the impact of the virus to last for much longer than they previously thought

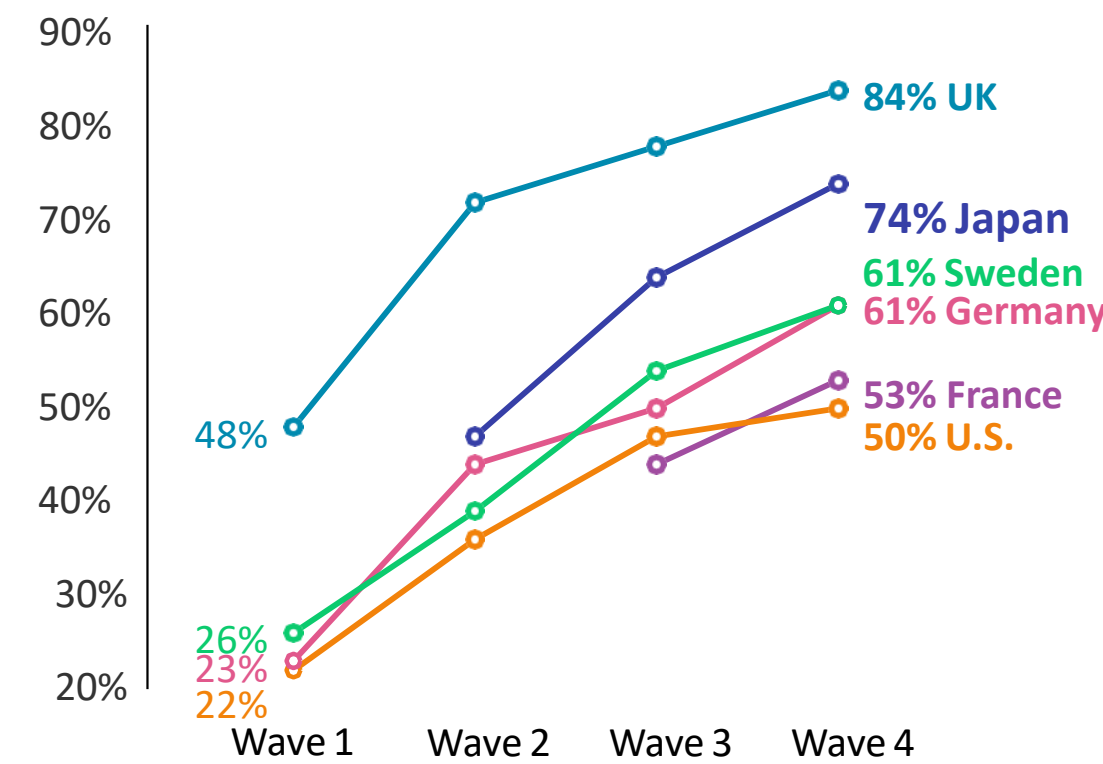
The impact on businesses and how they function



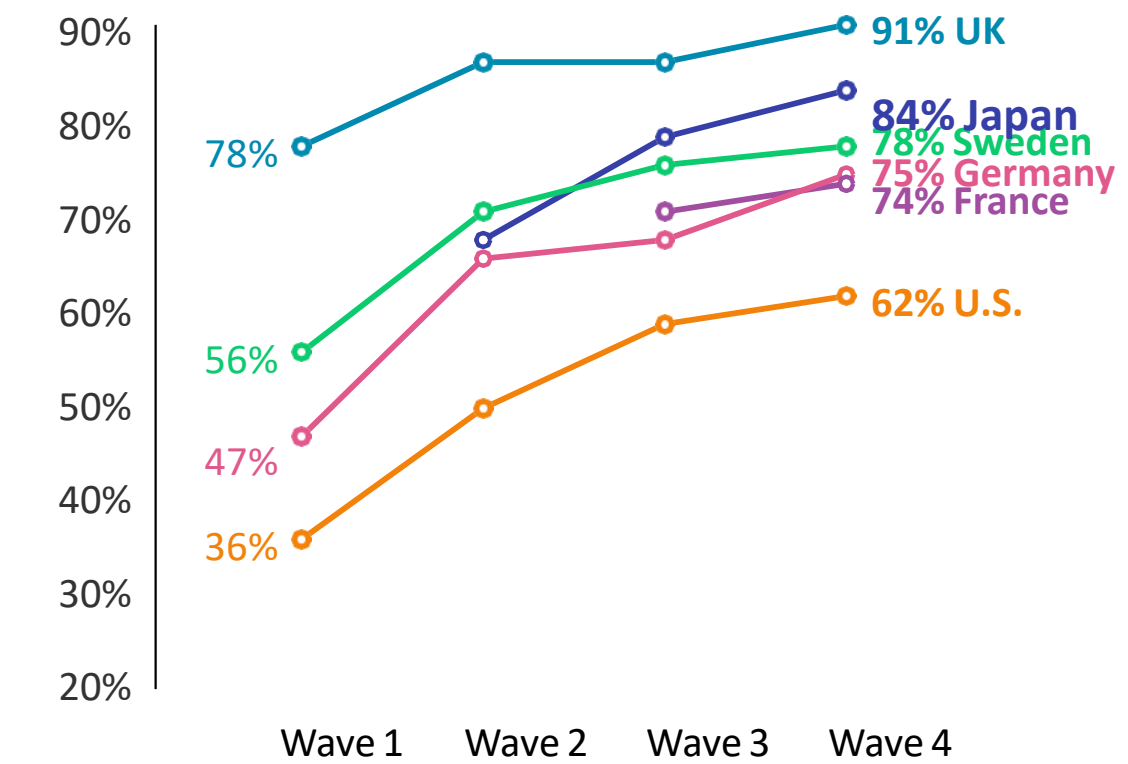
The impact on my country



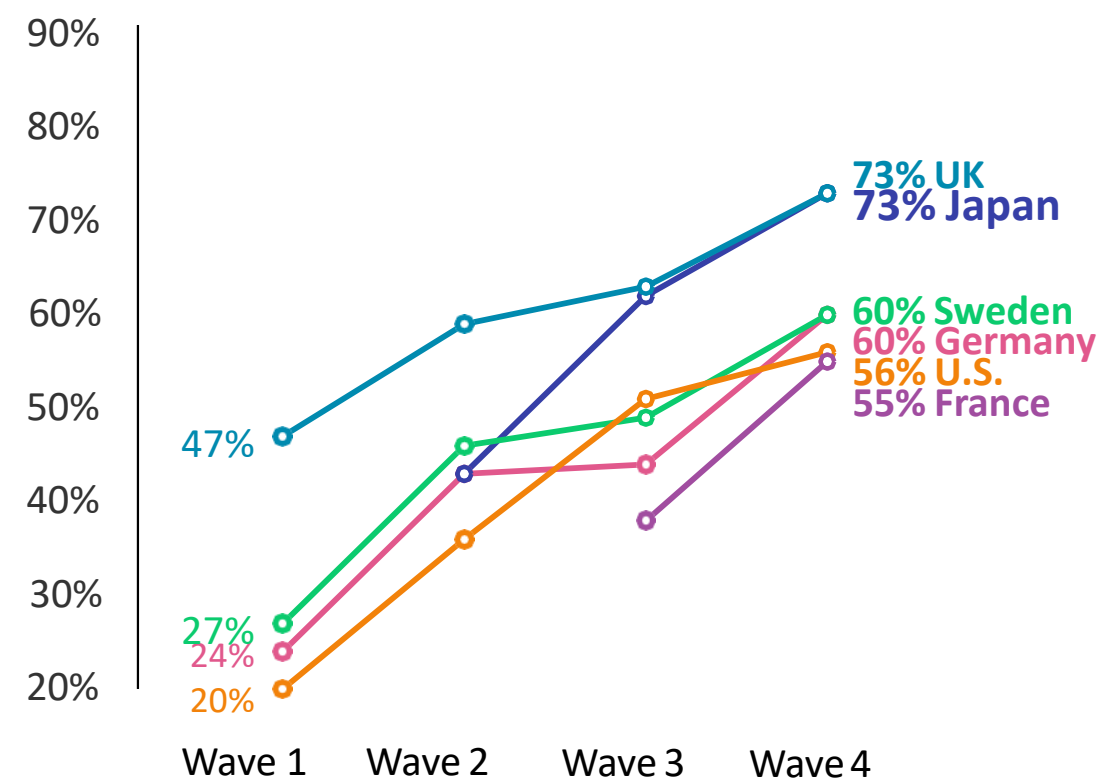
The impact on society overall



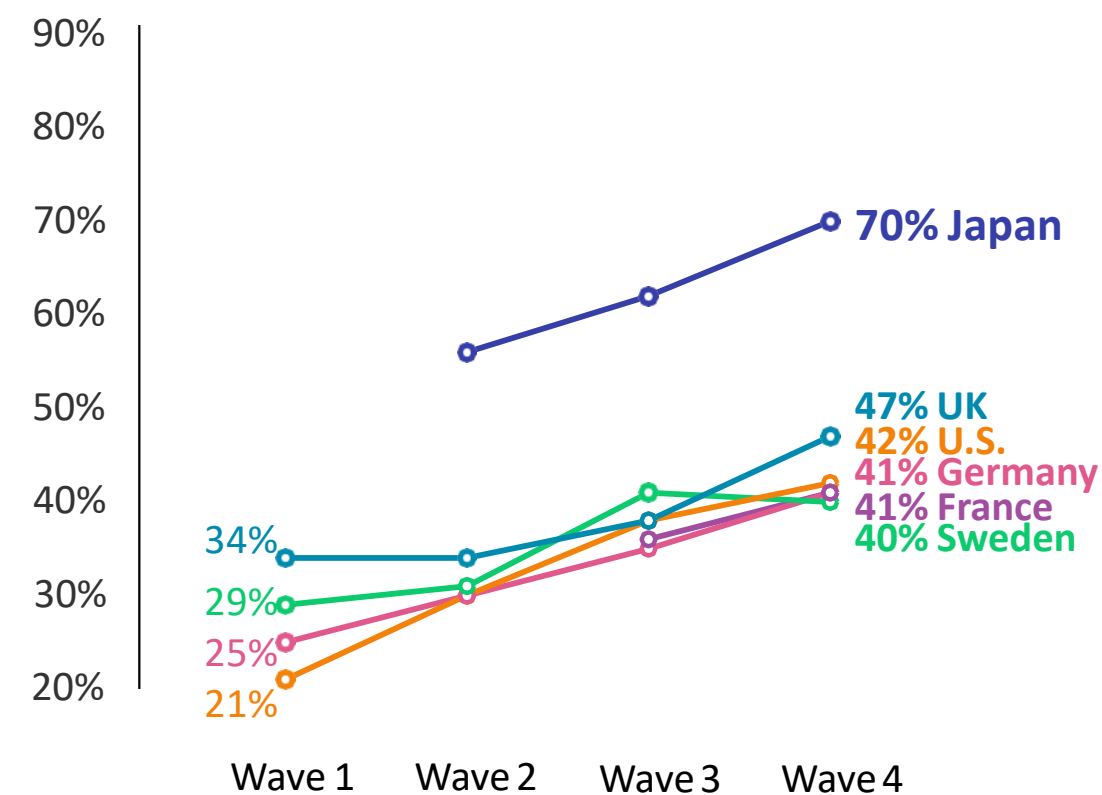
The impact on the economy



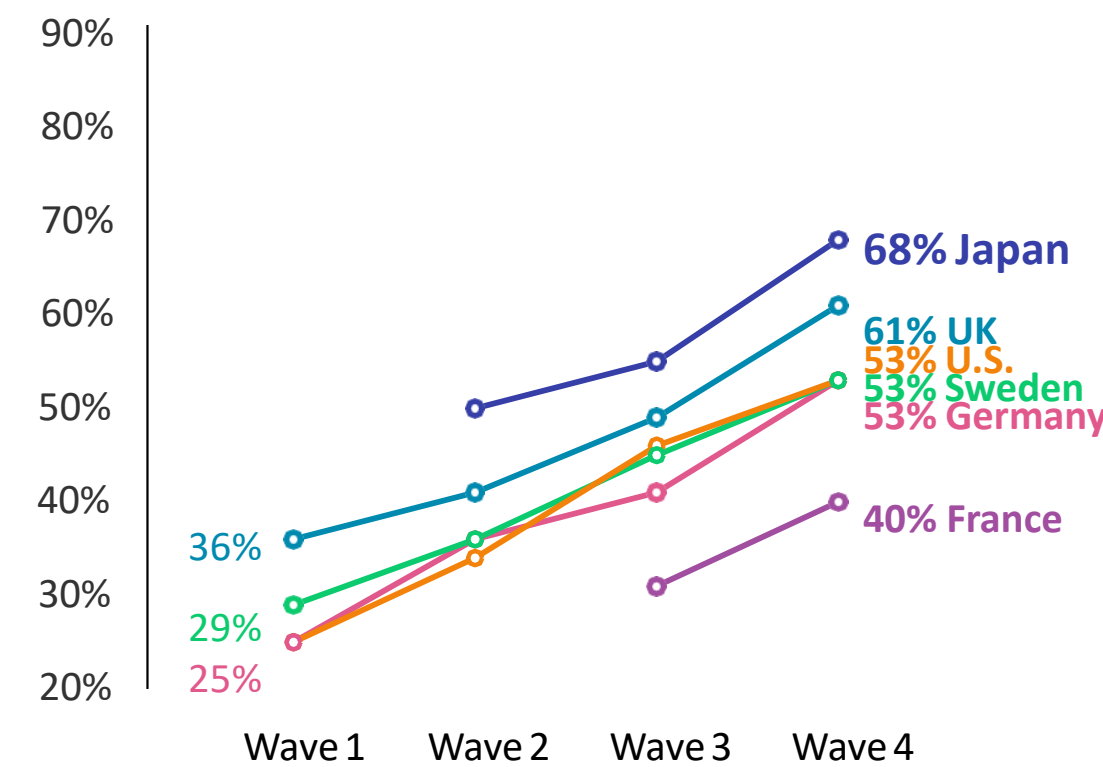
The impact on travel and holidays



The impact on your own household finances



The impact on your own life



Percentage from each country choosing “Longer than a year” or “Longer than two years” for each issue.

Respondents across all countries were asked how long they think the effects of the virus on a range of different issues will last for.

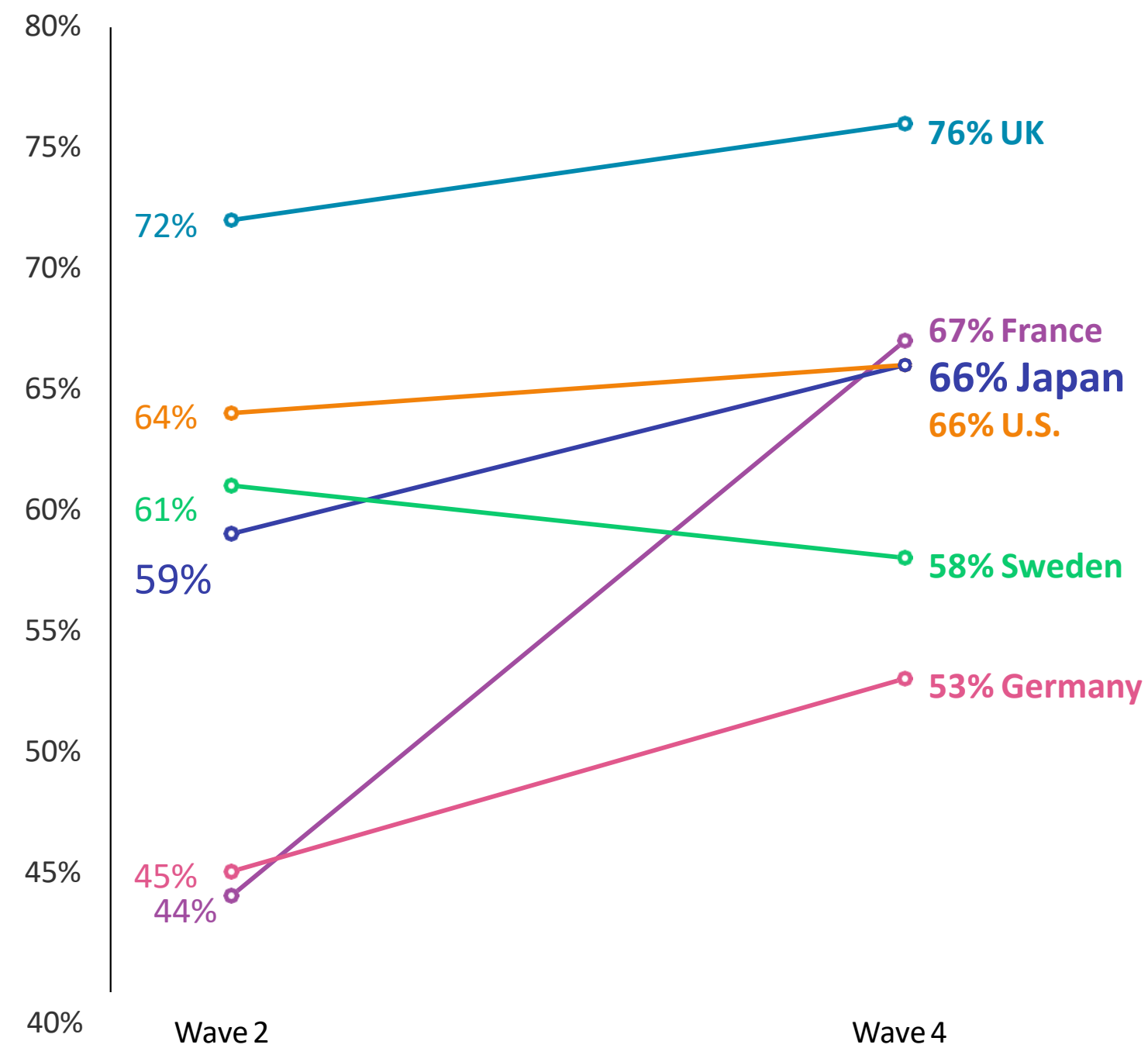


# 6 Second wave expectations



## Many more people expect second waves of coronavirus in their countries than a month ago

I expect there will be a second wave of the coronavirus in my country in the next year or so



Respondents across all countries were asked to agree or disagree with a number of statements related to public health. Displayed below is the % of people in each country who agreed with the given statement.

- **Expectations of a second wave are increasing** –this is particularly the case in France where last month 44% expected a second wave, and now 67% do, **the biggest increase of any country surveyed.**
- **The UK remains the nation most concerned about a second wave**, with three-quarters (76%) expecting one in the next year or so.
- Sweden is the only country this month to **be less likely to expect a second wave than they were in June.**



**+7** Points Up

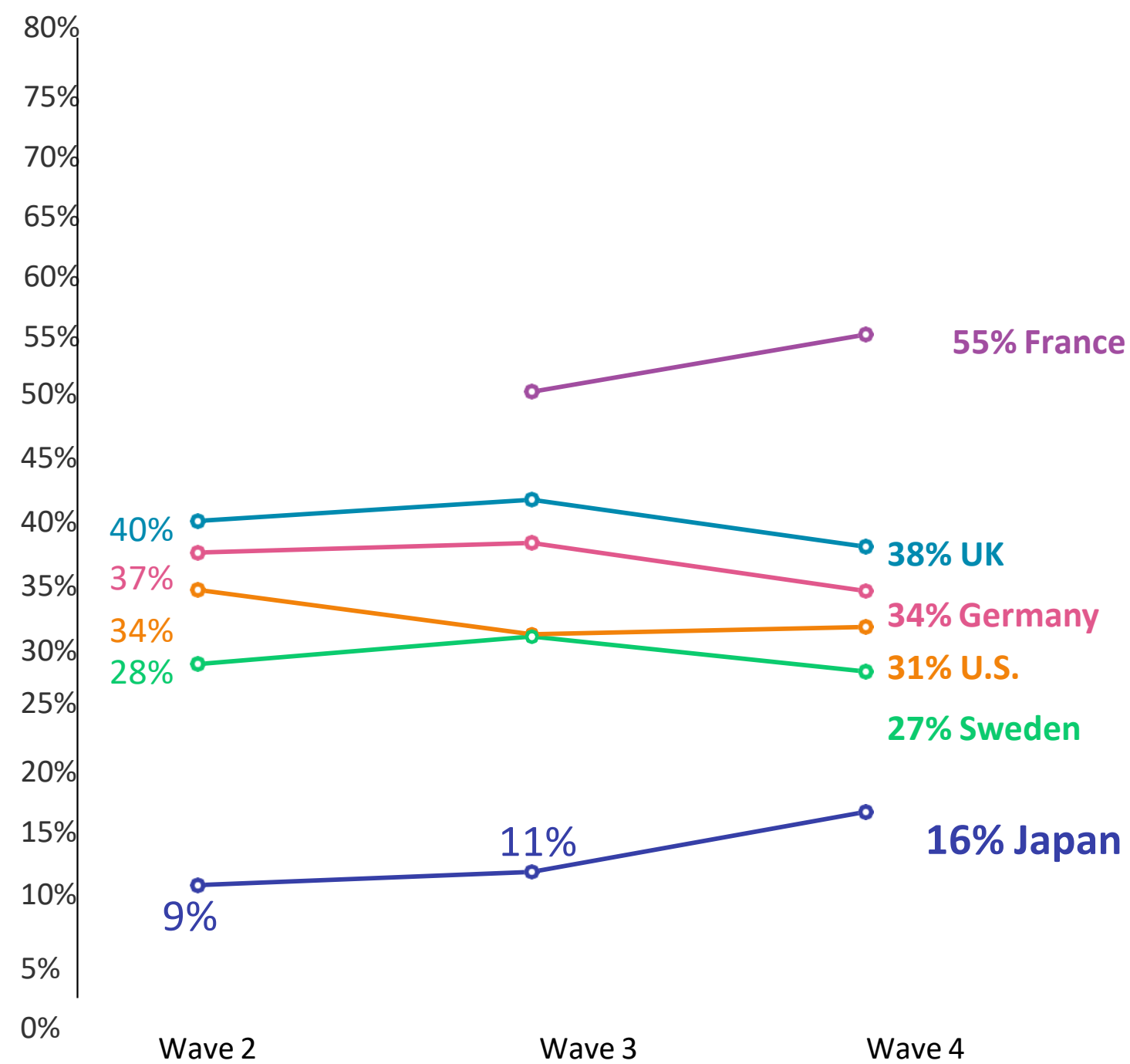
The growth over the last month in the amount of **Japanese** people saying they expect a second wave in the next year.

# 7 Views of business support

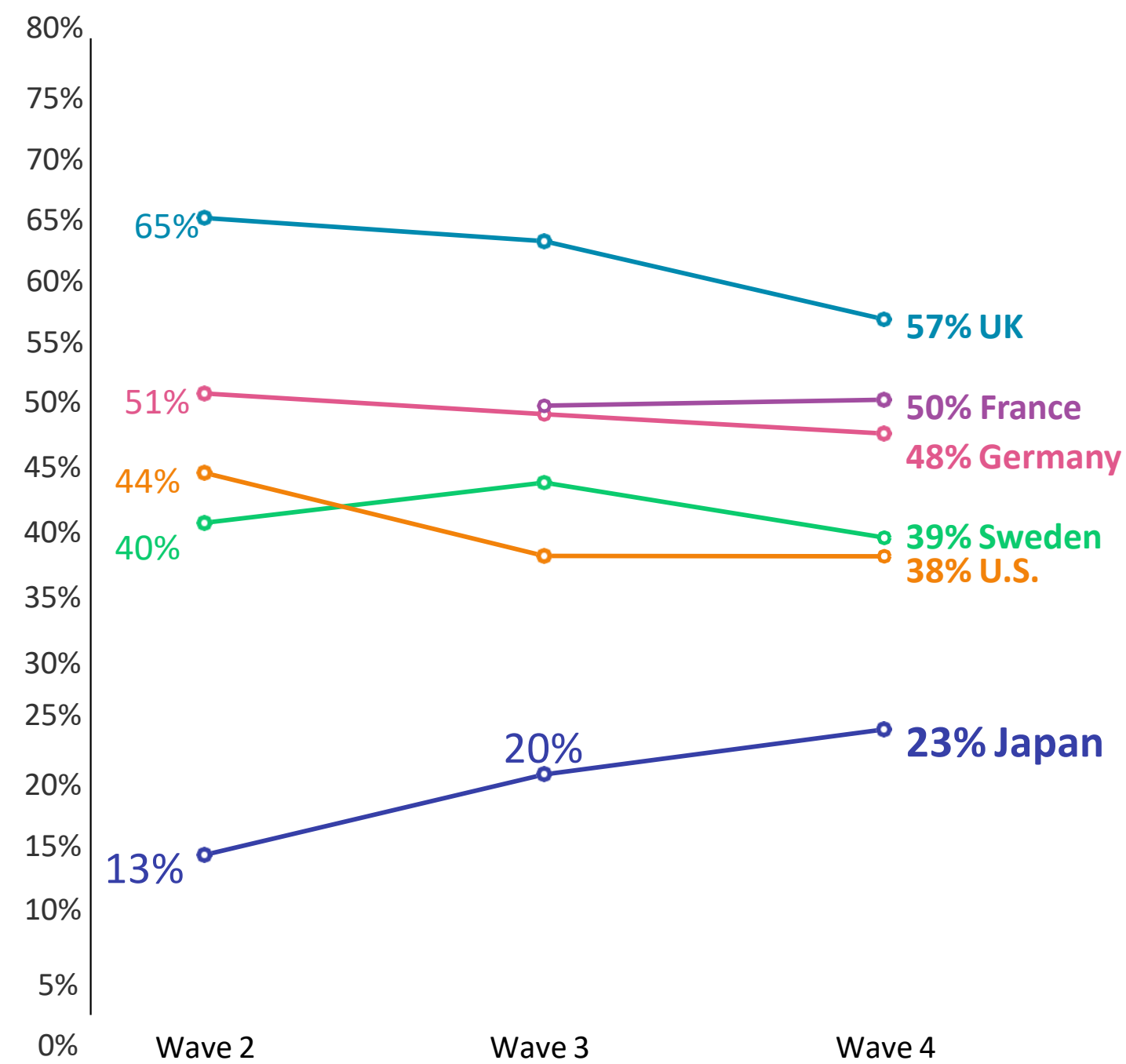


People continue to think their governments are giving business the support it needs – but the Japanese public are sharply critical

The business support the government in my country has announced is getting through to the companies that really need it



The government in my country is giving businesses the support it needs during this crisis



16%

Only 16% of the Japanese public, far less than in any other country, think the business support the government has announced is really getting through to the companies needing it.

Only 23% think the government is giving businesses the support they need during this crisis.



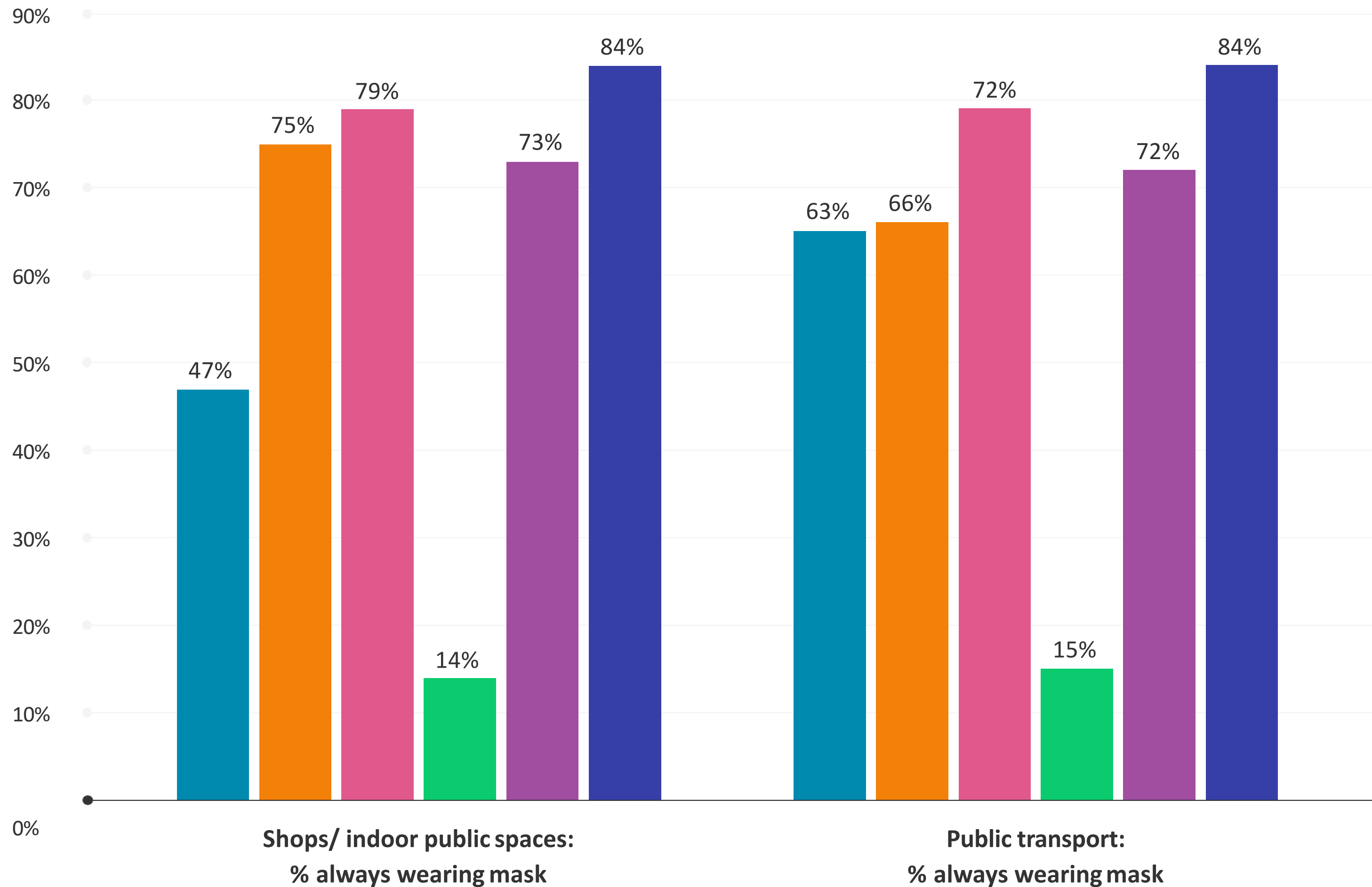
Respondents across all countries were asked whether they agreed or disagreed with statements about the amount of business support that their government is providing during the coronavirus outbreak.



# 8 Prevalence of mask-wearing



Mask wearing is high in the U.S., Germany, Japan and France; lower in the UK and at its lowest in Sweden



# 84 %

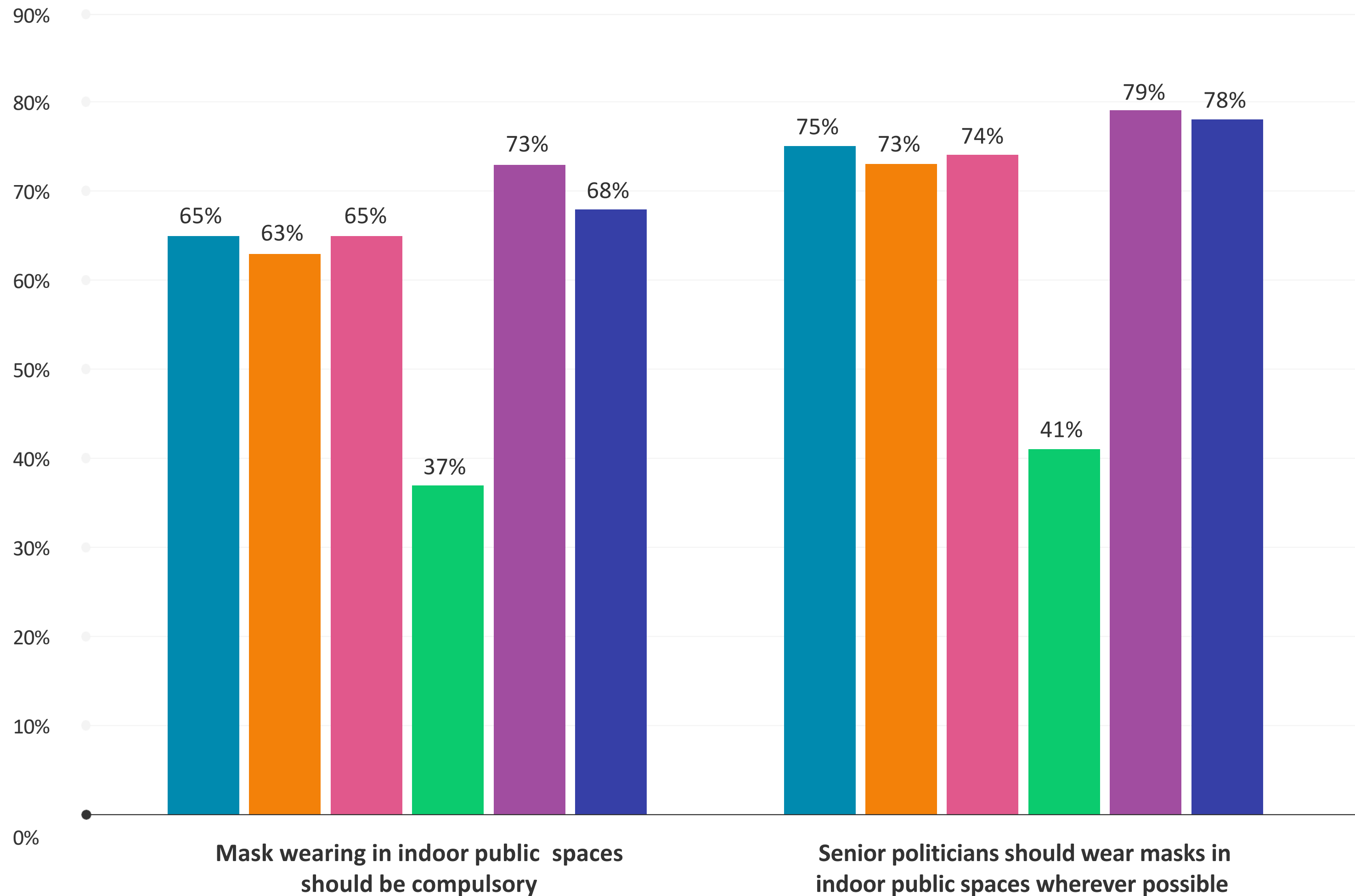
Japanese people clearly top their counterparts in all other countries in wearing masks in indoor public spaces and when using public transport.



# 8 Attitudes towards mask-wearing



Regardless of whether they wear masks themselves, people support compulsory mask-wearing in indoor places, and think senior figures should wear masks too, though Sweden remains the exception



## 63 - 79%

**Overwhelming majorities in all countries (except for Sweden) are in favor of having compulsory mask wearing.**

This would help to achieve the high mask wearing rates of Japan, which are traditionally not based on legal stipulations.

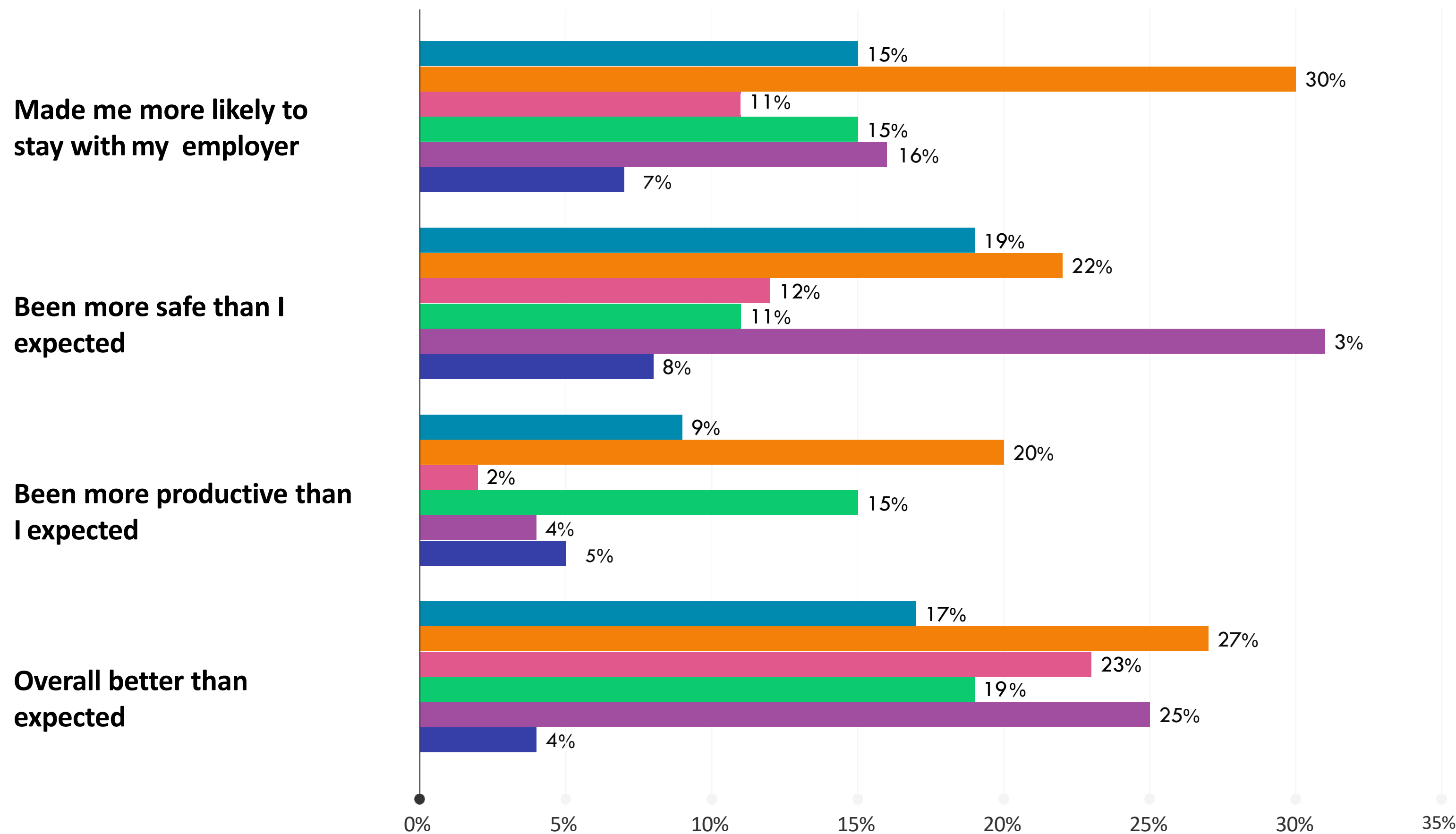


# 9 Working at regular workplaces

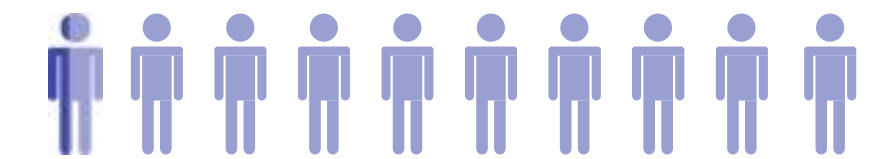


Employees who have stayed at or have returned to their normal workplace are more positive than negative about the experience so far, with more saying the workplace in July was more safe and more productive than expected

Experience of returning to work: net % score



4%



The overall experience of returning to the former workplace is rather positive than negative in all six countries.

Japanese rate their experience the least positive with only 4% experiencing an overall better situation than expected.





# 10 Perception vs reality – the impact of Covid-19



People think coronavirus is much more prevalent than it is – and that many more have died than in reality

How many people in your country have had coronavirus?

22%

4x modelled cases (ONS)

20%

20x confirmed cases (CDC)

11%

46x confirmed cases (RKI)

16%

20x confirmed cases (PHS)

12%

46x confirmed cases (SPF)

5%

250x confirmed cases (Hazard)

How many people in your country have died from coronavirus?

7%

100x confirmed deaths (PHE)

9%

225x confirmed deaths (CDC)

3%

300x confirmed deaths (RKI)

6%

100x confirmed deaths (PHS)

5%

100x confirmed deaths (SPF)

1%

1000x confirmed deaths (Hazard)

## 7 – 9%

In all countries, respondents think that up to 9% of the population have died from coronavirus, which is more than 100 times higher than official statistics show.

Estimates in Japan are much lower than elsewhere and in thus in line with lower official figures than elsewhere.





For further information please contact  
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More insights at the Kekst CNC Covid-19 Content Hub:  
**[www.kekstcnc.com/covid-19/responding-to-covid-19/](http://www.kekstcnc.com/covid-19/responding-to-covid-19/)**