

## International Survey on COVID-19:

### Only 18% of Japanese think the government is prepared for a second wave

- 33% of Japanese expect to lose their job, the highest figure among 6 countries surveyed
- Employees' top expectations globally incl. Japan are pay, healthy and safe workplace and job safety
- Japanese employers are rated worst for their performance during the pandemic
- Low satisfaction with internal and employee communications by Japanese companies

**Tokyo, 15 October 2020** – The 5<sup>th</sup> Kekst CNC COVID-19 international tracking survey has shown that 62% of Japanese are more worried about the future of Japan than they have ever been before.

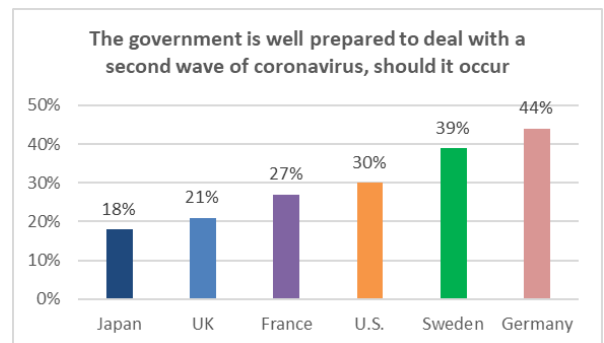
The research, carried out among a representative sample of 1,000 adults each in the US, UK, Germany, France, Sweden and Japan (6,000 adults in total) between 16 and 22 September, shows even higher concern levels in the UK (73%) France (65%), same concern in the US, and slightly lower ones in Germany (55%) and Sweden (44%).

The share of Japanese who want their government to limit the spread of Covid-19 is 43% and still far higher than those who like to see the government to prioritize the economy with 25%, although this number has increased from May (16%), June (22%) and July (22%).

#### High expectations of a second wave but limited faith in government preparedness

In all countries surveyed, more than half of the respondents expect a second wave of the coronavirus over the next 12 months. The figure for Japan is 57%.

Only 18% of Japanese think their government is well prepared to deal with a second wave of coronavirus should it occur, far less than in any other country.



#### Strong concerns about economic livelihood and ongoing dissatisfaction with the Japanese government's business support

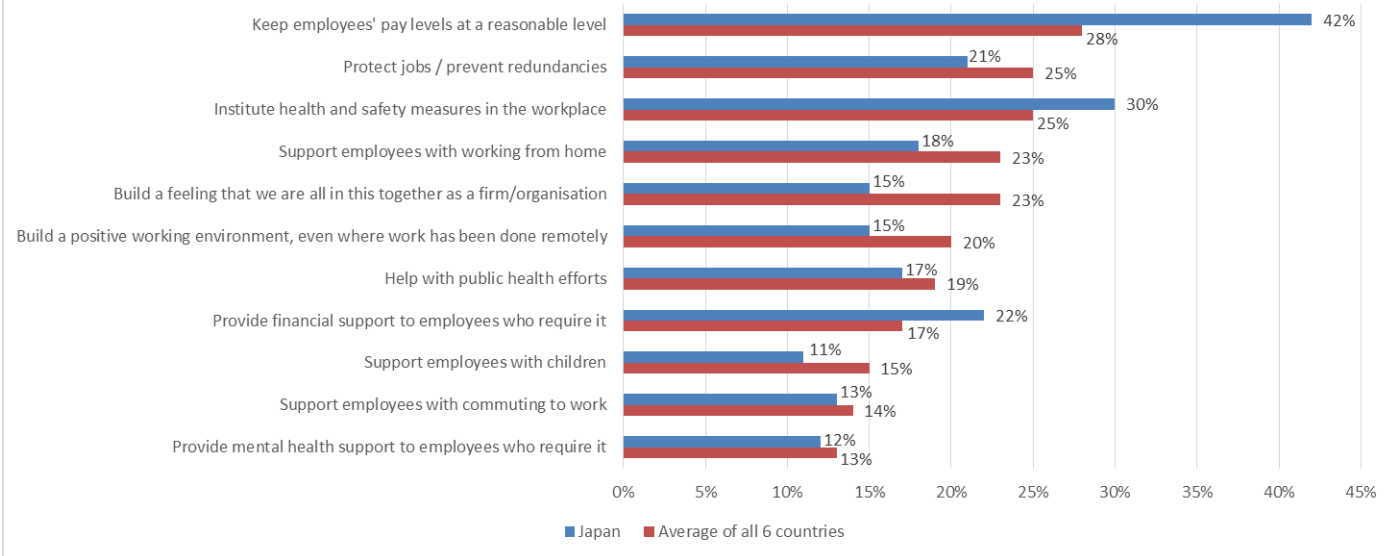
Japanese respondents are very concerned about their future employment situation. 33% of them expect to lose their job (compared to 11-17% in the UK, Sweden, Germany and France). Even the figure of 28% for the US is clearly lower than that for Japan.

Japanese continue to rate the business support provided by its government far lower than their global peers. Only 22% of Japanese feel that the government is giving business the right support it needs (compared to 35-49% in the other five countries). And only 15% think government's business support is getting through to companies that really need it (compared to 28-41% in the other five countries).

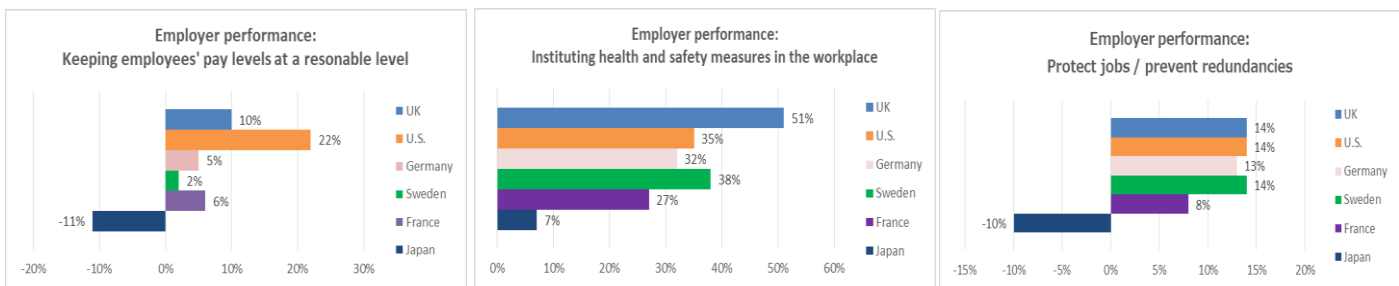
#### Low ratings for employer performance during the pandemic in Japan in areas most important for employees

When asked what employers should prioritize the most over the next three months, the three top expectations over all six countries are very clear: pay, a healthy and safe workplace and job protection. Japanese respondents named basically the same three top priorities with a strikingly high share naming pay levels as their top priority (42%). This comes as no surprise as Japan nominal wages fell for the fifth straight month in August to 273,263 yen on average, according to the announcement by the Ministry of Health, Labor and Welfare on October 9. Providing financial support to employees, who require it, is ranked in particular high in Japan (22%) and again shows the high economic concerns here.

### Main expectations by employees to their employers over the next three months

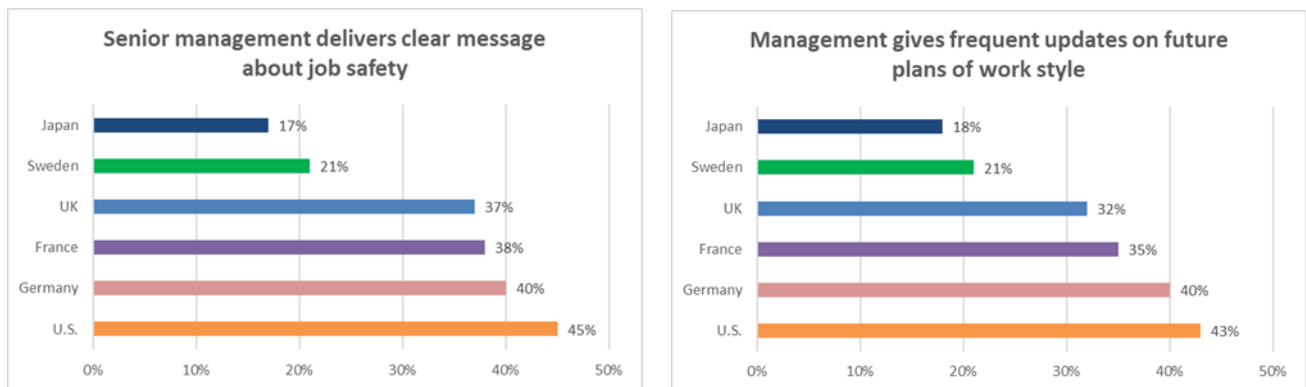


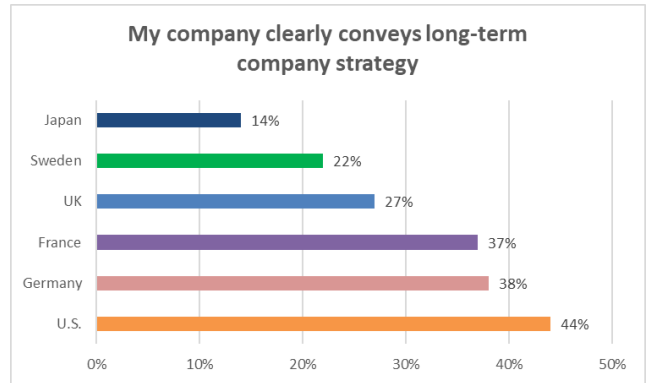
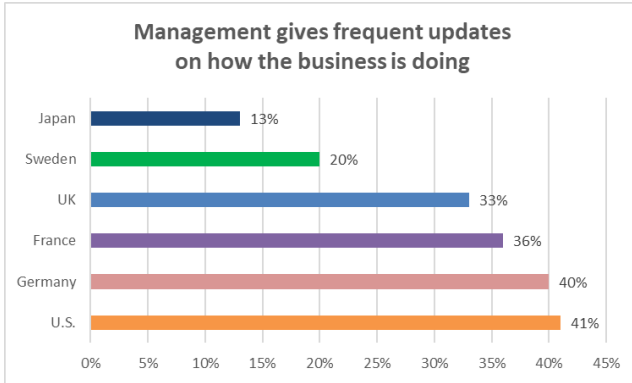
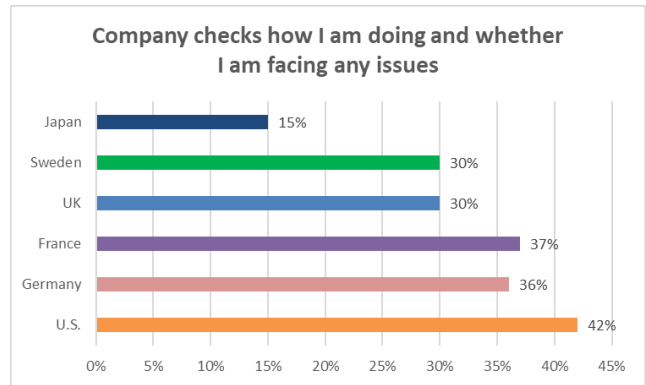
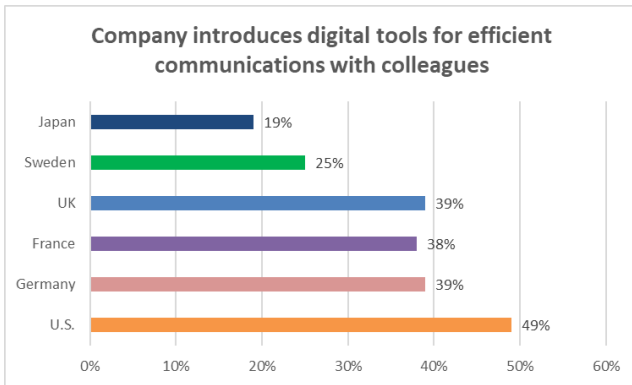
But Japanese rate the actual performance of their employers in the global top three categories far more critical than their counterparts in all other countries. While employers in the UK, the US, Germany, Sweden and France get positive net ratings for all three categories, Japanese respondents evaluate their employers clearly negative on a net basis. Only Health and Safety Measures in the Workplace are rated slightly positive in Japan but still far lower than in any other country.



### Employees dissatisfied with communications by their companies

Japanese employees are also less satisfied than their international peers with the way their employers communicate. Whether it is about frequent short-term updates, digital tools for efficient communications, clear messages about job safety, about the long-term company strategy or other communication areas, only 13-19% of Japanese think that Japanese companies have been doing a good job during the Covid-19 crisis. The satisfaction is much higher in the other five countries with values going up to 41-49% for each surveyed area.





Commenting on these findings, Jochen Legewie, Chairman Asia and Managing Director Japan of Kekst CNC, said, “The top demands to employers under Covid-19 are the same everywhere globally and they are loud and clear: a reasonable pay, a healthy and safe workplace and job protection. Japanese companies are very lowly rated for their performance in these areas. Likewise Japanese employees are not satisfied with the internal communications within their companies. This combination might create a vicious circle and become a major challenge for many firms.”

**Methodology and full results**

- Nationally representative sample of 1,000 adults each in Great Britain, Sweden, Germany, the United States, France and Japan.
- Fieldwork took place on 16-22 September 2020.
- Quotas and weights on gender, age and region in each country.
- Margins of error of +/- 3.3% for all countries.

Full results of the survey available at: <https://www.kekstcnc.com/insights/covid-19-opinion-tracker-edition-5>

**About Kekst CNC**

Kekst CNC is a leading global strategic communication consultancy. The team of over 250 experienced professionals serve clients from 13 offices in New York, London, Munich, Berlin, Frankfurt, Paris, Brussels, Tokyo, Seoul, Hong Kong, Dubai, Abu Dhabi and Stockholm.

As trusted advisors, the firm contributes its expertise on such high-stake matters as: M&A, shareholder activism and governance, crisis communications, restructurings, regulatory investigations, litigation support, investor relations, IPO communications, issues and reputation management, change management and employee engagement, as well as digital and social communications. The Tokyo office has been serving its Japanese and international clients since 2004.

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