

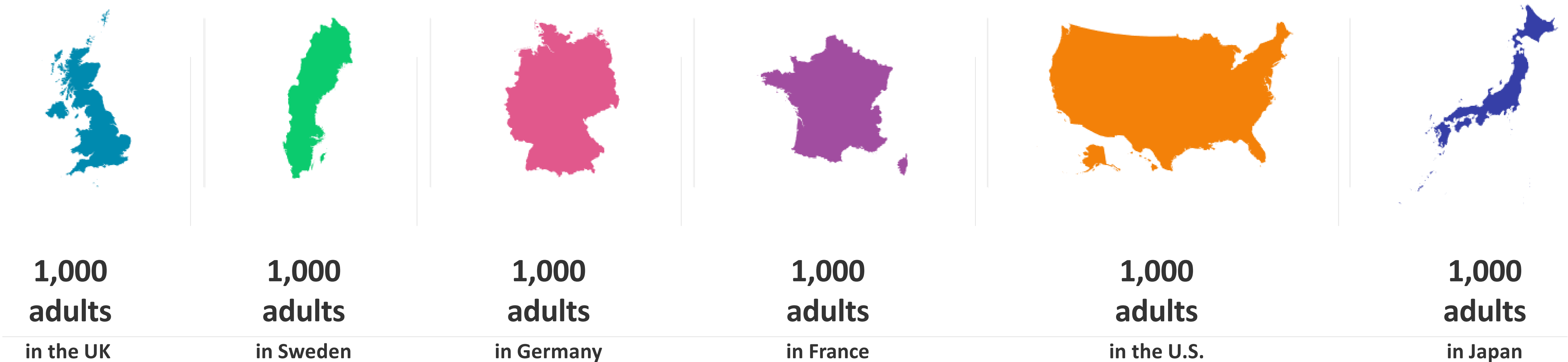
Kekst CNC Jochen Legewie

# COVID-19 Opinion Tracker Fifth Wave

Tokyo, 16 October 2020

# Methodology

Polling conducted by KEKST CNC, nationally representative sample of



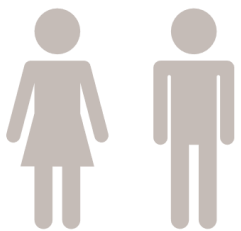
Fieldwork of wave 5  
took place on  
16<sup>th</sup> – 20<sup>th</sup> September  
2020

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

Fieldwork of wave 4 took place on  
10th July – 15<sup>th</sup> July



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

## The economy on the rise

In the next phase of the pandemic, people are becoming more likely to want their government to prioritise the economy

2

## Braced but not prepared

People expect more waves of coronavirus, but fewer believe their governments are prepared for them

3

## Business brands

In most countries, business has performed well during the pandemic – but the winter will pose different challenges

4

## Leadership matters

Public approval of institutions is falling fast in the UK and France, while people felt more positive in September in Sweden and Japan

5

## Put me first

Employees' priorities over the next three months are focused on pay, keeping their job, and health and safety measures

6

## More drugs, fewer planes

People want a bigger role for the pharmaceutical industry in the future economy, and a smaller role for aviation

# Japan Results: Six key findings

1

## Economic concerns in focus

Japanese increasingly want their government to prioritise the economy over health – but not yet

2

## Temporary respite for Suga

Following the change from Abe to Suga Japanese see their government less critical – but how long?

3

## Grave future outlook

More than 6 out of 10 people in Japan are worried about the future of Japan more than ever in the past

4

## Business and jobs - Stupid

No change in a far-reaching anxiety of job losses and dissatisfaction with governmental business support

5

## Put me first

Like elsewhere in the world, Japanese employees' want their companies to focus on pay, job safety, and health and safety measures

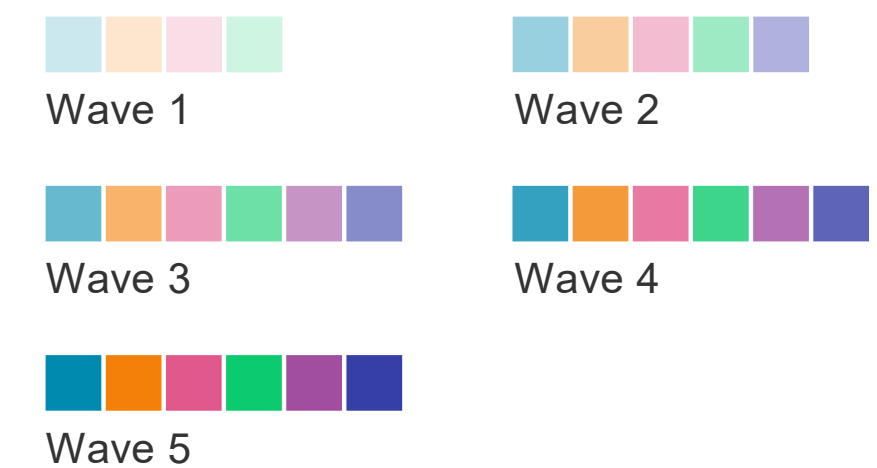
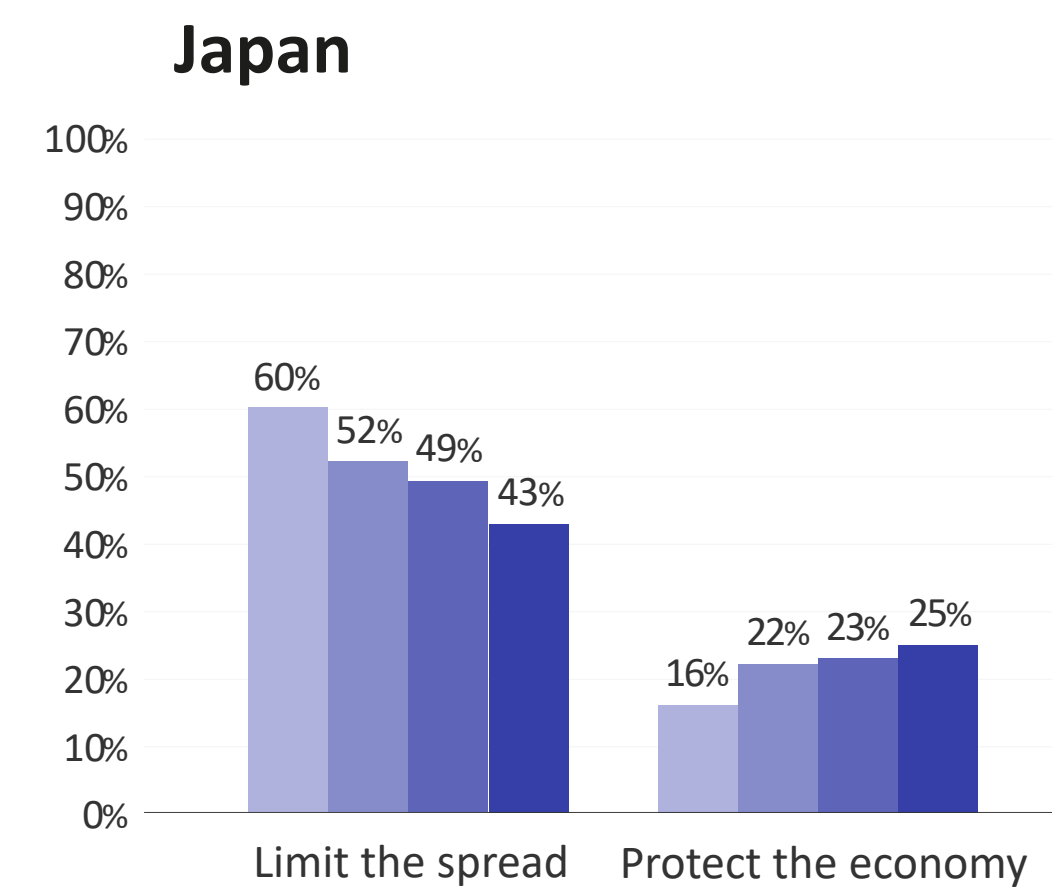
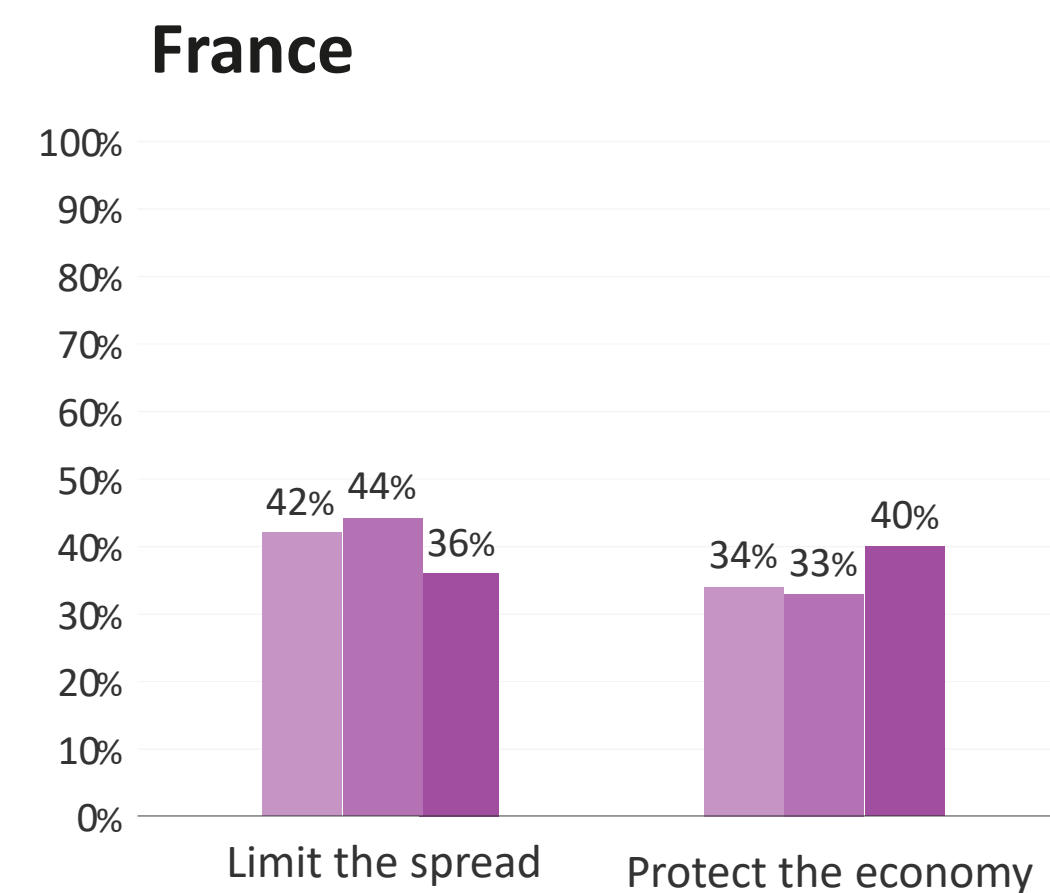
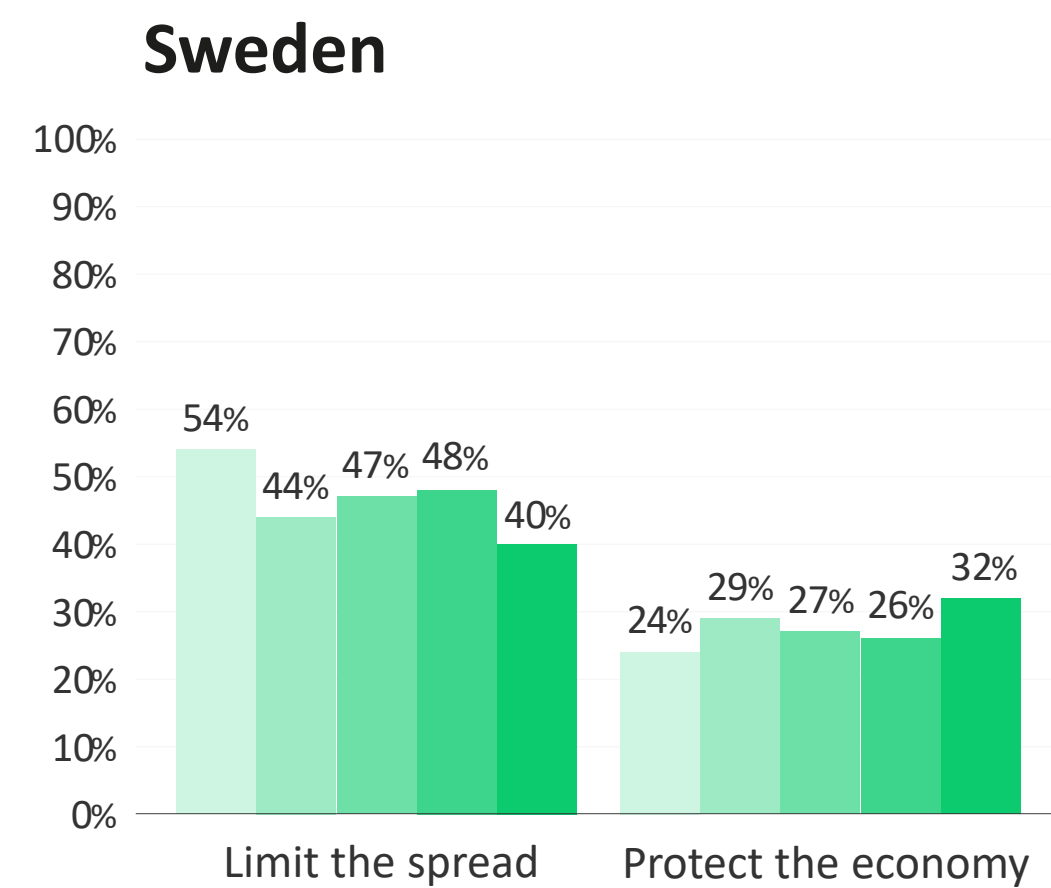
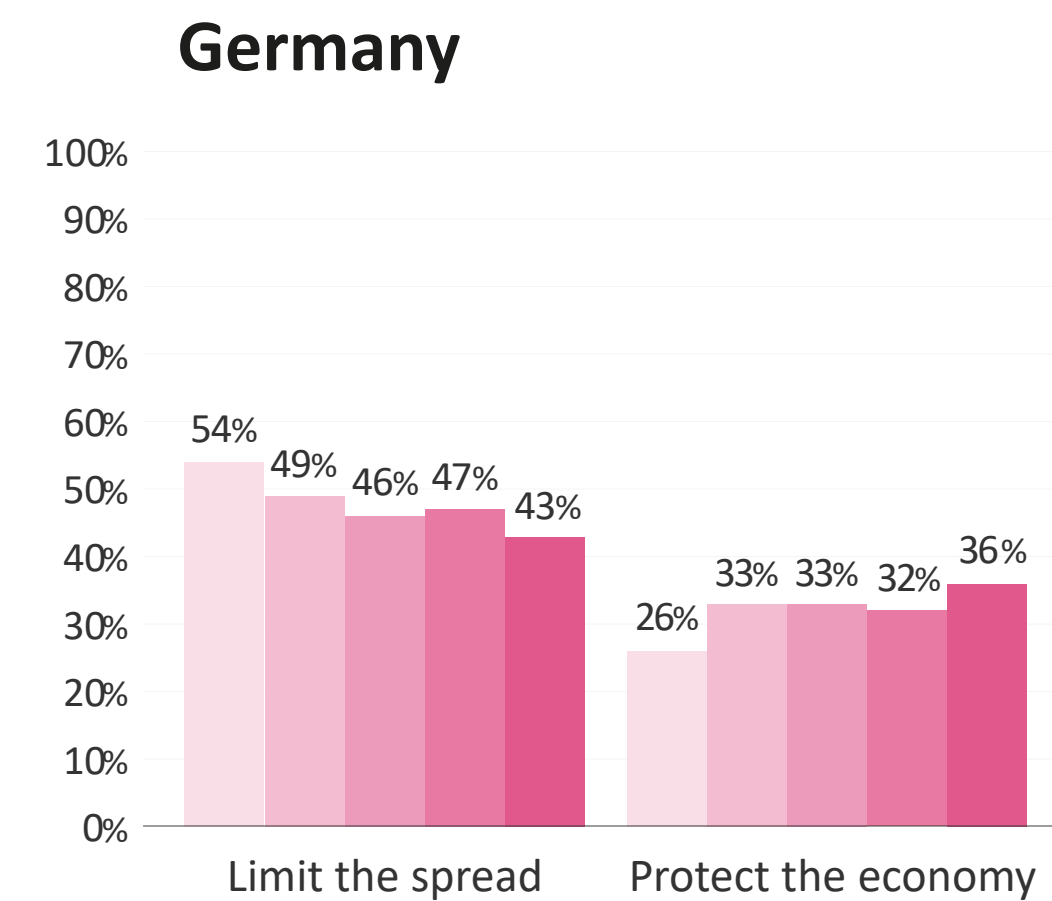
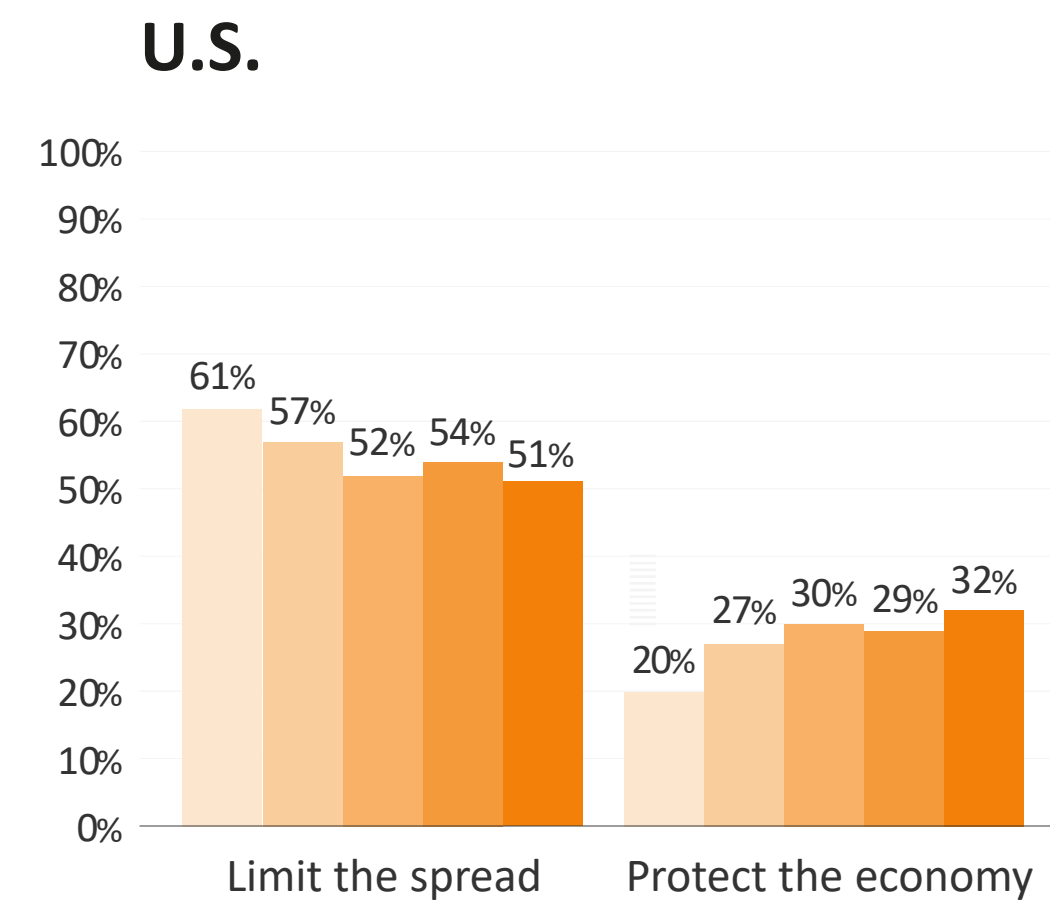
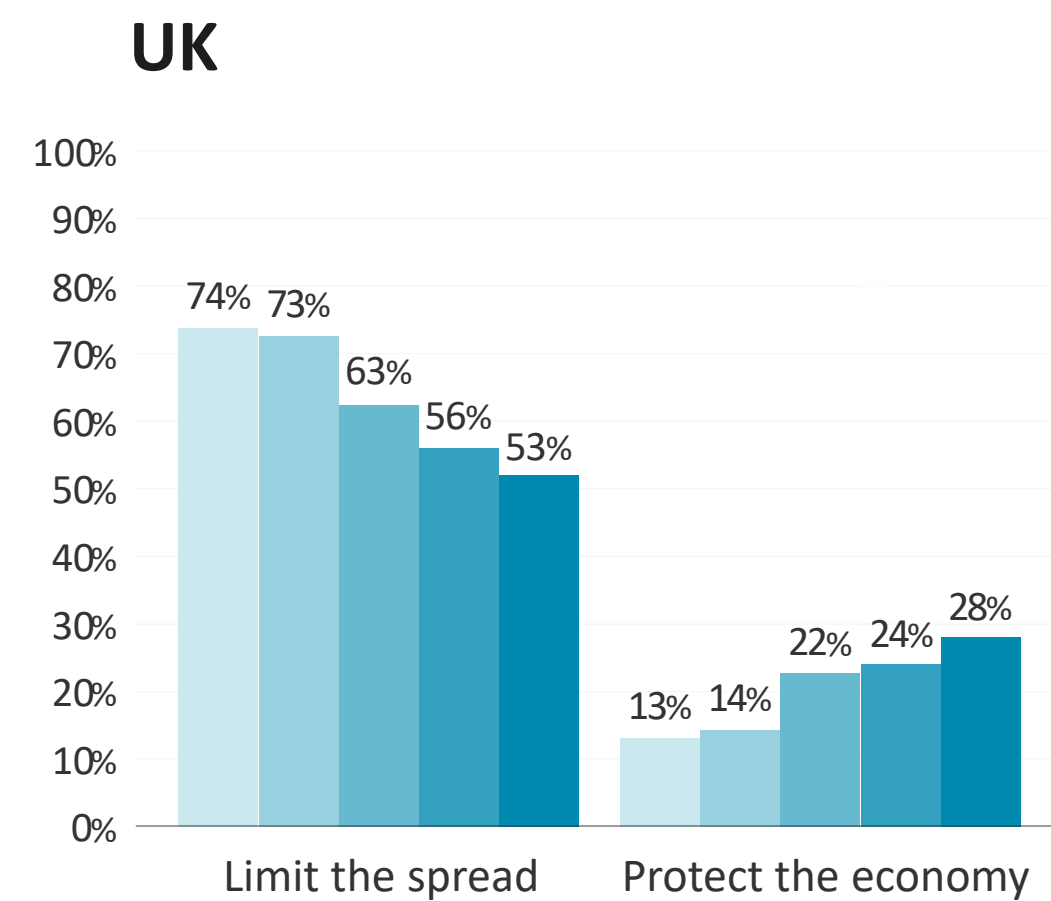
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## Act and communicate better

There is widespread dissatisfaction in Japan with employers' performance and communications during the crisis so far

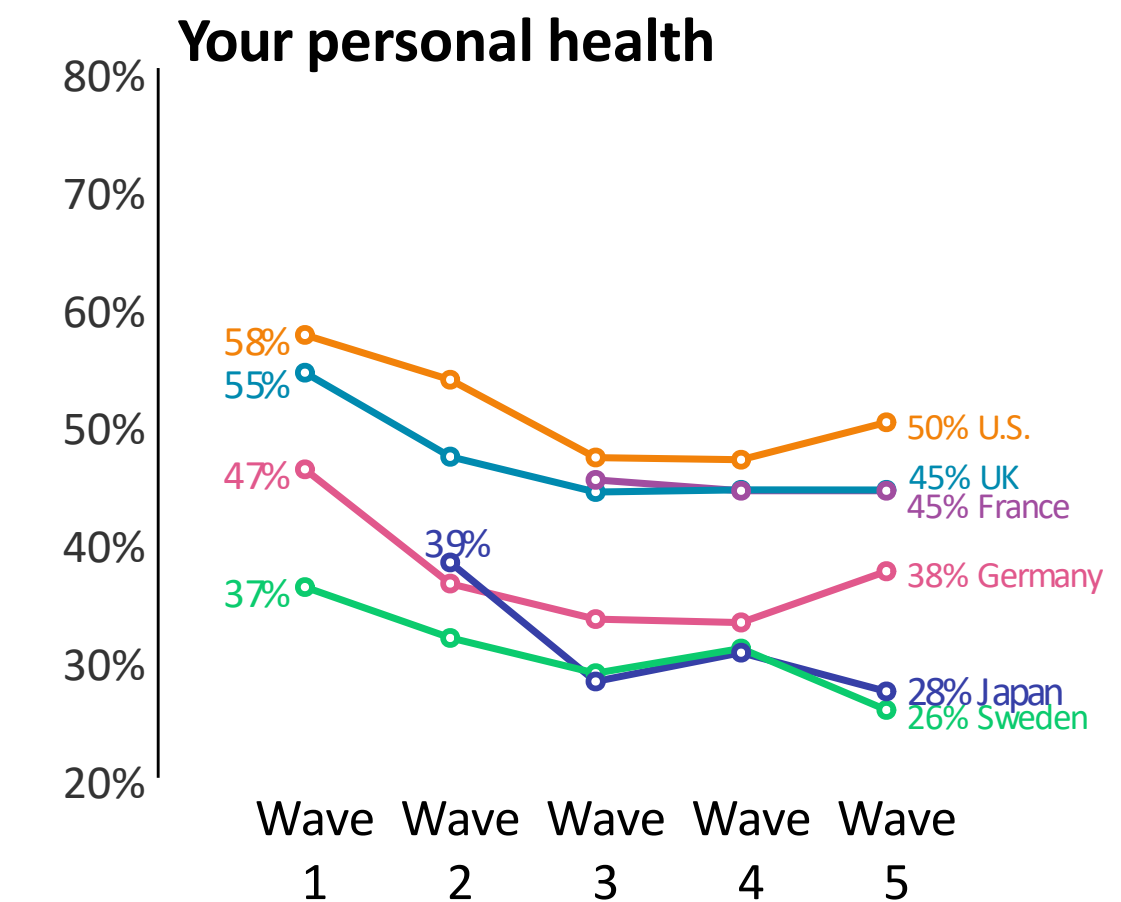
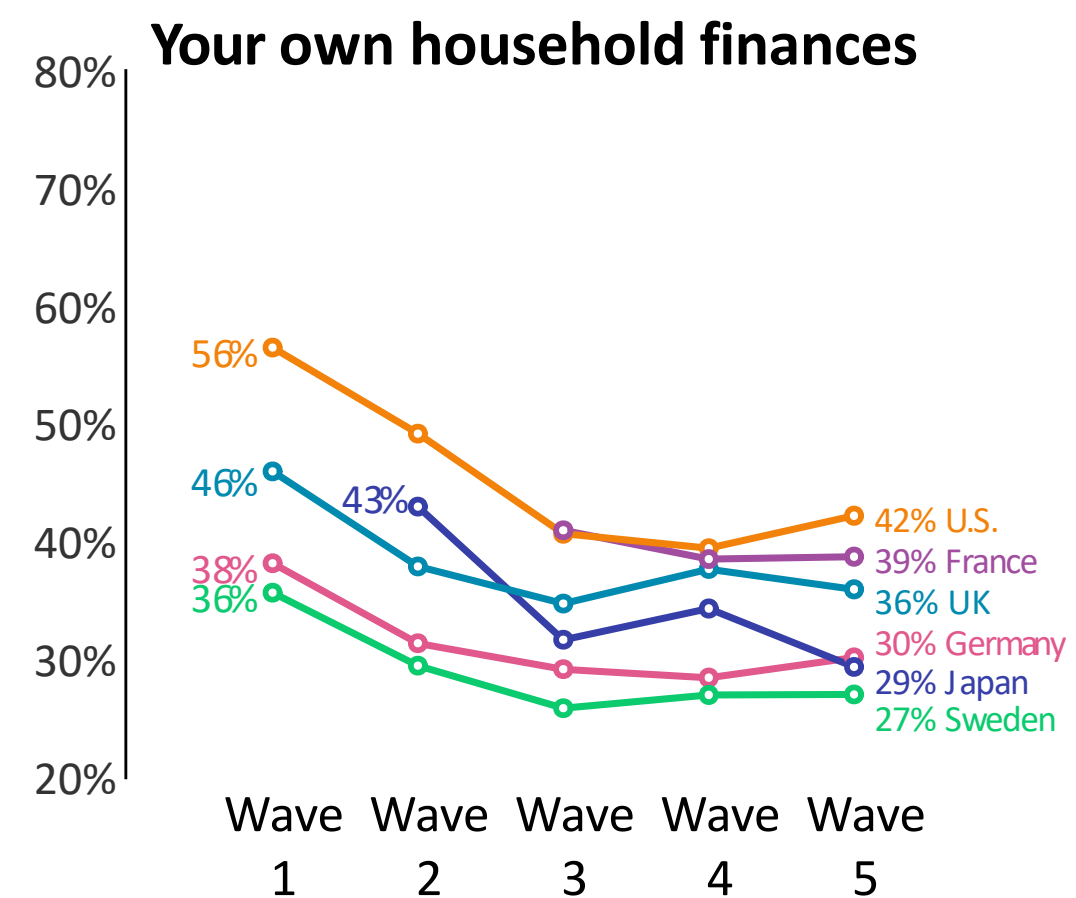
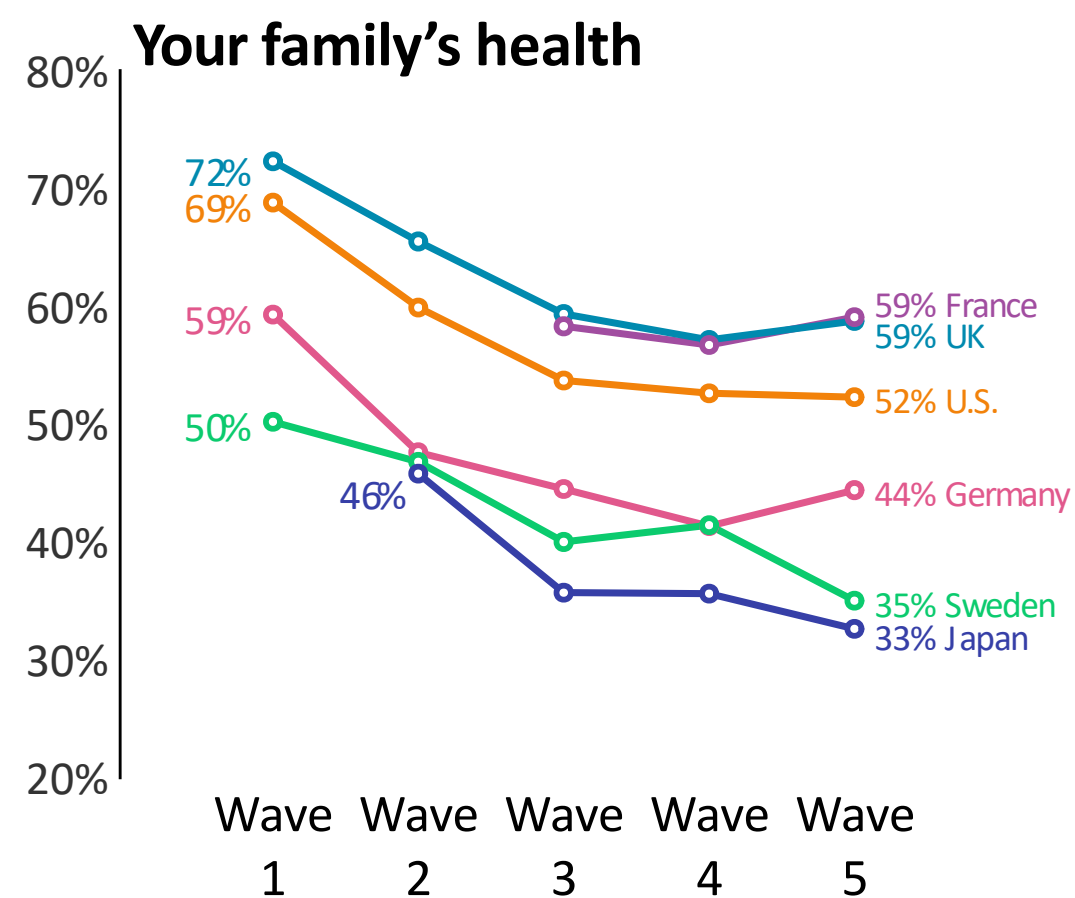
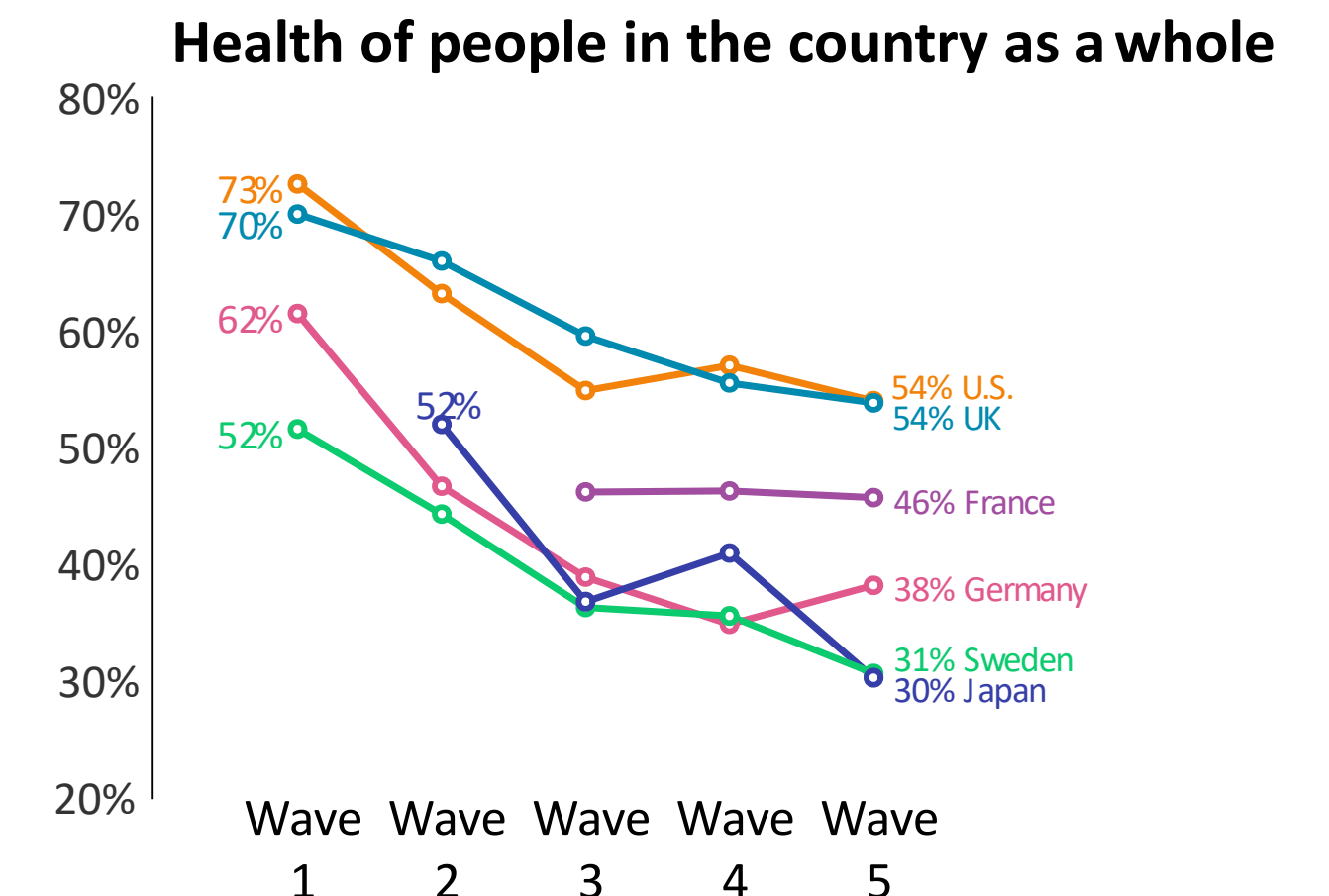
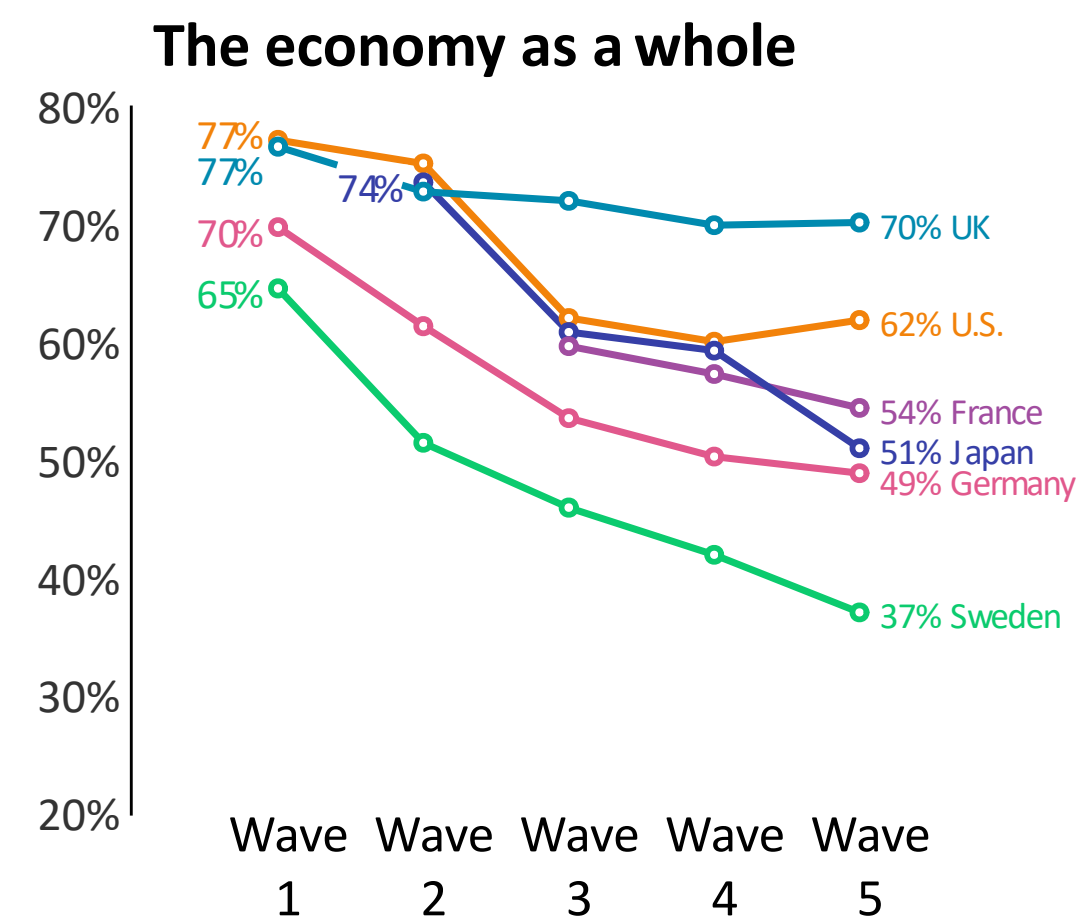
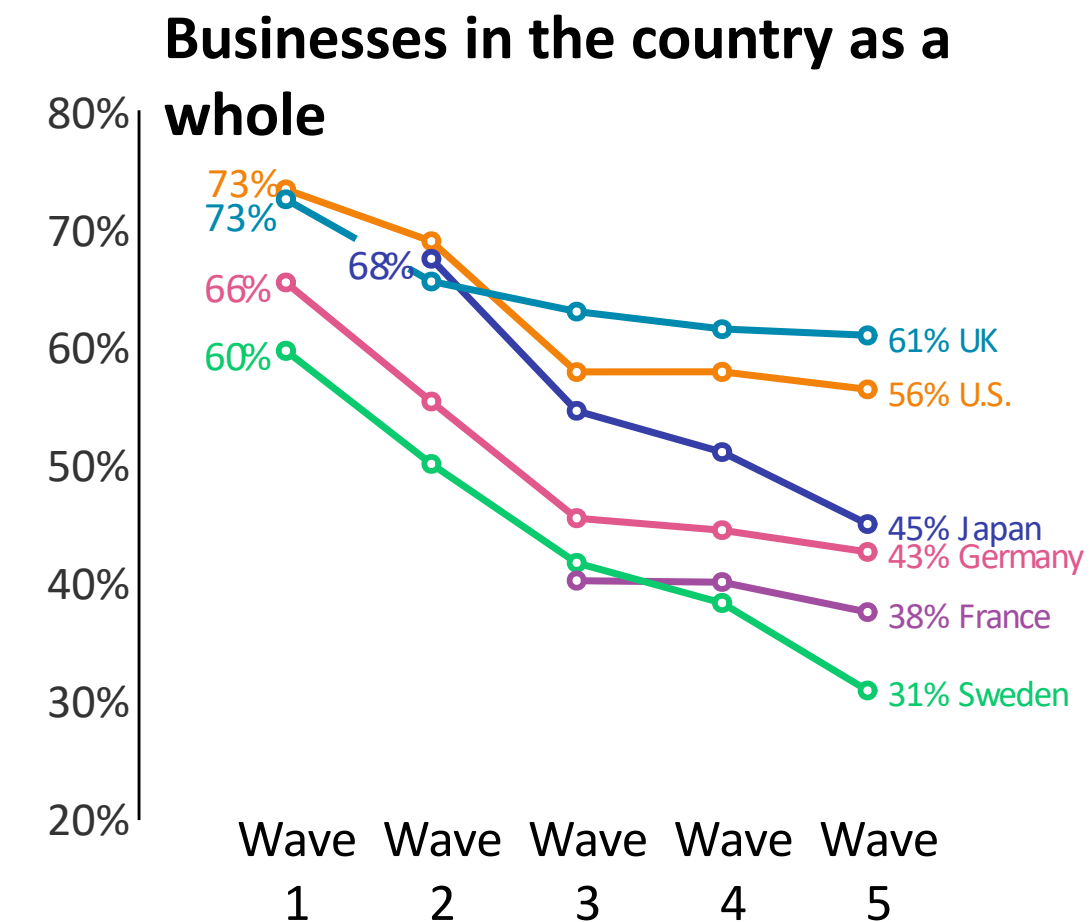
# 1 Government decisions

Despite rising cases, people are becoming more focused on protecting the economy – and in France, the public now put protecting the economy above limiting the spread of the virus



# 2 Levels of concern

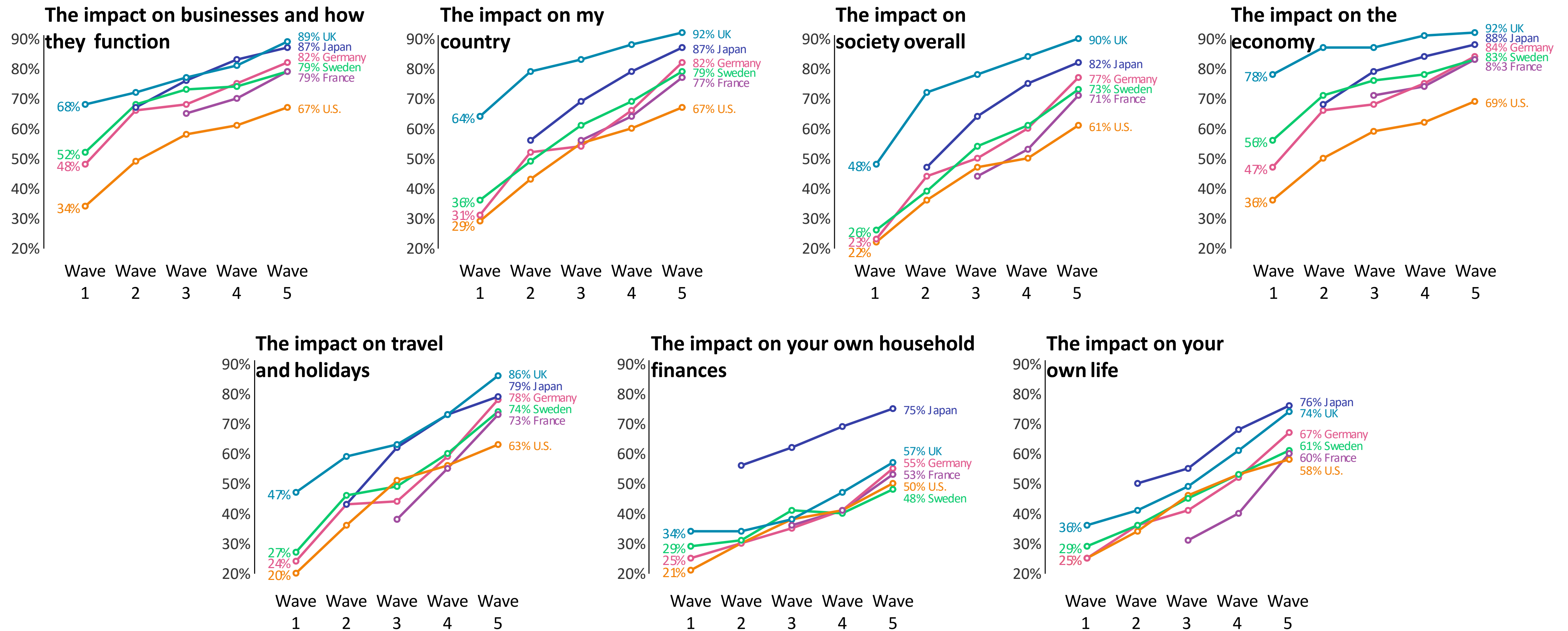
Concern about the impact of the virus is largely stable, but falling in Sweden and Japan



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 Expected duration

People expect the impact of the virus to last for much longer than they previously thought, in particular in Japan

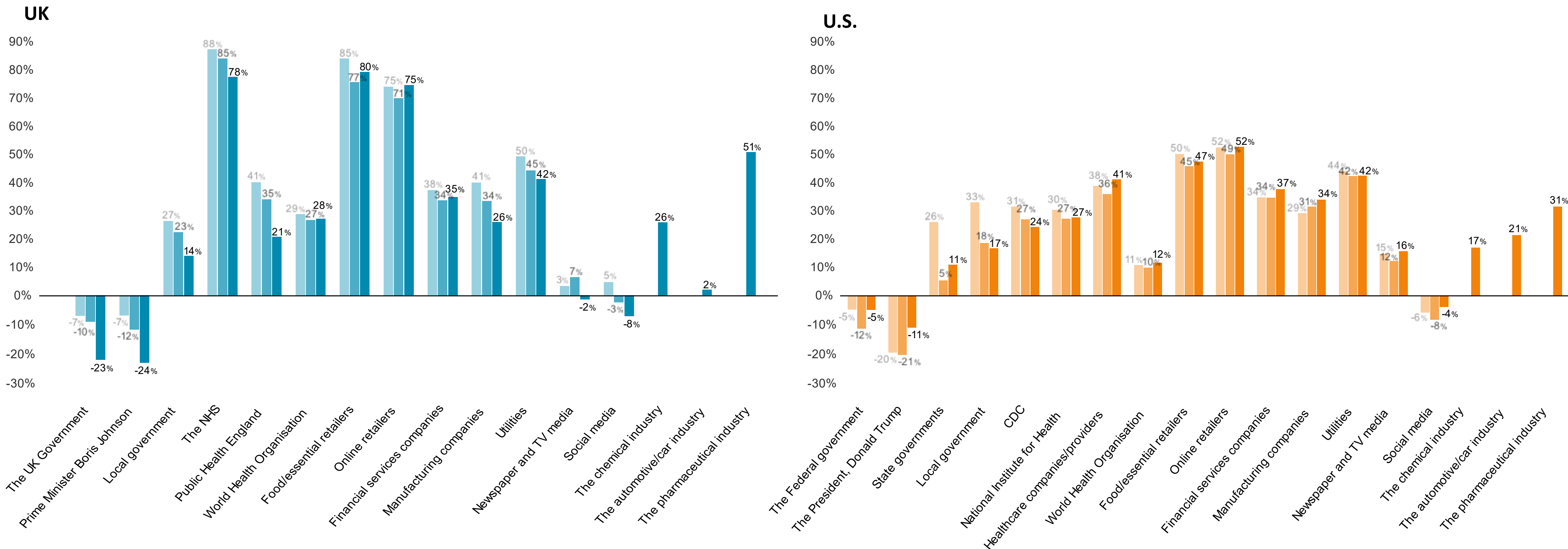


Percentage from each country choosing “Longer than a year” or “Longer than two years” for each issue.

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

# 4 Performance of institutions (1)

The British are losing faith in their institutions, US citizens see their government and president critical but less than in the past

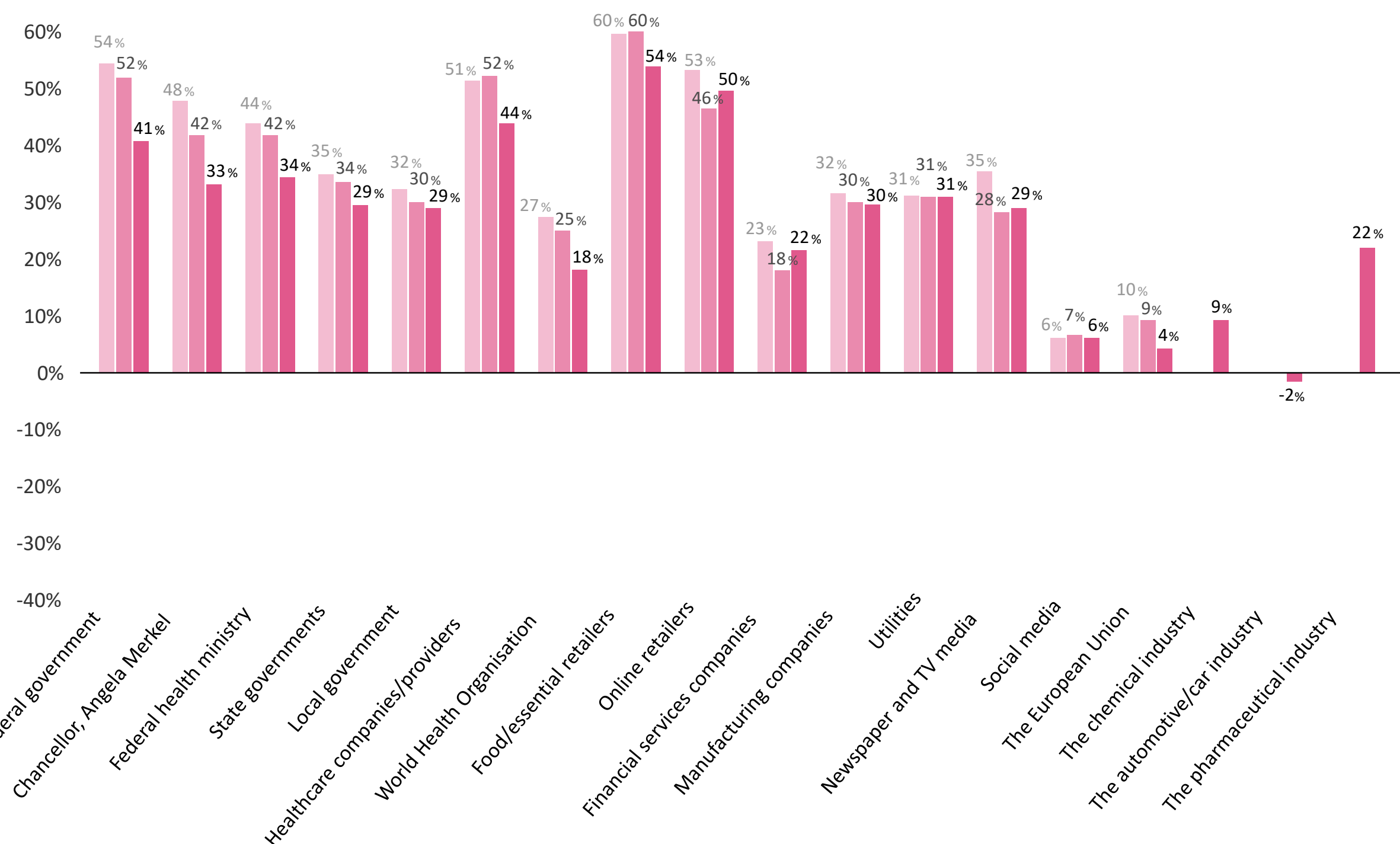


Respondents across all countries were asked whether they thought a number of institutions had done well or badly in responding to the coronavirus. Displayed is the net 'well' score in each country.

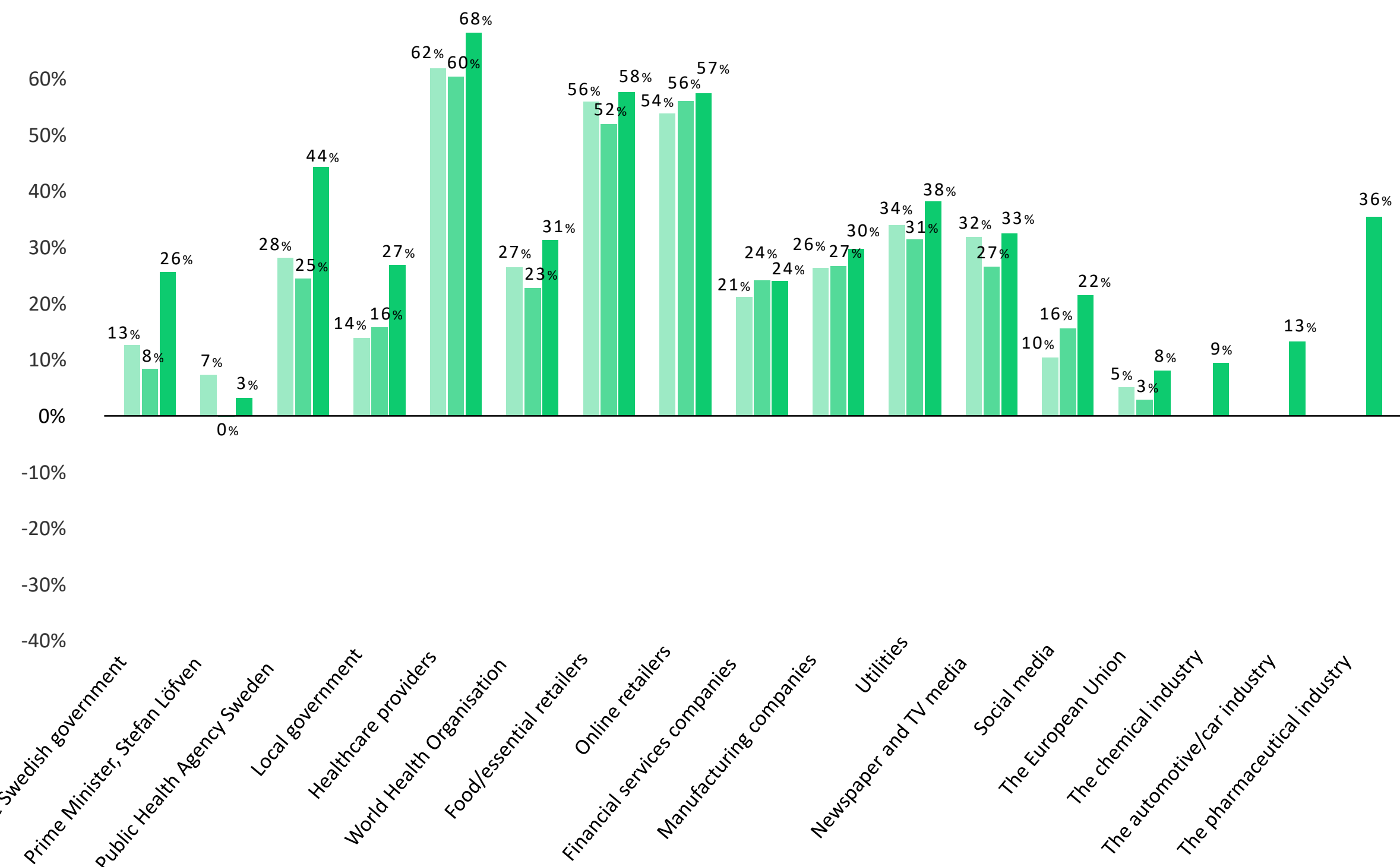
# 4 Performance of institutions (2)

German support for institutions is on the decline but remains high, in Sweden we see an overall rise of support for institutions

## Germany



## Sweden



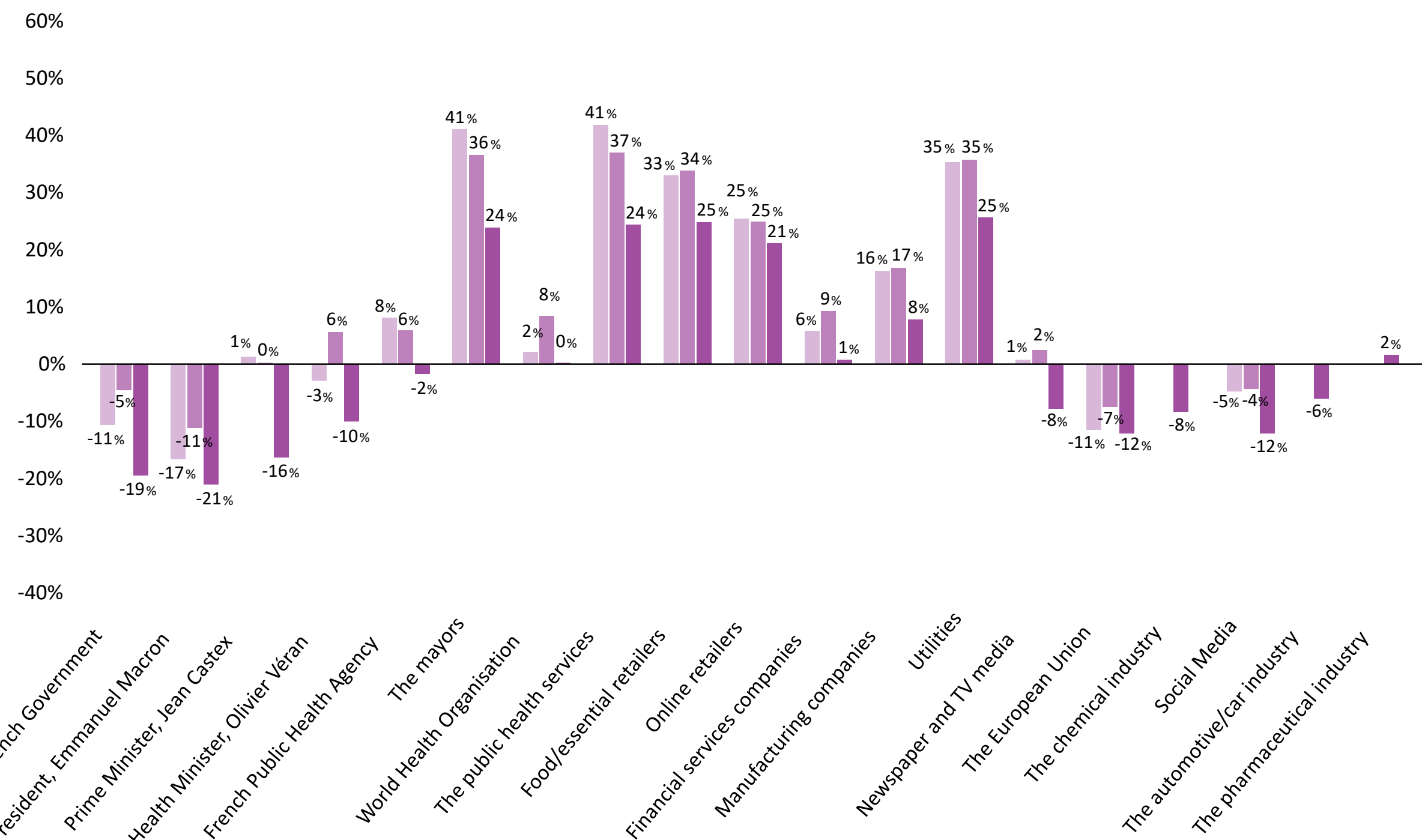
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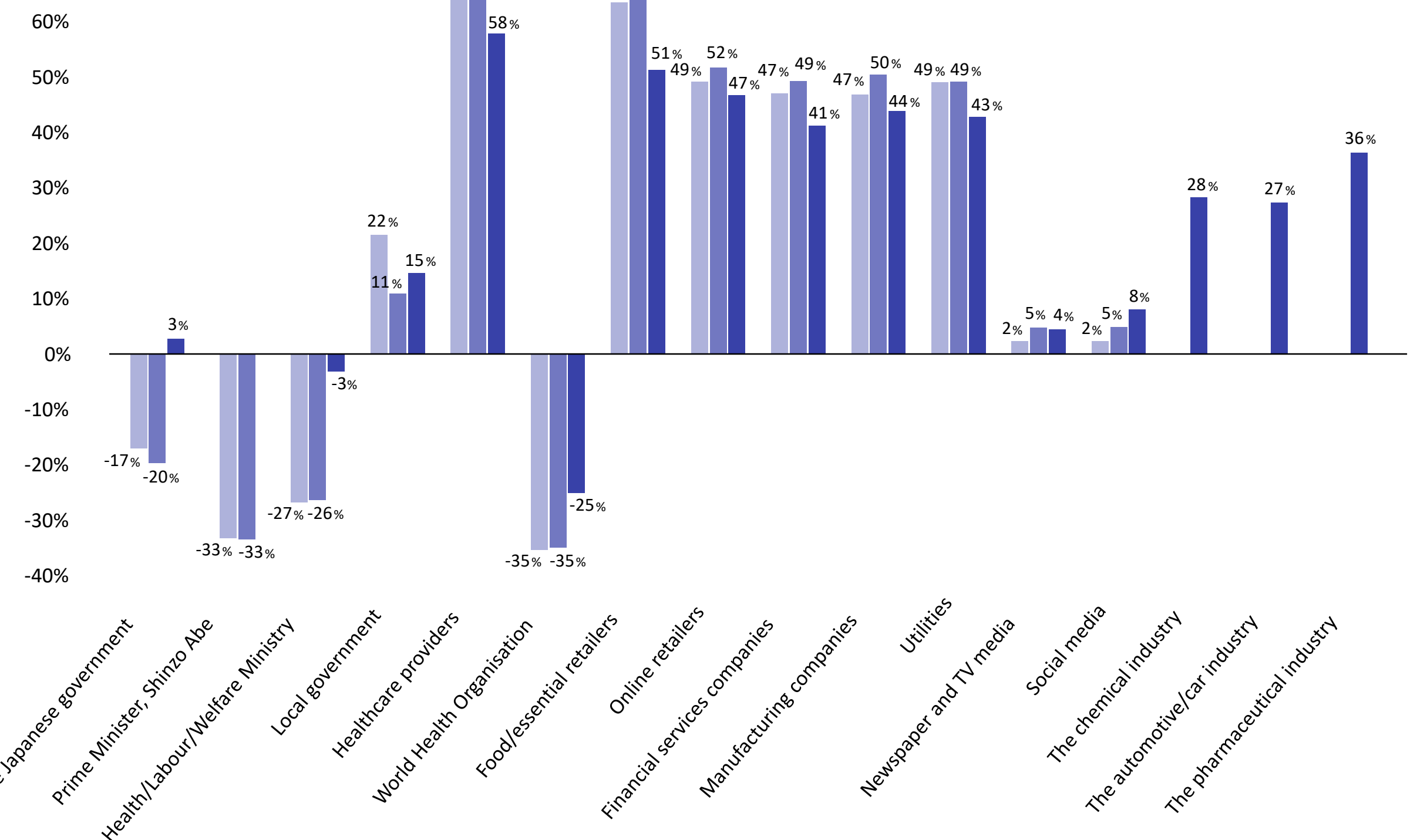
# 4 Performance of institutions (3)

French are losing faith in their institutions, Japanese result clearly impacted by change of prime minister and could be temporary

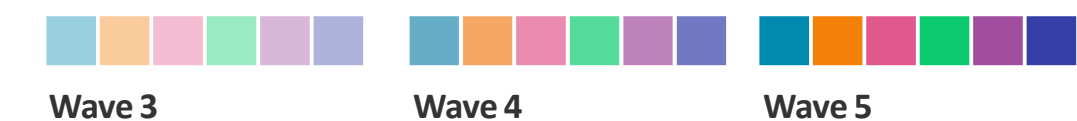
## France



## Japan



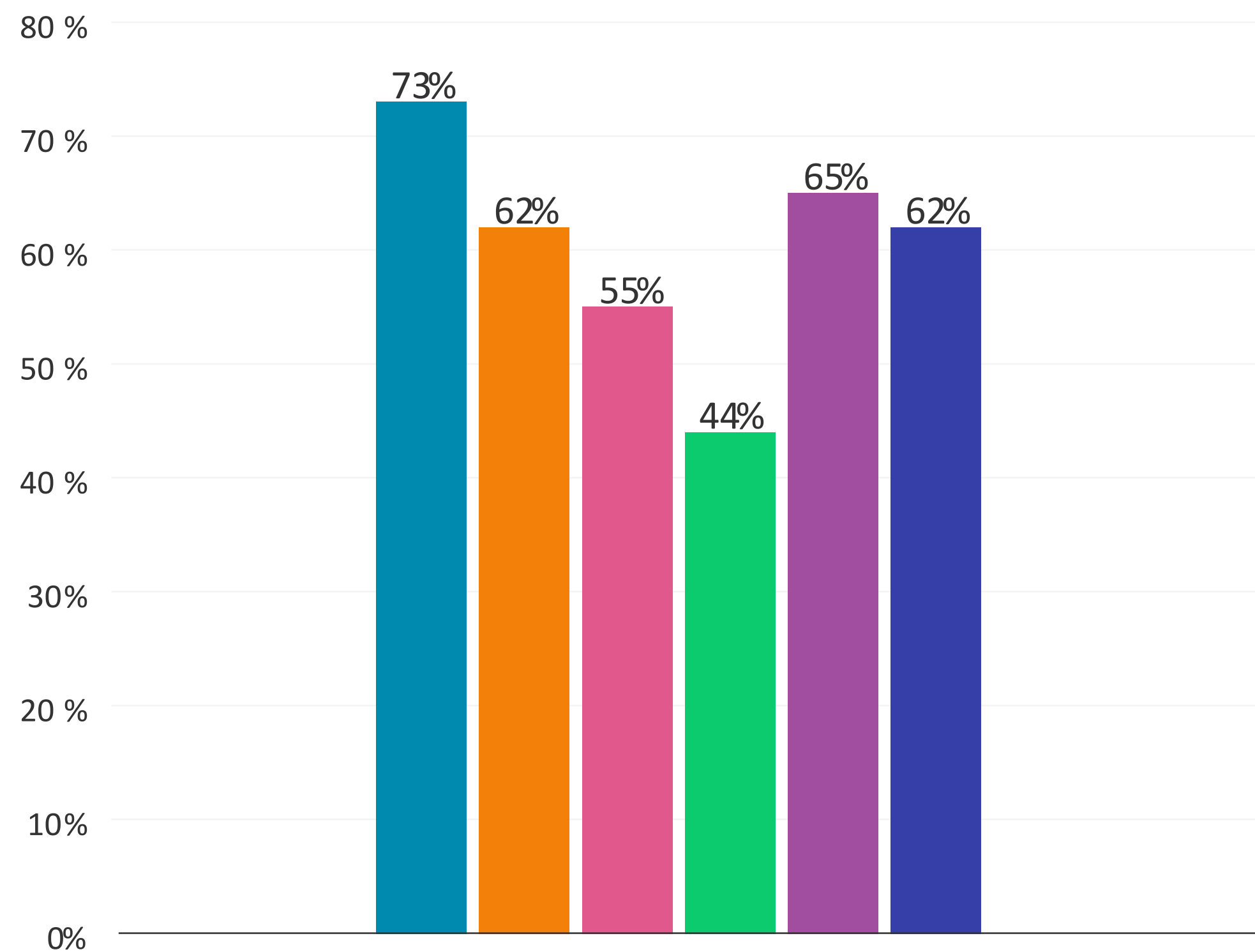
Respondents across all countries were asked whether they thought a number of institutions had done well or badly in responding to the coronavirus. Displayed is the net 'well' score in each country.



# 5 Future outlook

Majorities in every country apart from Sweden say they are more worried about their country's future than they have ever been

% who agree "I am more worried about the future of my country than I have ever been before"



62%



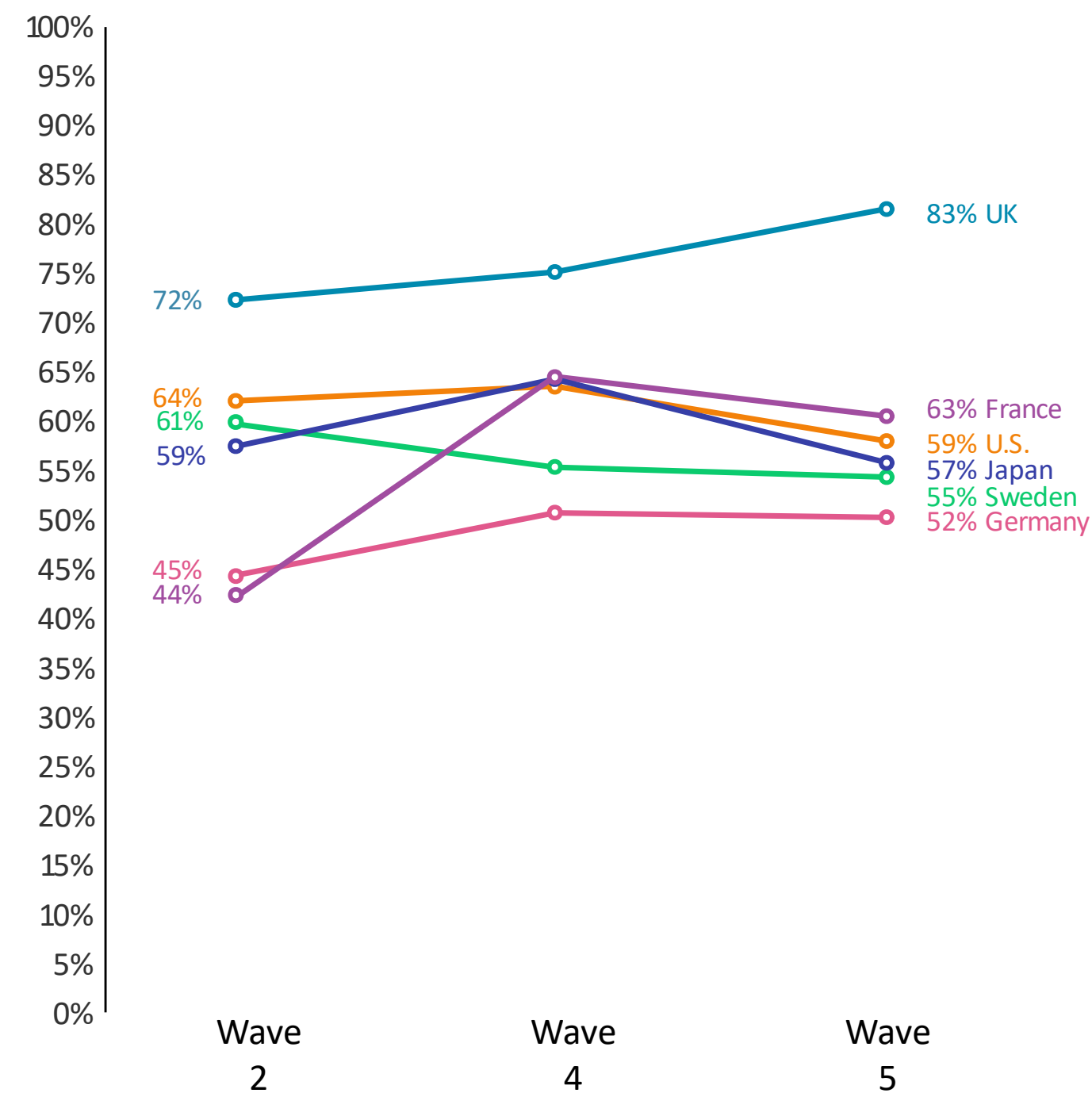
More than six out of 10 people in Japan, the third-highest of all markets surveyed, say they are more worried about the future of their country than they have ever been, with only 11% disagreeing



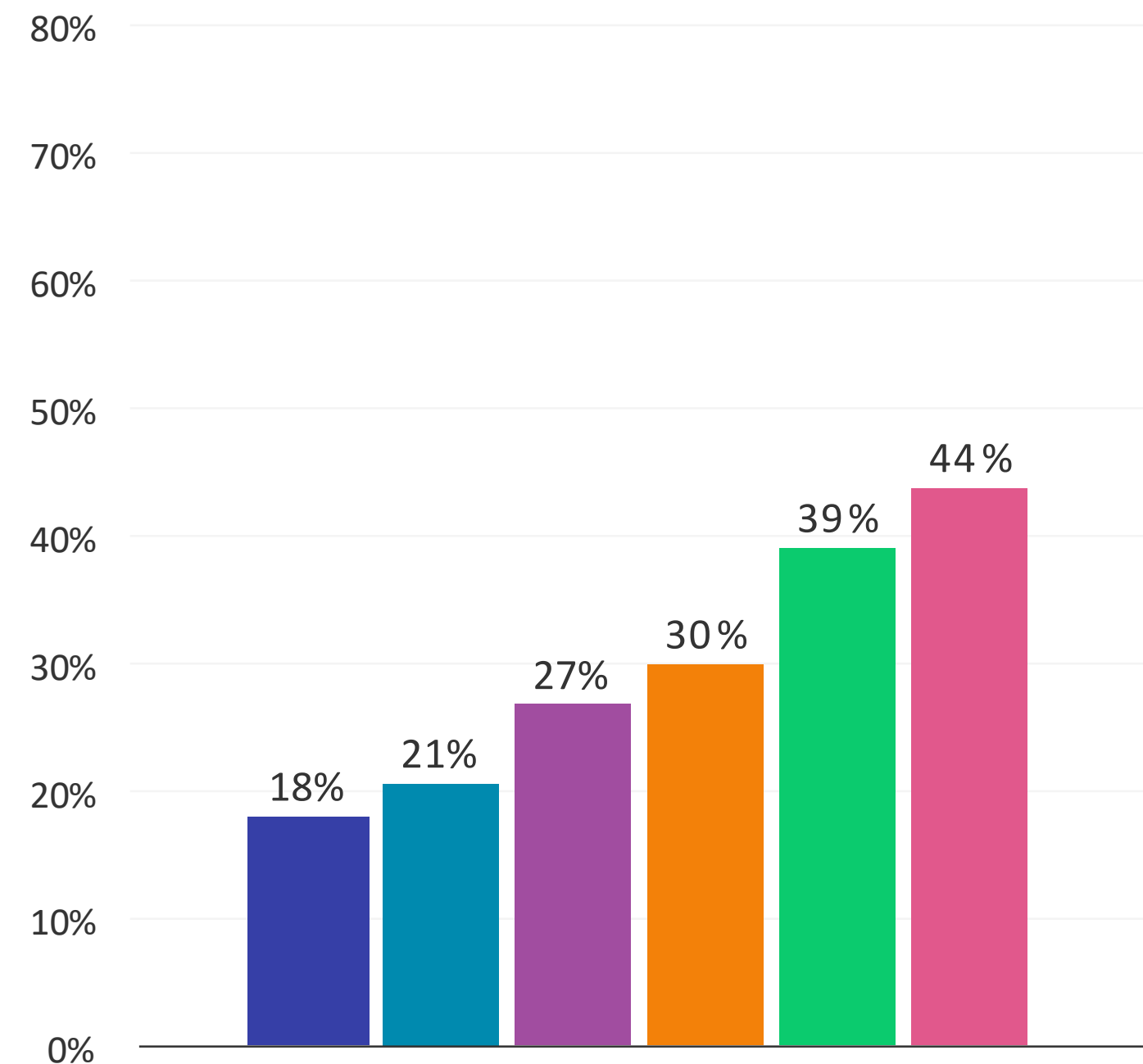
# 6 Government preparedness for future waves of the virus

Though large numbers expect another wave of coronavirus, faith in government preparedness is low, in particular in Japan

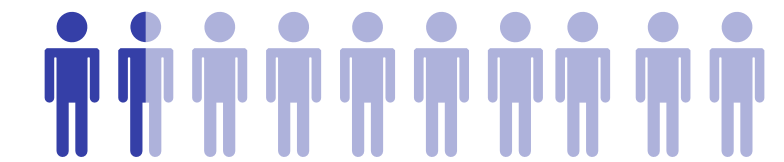
I expect there will be a second wave of the coronavirus in my country in the next year or so



The government is well prepared to deal with another/second wave of the coronavirus, should it occur



18%



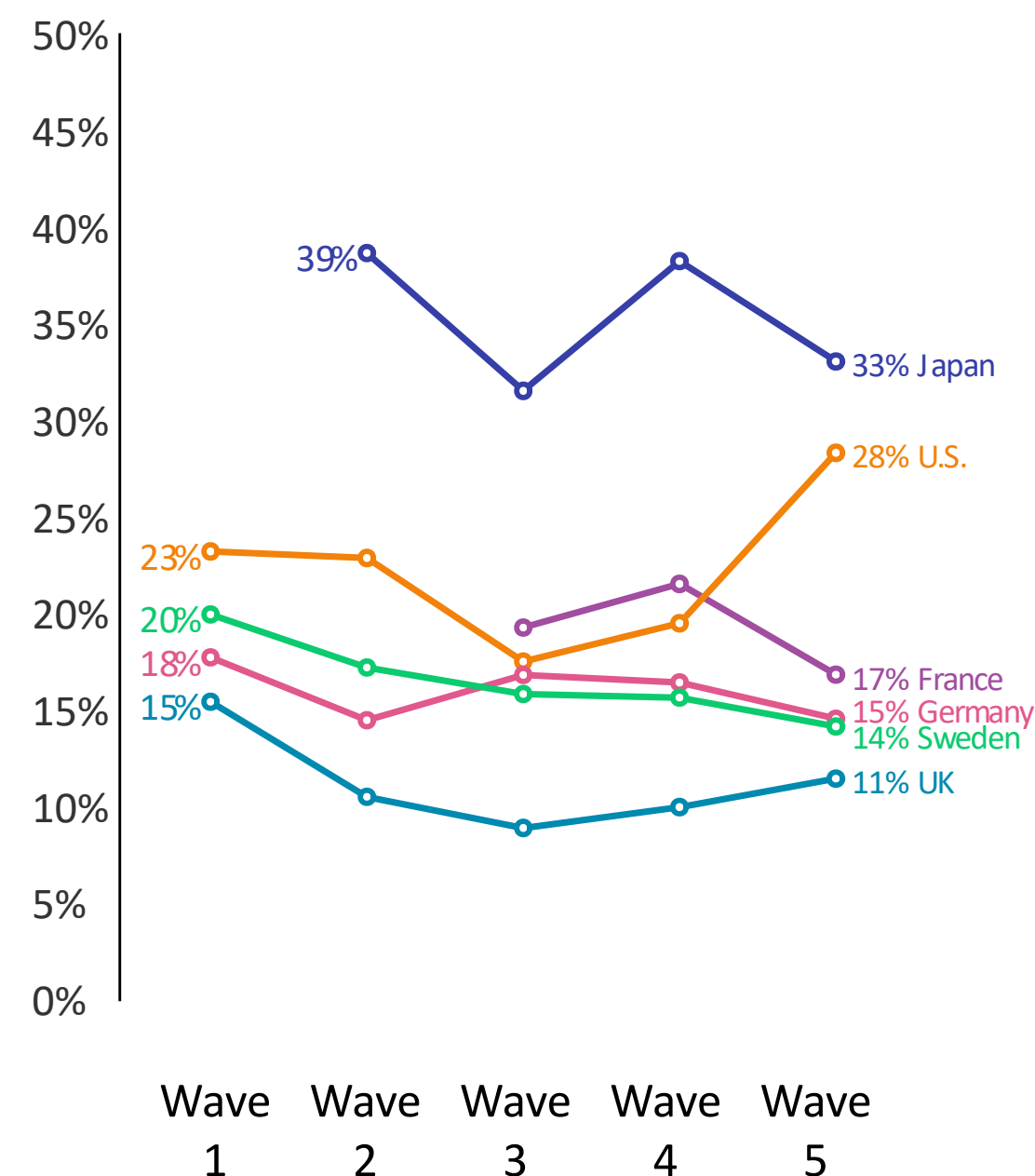
Despite 57% of the Japanese people expecting another wave, **only 18% in Japan agree that the government is well-prepared** to deal with such a spike of the virus



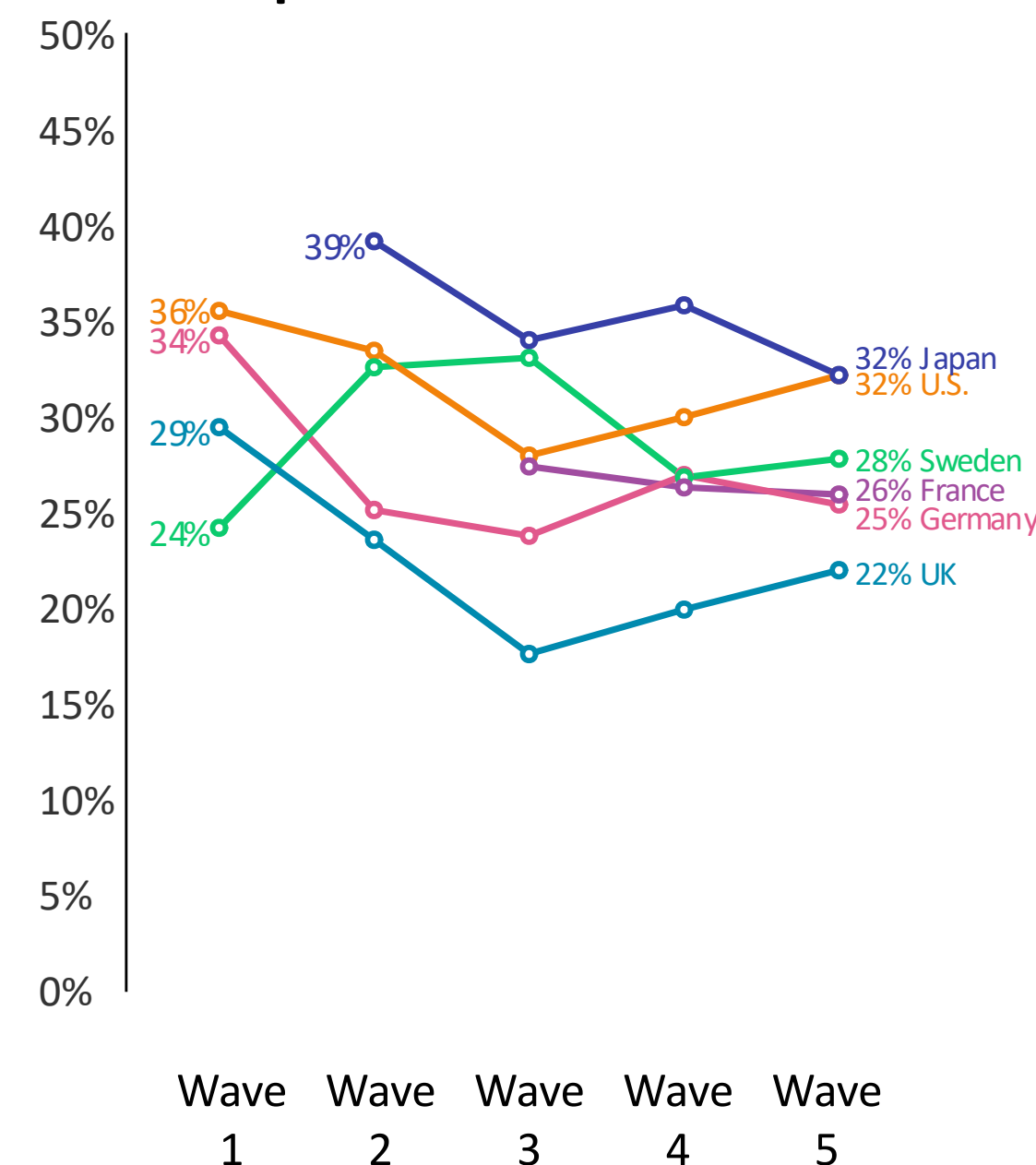
# 7 The labour market during the crisis

As economic effects bite, up to a third of people are concerned their company will collapse  
– American workers are becoming more worried, but still far less than Japanese

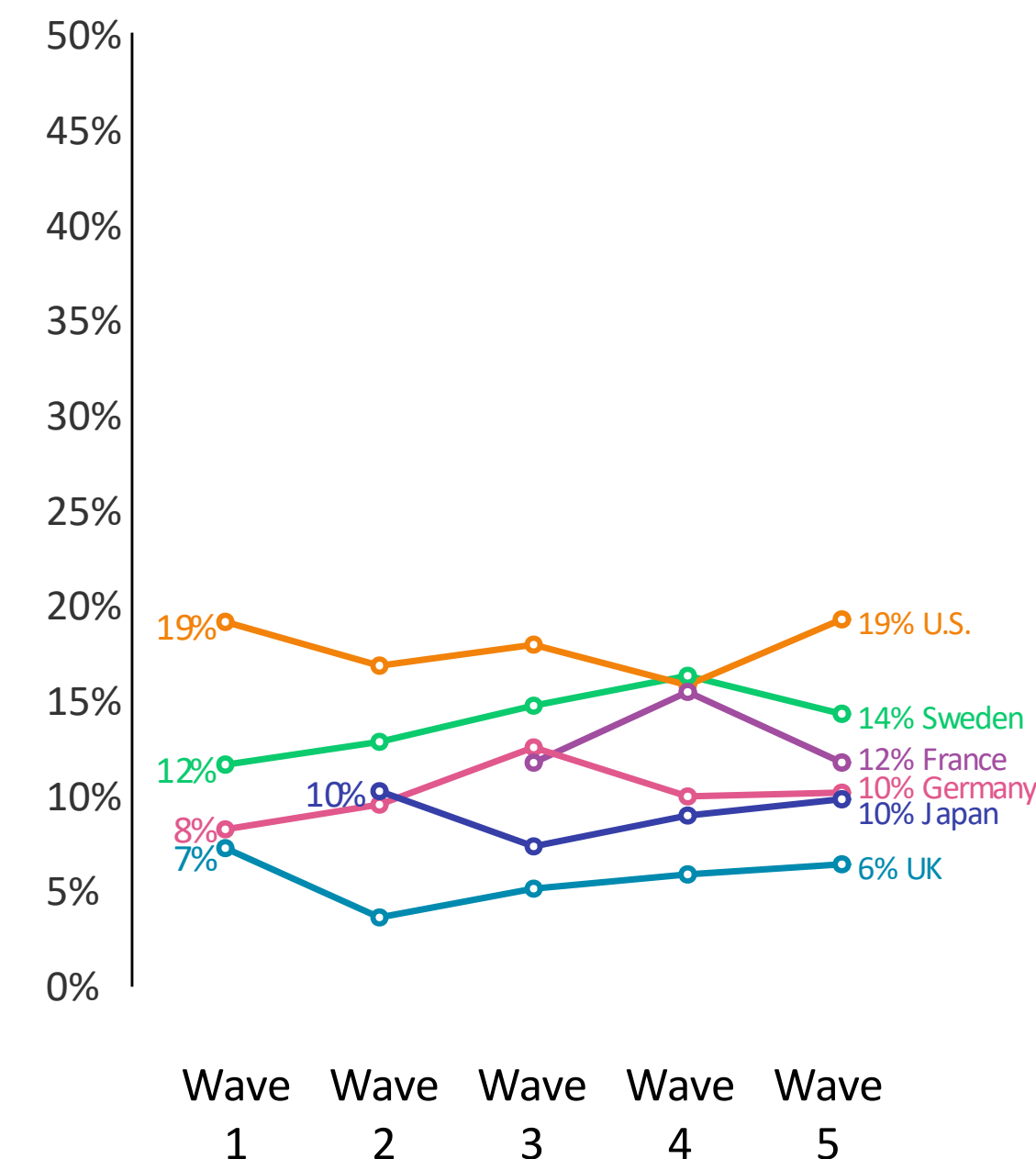
I expect to lose my job



I am worried that my company might collapse



I have already lost my job



32-33%



About one third of employees in Japan currently in work expect to **lose their jobs and their company to collapse** due to the impact of Covid-19

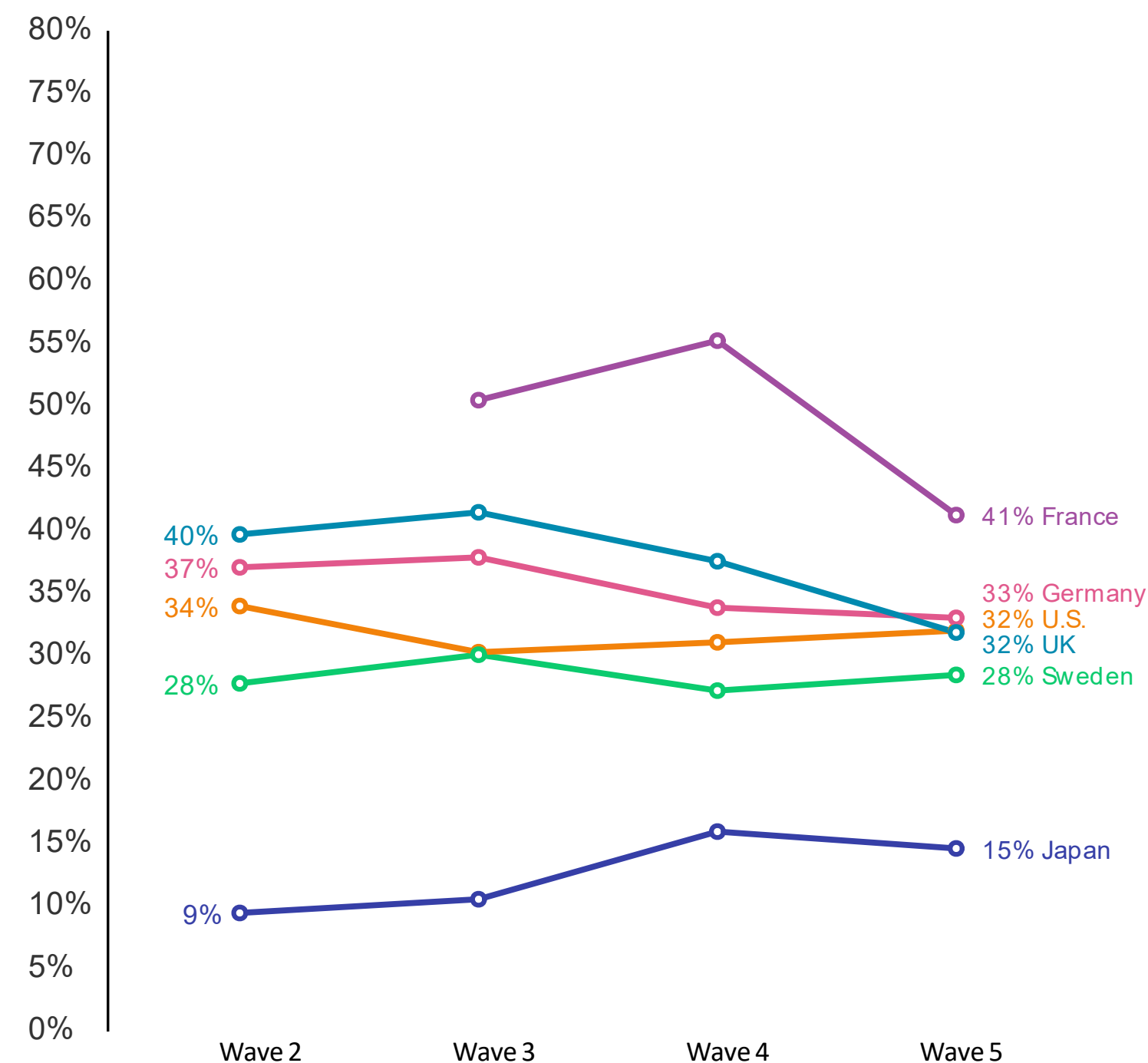


Respondents across all countries were asked whether they agreed or disagreed with a set of statements referring to their own employment and job. All statements here are filtered just by those who said they are working full-time or part-time, apart from “I have already lost my job” which is presented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

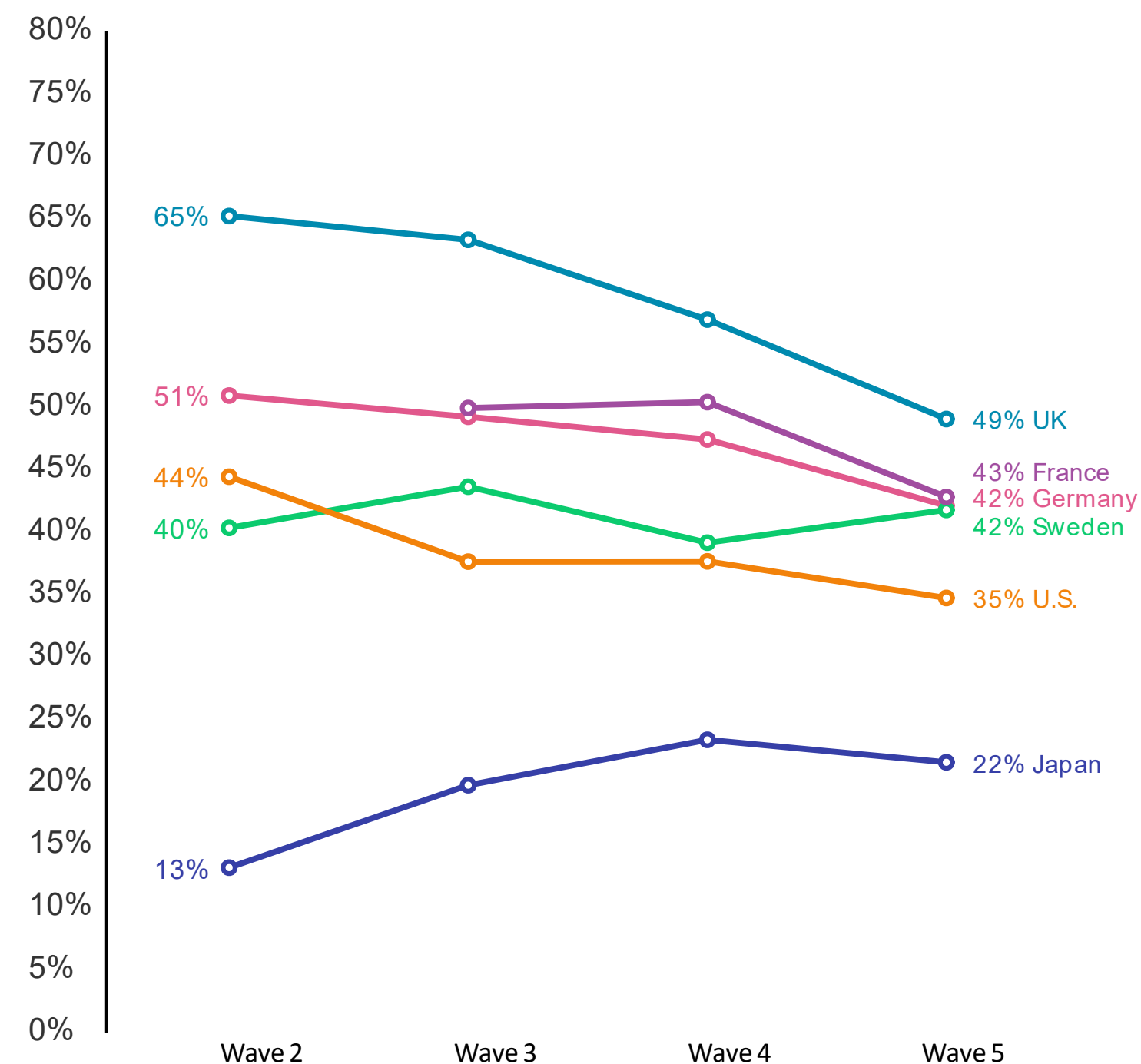
# 8 Views of business support

People in the UK, France and Germany are feeling less confident that their governments are providing business with the support it needs, Japanese stick at record lows

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



15%

The proportion of Japanese people who think business support is getting through to the companies that need it the most, the lowest of all markets surveyed



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.

# 9 Employee priorities for the next three months

**Pay, health and safety measures, and protecting jobs are the main priorities for employees over the next three months – as well as continued support for working from home**

Keep employees' pay levels at a reasonable level

Institute health and safety measures in the workplace

Protect jobs / prevent redundancies

Support employees with working from home

Build a feeling that we are all in this together as a firm/organisation

Build a positive working environment, even where work has been done remotely

Help with public health efforts

Provide financial support to employees who require it

Support employees with children

Support employees with commuting to work

Ensure top executive/senior management act responsibly

Provide mental health support to employees who require it

Provide transparency on business activities and planned business decisions

Give strong voice to employees

Provide cheaper or free goods/services for customer who are key workers in the economy

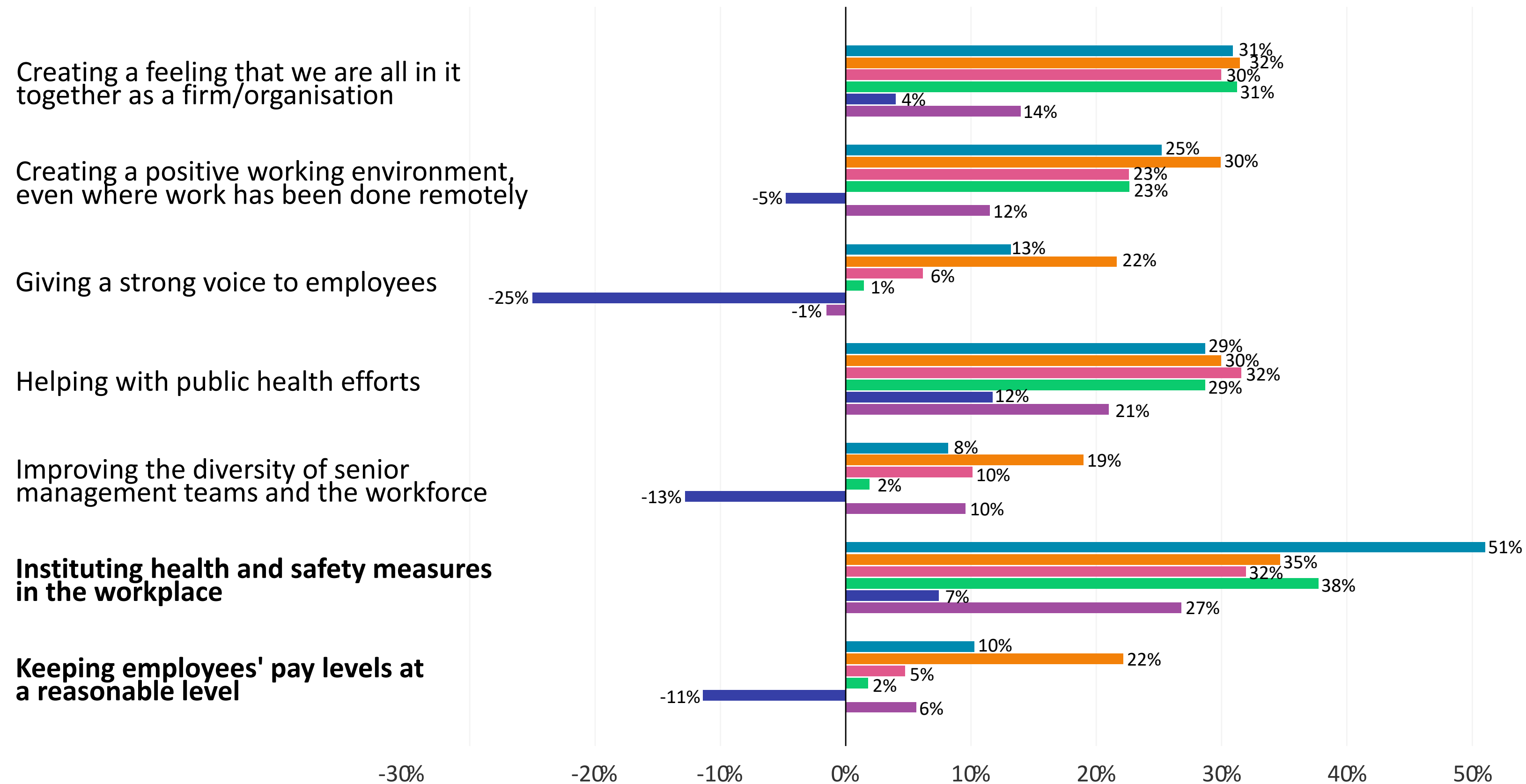
Make changes to improve the business' impact on the natural environment

Improve the diversity of senior management teams and the workforce

UK	U.S.	DE	SE	JP	FR	AVERAGE
26%	23%	22%	28%	42%	27%	28%
29%	18%	27%	20%	30%	25%	25%
39%	14%	22%	27%	21%	24%	25%
23%	31%	21%	30%	18%	17%	23%
20%	24%	33%	28%	15%	19%	23%
21%	23%	16%	24%	15%	19%	20%
11%	25%	26%	18%	17%	15%	19%
15%	18%	15%	15%	22%	14%	17%
11%	19%	20%	8%	11%	19%	15%
6%	23%	13%	13%	13%	15%	14%
6%	10%	8%	20%	19%	17%	13%
17%	11%	11%	16%	12%	10%	13%
13%	9%	5%	6%	11%	5%	8%
9%	6%	7%	11%	4%	5%	7%
4%	5%	4%	7%	5%	6%	5%
5%	3%	4%	4%	2%	6%	4%
3%	5%	2%	1%	5%	4%	3%

# 10 Employer performance during the pandemic (1)

Positive ratings for employers on creating a positive working environment and an inclusive feel – but lower marks from employees on providing financial support, and help with mental health issues, Japan lowest in all areas



44 p.p.



The difference between how employees in the UK and employees in Japan **rate their employer in instituting health and safety measures in the workplace**

33 p.p.

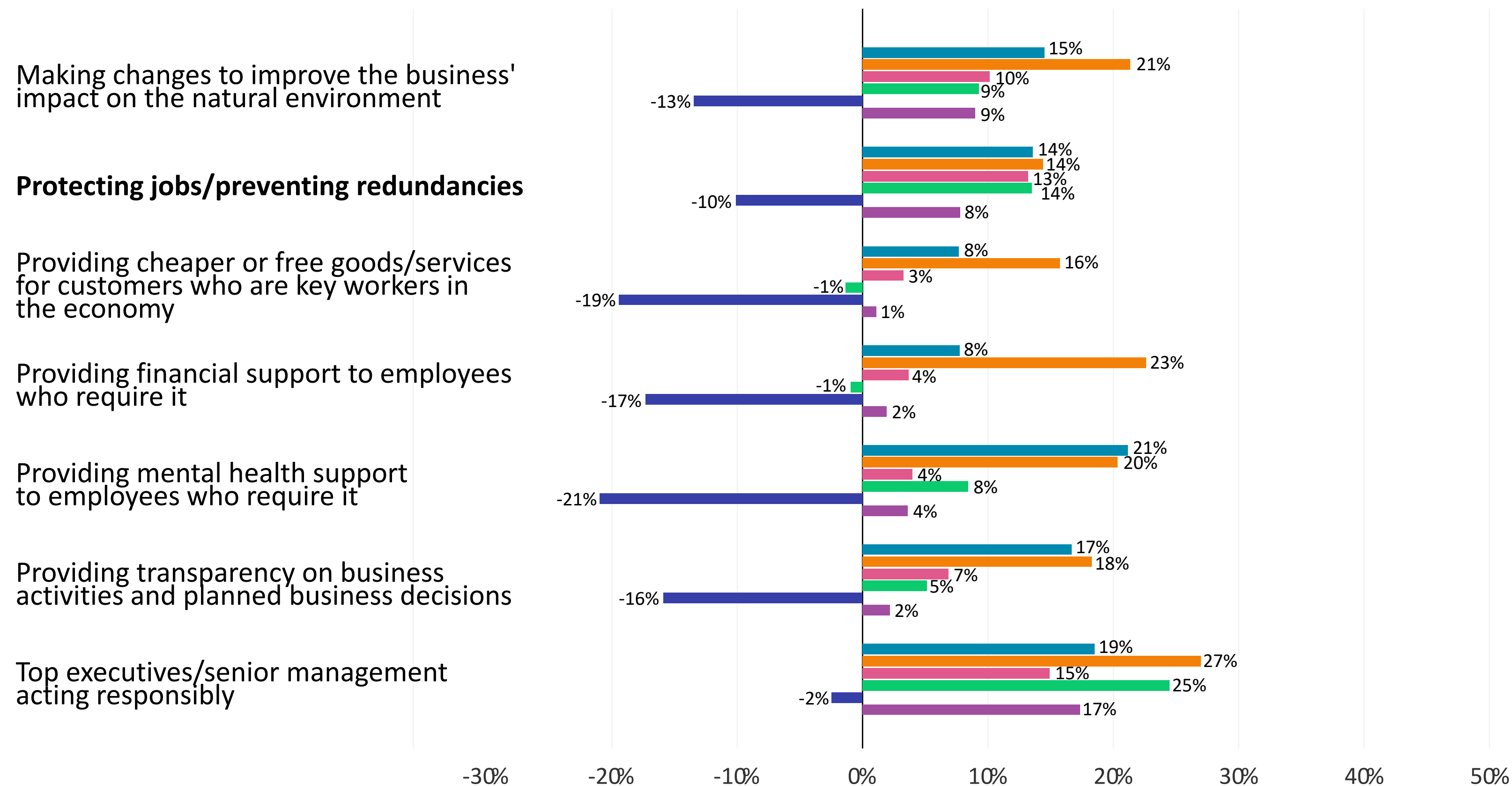


The difference between how employees in the US and employees in Japan **rate their employer in keeping employees' pay level at a reasonable level**

# 10 Employer performance during the pandemic (2)

COVID-19 OPINION TRACKER EDITION 5  
16 OCTOBER 2020

Positive ratings for employers on creating a positive working environment and an inclusive feel – but lower marks from employees on providing financial support, and help with mental health issues, Japan negative in all areas

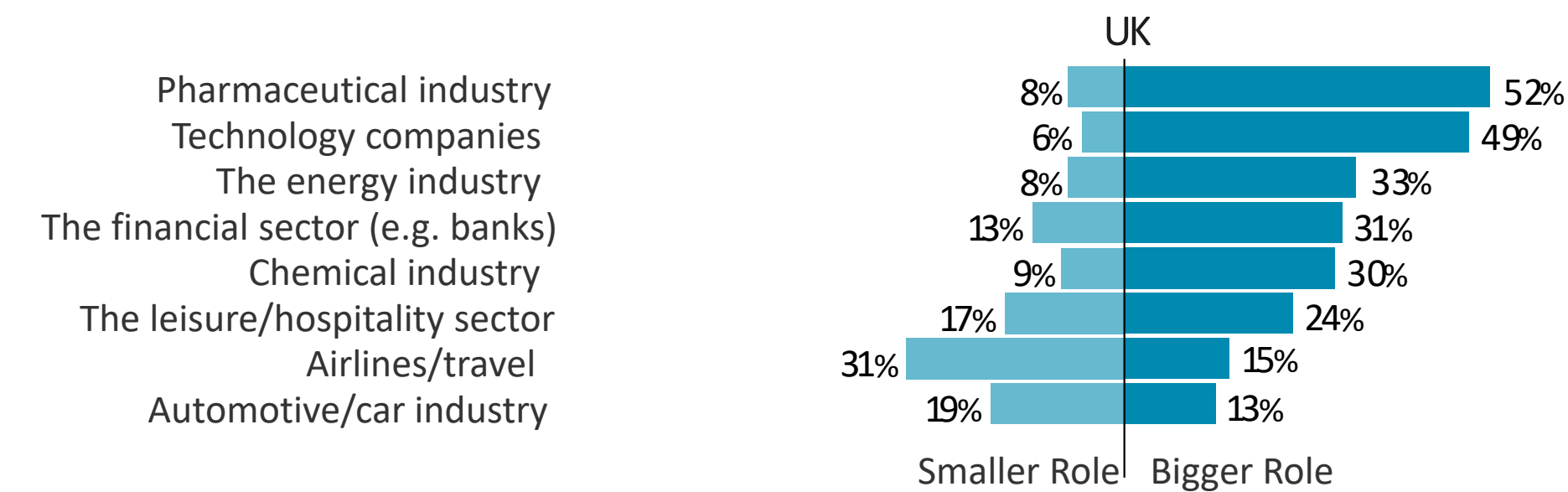


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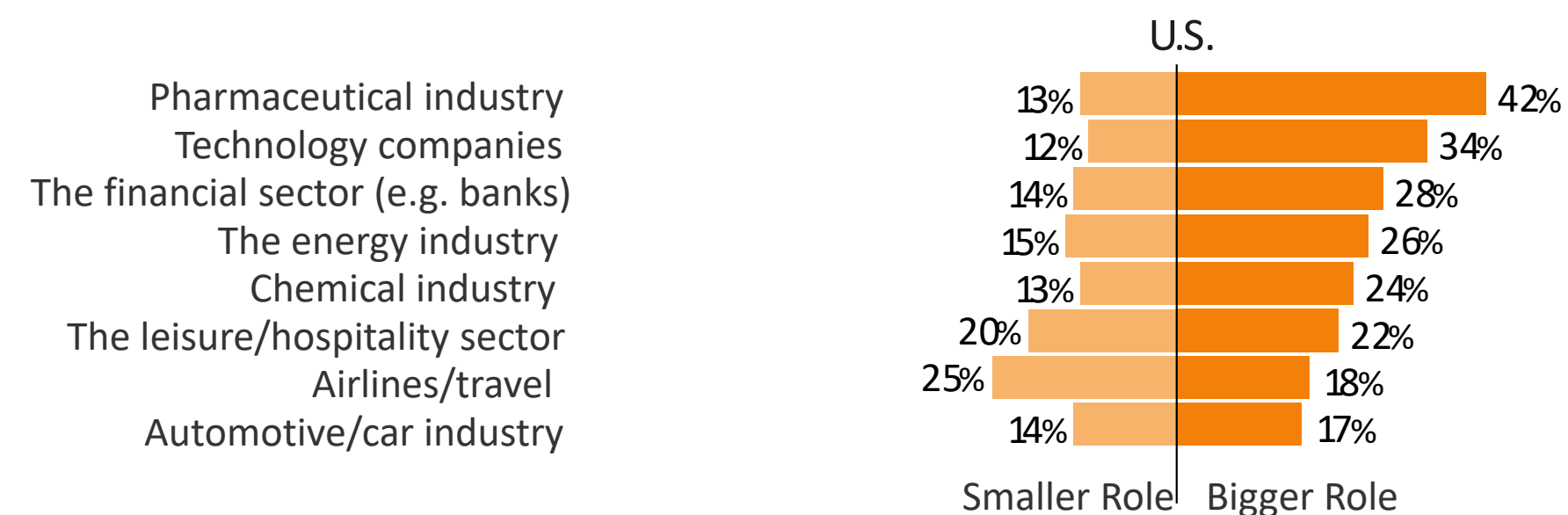
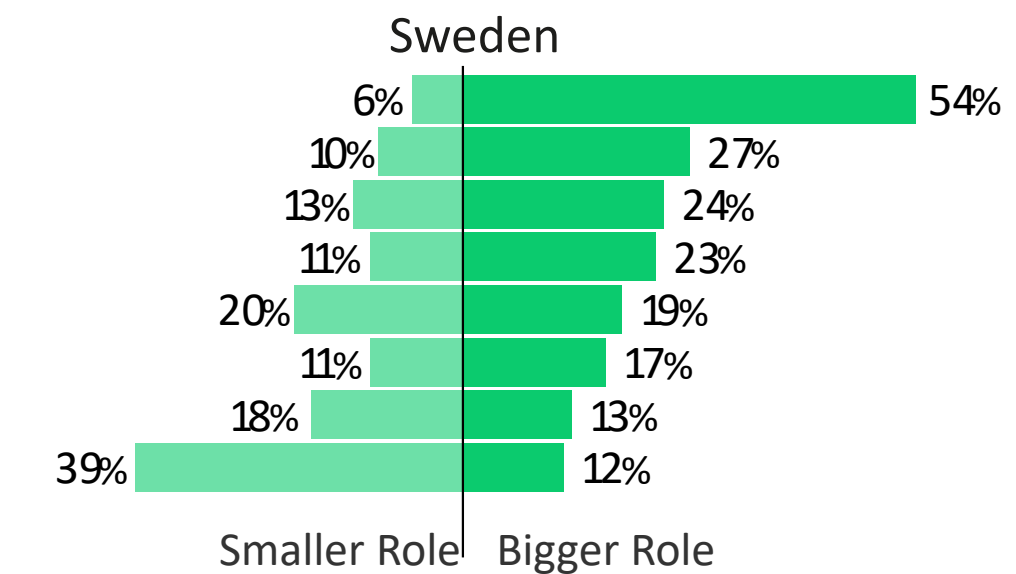
The difference between how employees in the US, UK and Sweden and employees in Japan rate their employer in protecting jobs / preventing redundancies

# 11 Role of industry after coronavirus

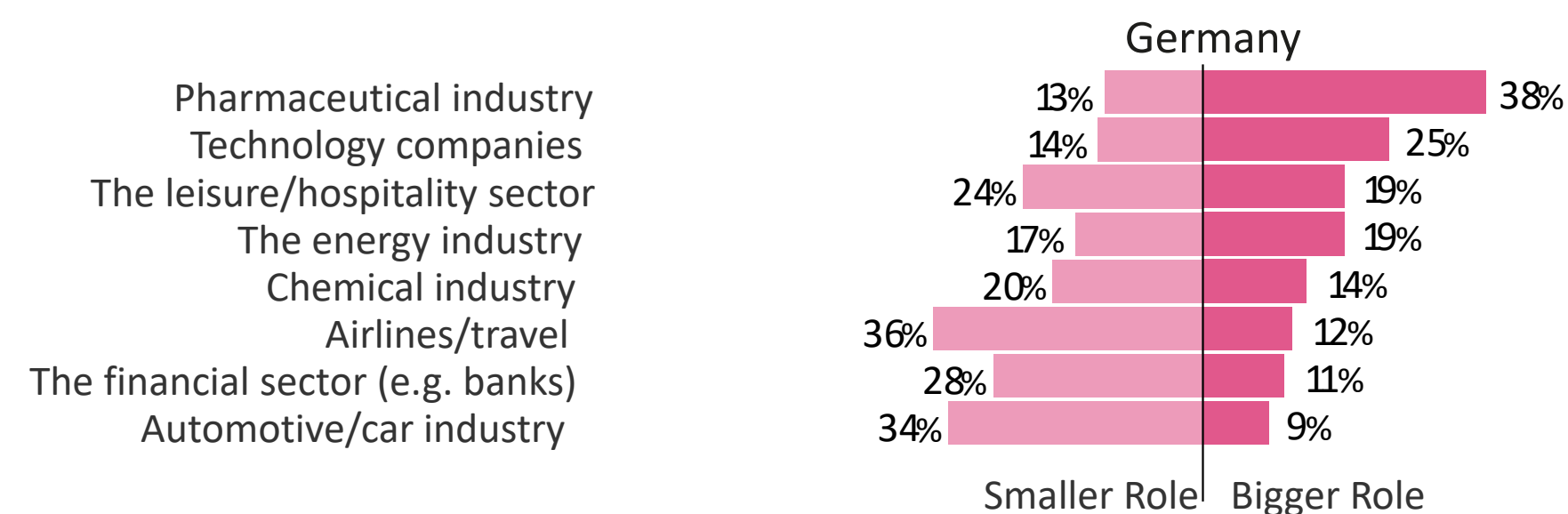
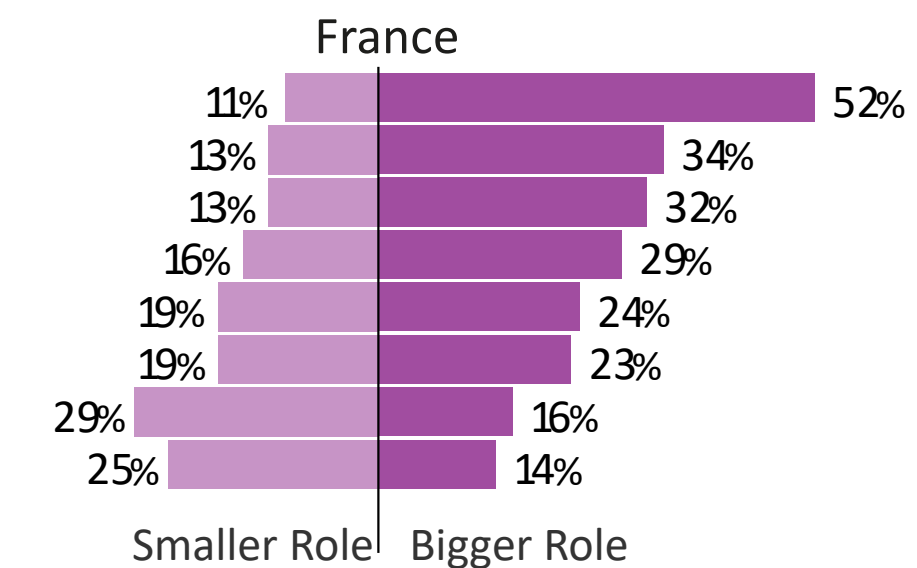
**A larger role demanded for the pharmaceutical industry and technology companies in the post-coronavirus economy, while most countries want the aviation sector to take a smaller role**



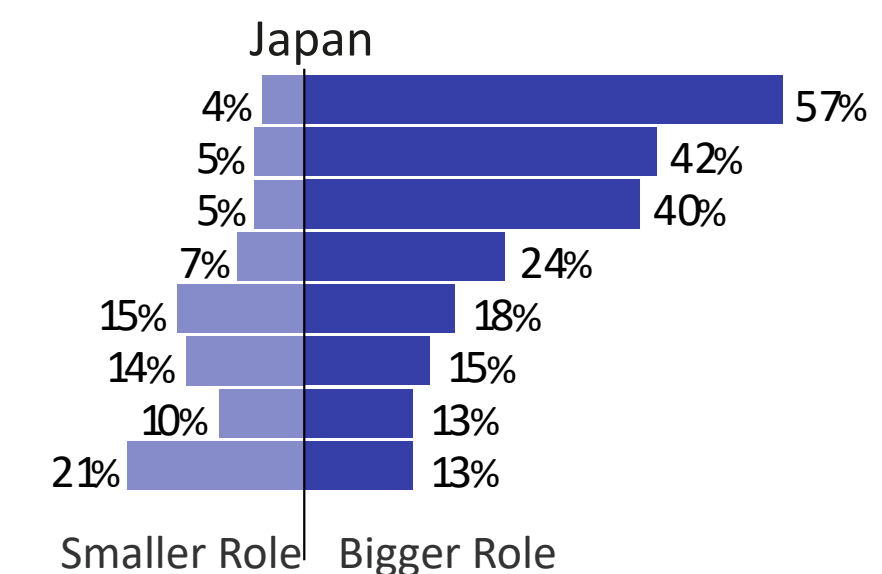
Pharmaceutical industry  
The energy industry  
The financial sector (e.g. banks)  
Technology companies  
The leisure/hospitality sector  
Chemical industry  
Automotive industry  
Airline/travel



Pharmaceutical industry  
Technology companies  
The energy industry  
The financial sector (e.g. banks)  
Chemical industry  
The leisure/hospitality sector  
Airlines/travel  
Automotive/car industry



Pharmaceutical industry  
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The energy industry  
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The financial sector (e.g. banks)  
Automotive industry  
Airline/travel



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/)**

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