

**Kekst CNC Webinar**

**Japan amidst COVID-19:  
Newest findings from an  
international tracking survey by  
Kekst CNC**

**3<sup>rd</sup> Kekst CNC COVID-19 international tracking survey:  
Japan in comparison with the US, UK, Germany,  
Sweden and France**

**Tokyo, 17 June 2020**



# Methodology

Polling conducted by KEKST CNC, nationally representative sample of



1,000 adults  
in Great Britain



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 3 took place on  
1st June - 5th June 2020

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

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



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

### Germany as World Champion

Germany is perceived by far as the country that has handled the pandemic the best – despite higher fatalities than in many countries

## 2

### The End of the Beginning

Protecting the economy is seen more important by the public in most countries, but protecting health remains top priority – yet

## 3

### Flattening the Curve

Concern about the virus is falling among all countries and categories but people expect the impact to last much longer than they did last month

## 4

### Respect for Institutions

In most countries, governments, health organizations and country leaders get high ratings for their performance during the crisis

## 5

### A New Focus on the “S”

People want to see businesses focusing on measures to help society and people

## 6

### Change in Spending Habits

Global consumers are not yet ready to return to normal levels of spend on travel and luxury goods



# Japan Results: Six Key Findings

## 1

### Japan Applauded by World

Among a total of 16 countries, Japan is ranked highly as No. 5 for having handled the coronavirus crisis well and as No. 2 after Germany among six surveyed countries

## 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 below Trump

Prime Minister Abe receives by far the most negative rating for his crisis performance, even far below US President Trump

## 5

### Less Spending Japan

Japanese people show by far the highest restraints on spending for travel and luxury items among all countries

## 6

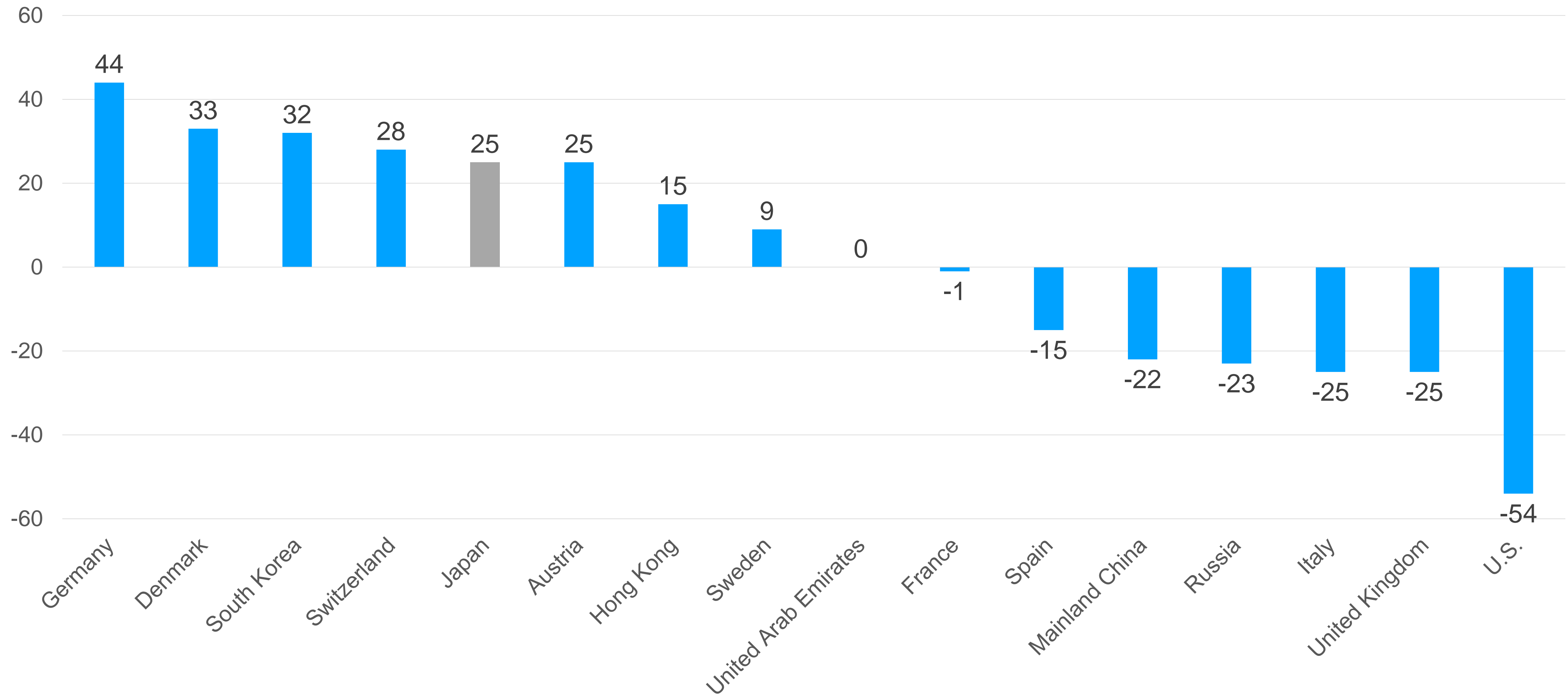
### Tokyo Olympics at Risk

A half of global respondents and even more Japanese think the Tokyo Olympics should only be held in 2021 if a vaccine is available

# 1 International view on 16 countries' crisis handling



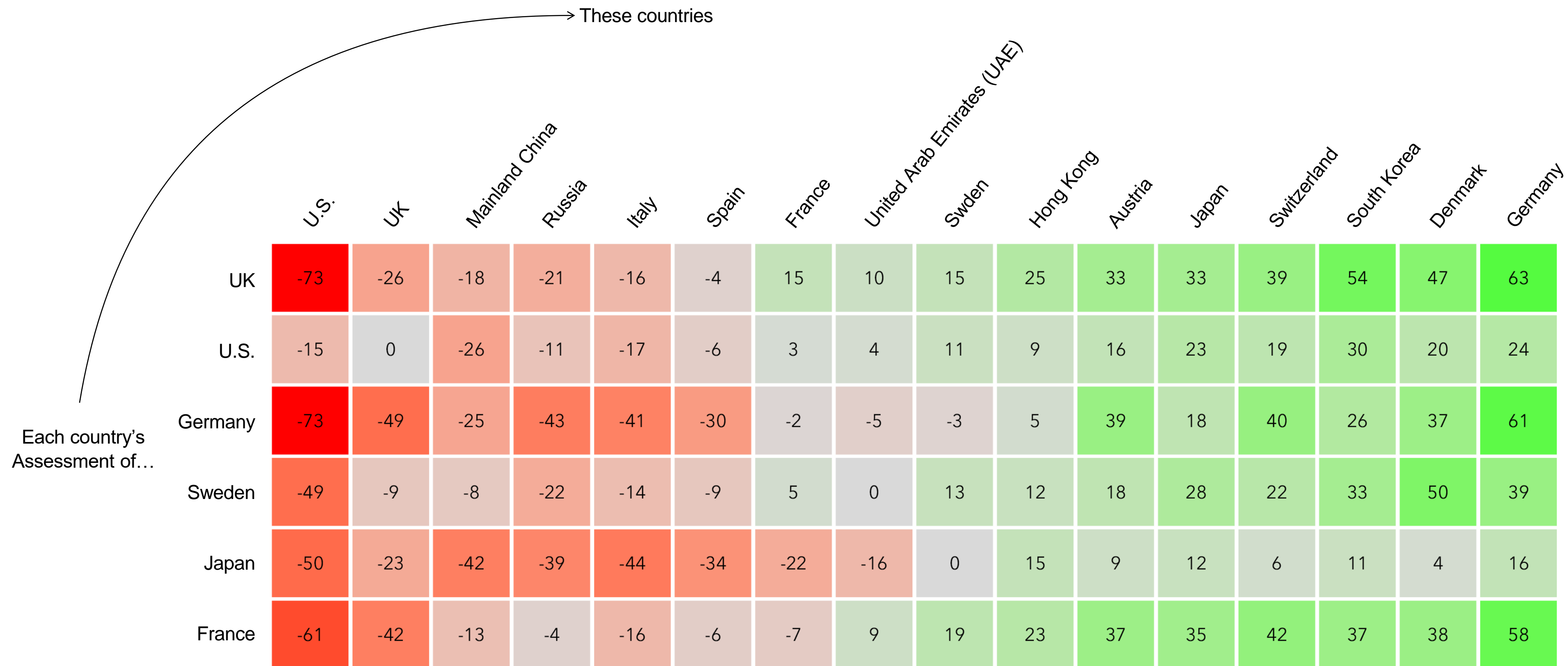
For each of the following countries/jurisdictions, please indicate how well or badly you think they have handled the coronavirus crisis overall



# 1 Country ratings



The U.S. and the UK are seen to have handled the coronavirus crisis the worst – global opinion feels Germany has had the best handling of the crisis



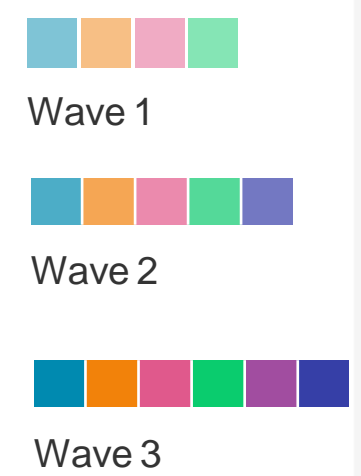
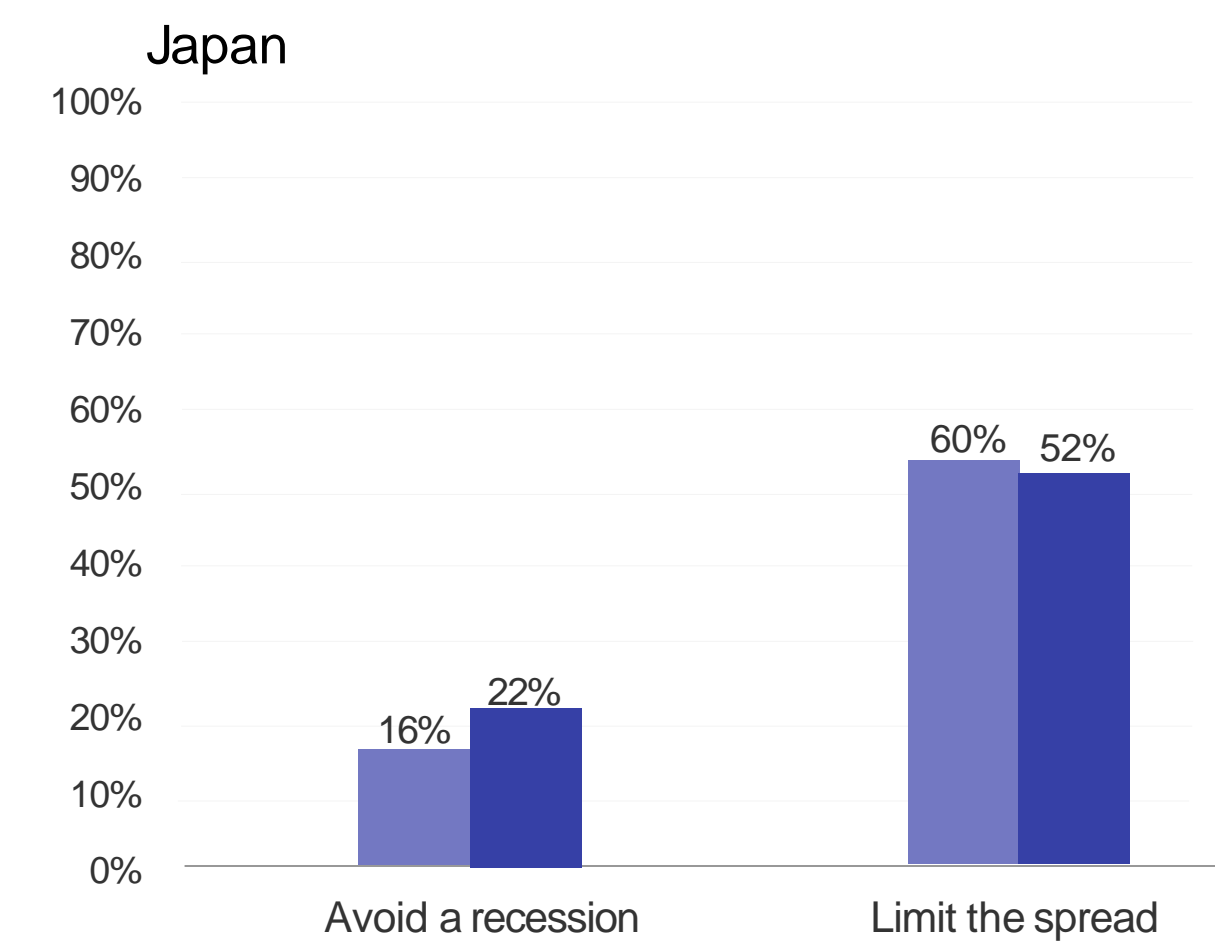
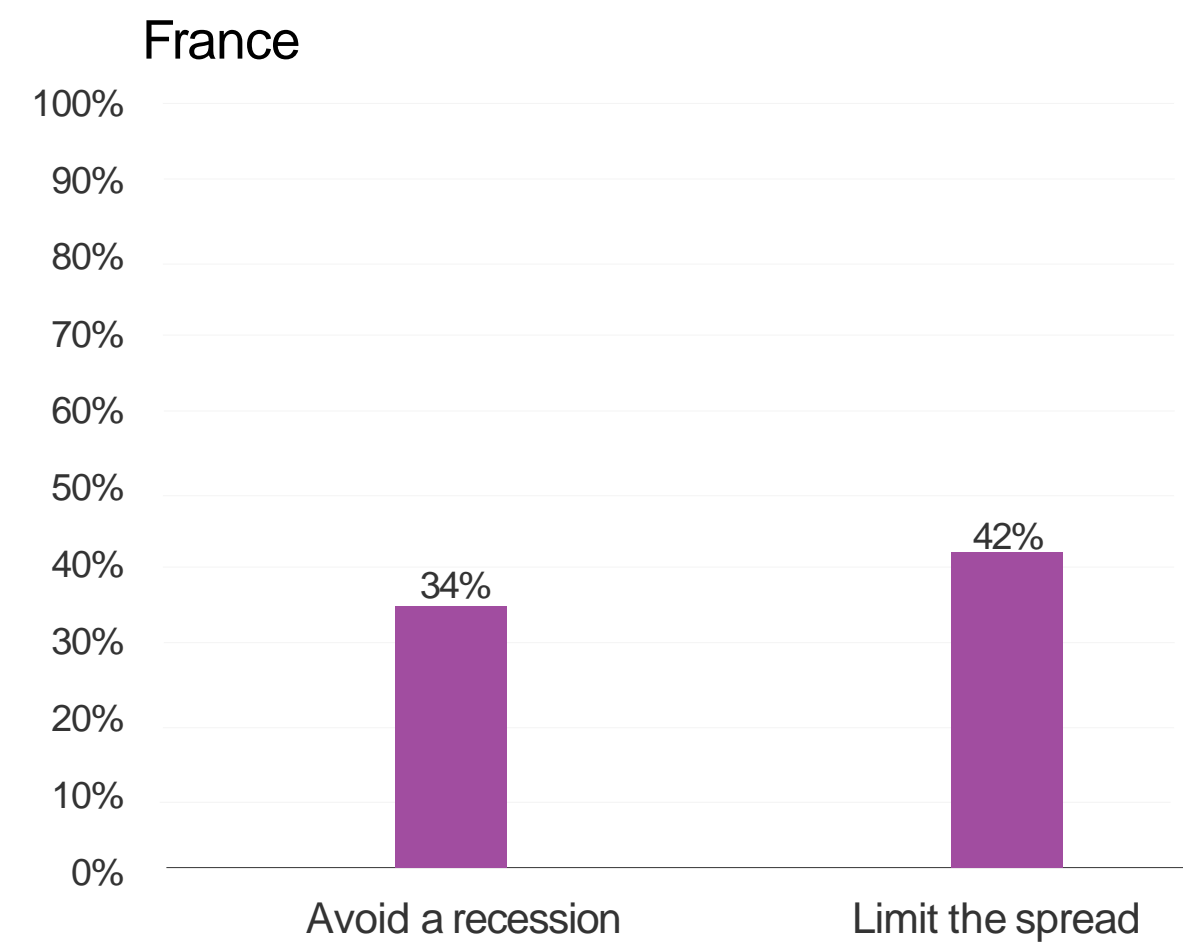
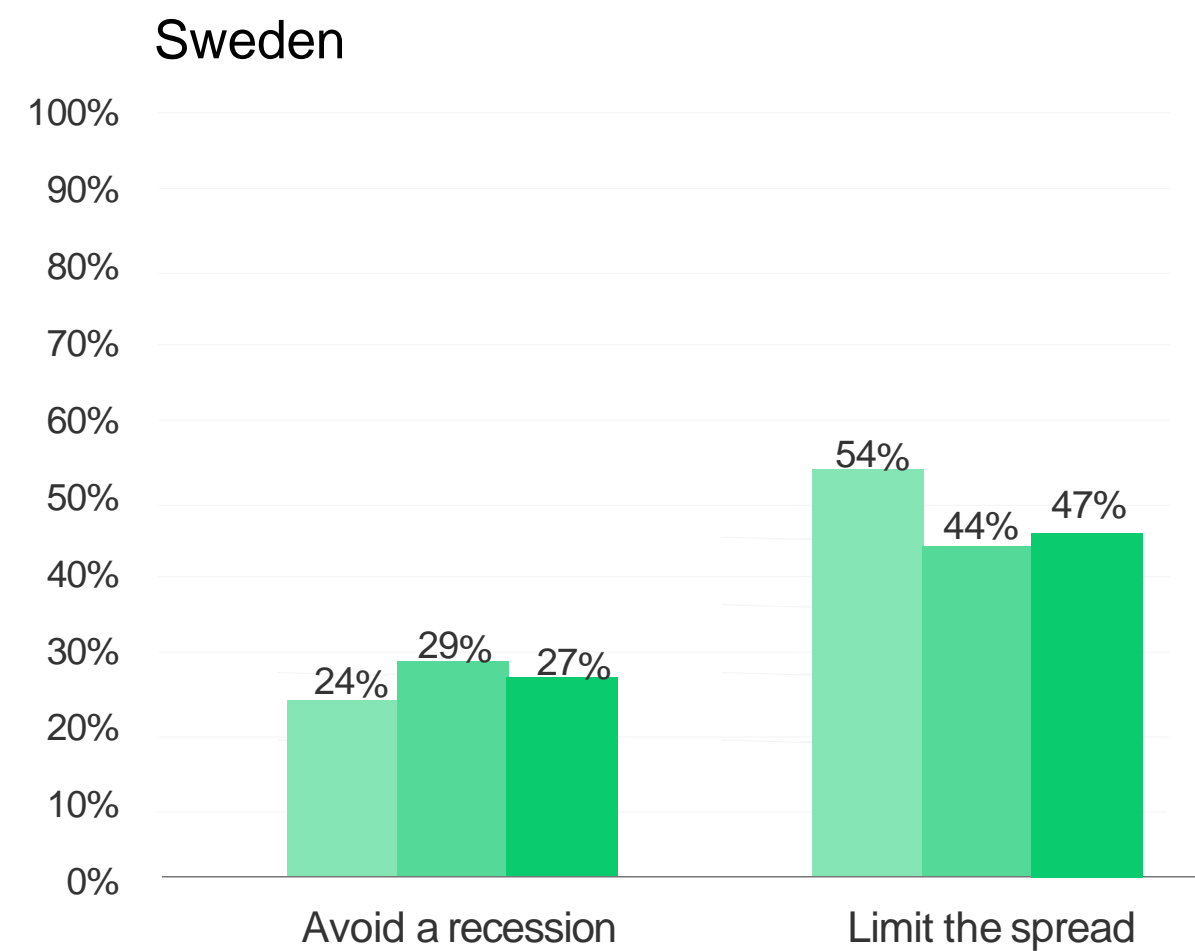
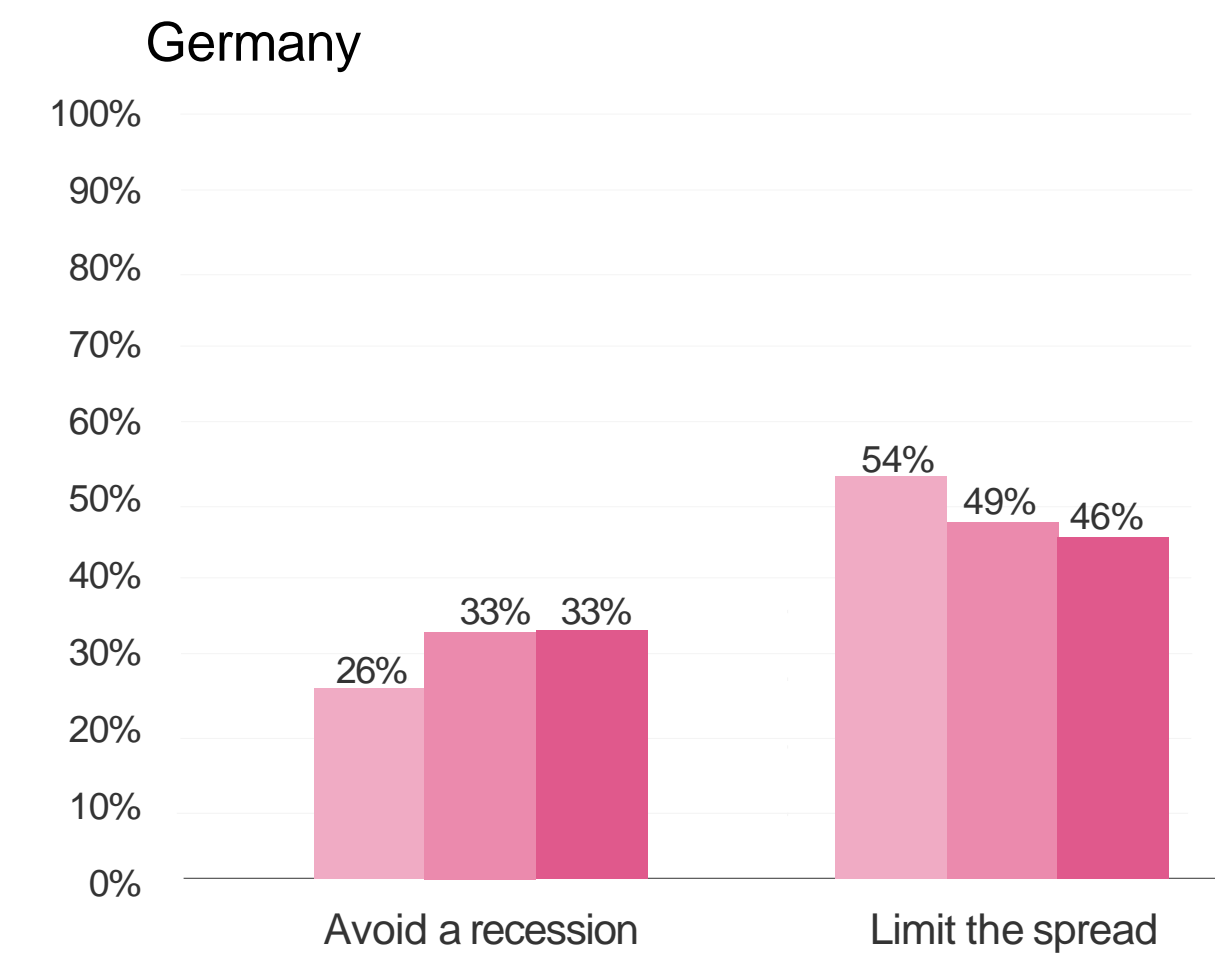
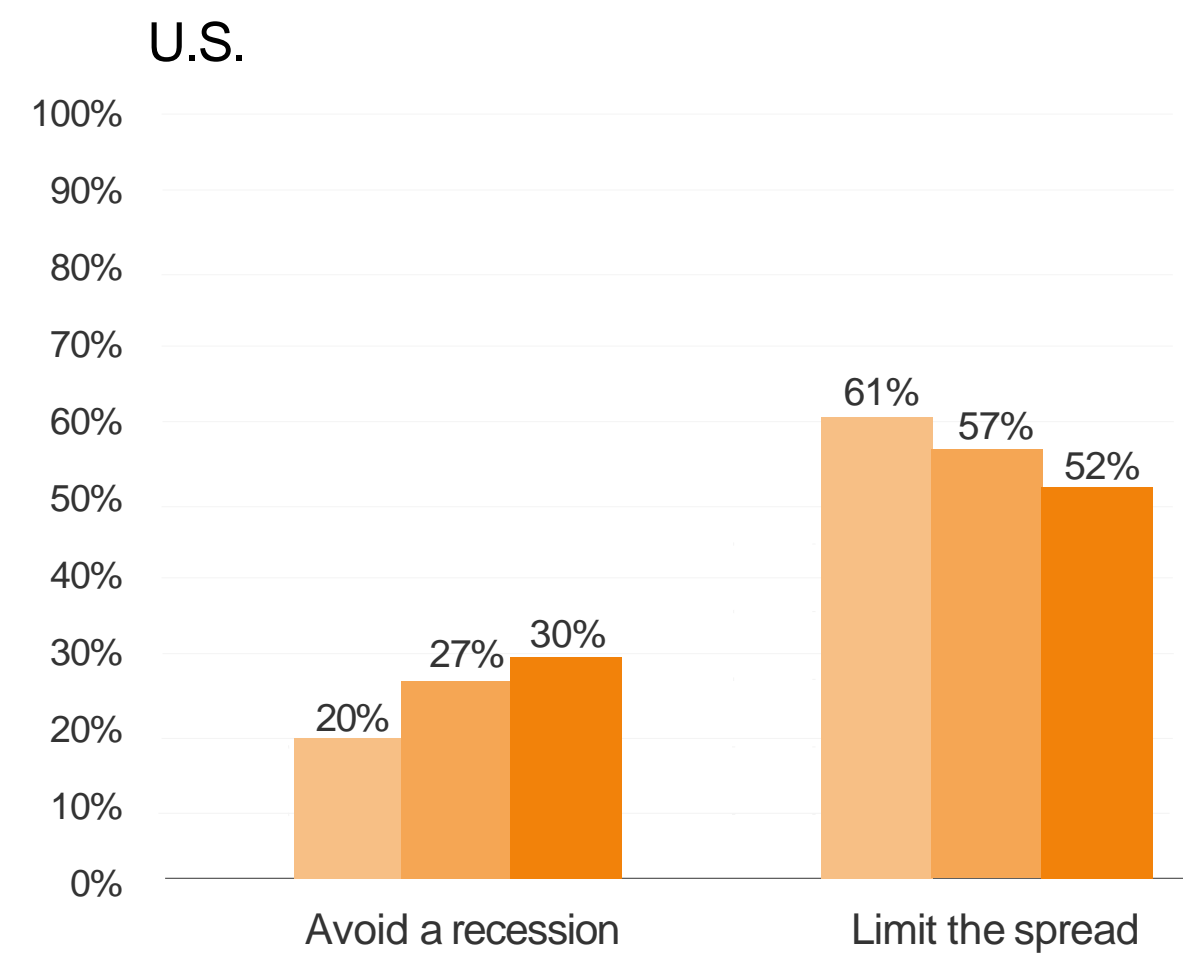
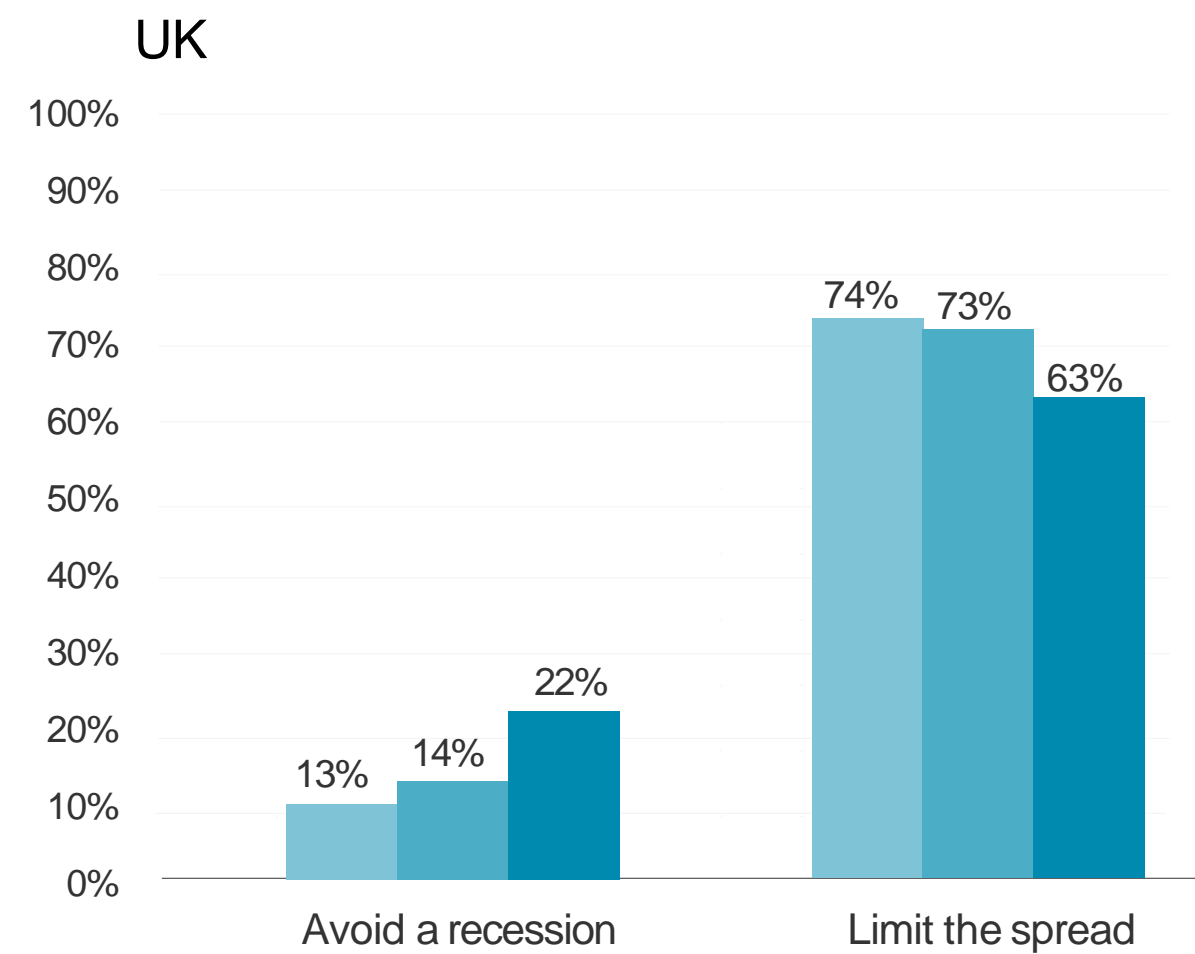
- Respondents across all countries were asked how well or badly they thought a range of countries around the world had handled the coronavirus crisis overall.

Displayed here is the net score given for each country in each of the markets surveyed.

# 2 Government decisions



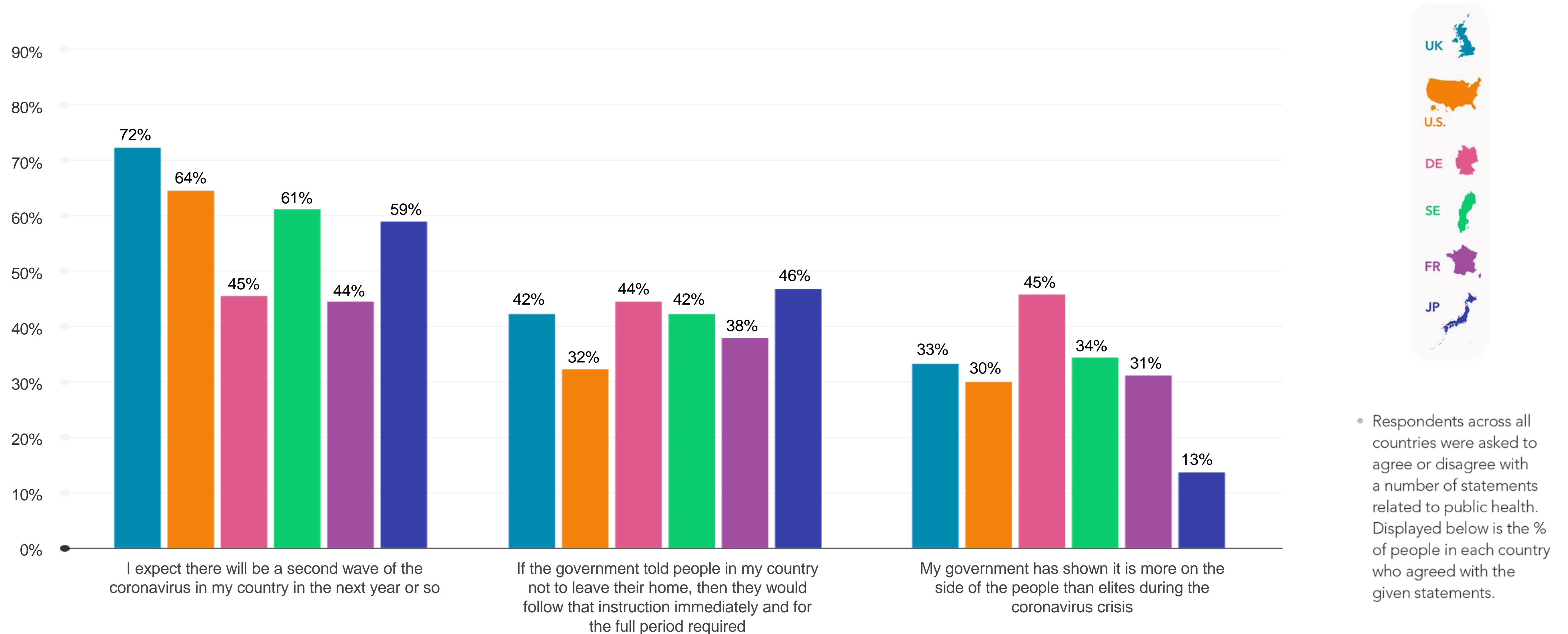
The gap between prioritizing lives and the economy is narrowing in many countries, but not in Sweden



# 3 Views on public health and a second wave



With the exception of Germany and France, populations expect a second wave of coronavirus

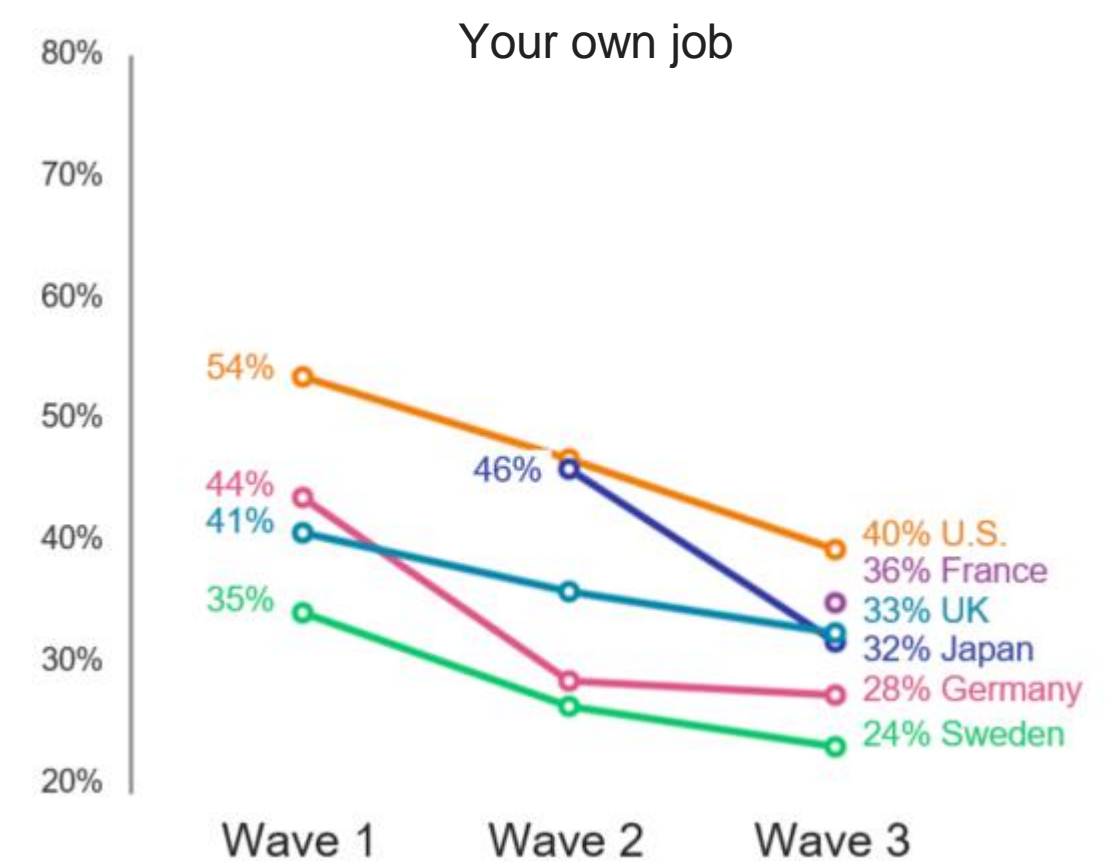
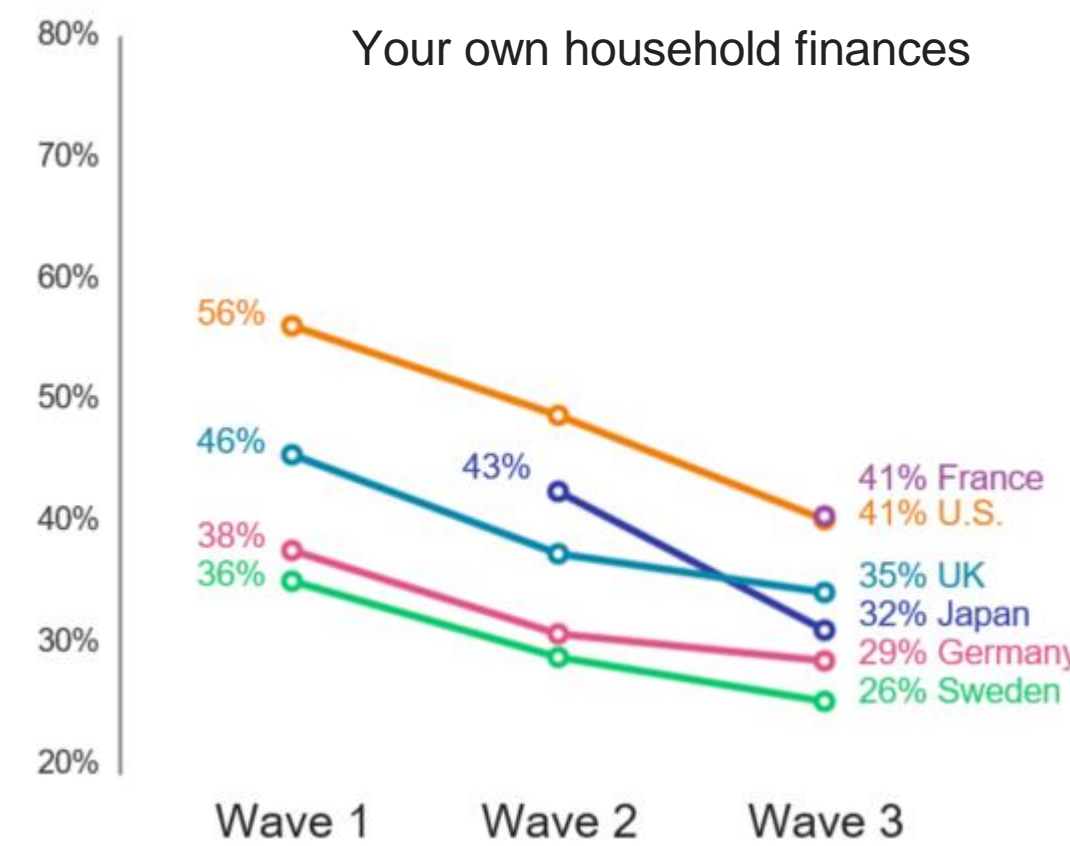
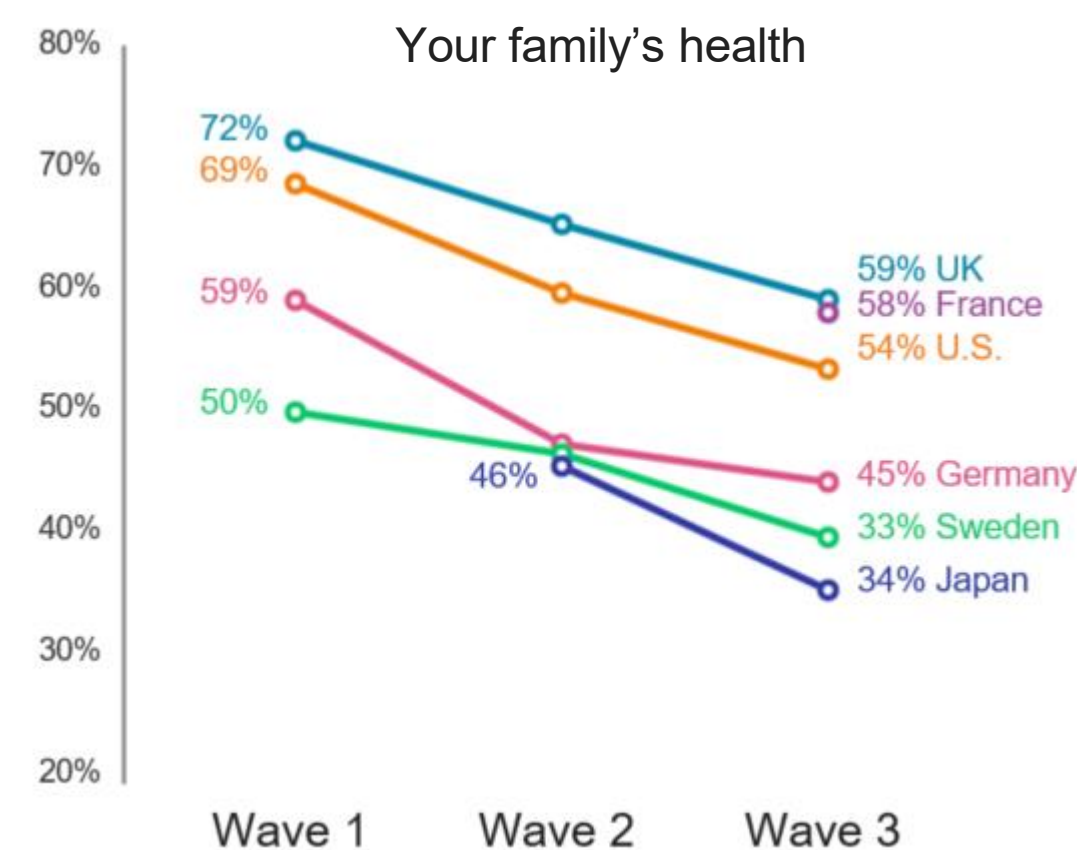
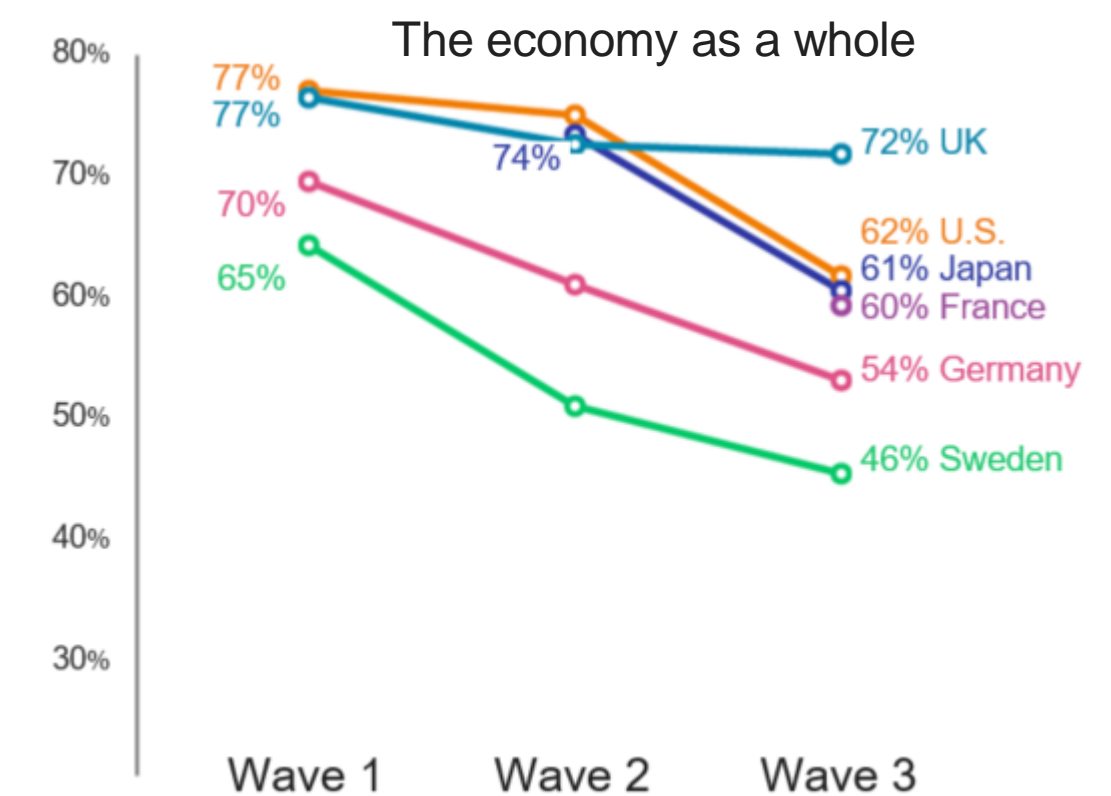
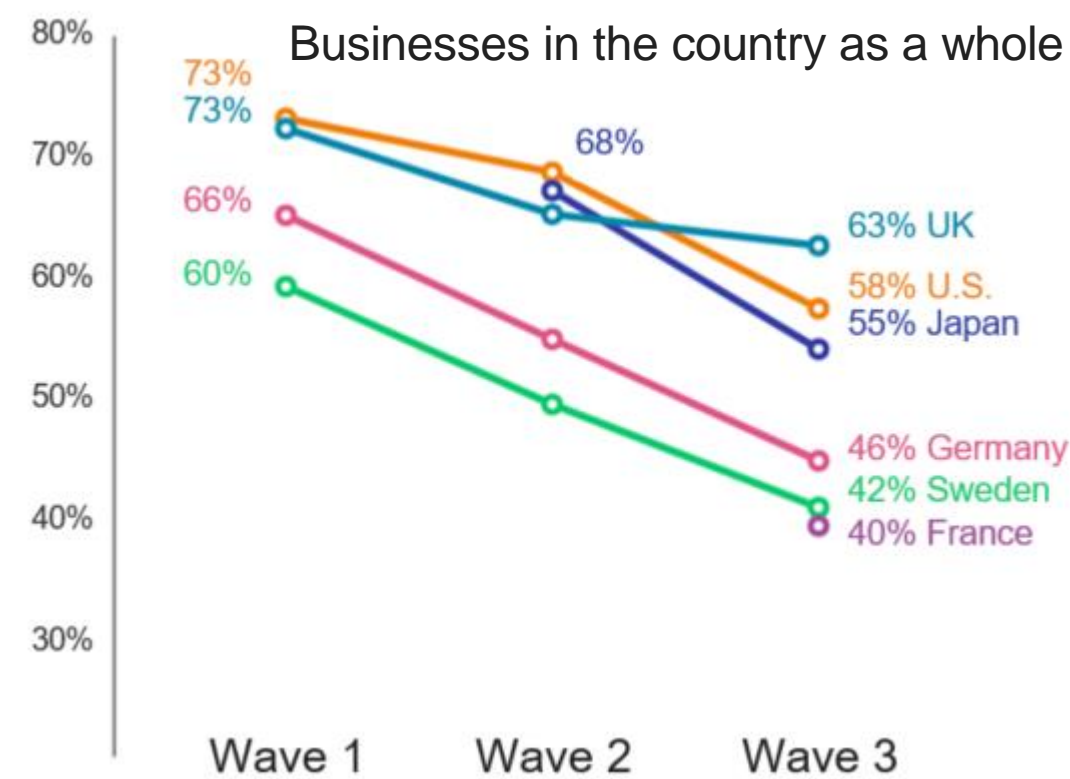
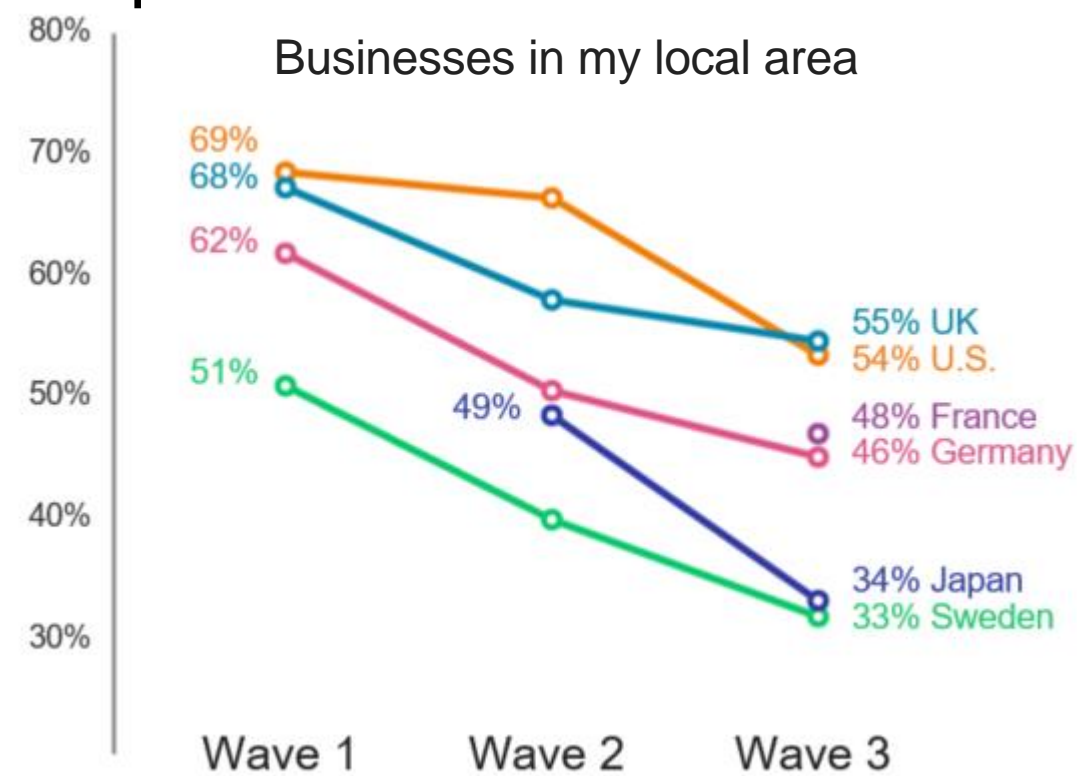




# 4 Levels of concern



Concern about the impact of the virus is trending down, particularly in Germany, Sweden and Japan, marking the end of the beginning for this pandemic



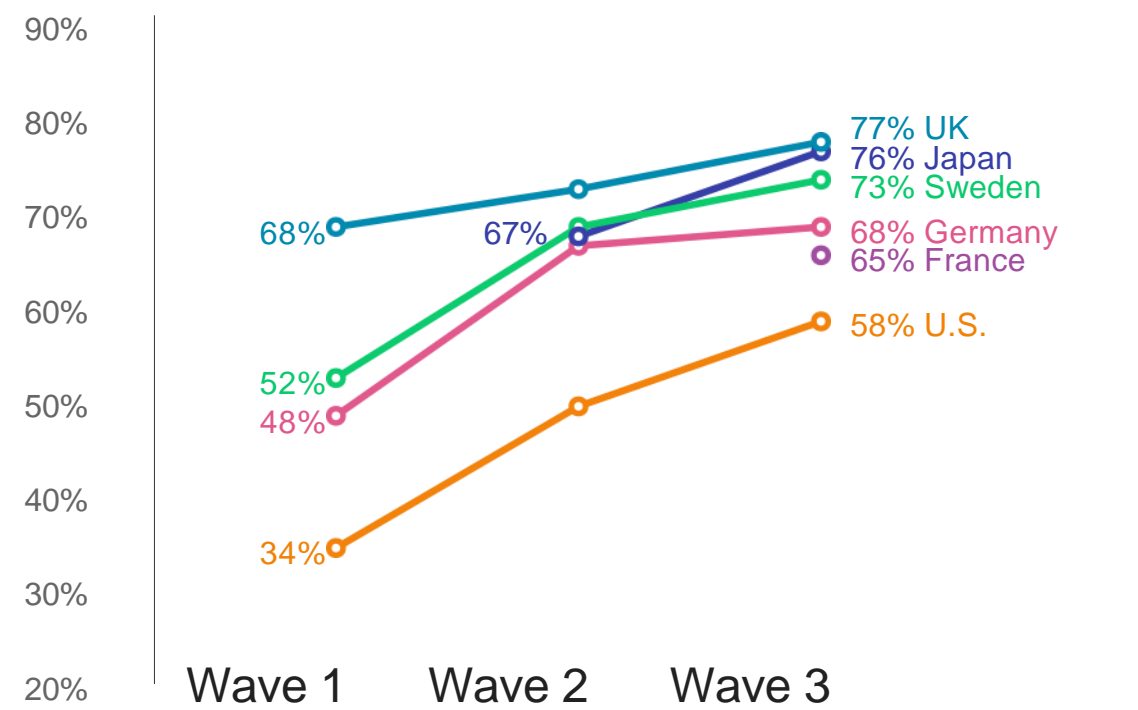
- Respondents across all countries were asked to rate on a scale of 1-10 how concerned they are about the impact of the coronavirus on a number of things. Any response ranking at 8 or above is described as someone being "very concerned" about an issue.

# 5 Expected duration

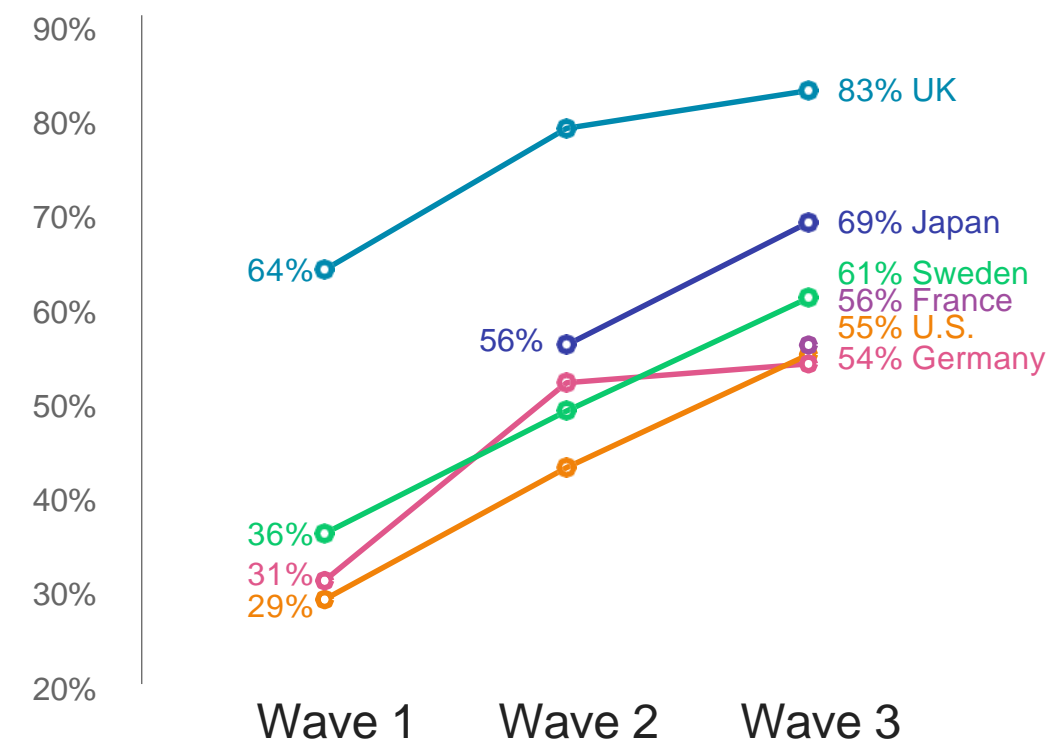


People expect the impact of the virus to last for much longer than they previously thought

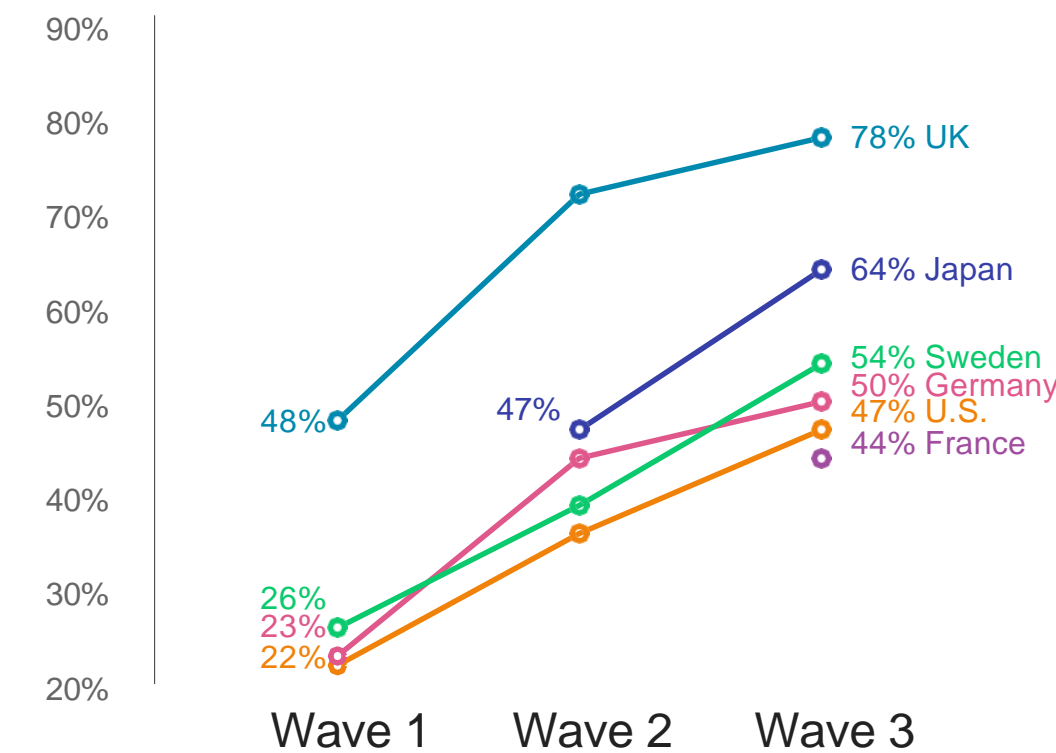
The impact on business and how they function



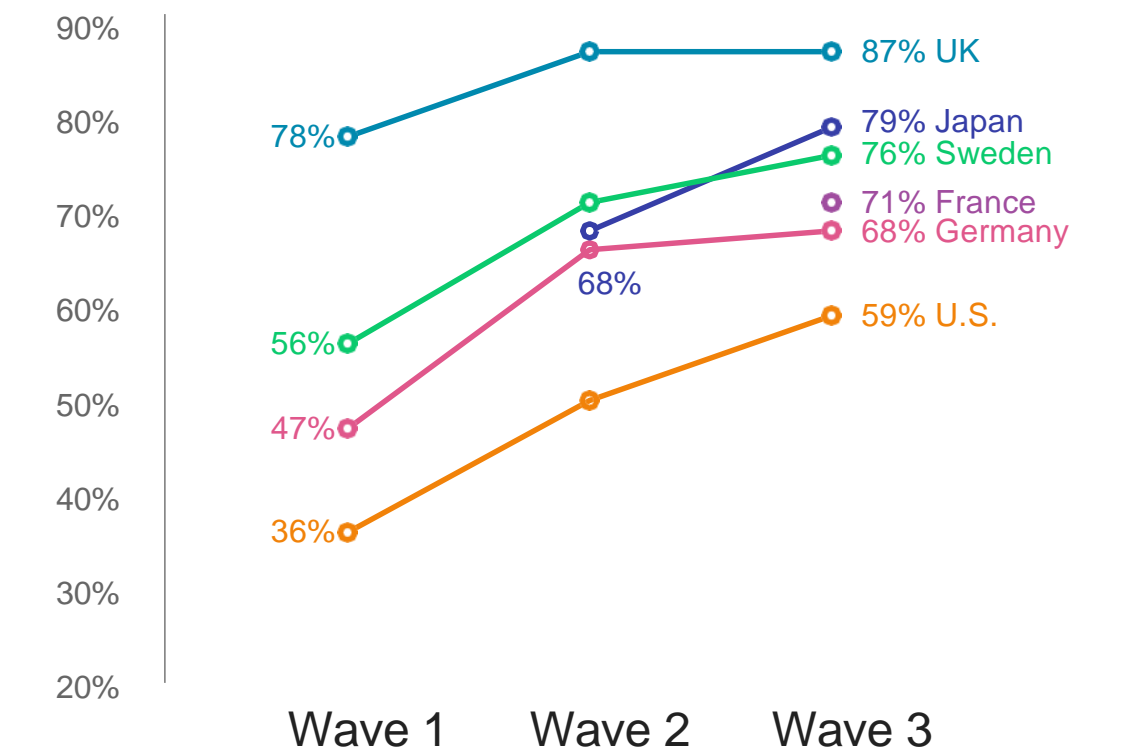
The impact on my country



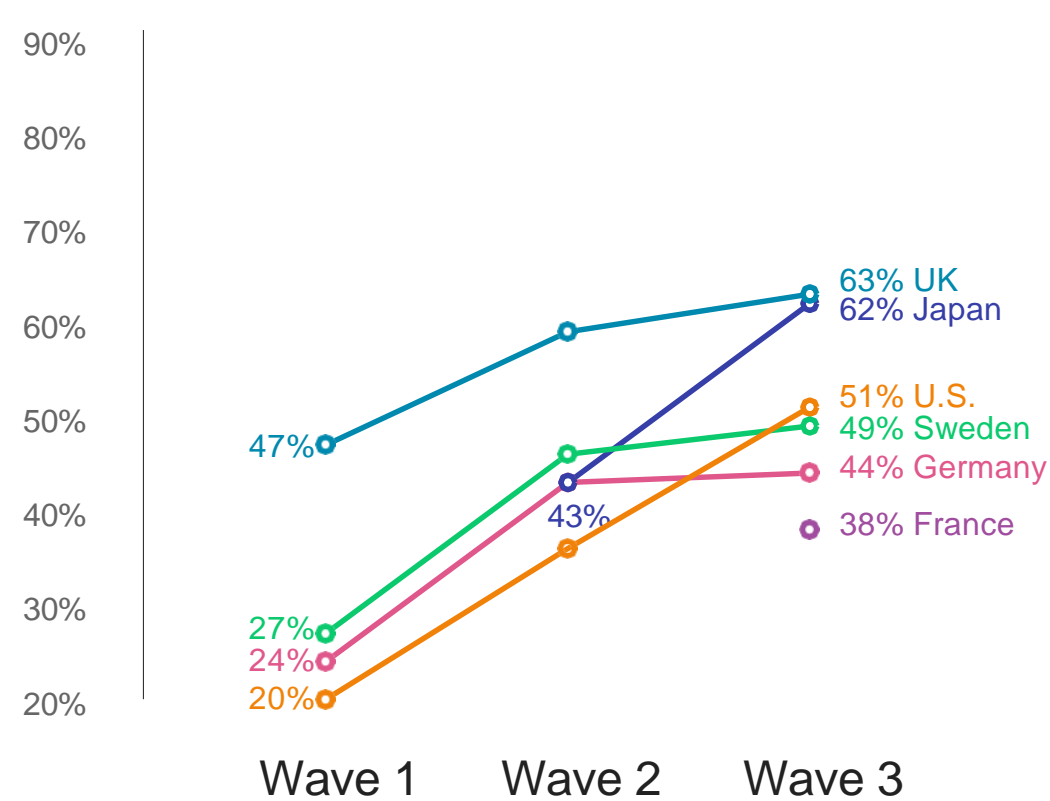
The impact on society overall



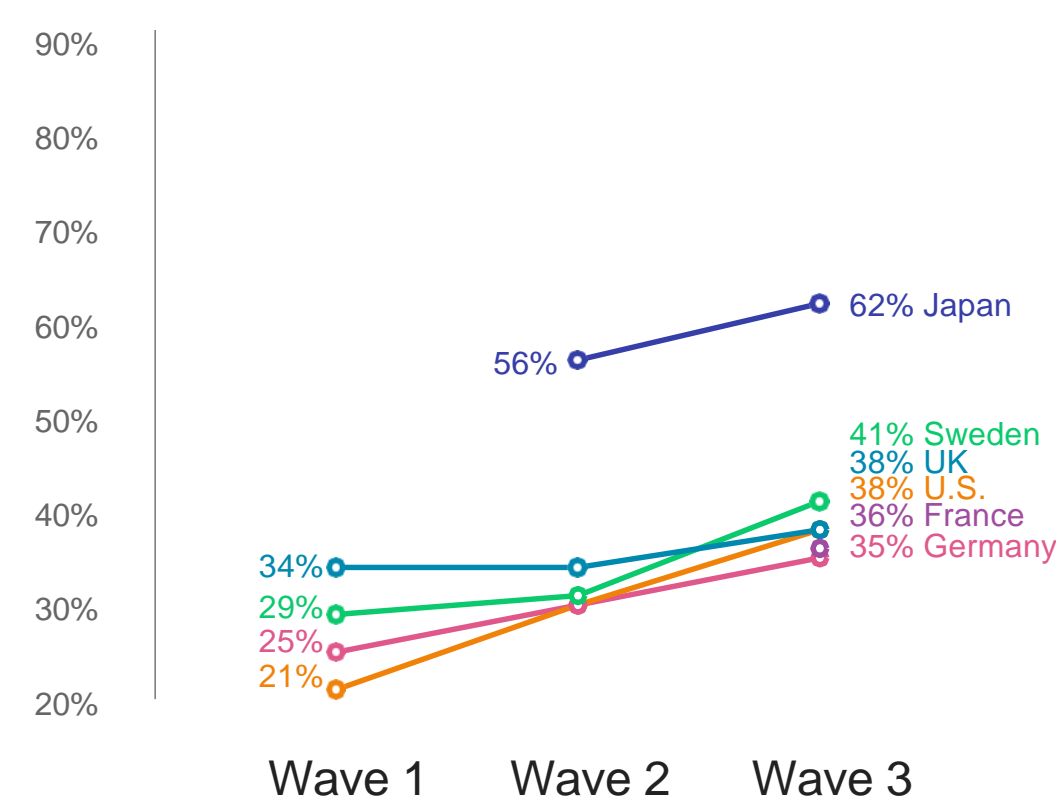
The impact on the economy



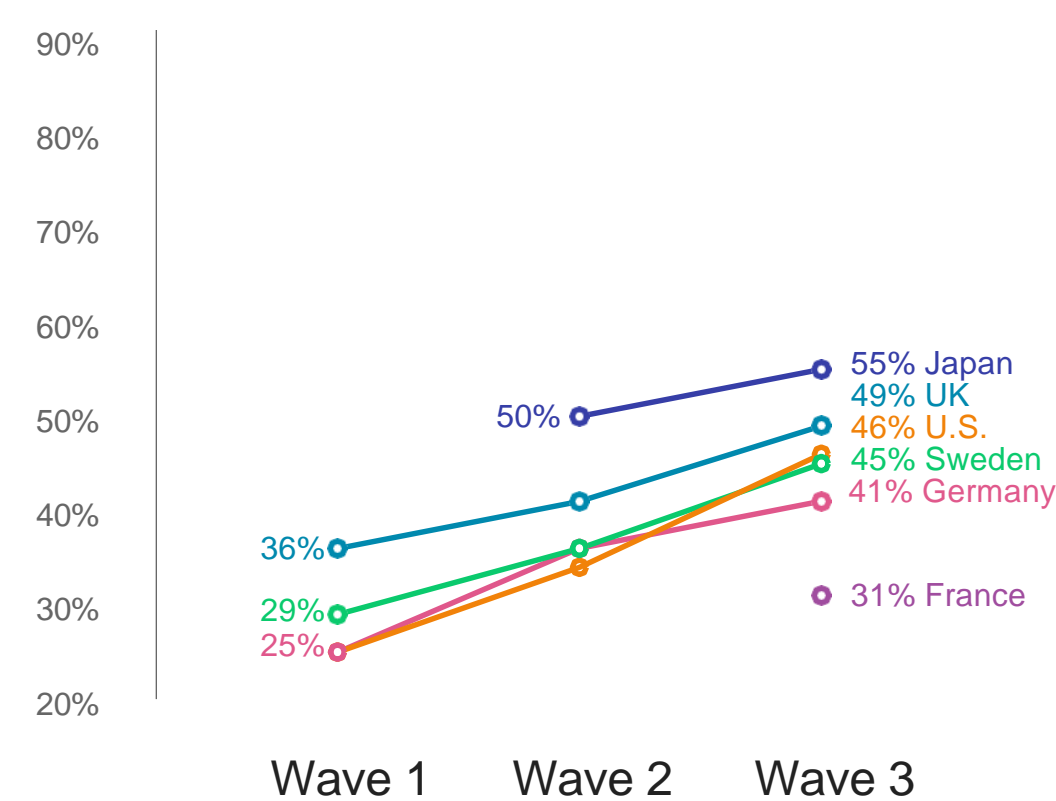
The impact on travel and holidays



The impact on your household finances



The impact on your own life



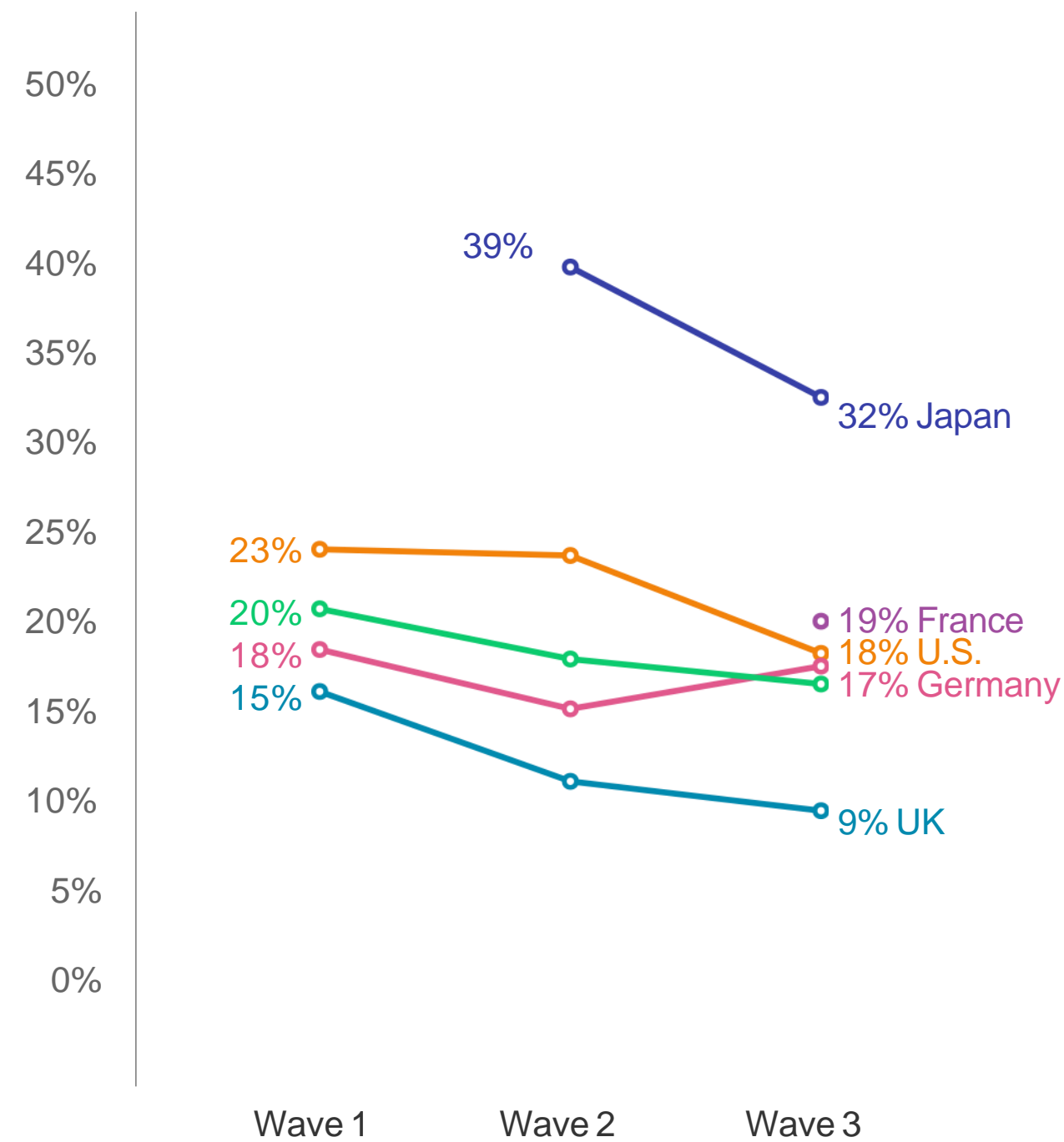
- Respondents across all countries were asked how long they think the effects of the virus on a range of different issues will last for.
- Percentage from each country choosing "Longer than a year" or "Longer than two years" for each issue.

# 6 The labor market during the crisis

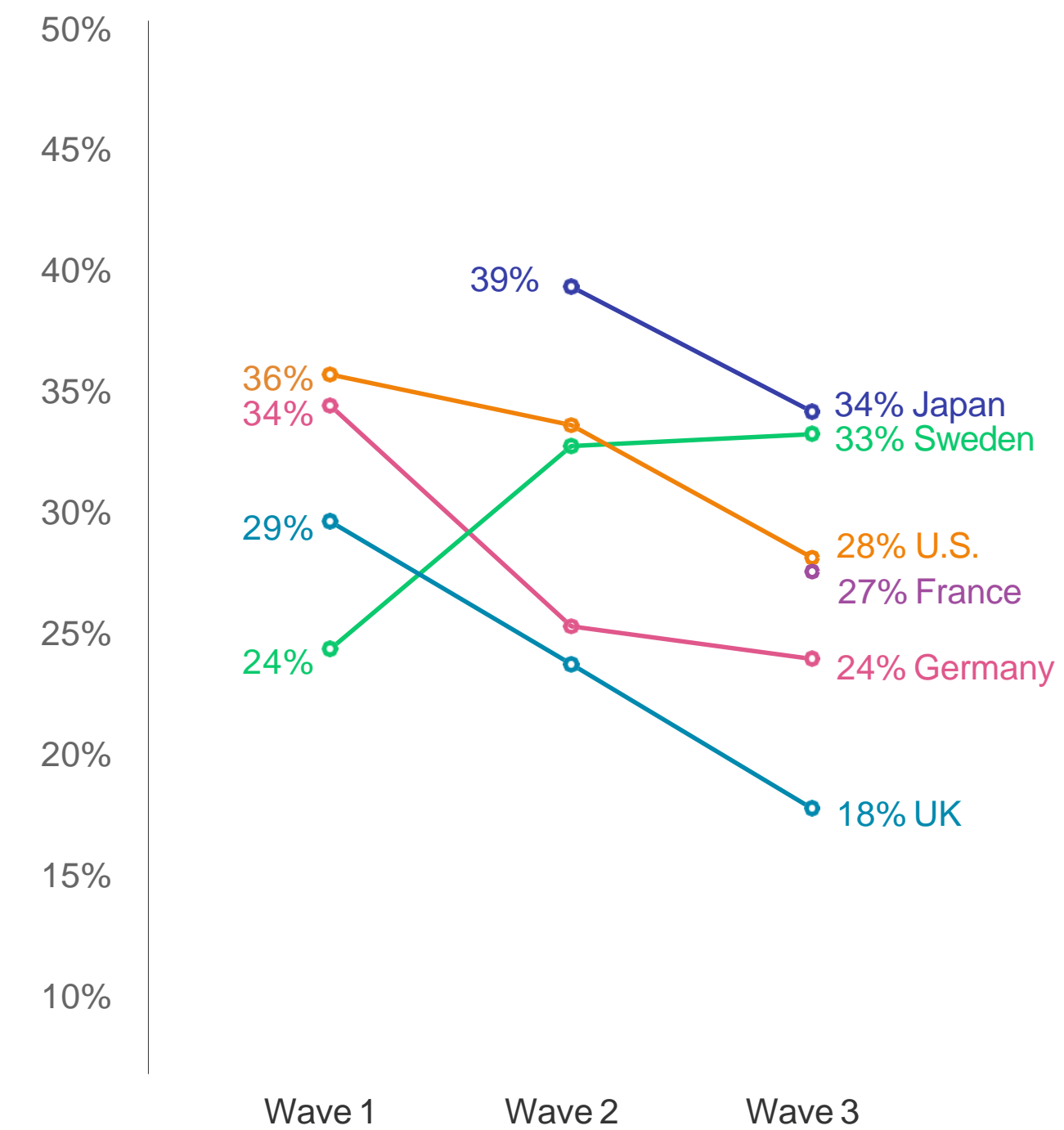


In general, fewer expect to lose their job compared to the start of the crisis but Japanese figures stand out as record highs

I expect to lose my job



I am worried that my company overall might collapse



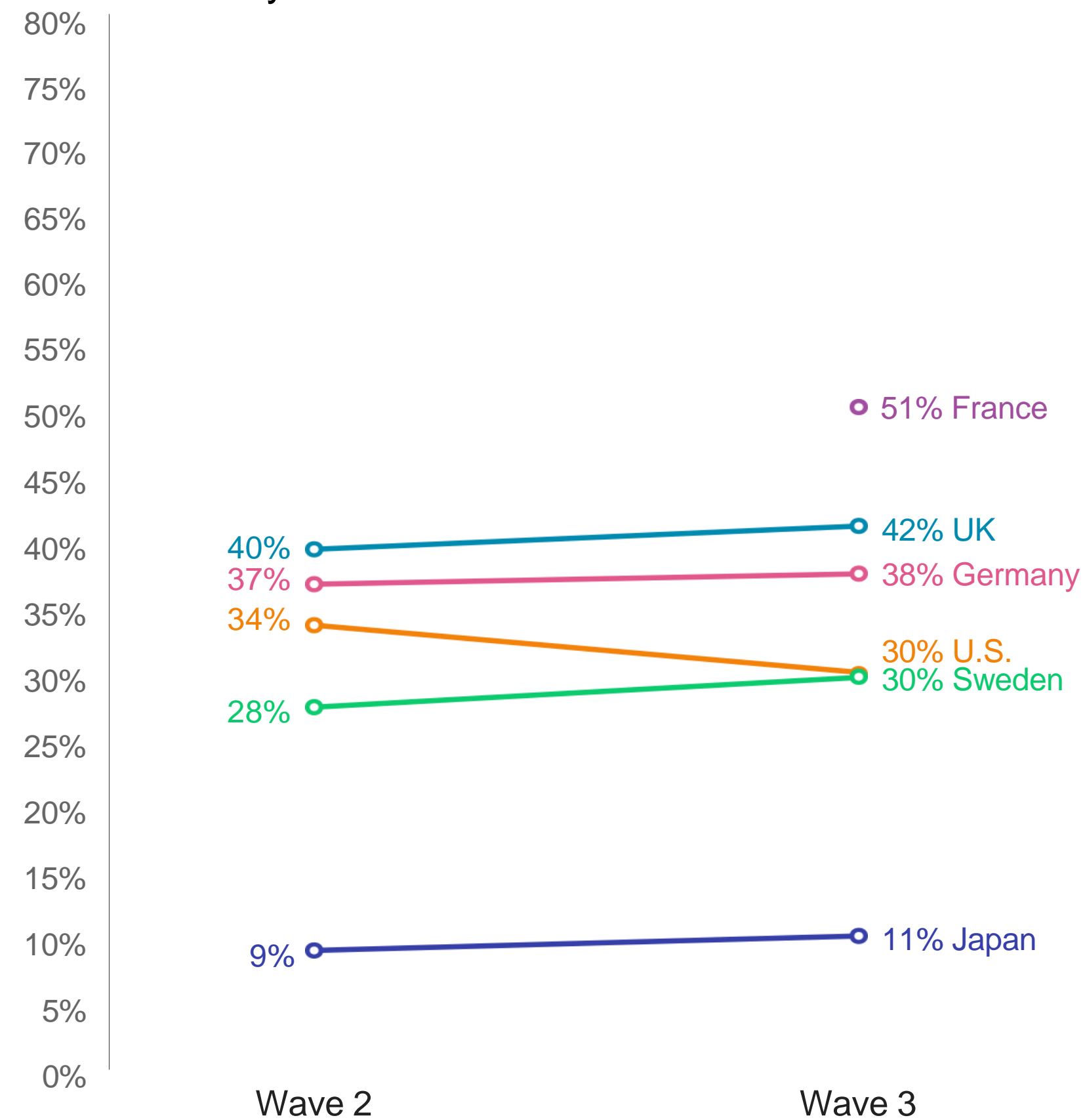
- Respondents across all countries were asked whether they agreed or disagreed with a set of statements referring to their own employment and job. All statements here are filtered just by those who said they are working full-time or part-time, apart from "I have already lost my job" which is presented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

# 7 Views of business support

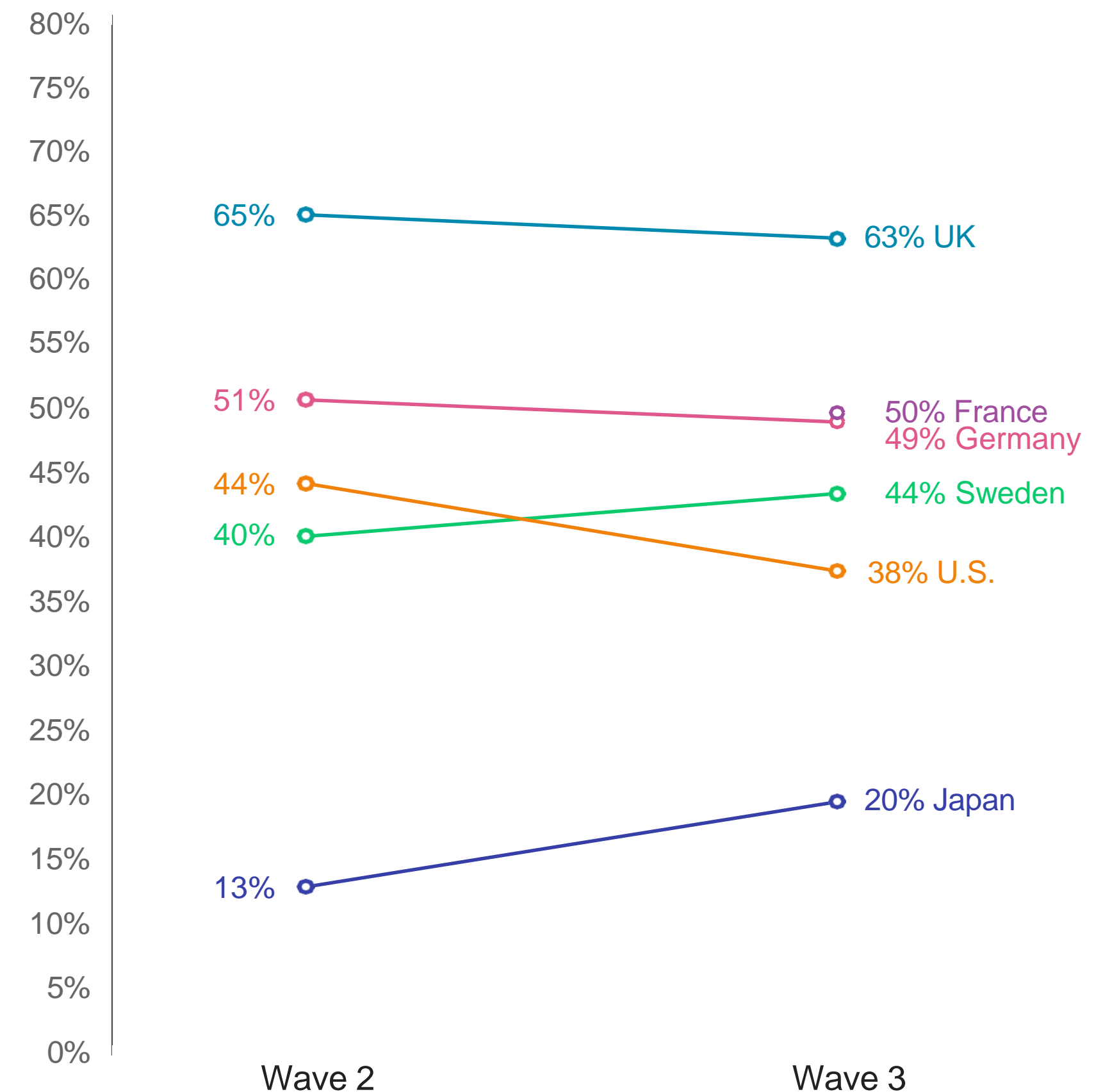


People think their governments are giving business the support it needs but the Japanese respondents are sharply critical – like a month ago

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



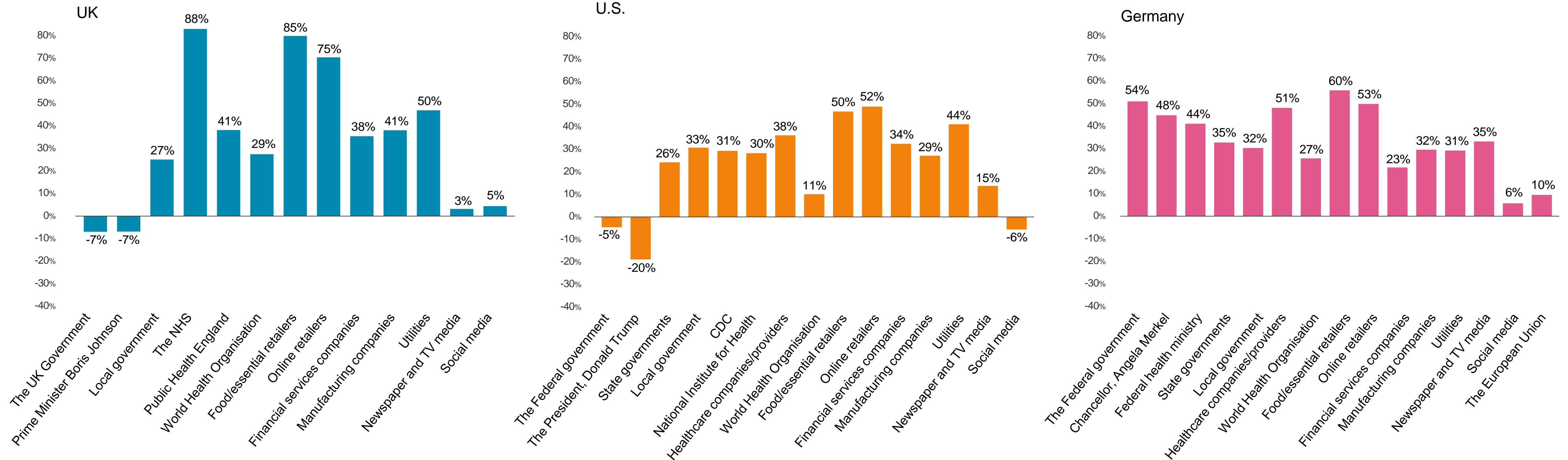
The government in my country is giving businesses the support it needs during the crisis



# 8 Performance of institutions



Most institutions perform well across countries, and the German public are the most positive about how their institutions have performed

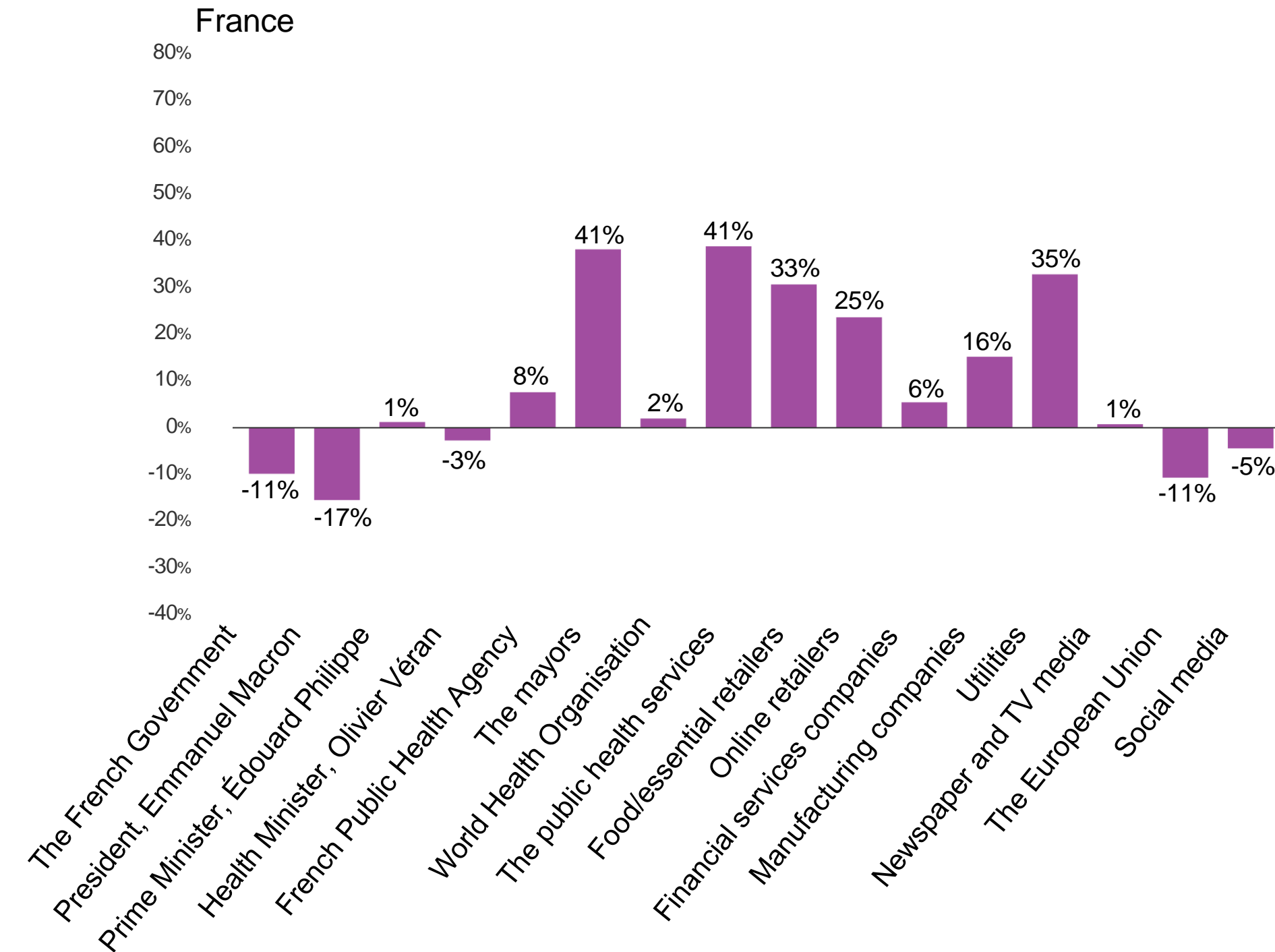
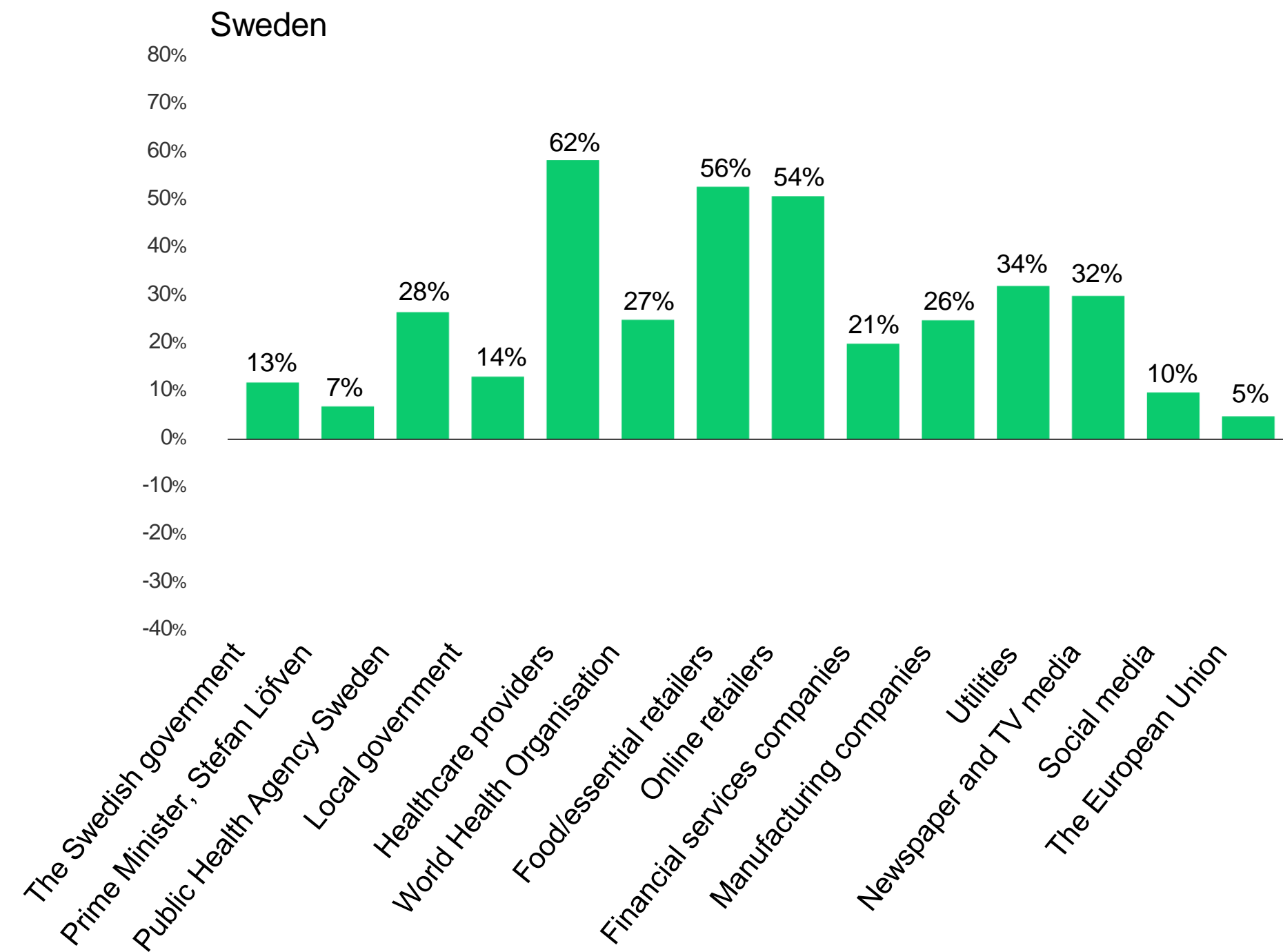


• Respondents across all countries were asked whether they thought a number of institutions had done well or badly in responding to the coronavirus. Displayed is the net 'well' score in each country.

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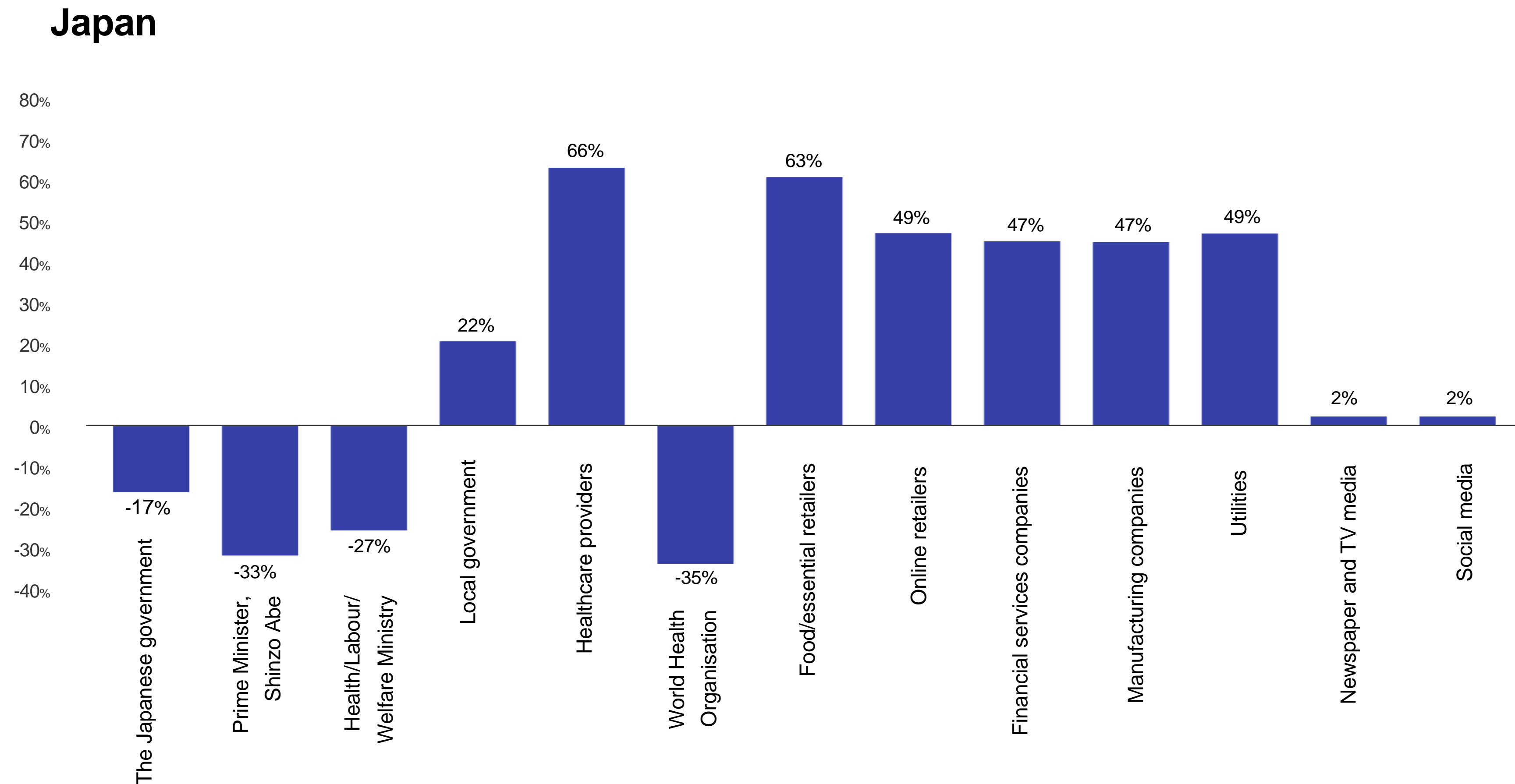


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# 8 Performance of institutions



By contrast, Japanese very critically evaluate performance of the Japanese government, Prime Minister Abe, the Health Ministry and also the WHO



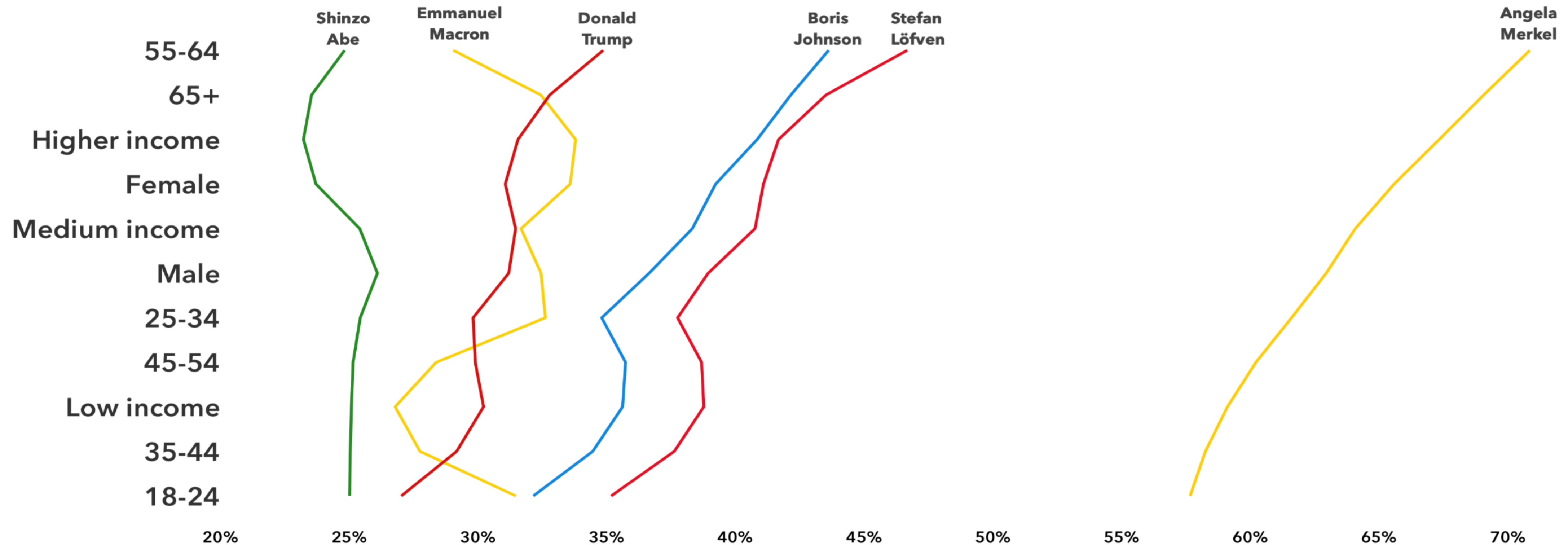
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# 8 Ratings for country leaders' crisis performance



Prime Minister Abe stands out with the lowest approval ratios of all six country leaders among all respondent categories

% in each category saying their leader had done well in handling the virus

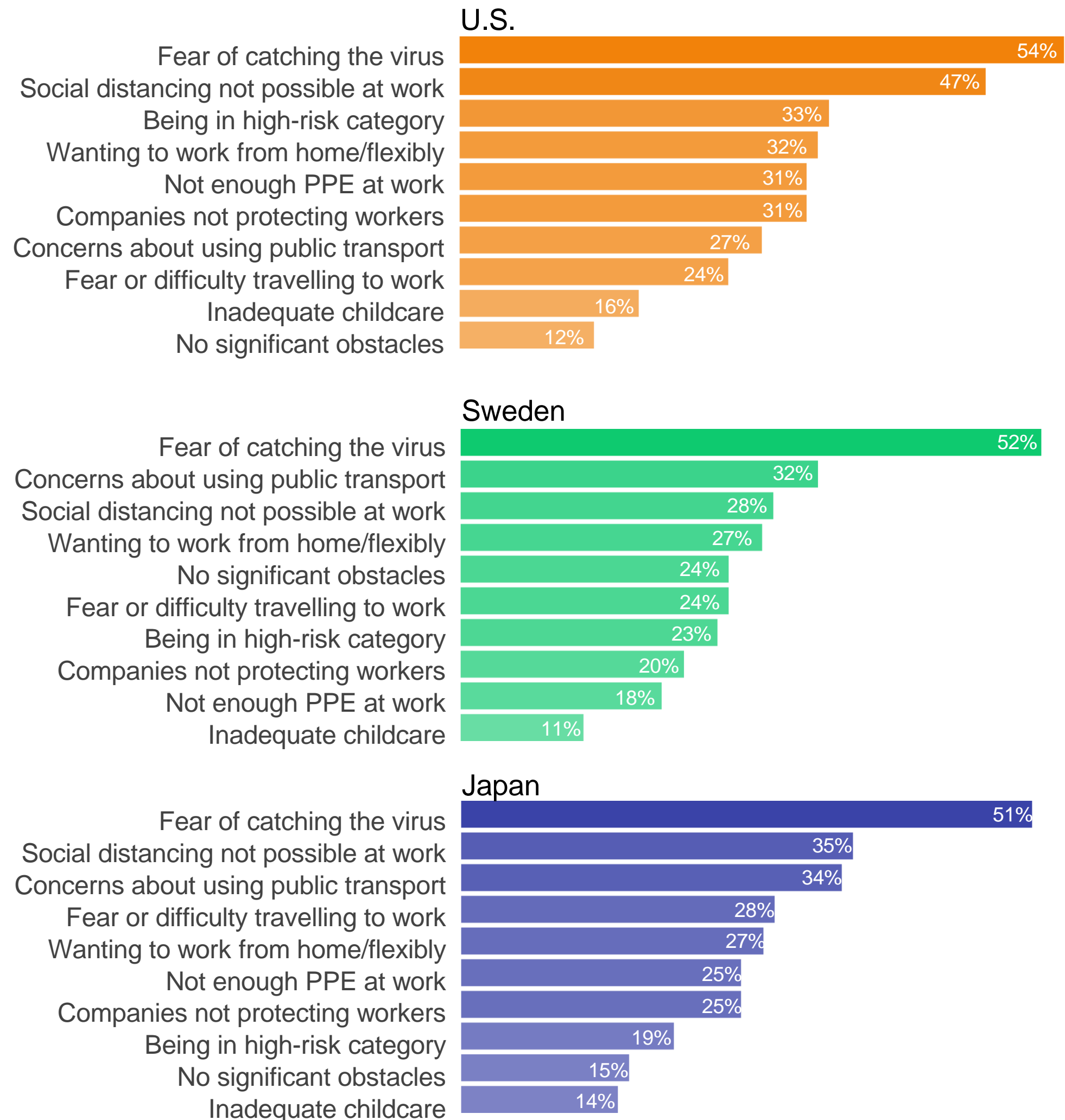
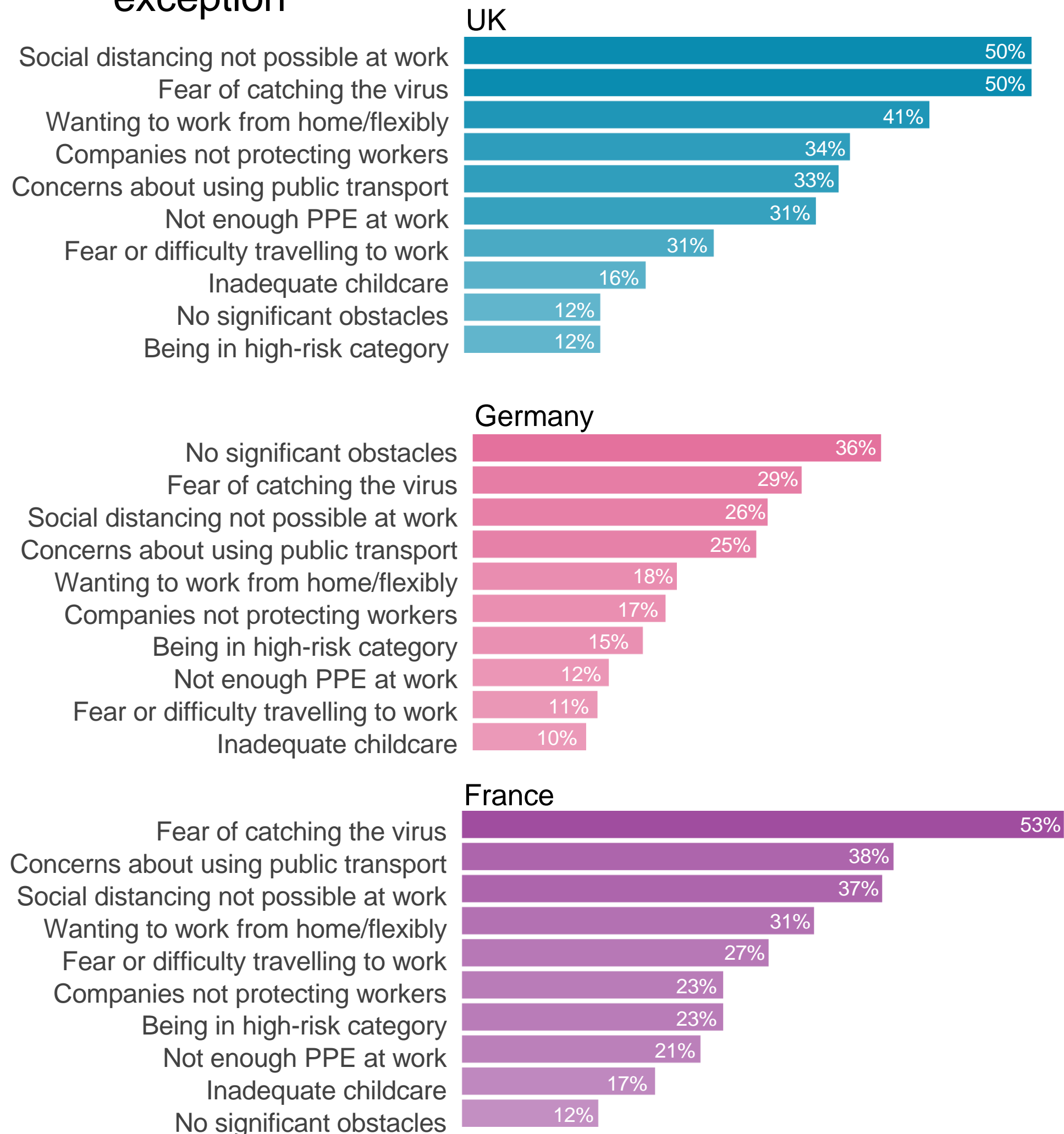




# 9 Barriers to office workers returning



Fear of catching the virus and social distancing measures are the main barriers to returning to work – Germany being the only exception

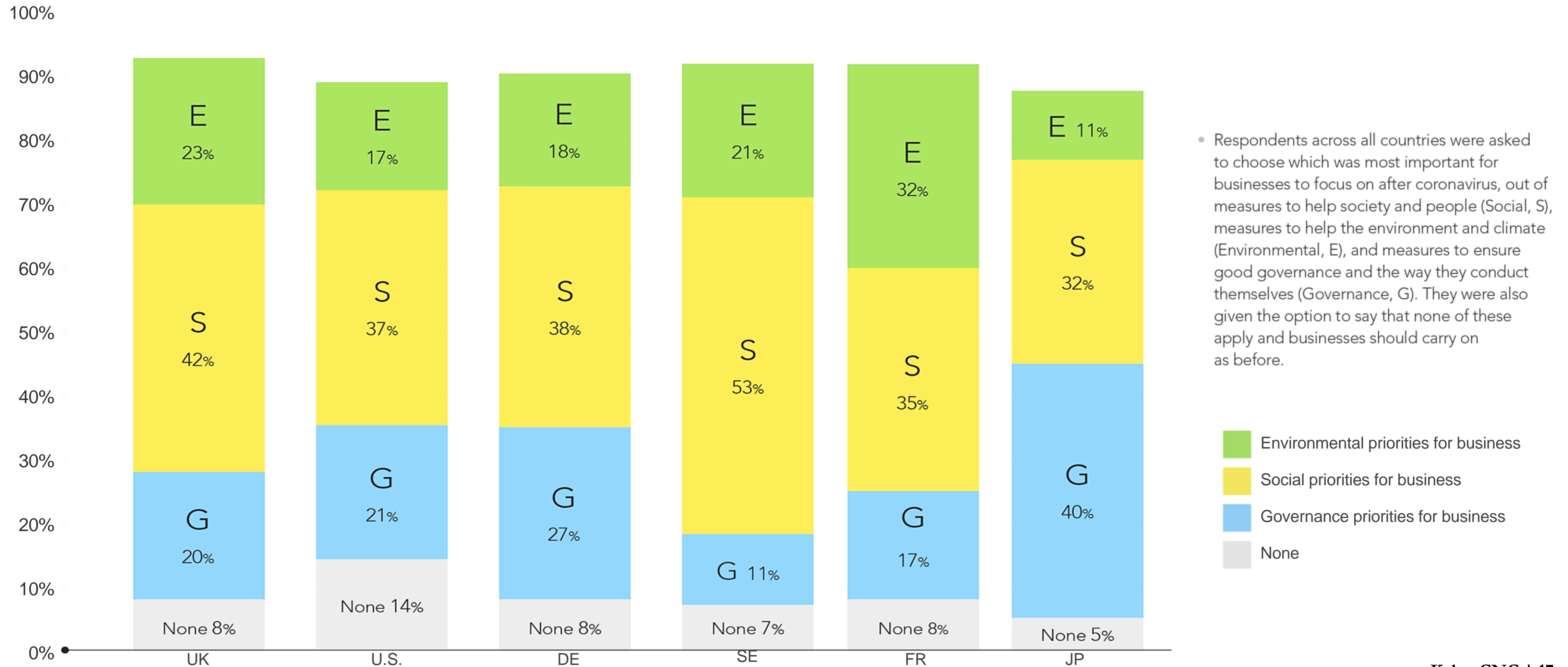


- Office workers across all countries were asked what they felt were the main barriers to them returning to work.

# 10 ESG priorities



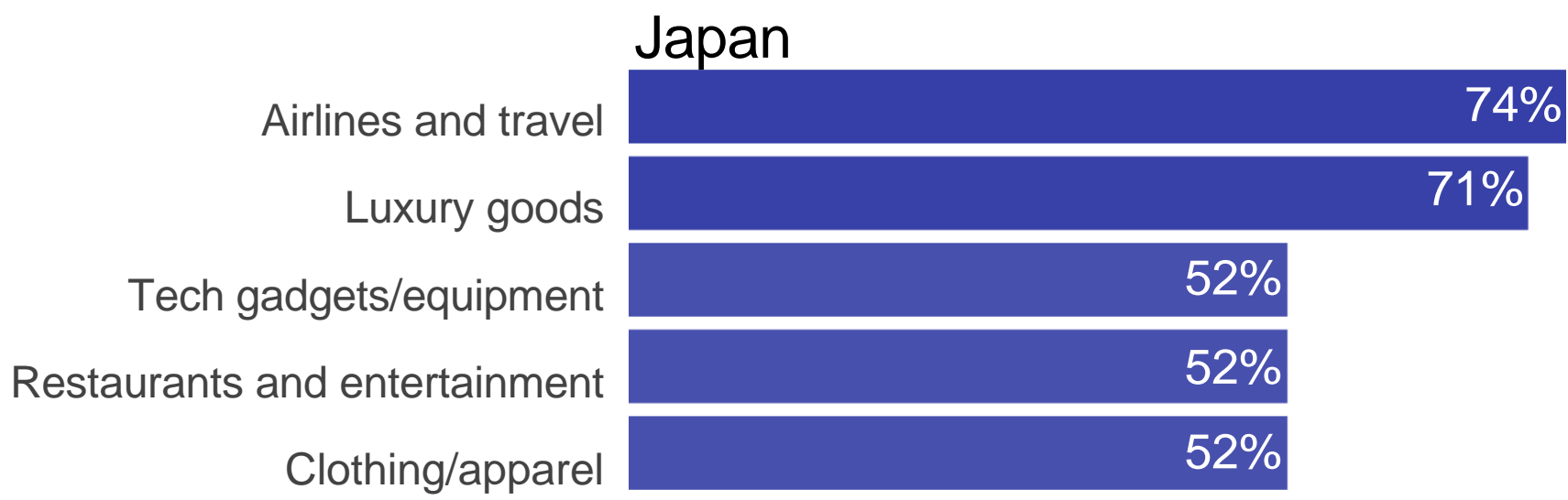
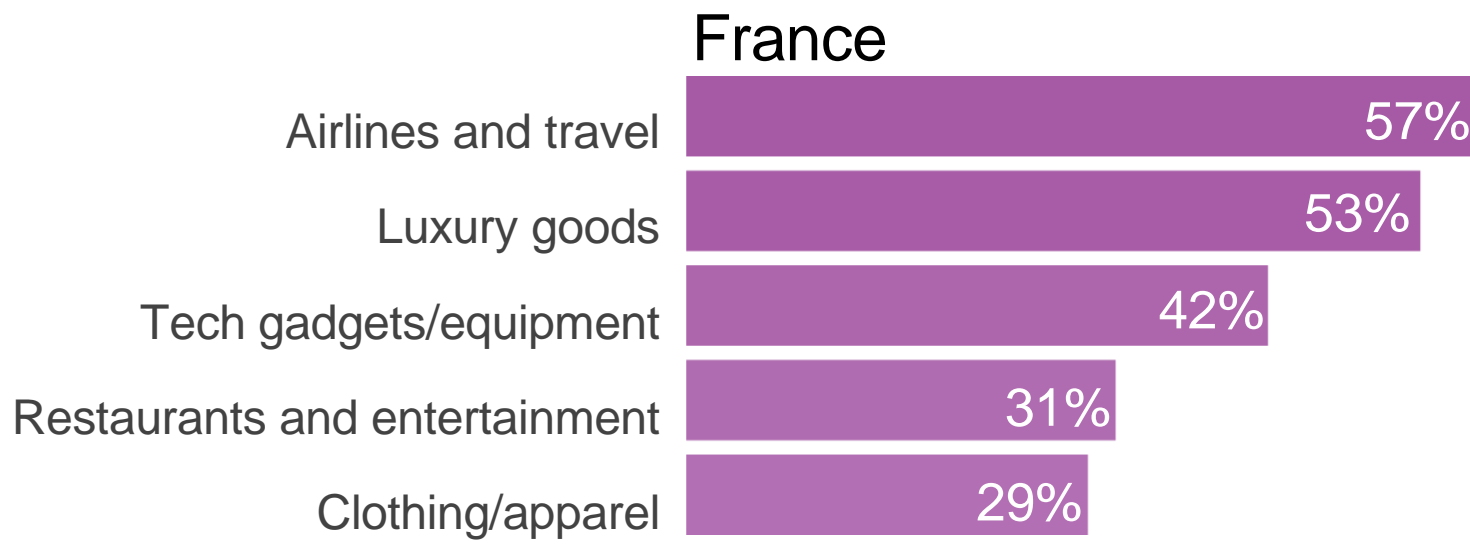
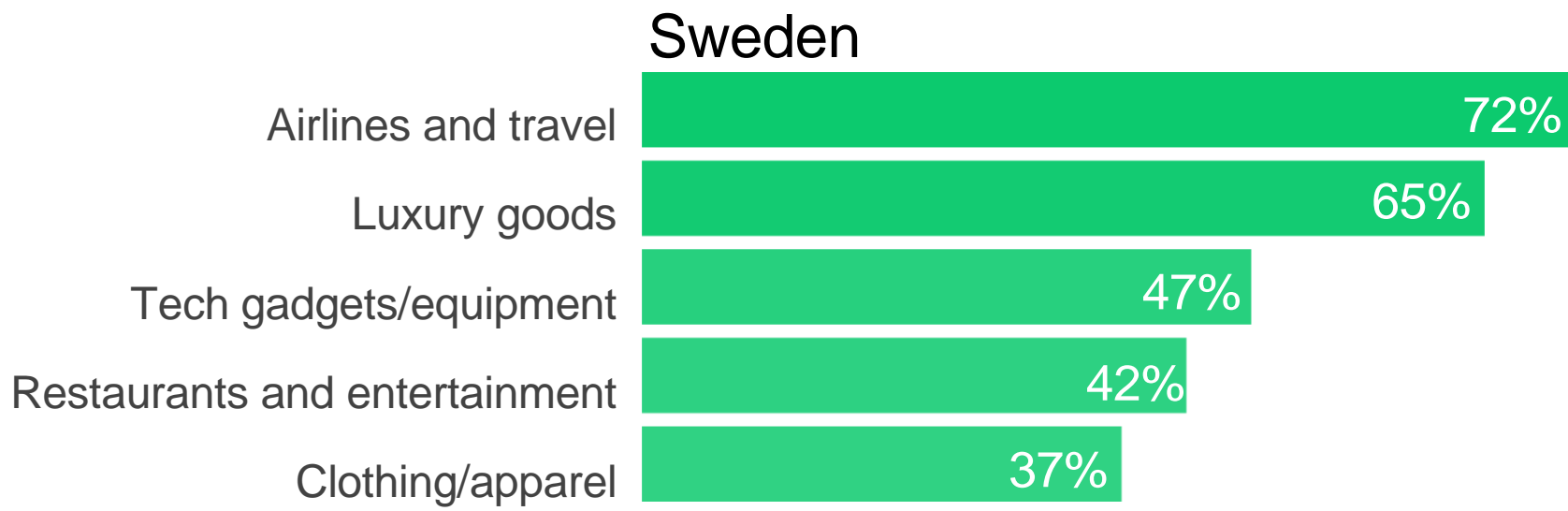
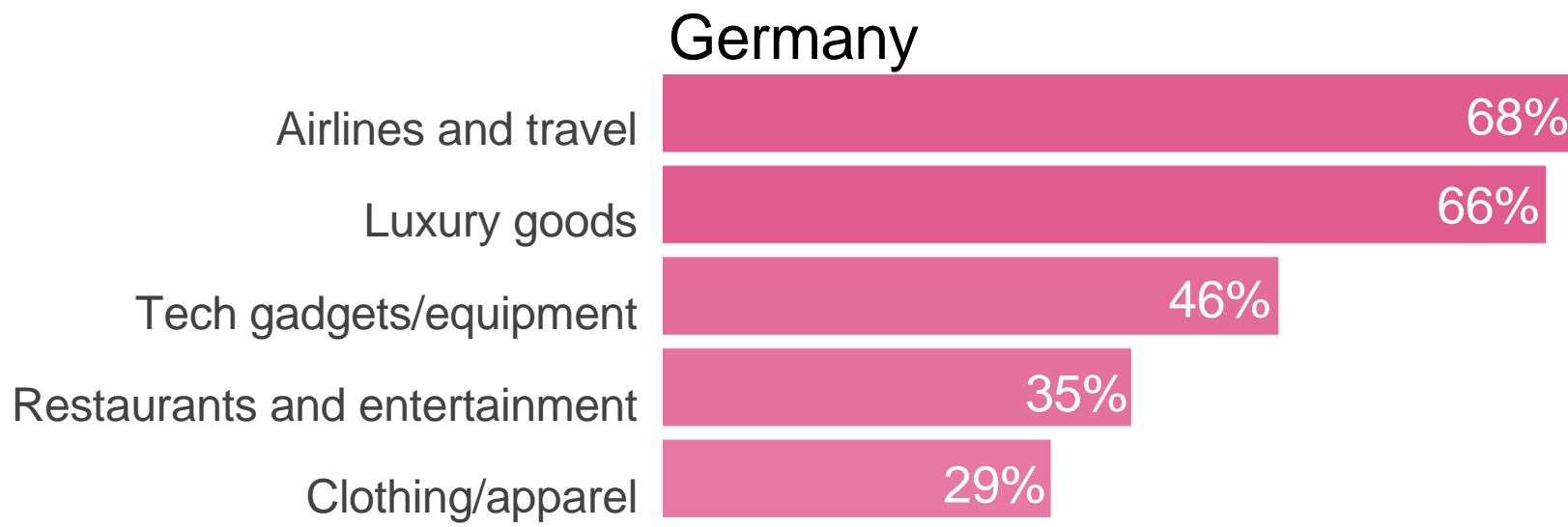
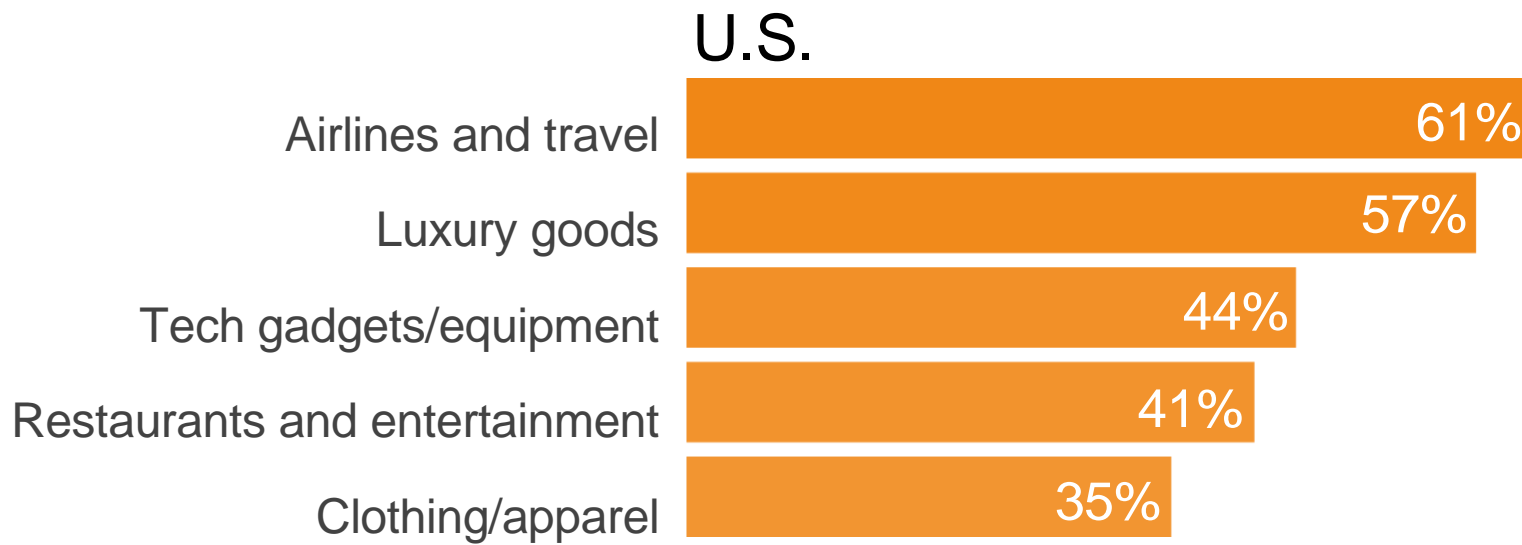
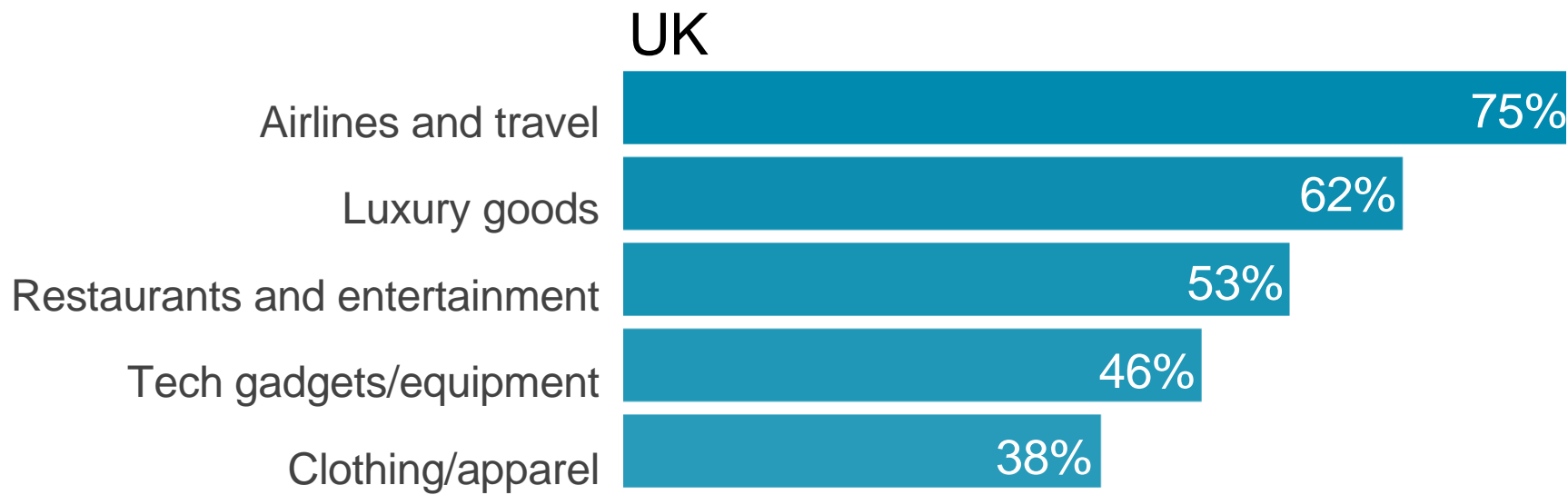
People most want to see businesses focusing on the measures to help society and people – there has been a shift to the ‘S’ of ESG





# 11 Spending habits

Globally consumers say they are not going to be ready to return to normal levels of spend on travel and luxury goods for at least one year



- Respondents across all countries were asked to say how long it would be for their spending on various goods and services to return to normal levels or higher.

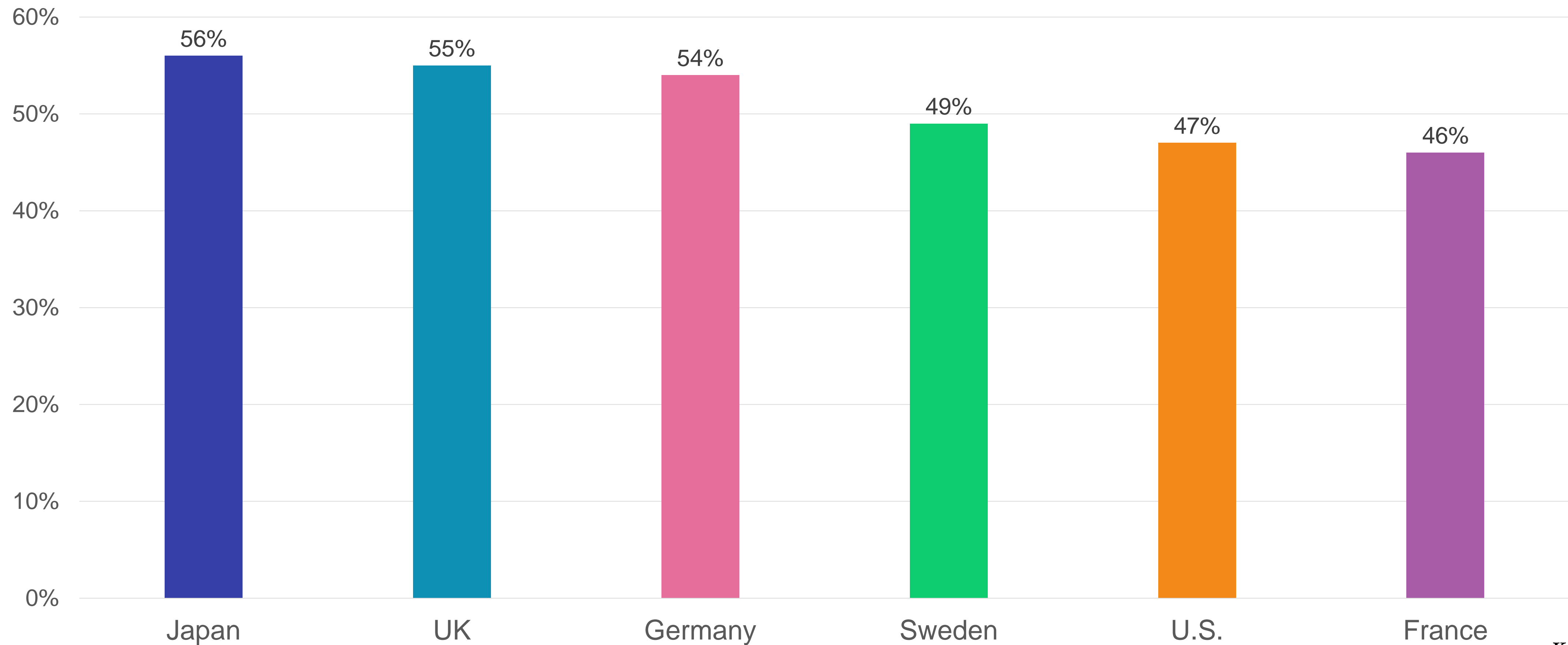
Displayed are the % in each country that say it would take until another year for them to do so.

# 12 Tokyo Olympic Games



About a half of all global respondents wish the Tokyo Olympics to be cancelled unless an effective vaccine is developed and made available

The Tokyo Olympics, currently scheduled for summer 2021, should only be held if a vaccine is widely available



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/)