

## **Results of the “Survey on the Impact that Spreading Novel Coronavirus Infection Has on Work and Daily Life”**

(December 2020 Survey, coupling with the respondents of April, May, and August surveys) (First Aggregation)

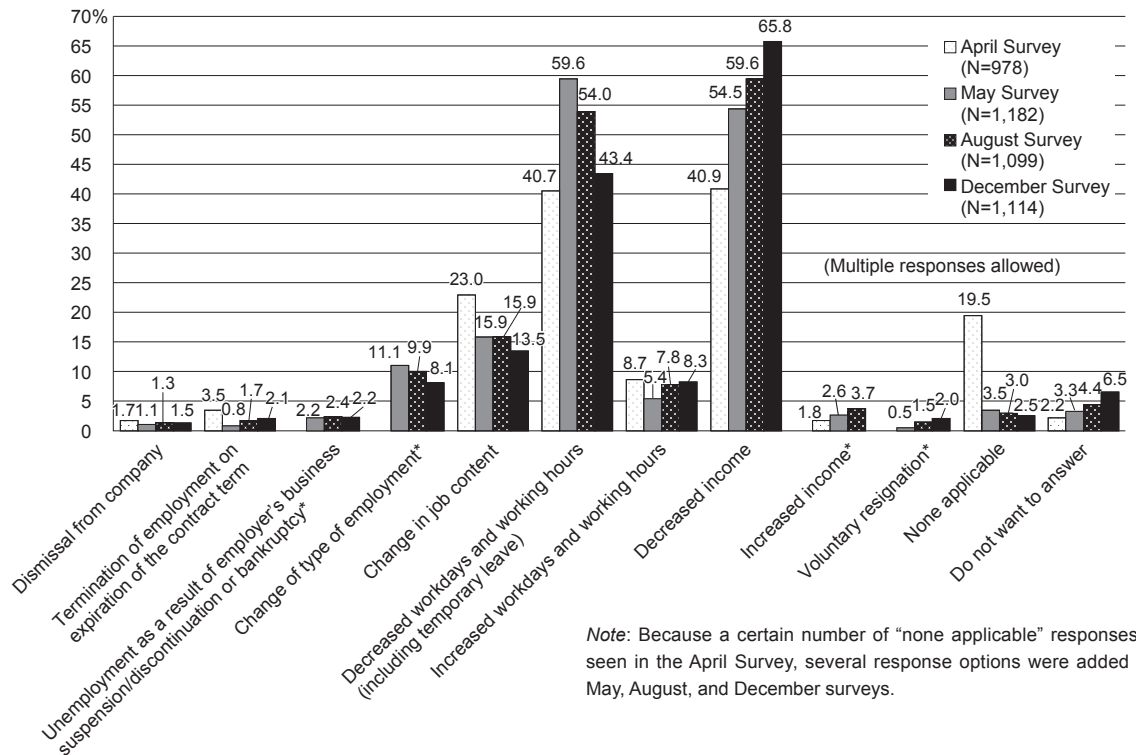
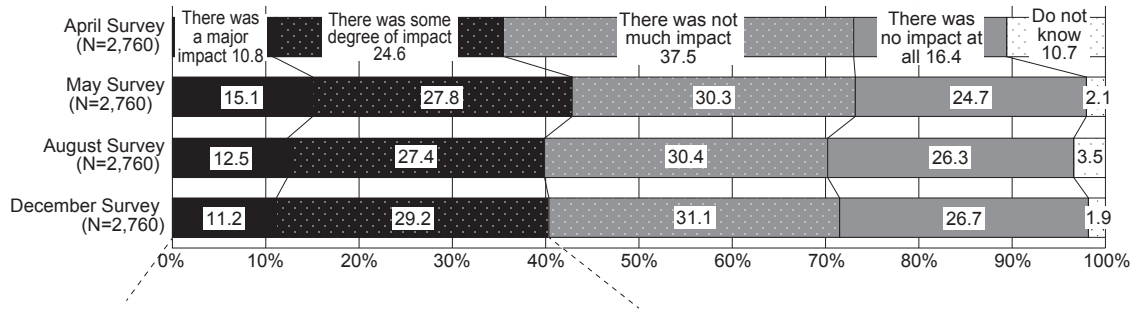
**Despite the fact that a year has passed since the first COVID-19 case was confirmed in Japan, the strong anxiety that the respondents feel in terms of “inability to see when infections will abate” remained conspicuous in the December 2020 Survey. With more than 30% of employees and more than 40% of freelance workers expecting a decrease in their annual incomes for 2020, anxiety with respect to a “worsening economic situation” and other effects was strong. Now is the time, at least in workplaces, to practice new ways of working, in order to simultaneously achieve greater infection prevention and economic activity. However, as of December 2020, about two-thirds responded that work productivity/efficiency had decreased as a result of work from home/telecommuting, and more than half of respondents who had first experienced such work style in March-May indicated that they were currently not working from home or that the number of “work from home/telecommuting” days had decreased. These and other results point to the difficulty of autonomous behavioral change.**

### **I. Impact on “employees of private enterprises”**

**The main effects relating to COVID-19 has shifted to “decreased income.” (Figure 1)**

The Japan Institute for Labour Policy and Training (JILPT) aggregated responses of those who were “employees of private enterprises” as of April 1, 2020, and responded to all three surveys—the April, May, and August surveys (N=2,760) (see the attached “Outline of the Survey”). It was found that responses indicating “there was an impact” relating to their own employment and/or income rose from 35.4% in April to 42.8% in May but then decreased to 39.8% in August and remained at about the same level at 40.4% in December, 2020. There was a major shift in the main effects relating to COVID-19 toward “decreased income.” Looking at specific responses (multiple responses), the percentage of “decreased number of workdays and working hours” fell, but that of “decreased income” showed continuous increases (40.9% in April, 54.5% in May, 59.6% in August and 65.8% in December).

Figure 1. COVID-19-associated impacts on their own employment and/or income: Comparison of the April, May, August, and December surveys



Note: Because a certain number of "none applicable" responses were seen in the April Survey, several response options were added to the May, August, and December surveys.

**More than one person in four indicated that they received a winter bonus in decreased amount or did not receive a winter bonus, or payment was undecided. (Figure 2-1, 2-2)**

When the survey asked respondents who were "employees of private enterprises" at the time of the December Survey (N=4,165) about the receipt of a winter bonus (special allowance), more than half (53.7%) said that they have received it in 2019 ("last year") and 2020 ("this year"). However, a breakdown of change in amount compared to the amount paid last year (including expected change) showed that 29.2% indicated "roughly the same (change of less than 10%)" and 15.8% indicated that it was decreased. Additionally, when combined, the percentage of respondents who indicated "received last year but did not receive this year" (4.9%) and "received last year but it has not yet been decided/do not know for this year" (7.2%) exceeded one person in ten. On the whole, more than one person in four (27.9%) responded that they received a decreased amount or did not receive winter bonus, or payment of a bonus was not yet decided.

Figure 2-1. Receipt of winter bonus (special allowance) in 2020 and the previous year

| Type of employment  | N     | [ "Last year" = 2019 ]<br>[ "This year" = 2020 ] |  |  |  |   |                           |   |                           |                               |                               | (%)  |  | (Percentage points) |
|---|-------|--|--|--|--|---|---------------------------|---|---------------------------|-------------------------------|-------------------------------|--|--|---------------------|
|   |       | Received this year and last year                 | Received last year but did not receive this year (a) | Received last year but it has not yet been decided this year/Do not know for this year (b) | Did not receive last year but received this year | Did not receive last year but it has not yet been decided this year/Do not know for this year | Did not receive last year | Did not receive last year but it has not yet been decided this year/Do not know for this year | Did not receive last year | Total of "received last year" | Total of "received this year" | Total of "received this year" - "received last year" |  |                     |
| <b>Total</b>  | 4,165 | 53.7   | 4.9  | 7.2  | 2.0  | 3.6   | 28.6                      | 65.8  | 55.7                      | ▲10.1                         |                               |  |  |                     |
| Regular employees   | 2,789 | 69.3   | 5.8  | 8.1  | 1.6  | 2.9   | 12.3                      | 83.2  | 70.8                      | ▲12.3                         |                               |  |  |                     |
| Non-regular employees (total)   | 1,376 | 22.2   | 2.9  | 5.4  | 2.8  | 5.1   | 61.6                      | 30.5  | 25.0                      | ▲5.5                          |                               |  |  |                     |
| Breakdown of non-regular employees                                      | 963   | 19.4   | 2.8  | 6.1  | 3.0  | 5.7   | 62.9                      | 28.3  | 22.4                      | ▲5.9                          |                               |  |  |                     |
| Contract workers and shokufutaku (entrusted workers)                    | 277   | 41.5   | 2.9  | 4.7  | 2.2  | 2.9   | 45.8                      | 49.1  | 43.7                      | ▲5.4                          |                               |  |  |                     |
| Dispatched workers  | 136   | 2.9  | 3.7  | 1.5  | 2.2  | 5.1   | 84.6                      | 8.1   | 5.1                       | ▲2.9                          |                               |  |  |                     |
| Administrative and managerial workers (section manager level or higher) | 374   | 73.3   | 6.1  | 4.8  | 1.1  | 1.1   | 13.6                      | 84.2  | 74.3                      | ▲9.9                          |                               |  |  |                     |
| Professional and engineering workers                                    | 1,057 | 65.2   | 4.6  | 7.2  | 2.4  | 3.2   | 17.4                      | 77.0  | 67.5                      | ▲9.5                          |                               |  |  |                     |
| Clerical workers  | 1,017 | 52.5   | 4.3  | 7.1  | 2.4  | 2.2   | 31.6                      | 63.9  | 54.9                      | ▲9.0                          |                               |  |  |                     |
| Sales workers   | 565   | 48.3   | 5.3  | 8.1  | 1.8  | 4.8   | 31.7                      | 61.8  | 50.1                      | ▲11.7                         |                               |  |  |                     |
| Service workers   | 426   | 28.9   | 5.4  | 7.7  | 2.1  | 7.3   | 48.6                      | 42.0  | 31.0                      | ▲11.0                         |                               |  |  |                     |
| Security workers  | 20    | 50.0   | 5.0  | -  | -  | -   | 45.0                      | 55.0  | 50.0                      | ▲5.0                          |                               |  |  |                     |
| Production/skilled workers  | 337   | 56.4   | 3.9  | 8.3  | 2.1  | 4.2   | 25.2                      | 68.5  | 58.5                      | ▲10.1                         |                               |  |  |                     |
| Transport and machine operation workers                                 | 89    | 53.9   | 9.0  | 10.1   | -  | -   | 27.0                      | 73.0  | 53.9                      | ▲19.1                         |                               |  |  |                     |
| Construction and mining workers   | 33    | 39.4   | 6.1  | 6.1  | -  | 12.1  | 36.4                      | 51.5  | 39.4                      | ▲12.1                         |                               |  |  |                     |
| Carrying, cleaning, and packaging workers                               | 133   | 33.1   | 3.0  | 4.5  | 0.8  | 7.5   | 51.1                      | 40.6  | 33.8                      | ▲6.8                          |                               |  |  |                     |
| Others  | 94    | 36.2   | 5.3  | 7.4  | 1.1  | 2.1   | 47.9                      | 48.9  | 37.2                      | ▲11.7                         |                               |  |  |                     |
| Do not know   | 20    | 30.0   | 5.0  | 10.0   | 5.0  | 20.0  | 30.0                      | 45.0  | 35.0                      | ▲10.0                         |                               |  |  |                     |
| Construction  | 198   | 57.1   | 5.1  | 10.1   | 1.5  | 6.1   | 20.2                      | 72.2  | 58.6                      | ▲13.6                         |                               |  |  |                     |
| Manufacturing   | 873   | 68.4   | 4.4  | 6.4  | 1.6  | 2.7   | 16.7                      | 79.2  | 69.8                      | ▲9.4                          |                               |  |  |                     |
| Electricity, gas, heat supply and water                                 | 61    | 62.3   | 4.9  | 4.9  | 1.6  | 3.3   | 23.0                      | 72.1  | 63.9                      | ▲8.2                          |                               |  |  |                     |
| Information and communications  | 239   | 63.6   | 3.3  | 5.4  | 1.3  | 3.3   | 23.0                      | 72.4  | 64.9                      | ▲7.5                          |                               |  |  |                     |
| Transport   | 234   | 58.1   | 8.1  | 4.3  | 0.9  | 2.1   | 26.5                      | 70.5  | 59.0                      | ▲11.5                         |                               |  |  |                     |
| Wholesale and retail trade  | 511   | 42.9   | 5.1  | 9.8  | 1.8  | 4.5   | 36.0                      | 57.7  | 44.6                      | ▲13.1                         |                               |  |  |                     |
| Finance and insurance   | 204   | 62.3   | 2.0  | 2.0  | 4.9  | 1.5   | 27.5                      | 66.2  | 67.2                      | 1.0                           |                               |  |  |                     |
| Real estate   | 87    | 59.8   | 4.6  | 5.7  | -  | 1.1   | 28.7                      | 70.1  | 59.8                      | ▲10.3                         |                               |  |  |                     |
| Accommodations, eating and drinking services                            | 121   | 19.0   | 6.6  | 9.1  | 2.5  | 5.0   | 57.9                      | 34.7  | 21.5                      | ▲13.2                         |                               |  |  |                     |
| Medical, health care and welfare  | 759   | 59.6   | 3.6  | 9.0  | 2.5  | 3.6   | 21.9                      | 72.1  | 62.1                      | ▲10.0                         |                               |  |  |                     |
| Education, learning support   | 119   | 29.4   | 4.2  | 5.0  | 5.9  | 4.2   | 51.3                      | 38.7  | 35.3                      | ▲3.4                          |                               |  |  |                     |
| Postal services, cooperative associations                               | 36    | 77.8   | 5.6  | 2.8  | 2.8  | -   | 11.1                      | 86.1  | 80.6                      | ▲5.6                          |                               |  |  |                     |
| Services  | 538   | 38.3   | 6.5  | 6.9  | 1.9  | 4.3   | 42.2                      | 51.7  | 40.1                      | ▲11.5                         |                               |  |  |                     |
| Others  | 172   | 32.6   | 7.6  | 8.1  | 1.2  | 6.4   | 44.2                      | 48.3  | 33.7                      | ▲14.5                         |                               |  |  |                     |
| Do not know   | 13    | 30.8   | 7.7  | 7.7  | 0.0  | 15.4  | 38.5                      | 46.2  | 30.8                      | ▲15.4                         |                               |  |  |                     |
| 29 or fewer employees   | 861   | 33.7   | 6.4  | 11.3   | 2.3  | 4.3   | 42.0                      | 51.3  | 36.0                      | ▲15.3                         |                               |  |  |                     |
| 30 to 299 employees   | 1,295 | 54.2   | 5.5  | 9.7  | 1.7  | 3.9   | 25.1                      | 69.3  | 55.9                      | ▲13.4                         |                               |  |  |                     |
| 300 to 999 employees  | 556   | 64.9   | 5.4  | 4.5  | 1.6  | 2.9   | 20.7                      | 74.8  | 66.5                      | ▲8.3                          |                               |  |  |                     |
| 1,000 or more employees   | 1,114 | 71.1   | 3.4  | 3.1  | 2.3  | 2.0   | 18.1                      | 77.6  | 73.4                      | ▲4.1                          |                               |  |  |                     |
| Do not know   | 339   | 27.4   | 2.7  | 5.3  | 1.5  | 8.0   | 55.2                      | 35.4  | 28.9                      | ▲6.5                          |                               |  |  |                     |
| Tokyo metropolitan area   | 1,275 | 53.8   | 4.8  | 5.6  | 1.4  | 4.4   | 30.0                      | 64.2  | 55.2                      | ▲9.0                          |                               |  |  |                     |
| Chubu or Kansai area  | 1,433 | 56.1   | 4.5  | 6.3  | 2.4  | 3.2   | 27.5                      | 66.9  | 58.5                      | ▲8.3                          |                               |  |  |                     |
| Others  | 1,457 | 51.3   | 5.4  | 9.4  | 2.0  | 3.4   | 28.5                      | 66.1  | 53.3                      | ▲12.8                         |                               |  |  |                     |

Status as of April 1, 2020

Figure 2-2. Receipt of winter bonus (special allowance) and change in amount paid in 2020 compared to the previous year

| Type of employment  | N     | Received this year and last year | Decreased by 90% or more | Decreased by 70% to 80% | Decreased by 50% to 60% | Decreased by about 30% to 40% | Decreased by about 10% to 20% | Roughly the same (change of less than 10%) | Increased by about 10% to 20% | Increased by about 30% to 40% | Increased by 50% or more | Not yet been decided/Do not know | Total of "it was decreased" (c) | Total of "it was increased" | (a), (b) in figure 2-1 and (c) at left | (%) |
|---|-------|----------------------------------|--------------------------|-------------------------|-------------------------|-------------------------------|-------------------------------|--|-------------------------------|-------------------------------|--------------------------|----------------------------------|---------------------------------|-----------------------------|--|-----|
|   |       |                                  |                          |                         |                         |                               |                               |  |                               |                               |                          |                                  |                                 |                             |  |     |
| Total   | 4,165 | 53.7                             | 0.4                      | 0.7                     | 1.5                     | 3.5                           | 9.6                           | 29.2                                       | 2.9                           | 0.6                           | 0.4                      | 4.8                              | 15.8                            | 3.9                         | 27.9                                   |     |
| Regular employees   | 2,789 | 69.3                             | 0.5                      | 1.1                     | 2.0                     | 5.0                           | 13.0                          | 36.5                                       | 4.2                           | 0.8                           | 0.4                      | 6.0                              | 21.6                            | 5.3                         | 35.5                                   |     |
| Non-regular employees (total)   | 1,376 | 22.2                             | 0.3                      | -                       | 0.6                     | 0.5                           | 2.8                           | 14.5                                       | 0.4                           | 0.2                           | 0.4                      | 2.6                              | 4.1                             | 1.0                         | 12.4                                   |     |
| Breakdown of non-regular employees                                      |       |                                  |                          |                         |                         |                               |                               |  |                               |                               |                          |                                  |                                 |                             |  |     |
| Part-time workers and arbeits (temporary workers)                       | 963   | 19.4                             | 0.3                      | -                       | 0.3                     | 0.2                           | 1.8                           | 13.0                                       | 0.4                           | 0.2                           | 0.4                      | 2.8                              | 2.6                             | 1.0                         | 11.5                                   |     |
| Contract workers and shokutaku (entrusted workers)                      | 277   | 41.5                             | 0.4                      | -                       | 1.8                     | 1.4                           | 7.6                           | 26.0                                       | 0.7                           | 0.4                           | 0.4                      | 2.9                              | 11.2                            | 1.4                         | 18.8                                   |     |
| Dispatched workers  | 136   | 2.9                              | -                        | -                       | -                       | 0.7                           | -                             | 1.5  | -                             | -                             | -                        | 0.7                              | 0.7                             | -                           | 5.9                                    |     |
| Administrative and managerial workers (section manager level or higher) | 374   | 73.3                             | 0.3                      | 1.3                     | 3.7                     | 5.1                           | 12.3                          | 40.4                                       | 4.0                           | 0.8                           | 1.1                      | 4.3                              | 22.7                            | 5.9                         | 33.7                                   |     |
| Professional and engineering workers                                    | 1,057 | 65.2                             | 0.4                      | 0.9                     | 1.6                     | 4.1                           | 12.2                          | 37.0                                       | 2.7                           | 0.6                           | 0.2                      | 5.6                              | 19.1                            | 3.5                         | 30.9                                   |     |
| Clerical workers  | 1,017 | 52.5                             | 0.4                      | 0.6                     | 1.4                     | 3.1                           | 10.8                          | 28.7                                       | 2.6                           | 0.3                           | 0.4                      | 4.2                              | 16.3                            | 3.2                         | 27.7                                   |     |
| Sales workers   | 565   | 48.3                             | 0.4                      | 0.5                     | 1.4                     | 2.3                           | 6.7                           | 26.2                                       | 3.4                           | 1.1                           | 0.5                      | 5.8                              | 11.3                            | 5.0                         | 24.8                                   |     |
| Service workers   | 426   | 28.9                             | 0.2                      | -                       | 0.2                     | 0.9                           | 4.9                           | 16.0                                       | 1.6                           | 0.7                           | 0.2                      | 4.0                              | 6.3                             | 2.6                         | 19.5                                   |     |
| Security workers  | 20    | 50.0                             | -                        | -                       | 5.0                     | 5.0                           | -                             | 35.0                                       | -                             | -                             | -                        | 5.0                              | 10.0                            | -                           | 15.0                                   |     |
| Production/skilled workers  | 337   | 56.4                             | 0.9                      | 1.2                     | 0.9                     | 7.1                           | 10.7                          | 26.1                                       | 3.6                           | 0.3                           | -                        | 5.6                              | 20.8                            | 3.9                         | 32.9                                   |     |
| Transport and machine operation workers                                 | 89    | 53.9                             | 1.1                      | 3.4                     | 4.5                     | 5.6                           | 12.4                          | 18.0                                       | 3.4                           | 1.1                           | -                        | 4.5                              | 27.0                            | 4.5                         | 46.1                                   |     |
| Construction and mining workers   | 33    | 39.4                             | -                        | -                       | 3.0                     | -                             | 3.0                           | 27.3                                       | 3.0                           | -                             | -                        | 3.0                              | 6.1                             | 3.0                         | 18.2                                   |     |
| Carrying, cleaning, and packaging workers                               | 133   | 33.1                             | -                        | -                       | -                       | 3.0                           | 3.0                           | 20.3                                       | 3.8                           | 0.8                           | 0.8                      | 1.5                              | 6.0                             | 5.3                         | 13.5                                   |     |
| Others  | 94    | 36.2                             | -                        | -                       | 1.1                     | 1.1                           | 4.3                           | 18.1                                       | 5.3                           | -                             | -                        | 6.4                              | 6.4                             | 5.3                         | 19.1                                   |     |
| Do not know   | 20    | 30.0                             | 5.0                      | -                       | -                       | 5.0                           | 5.0                           | 10.0                                       | -                             | -                             | -                        | 5.0                              | 15.0                            | -                           | 30.0                                   |     |
| Construction  | 198   | 57.1                             | 1.0                      | 1.0                     | 1.0                     | 1.5                           | 13.1                          | 28.3                                       | 5.1                           | 1.0                           | 0.5                      | 4.5                              | 17.7                            | 6.6                         | 32.8                                   |     |
| Manufacturing   | 873   | 68.4                             | 0.5                      | 1.1                     | 2.3                     | 6.1                           | 15.7                          | 32.9                                       | 3.8                           | 0.5                           | 0.2                      | 5.4                              | 25.7                            | 4.5                         | 36.4                                   |     |
| Electricity, gas, heat supply and water                                 | 61    | 62.3                             | 1.6                      | -                       | 1.6                     | 3.3                           | 1.6                           | 47.5                                       | 6.6                           | -                             | -                        | -                                | 8.2                             | 6.6                         | 18.0                                   |     |
| Information and communications  | 239   | 63.6                             | 0.4                      | 0.8                     | 1.3                     | 2.1                           | 7.1                           | 38.1                                       | 6.3                           | 0.8                           | 0.4                      | 6.3                              | 11.7                            | 7.5                         | 20.5                                   |     |
| Transport   | 234   | 58.1                             | 1.3                      | 2.1                     | 3.8                     | 8.1                           | 11.1                          | 22.2                                       | 5.6                           | 0.4                           | 0.4                      | 3.0                              | 26.5                            | 6.4                         | 38.9                                   |     |
| Wholesale and retail trade  | 511   | 42.9                             | 0.2                      | 0.6                     | 1.0                     | 1.6                           | 7.0                           | 23.5                                       | 1.8                           | 0.6                           | 0.8                      | 5.9                              | 10.4                            | 3.1                         | 25.2                                   |     |
| Finance and insurance   | 204   | 62.3                             | -                        | 0.5                     | 1.0                     | 4.9                           | 7.8                           | 40.7                                       | 2.5                           | 1.0                           | -                        | 3.9                              | 14.2                            | 3.4                         | 18.1                                   |     |
| Real estate   | 87    | 59.8                             | -                        | -                       | 1.1                     | 3.4                           | 5.7                           | 41.4                                       | 5.7                           | -                             | -                        | 2.3                              | 10.3                            | 5.7                         | 20.7                                   |     |
| Accommodations, eating and drinking services                            | 121   | 19.0                             | -                        | -                       | -                       | 1.7                           | 5.8                           | 8.3  | -                             | -                             | -                        | 3.3                              | 7.4                             | -                           | 23.1                                   |     |
| Medical, health care and welfare  | 759   | 59.6                             | 0.3                      | 0.5                     | 0.9                     | 3.6                           | 9.9                           | 36.5                                       | 1.6                           | 0.3                           | 0.3                      | 5.8                              | 15.2                            | 2.1                         | 27.7                                   |     |
| Education, learning support   | 119   | 29.4                             | -                        | -                       | 0.8                     | -                             | 9.2                           | 13.4                                       | 1.7                           | 1.7                           | -                        | 2.5                              | 10.1                            | 3.4                         | 19.3                                   |     |
| Postal services, cooperative associations                               | 36    | 77.8                             | -                        | -                       | 2.8                     | -                             | 2.8                           | 55.6                                       | 8.3                           | 5.6                           | 2.8                      | -                                | 5.6                             | 16.7                        | 13.9                                   |     |
| Services  | 538   | 38.3                             | 0.6                      | 0.4                     | 1.9                     | 2.2                           | 5.4                           | 20.1                                       | 1.9                           | 0.6                           | 0.6                      | 4.8                              | 10.4                            | 3.0                         | 23.8                                   |     |
| Others  | 172   | 32.6                             | -                        | 0.6                     | 1.2                     | 1.2                           | 7.6                           | 16.9                                       | 0.6                           | 0.6                           | -                        | 4.1                              | 10.5                            | 1.2                         | 26.2                                   |     |
| Do not know   | 13    | 30.8                             | -                        | -                       | -                       | 7.7                           | 7.7                           | 15.4                                       | -                             | -                             | -                        | -                                | 15.4                            | -                           | 30.8                                   |     |
| 29 or fewer employees   | 861   | 33.7                             | 0.1                      | 0.2                     | 0.7                     | 1.6                           | 4.3                           | 20.3                                       | 0.8                           | 0.3                           | 0.3                      | 4.9                              | 7.0                             | 1.5                         | 24.6                                   |     |
| 30 to 299 employees   | 1,295 | 54.2                             | 0.3                      | 0.5                     | 1.5                     | 3.6                           | 9.7                           | 28.8                                       | 3.0                           | 0.8                           | 0.5                      | 5.6                              | 15.6                            | 4.2                         | 30.7                                   |     |
| 300 to 999 employees  | 566   | 64.9                             | 0.5                      | 0.5                     | 1.8                     | 4.3                           | 13.7                          | 33.5                                       | 4.1                           | 0.9                           | 0.2                      | 5.4                              | 20.9                            | 5.2                         | 30.8                                   |     |
| 1,000 or more employees   | 1,114 | 71.1                             | 0.7                      | 1.3                     | 2.3                     | 5.4                           | 13.9                          | 37.9                                       | 4.6                           | 0.4                           | 0.4                      | 4.0                              | 23.7                            | 5.5                         | 30.2                                   |     |
| Do not know   | 339   | 27.4                             | 0.3                      | 0.9                     | 0.9                     | 0.6                           | 2.4                           | 17.7                                       | 0.6                           | 0.3                           | -                        | 3.8                              | 5.0                             | 0.9                         | 13.0                                   |     |
| Tokyo metropolitan area   | 1,275 | 53.8                             | 0.5                      | 0.8                     | 1.7                     | 3.8                           | 10.6                          | 28.7                                       | 2.7                           | 0.4                           | 0.2                      | 4.4                              | 17.4                            | 3.3                         | 27.8                                   |     |
| Chubu or Kansai area  | 1,433 | 56.1                             | 0.4                      | 0.8                     | 1.0                     | 3.4                           | 9.8                           | 31.4                                       | 2.5                           | 0.3                           | 0.7                      | 5.6                              | 15.6                            | 3.6                         | 26.3                                   |     |
| Others  | 1,457 | 51.3                             | 0.3                      | 0.5                     | 1.9                     | 3.4                           | 8.6                           | 27.5                                       | 3.6                           | 1.0                           | 0.1                      | 4.5                              | 14.7                            | 4.7                         | 29.4                                   |     |

Status as of April 1, 2020

**One in five responded that their first experience with work from home/telecommuting was in March-May, but more than half indicated that they were “not working from home/telecommuting now” in December or that the number of “work from home/telecommuting” days had decreased during the most recent one month. (Figure 3)**

Of “employees of private enterprises” at the time of the December Survey (N=4,165), just under one in three (28.2%) responded that they had experience with work from home/telecommuting before. Of them, roughly two in ten (19.7%) indicated that their “first experience was in March-May (2020).” On the other hand, just under one in ten (9.1%) indicated that they were “not doing it now.” Additionally, 4.4% of those who responded “currently doing it” (10.6%) indicated that the number of “work from home/telecommuting” days in the most recent month had “decreased compared to the period when COVID-19 cases were increasing.” Why are they not “doing it now” or why had the number of “work from home/telecommuting” days decreased in a company/job that permitted it? Their responses (multiple responses) included “because the state of emergency declaration was lifted” and “because tasks that can be done through work from home/telecommuting are limited (because I have tasks that require me to go to the office [e.g., to deal with customers, use special systems, handle paperwork, etc.].”

Figure 3. Experience with work from home/telecommuting and the number of “work from home/telecommuting” days in most recent one month compared to the period when COVID-19 cases were increasing.

| Type of employment  | N     | Experience with work from home/telecommuting                      |   |   |   |   |   |   |      |  |  | Total of those at left with first experience in March-May (b) + (e) |
|---|-------|---|---|---|---|---|---|---|------|--|--|---|
|   |       | Had experience before February 2020 and am currently doing it (a) | First experience was in March, May, and am currently doing it (b) | First experience was in June or later and am currently doing it (c) | Had experience before February 2020 but am not doing it now (d) | First experience was in March-May but am not doing it now (e) | First experience was in June or later but am not doing it now (f) | Have never experienced work from home/telecommuting (g) |      |  |  |   |
| Total   | 4,165 | 4.8   | 10.6  | 1.3   | 1.2   | 9.1   | 1.3   | 71.8  | 19.7 |  |  |   |
| Regular employees   | 2,769 | 6.0   | 13.4  | 1.5   | 1.3   | 10.9  | 1.5   | 65.4  | 24.2 |  |  |   |
| Non-regular employees (total)   | 1,376 | 2.3   | 5.1   | 0.8   | 0.9   | 5.4   | 0.9   | 84.7  | 10.5 |  |  |   |
| Breakdown of non-regular employees                                      |       | 1.9   | 2.2   | 0.4   | 0.8   | 2.8   | 0.6   | 91.3  | 5.0  |  |  |   |
| Part-time workers and arbei (temporary workers)                         | 277   | 4.0   | 12.3  | 1.4   | 1.4   | 14.1  | 1.4   | 65.3  | 26.4 |  |  |   |
| Contract workers and shokutaku (entrusted workers)                      |       | 1.5   | 11.0  | 2.2   | -   | 5.9   | 2.2   | 77.2  | 16.9 |  |  |   |
| Dispatched workers  | 136   | 9.6   | 23.8  | 1.6   | 1.6   | 15.2  | 2.7   | 45.5  | 39.0 |  |  |   |
| Administrative and managerial workers (section manager level or higher) | 374   | 6.5   | 13.2  | 1.7   | 1.1   | 9.2   | 1.6   | 66.7  | 22.3 |  |  |   |
| Professional and engineering workers                                    | 1,057 | 4.0   | 12.8  | 2.3   | 2.1   | 11.6  | 1.0   | 66.3  | 24.4 |  |  |   |
| Clerical workers  | 1,017 | 5.5   | 10.1  | 0.5   | 1.1   | 11.5  | 1.2   | 70.1  | 21.6 |  |  |   |
| Sales workers   | 565   | 1.9   | 3.3   | 0.5   | 0.5   | 3.8   | 0.9   | 89.2  | 7.0  |  |  |   |
| Service workers   | 426   | -   | -   | -   | -   | -   | -   | 100.0   | -    |  |  |   |
| Security workers  | 20    | 2.1   | 1.5   | 0.3   | 0.3   | 2.4   | 0.6   | 92.9  | 3.9  |  |  |   |
| Production/skilled workers  | 337   | -   | 1.1   | -   | -   | 5.6   | 1.1   | 92.1  | 6.7  |  |  |   |
| Transport and machine operation workers                                 | 89    | -   | -   | -   | -   | 9.1   | 3.0   | 87.9  | 9.1  |  |  |   |
| Construction and mining workers   | 33    | 2.3   | 0.8   | -   | -   | 0.8   | 0.8   | 95.5  | 1.5  |  |  |   |
| Carrying, cleaning, and packaging workers                               | 133   | 2.1   | 7.4   | -   | 1.1   | 6.4   | 2.1   | 80.9  | 13.8 |  |  |   |
| Others  | 94    | 5.0   | -   | -   | -   | 5.0   | 5.0   | 85.0  | 5.0  |  |  |   |
| Do not know   | 20    | 5.6   | 6.1   | 1.5   | 2.0   | 12.1  | 2.5   | 70.2  | 18.2 |  |  |   |
| Construction  | 198   | 5.5   | 15.7  | 1.7   | 1.3   | 9.0   | 1.5   | 65.3  | 24.7 |  |  |   |
| Manufacturing   | 873   | 1.6   | 14.8  | -   | 1.6   | 13.1  | -   | 68.9  | 27.9 |  |  |   |
| Electricity, gas, heat supply and water                                 | 61    | 20.5  | 33.1  | 2.9   | 1.3   | 9.6   | 3.3   | 29.3  | 42.7 |  |  |   |
| Information and communications  | 239   | 2.6   | 5.1   | 0.4   | 0.4   | 9.0   | 1.3   | 81.2  | 14.1 |  |  |   |
| Transport   | 234   | 2.3   | 7.8   | 1.2   | 0.4   | 5.9   | 0.8   | 81.6  | 13.7 |  |  |   |
| Wholesale and retail trade  | 511   | 5.9   | 16.2  | 3.4   | 2.5   | 21.1  | 3.4   | 47.5  | 37.3 |  |  |   |
| Finance and insurance   | 204   | 4.6   | 16.1  | 2.3   | -   | 18.4  | 3.4   | 55.2  | 34.5 |  |  |   |
| Real estate   | 87    | 1.7   | 3.3   | -   | 1.7   | 3.3   | -   | 90.1  | 6.6  |  |  |   |
| Accommodations, eating and drinking services                            | 121   | 1.3   | 1.7   | 0.4   | 0.8   | 3.4   | 0.3   | 92.1  | 5.1  |  |  |   |
| Medical, health care and welfare  | 759   | 1.7   | 14.3  | 1.7   | 2.5   | 24.4  | 2.5   | 52.9  | 38.7 |  |  |   |
| Education, learning support   | 119   | -   | -   | -   | -   | 16.7  | -   | 83.3  | 16.7 |  |  |   |
| Postal services, cooperative associations                               | 36    | 5.6   | 8.2   | 0.9   | 1.7   | 9.9   | 0.9   | 72.9  | 18.0 |  |  |   |
| Services  | 538   | 5.8   | 15.7  | 1.2   | 1.2   | 8.7   | 1.2   | 66.3  | 24.4 |  |  |   |
| Others  | 172   | 7.7   | 15.4  | -   | -   | -   | 7.7   | 69.2  | 15.4 |  |  |   |
| Do not know   | 13    | 2.9   | 5.1   | 0.7   | 1.0   | 4.8   | 1.4   | 84.1  | 9.9  |  |  |   |
| 29 or fewer employees   | 861   | 3.3   | 8.1   | 1.4   | 1.2   | 9.4   | 0.8   | 75.8  | 17.5 |  |  |   |
| 30 to 299 employees   | 1,295 | 3.4   | 16.2  | 1.6   | 0.7   | 9.4   | 2.0   | 66.7  | 25.5 |  |  |   |
| 300 to 999 employees  | 556   | 1,114   | 9.3   | 1.6   | 1.6   | 13.1  | 1.9   | 55.3  | 30.3 |  |  |   |
| 1,000 or more employees   | 1,114 | 2.1   | 3.8   | 0.6   | 0.9   | 4.7   | 0.3   | 87.6  | 8.6  |  |  |   |
| Do not know   | 339   | 7.7   | 17.5  | 1.4   | 1.4   | 9.3   | 1.2   | 61.5  | 26.8 |  |  |   |
| Tokyo metropolitan area   | 1,275 | 3.8   | 9.2   | 1.0   | 1.3   | 8.8   | 1.5   | 74.3  | 18.0 |  |  |   |
| Chubu or Kansai area  | 1,433 | 3.1   | 6.0   | 1.4   | 0.8   | 9.1   | 1.4   | 78.2  | 15.1 |  |  |   |
| Others  | 1,457 |   |   |   |   |   |   |   |      |  |  |   |

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Figure 3. Continued

| Type of employment  | N     | Total of respondents with experience up to May and currently doing it [(a) + (b)] | Number of "work from home/telecommuting" days in most recent one month compared to the period when COVID-19 cases were increasing |                    |                 |           | Total of "decreased" | Total of "have experience but not doing it now" [(d) to (f)] | Is work from home/telecommuting applicable to your current job? |                |  | Total of "have experience with work from home/telecommuting" [(a) to (f)] | Of this, total of "currently doing it" [(a) to (c)] |      | Continuation rate |
|---|-------|---|---|--------------------|-----------------|-----------|----------------------|--|---|----------------|--|---|---|------|-------------------|
|   |       |   | Decreased considerably  | Decreased slightly | Almost the same | Increased |                      |  | Applicable  | Not applicable | Company does not practice work from home/telecommuting |   | (a)   | (c)  |                   |
| <b>Total</b>  | 4,165 | 15.4  | 2.4   | 3.2                | 7.7             | 2.1       | 5.6                  | 11.6   | 2.3   | 5.0            | 4.3  | 28.2  | 16.7  | 59.0 |                   |
| Regular employees   | 2,789 | 19.4  | 2.9   | 4.1                | 9.8             | 2.5       | 7.0                  | 13.7   | 2.8   | 5.8            | 5.1  | 34.6  | 20.9  | 60.3 |                   |
| Non-regular employees (total)   | 1,376 | 7.3   | 1.3   | 1.5                | 3.4             | 1.2       | 2.8                  | 7.2  | 1.1   | 3.3            | 2.8  | 15.3  | 8.1   | 53.1 |                   |
| Part-time workers and arbeits (temporary workers)                       | 963   | 4.0   | 0.7   | 0.7                | 1.7             | 0.9       | 1.5                  | 4.3  | 0.4   | 1.8            | 2.1  | 8.7   | 4.5   | 51.2 |                   |
| Contract workers and shokutaku (entrusted workers)                      | 277   | 16.2  | 3.6   | 4.3                | 6.1             | 2.2       | 7.9                  | 17.0   | 2.2   | 9.0            | 5.8  | 34.7  | 17.7  | 51.0 |                   |
| Dispatched workers  | 136   | 12.5  | 0.7   | 0.7                | 10.3            | 0.7       | 1.5                  | 8.1  | 3.7   | 2.2            | 2.2  | 22.8  | 14.7  | 64.5 |                   |
| Administrative and managerial workers (section manager level or higher) | 374   | 33.4  | 4.5   | 4.3                | 19.8            | 4.8       | 8.8                  | 19.5   | 4.3   | 7.8            | 7.5  | 54.5  | 35.0  | 64.2 |                   |
| Professional and engineering workers                                    | 1,057 | 19.7  | 2.8   | 4.3                | 10.0            | 2.6       | 7.1                  | 11.9   | 2.6   | 5.0            | 4.3  | 33.3  | 21.4  | 64.2 |                   |
| Clerical workers  | 1,017 | 16.8  | 2.5   | 3.9                | 8.7             | 1.8       | 6.4                  | 14.7   | 3.4   | 5.7            | 5.5  | 33.7  | 19.1  | 56.6 |                   |
| Sales workers   | 565   | 15.6  | 2.7   | 4.4                | 5.5             | 3.0       | 7.1                  | 13.8   | 1.9   | 6.5            | 5.3  | 29.9  | 16.1  | 53.8 |                   |
| Service workers   | 426   | 5.2   | 1.6   | 0.9                | 2.3             | 0.2       | 2.6                  | 5.2  | 0.2   | 1.9            | 3.1  | 10.8  | 5.6   | 52.2 |                   |
| Security workers  | 20    | -   | -   | -                  | -               | -         | -                    | -  | -   | -              | -  | -   | -   | -    |                   |
| Production/skilled workers  | 337   | 3.6   | 1.2   | 0.3                | 1.5             | 0.6       | 1.5                  | 3.3  | 0.3   | 2.7            | 0.3  | 7.1   | 3.9   | 54.2 |                   |
| Transport and machine operation workers                                 | 89    | 1.1   | -   | 1.1                | -               | -         | 1.1                  | 6.7  | -   | 3.4            | 3.4  | 7.9   | 1.1   | 14.3 |                   |
| Construction and mining workers   | 33    | -   | -   | -                  | -               | -         | -                    | 12.1   | -   | 12.1           | -  | 12.1  | -   | -    |                   |
| Carrying, cleaning, and packaging workers                               | 133   | 3.0   | -   | 0.8                | 0.8             | 1.5       | 0.8                  | 1.5  | -   | 0.8            | 0.8  | 4.5   | 3.0   | 66.7 |                   |
| Others  | 94    | 9.6   | 1.1   | 2.1                | 4.3             | 2.1       | 3.2                  | 9.6  | 2.1   | 5.3            | 2.1  | 19.1  | 9.6   | 50.0 |                   |
| Do not know   | 20    | 5.0   | -   | -                  | 5.0             | -         | -                    | 10.0   | -   | -              | 10.0   | 15.0  | 5.0   | 33.3 |                   |
| Construction  | 198   | 11.6  | 3.0   | 2.0                | 5.1             | 1.5       | 5.1                  | 16.7   | 3.5   | 8.1            | 5.1  | 29.8  | 13.1  | 44.1 |                   |
| Manufacturing   | 873   | 21.2  | 3.0   | 5.5                | 10.2            | 2.5       | 8.5                  | 11.8   | 3.1   | 5.6            | 3.1  | 34.7  | 22.9  | 66.0 |                   |
| Electricity, gas, heat supply and water                                 | 61    | 16.4  | 3.3   | 6.6                | 3.3             | 3.3       | 9.8                  | 14.8   | 3.3   | 8.2            | 3.3  | 31.1  | 16.4  | 52.6 |                   |
| Information and communications  | 239   | 53.6  | 5.0   | 6.7                | 35.1            | 6.7       | 11.7                 | 14.2   | 4.2   | 6.3            | 3.8  | 70.7  | 56.5  | 79.9 |                   |
| Transport   | 234   | 7.7   | 0.9   | 2.1                | 3.8             | 0.9       | 3.0                  | 10.7   | 2.6   | 5.6            | 2.6  | 18.8  | 8.1   | 43.2 |                   |
| Wholesale and retail trade  | 511   | 10.2  | 1.6   | 2.5                | 4.1             | 2.0       | 4.1                  | 7.0  | 0.6   | 3.5            | 2.9  | 18.4  | 11.4  | 61.7 |                   |
| Finance and insurance   | 204   | 22.1  | 3.4   | 5.9                | 8.8             | 3.9       | 9.3                  | 27.0   | 5.9   | 9.8            | 11.3   | 52.5  | 25.5  | 48.6 |                   |
| Real estate   | 87    | 20.7  | 2.3   | 4.6                | 12.6            | 1.1       | 6.9                  | 21.8   | 5.7   | 8.0            | 8.0  | 44.8  | 23.0  | 51.3 |                   |
| Accommodations, eating and drinking services                            | 121   | 5.0   | 1.7   | 0.8                | 2.5             | -         | 2.5                  | 5.0  | 1.7   | 0.8            | 2.5  | 9.9   | 5.0   | 50.0 |                   |
| Medical, health care and welfare  | 759   | 3.0   | 0.7   | 0.8                | 1.3             | 0.3       | 1.4                  | 4.5  | 0.1   | 1.4            | 2.9  | 7.9   | 3.4   | 43.3 |                   |
| Education, learning support   | 119   | 16.0  | 2.5   | 5.9                | 5.0             | 2.5       | 8.4                  | 29.4   | 1.7   | 10.9           | 16.8   | 47.1  | 17.6  | 37.5 |                   |
| Postal services, cooperative associations                               | 36    | -   | -   | -                  | -               | -         | -                    | 16.7   | 2.8   | 8.3            | 5.6  | 16.7  | -   | -    |                   |
| Services  | 538   | 13.8  | 3.0   | 1.7                | 7.2             | 1.9       | 4.6                  | 12.5   | 2.2   | 4.8            | 5.4  | 27.1  | 14.7  | 54.1 |                   |
| Others  | 172   | 21.5  | 4.7   | 3.5                | 9.3             | 4.1       | 8.1                  | 11.0   | 2.3   | 5.8            | 2.9  | 33.7  | 22.7  | 67.2 |                   |
| Do not know   | 13    | 23.1  | -   | -                  | 15.4            | 7.7       | -                    | 7.7  | -   | -              | 7.7  | 30.8  | 23.1  | 75.0 |                   |
| 29 or fewer employees   | 861   | 8.0   | 1.4   | 0.7                | 4.9             | 1.0       | 2.1                  | 7.2  | 1.3   | 2.1            | 3.8  | 15.9  | 8.7   | 54.7 |                   |
| 30 to 299 employees   | 1,295 | 11.4  | 2.0   | 2.7                | 5.8             | 0.9       | 4.7                  | 11.4   | 1.5   | 4.6            | 5.3  | 24.2  | 12.8  | 52.9 |                   |
| 300 to 999 employees  | 556   | 19.6  | 2.7   | 5.6                | 9.2             | 2.2       | 8.3                  | 12.1   | 2.2   | 5.6            | 4.3  | 33.3  | 21.2  | 63.8 |                   |
| 1,000 or more employees   | 1,114 | 26.5  | 3.8   | 5.4                | 13.1            | 4.2       | 9.2                  | 16.6   | 4.5   | 8.1            | 4.0  | 44.7  | 28.1  | 62.9 |                   |
| Do not know   | 339   | 5.9   | 1.2   | 0.9                | 1.8             | 2.1       | 2.1                  | 5.9  | 0.3   | 2.7            | 2.9  | 12.4  | 6.5   | 52.4 |                   |
| Tokyo metropolitan area   | 1,275 | 25.2  | 3.1   | 4.9                | 13.4            | 3.8       | 8.0                  | 11.9   | 2.2   | 5.1            | 4.6  | 38.5  | 26.6  | 69.0 |                   |
| Chubu or Kansai area  | 1,433 | 13.0  | 2.3   | 3.1                | 5.8             | 1.8       | 5.4                  | 11.6   | 2.4   | 4.9            | 4.3  | 25.7  | 14.1  | 54.9 |                   |
| Others  | 1,457 | 9.1   | 1.8   | 1.9                | 4.5             | 0.9       | 3.7                  | 11.3   | 2.2   | 4.9            | 4.1  | 21.8  | 10.5  | 48.3 |                   |

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**Two-thirds responded that work productivity/efficiency “decreases” as a result of work from home/telecommuting. (Figure 4)**

When the survey asked “employees of private enterprises” at the time of the December Survey who had experience with work from home/telecommuting (N=1,176) about changes that are attributable to doing work from home/telecommuting in comparison with working in an office only, 21.1% of respondents responded “no change” and 12.7% responded “improves” with respect to “work productivity/efficiency” while approximately two-thirds (66.2%) responded “decreases.” The effective implementation of work from home/telecommuting is becoming a topic that must be addressed.



Figure 4. Changes in work productivity/efficiency that are attributable to work from home/telecommuting

|   | N     | Work productivity/efficiency        |  |                  | Fulfillment/satisfaction attained through work |                      |                                     | Achievement of work-life balance       |                  |                           | Total of "decreases" |      |      |      |      |      |
|---|-------|-------------------------------------|--|------------------|--|----------------------|-------------------------------------|--|------------------|---------------------------|----------------------|------|------|------|------|------|
|   |       | Decreases significantly (under 50%) | Decreases slightly (50% to under 100%) | No change (100%) | Improves (more than 100%)                      | Total of "decreases" | Decreases significantly (under 50%) | Decreases slightly (50% to under 100%) | No change (100%) | Improves (more than 100%) |                      |      |      |      |      |      |
|   | 1,176 | 12.9                                | 53.3                                   | 21.1             | 12.7   | 66.2                 | 16.5                                | 44.7                                   | 28.1             | 10.7                      | 61.2                 | 11.4 | 27.0 | 20.4 | 41.2 | 38.4 |
| Type of employment  |       |                                     |  |                  |  |                      |                                     |  |                  |                           |                      |      |      |      |      |      |
| Regular employees   | 965   | 11.4                                | 54.4                                   | 20.7             | 13.5   | 65.8                 | 16.4                                | 44.1                                   | 28.0             | 11.5                      | 60.5                 | 10.7 | 26.2 | 21.0 | 42.1 | 36.9 |
| Non-regular employees (total)   | 211   | 19.9                                | 48.3                                   | 22.7             | 9.0  | 68.2                 | 17.1                                | 47.4                                   | 28.4             | 7.1                       | 64.5                 | 14.7 | 30.8 | 17.5 | 37.0 | 45.5 |
| Administrative and managerial workers (section manager level or higher) | 204   | 7.4                                 | 62.3                                   | 20.6             | 9.8  | 69.6                 | 14.7                                | 47.1                                   | 29.9             | 8.3                       | 61.8                 | 7.8  | 28.4 | 25.0 | 38.7 | 36.3 |
| Main occupation   |       |                                     |  |                  |  |                      |                                     |  |                  |                           |                      |      |      |      |      |      |
| Professional and engineering workers                                    | 352   | 9.7                                 | 50.9                                   | 23.0             | 16.5   | 60.5                 | 11.6                                | 42.0                                   | 31.5             | 14.8                      | 53.7                 | 8.8  | 22.4 | 19.6 | 49.1 | 31.3 |
| Clerical workers  | 343   | 13.4                                | 55.1                                   | 21.6             | 9.9  | 68.5                 | 18.7                                | 46.9                                   | 25.7             | 8.7                       | 65.6                 | 12.8 | 27.4 | 19.0 | 40.8 | 40.2 |
| Sales workers   | 169   | 17.2                                | 46.2                                   | 18.9             | 17.8   | 63.3                 | 18.9                                | 42.6                                   | 27.2             | 11.2                      | 61.5                 | 11.8 | 30.2 | 21.9 | 36.1 | 42.0 |
| Service workers   | 46    | 26.1                                | 56.5                                   | 13.0             | 4.3  | 82.6                 | 34.8                                | 39.1                                   | 19.6             | 6.5                       | 73.9                 | 23.9 | 41.3 | 15.2 | 19.6 | 65.2 |
| Production/skilled workers  | 24    | 25.0                                | 45.8                                   | 20.8             | 8.3  | 70.8                 | 16.7                                | 50.0                                   | 25.0             | 8.3                       | 66.7                 | 16.7 | 37.5 | 16.7 | 29.2 | 54.2 |
| Transport and machine operation workers                                 | 7     | 28.6                                | 28.6                                   | 42.9             | -  | 57.1                 | 42.9                                | 14.3                                   | 28.6             | 14.3                      | 57.1                 | 57.1 | -    | 28.6 | 14.3 | 57.1 |
| Construction and mining workers   | 4     | 25.0                                | 50.0                                   | 25.0             | -  | 75.0                 | 25.0                                | 75.0                                   | -                | -                         | 100.0                | 25.0 | 25.0 | -    | 50.0 | 50.0 |
| Carrying, cleaning, and packaging workers                               | 6     | 33.3                                | 33.3                                   | 16.7             | 16.7   | 66.7                 | 16.7                                | 33.3                                   | 50.0             | -                         | 50.0                 | 16.7 | 22.2 | 33.3 | 33.3 | 33.3 |
| Others  | 18    | 22.2                                | 50.0                                   | 16.7             | 11.1   | 72.2                 | 5.6                                 | 66.7                                   | 16.7             | 11.1                      | 72.2                 | 11.1 | 22.2 | 16.7 | 50.0 | 33.3 |
| Do not know   | 3     | 33.3                                | 66.7                                   | -                | -  | 100.0                | 33.3                                | 33.3                                   | 33.3             | -                         | 66.7                 | -    | 66.7 | -    | 33.3 | 66.7 |
| Construction  | 59    | 8.5                                 | 62.7                                   | 22.0             | 6.8  | 71.2                 | 22.0                                | 37.3                                   | 32.2             | 8.5                       | 59.3                 | 11.9 | 25.4 | 22.0 | 40.7 | 37.3 |
| Manufacturing   | 303   | 8.3                                 | 53.5                                   | 24.4             | 13.9   | 61.7                 | 13.9                                | 48.2                                   | 26.7             | 11.2                      | 62.0                 | 6.9  | 27.7 | 19.8 | 45.5 | 34.7 |
| Electricity, gas, heat supply and water                                 | 19    | 26.3                                | 47.4                                   | 15.8             | 10.5   | 73.7                 | 42.1                                | 36.8                                   | 10.5             | 10.5                      | 78.9                 | 31.6 | 10.5 | 21.1 | 36.8 | 42.1 |
| Information and communications  | 169   | 7.7                                 | 45.6                                   | 26.6             | 20.1   | 53.3                 | 7.7                                 | 33.1                                   | 44.4             | 14.8                      | 40.8                 | 7.1  | 16.0 | 20.7 | 56.2 | 23.1 |
| Transport   | 44    | 18.2                                | 54.5                                   | 20.5             | 6.8  | 72.7                 | 18.2                                | 45.5                                   | 29.5             | 6.8                       | 63.6                 | 18.2 | 22.7 | 20.5 | 38.6 | 40.9 |
| Wholesale and retail trade  | 94    | 14.9                                | 55.3                                   | 12.8             | 17.0   | 70.2                 | 17.0                                | 43.6                                   | 25.5             | 13.8                      | 60.6                 | 9.6  | 36.2 | 16.0 | 38.3 | 45.7 |
| Finance and insurance   | 107   | 15.0                                | 57.0                                   | 20.6             | 7.5  | 72.0                 | 17.8                                | 46.7                                   | 25.2             | 10.3                      | 64.5                 | 12.1 | 21.5 | 24.3 | 42.1 | 33.6 |
| Real estate   | 39    | 15.4                                | 64.1                                   | 17.9             | 2.6  | 79.5                 | 17.9                                | 59.0                                   | 20.5             | 2.6                       | 76.9                 | 12.8 | 35.9 | 25.6 | 25.6 | 48.7 |
| Accommodations, eating and drinking services                            | 12    | 25.0                                | 41.7                                   | 33.3             | -  | 66.7                 | 25.0                                | 41.7                                   | 33.3             | -                         | 66.7                 | 16.7 | 58.3 | 25.0 | -    | 75.0 |
| Medical, health care and welfare  | 60    | 21.7                                | 45.0                                   | 15.0             | 18.3   | 66.7                 | 25.0                                | 41.7                                   | 18.3             | 15.0                      | 66.7                 | 20.0 | 25.0 | 21.7 | 33.3 | 45.0 |
| Education, learning support   | 56    | 19.6                                | 57.1                                   | 12.5             | 10.7   | 76.8                 | 21.4                                | 50.0                                   | 17.9             | 10.7                      | 71.4                 | 12.5 | 39.3 | 12.5 | 35.7 | 51.8 |
| Postal services, cooperative associations                               | 6     | 50.0                                | 33.3                                   | 16.7             | -  | 83.3                 | 16.7                                | 50.0                                   | 33.3             | -                         | 66.7                 | 33.3 | 16.7 | 16.7 | 33.3 | 50.0 |
| Services  | 146   | 14.4                                | 54.8                                   | 18.5             | 12.3   | 69.2                 | 19.9                                | 45.9                                   | 25.3             | 8.9                       | 65.8                 | 17.1 | 30.8 | 21.9 | 30.1 | 47.9 |
| Others  | 58    | 15.5                                | 53.4                                   | 25.9             | 5.2  | 69.0                 | 13.8                                | 53.4                                   | 25.9             | 6.9                       | 67.2                 | 8.6  | 31.0 | 20.7 | 39.7 | 39.7 |
| Do not know   | 4     | -                                   | 75.0                                   | -                | 25.0   | 75.0                 | -                                   | 50.0                                   | 50.0             | -                         | 50.0                 | -    | 25.0 | -    | 75.0 | 25.0 |
| 29 or fewer employees   | 137   | 17.5                                | 40.9                                   | 24.8             | 16.8   | 58.4                 | 17.5                                | 41.6                                   | 29.2             | 11.7                      | 59.1                 | 16.8 | 26.3 | 25.5 | 31.4 | 43.1 |
| 30 to 299 employees   | 314   | 13.1                                | 56.1                                   | 17.8             | 13.1   | 68.1                 | 20.4                                | 45.5                                   | 24.5             | 9.6                       | 65.9                 | 13.7 | 33.1 | 19.4 | 33.8 | 46.8 |
| 300 to 999 employees  | 185   | 9.2                                 | 59.5                                   | 17.8             | 13.5   | 68.6                 | 11.4                                | 45.9                                   | 28.6             | 14.1                      | 57.3                 | 7.0  | 26.5 | 21.6 | 44.9 | 33.5 |
| 1,000 or more employees   | 498   | 11.6                                | 53.4                                   | 23.3             | 11.6   | 65.1                 | 15.5                                | 45.0                                   | 29.1             | 10.4                      | 60.4                 | 9.8  | 22.5 | 19.3 | 48.4 | 32.3 |
| Do not know   | 42    | 28.6                                | 45.2                                   | 21.4             | 4.8  | 73.8                 | 19.0                                | 40.5                                   | 35.7             | 4.8                       | 59.5                 | 14.3 | 40.5 | 19.0 | 26.2 | 54.8 |
| Tokyo metropolitan area   | 491   | 10.8                                | 49.9                                   | 24.2             | 15.1   | 60.7                 | 11.6                                | 43.0                                   | 31.4             | 14.1                      | 54.6                 | 8.8  | 22.8 | 22.6 | 45.8 | 31.6 |
| Chubu or Kansai area  | 368   | 10.9                                | 56.2                                   | 17.1             | 13.9   | 69.0                 | 13.6                                | 50.5                                   | 26.6             | 9.2                       | 64.1                 | 9.5  | 30.4 | 19.0 | 41.0 | 39.9 |
| Others  | 317   | 18.6                                | 53.0                                   | 20.8             | 7.6  | 71.6                 | 27.4                                | 40.7                                   | 24.6             | 7.3                       | 68.1                 | 17.7 | 29.7 | 18.6 | 34.1 | 47.3 |

Status as of April 1, 2020

## **II. Impact on “freelance workers”**

### **More than 40% of freelance workers responded that they continue to feel an “impact on business performance (decrease in net sales/income).” (Figure 5)**

The survey asked “freelance workers” who continued to be “self-employed or do piecework” at the time of the December Survey (N=482) whether they still feel a continuing impact relating to COVID-19 (multiple responses). More than half (55.4%) responded that they continue to feel some kind of impact. Among them were responses such as “impact on business performance (decrease in net sales/income)” (42.1%).

### **More than one in four freelance workers responded that they “fell into a situation with no work (orders) at all (open but not doing business).” (Figure 6)**

The survey asked “freelance workers” as of April 1, 2020, (N=575) about situations they experienced from the time that COVID-19 infections began up to the present time (multiple responses). Responses received in order of the response percentage included “fell into a situation with no work (orders) at all (open but not doing business)” (27.1%), “received subsidy, etc., from national or local government” (25.4%), “curtailed own or family’s living expense to secure operating funds for work” (16.5%), and “used own or family’s savings to secure operating funds for work” (13.4%).

Figure 5. COVID-19-associated impacts on own work (business activity) and income and impacts continuing at the time of the December Survey

|   | N   | Total of "there was an impact" and "there is a continuing impact" | (Multiple responses)  |   |   |   |   |  |                                     |   |  |     | Responding to delays in deliveries/work periods |
|---|---|---|---|---|---|---|---|--|-------------------------------------|---|--|-----|---|
|   |   |   | Impact on business performance (decrease in net sales/income) | Impact on business performance (increase in net sales/income) | Cancellation or postponement of ordered jobs (including events and tours) | Suppression of business activity (production, sales, service) | Deteriorating relationship with client (due to retraining, delivery delays, etc.) | Reduction or loss of new orders or customers | Increase in new orders or customers | Suspension/scaling back of business or bankruptcy of client | Difficulty procuring products or materials due to distribution congestion/stoppage or increasing purchase prices |     |   |
| All impacts affecting respondent from the time that COVID-19 infections began | 575                                       | 62.3  | 49.7  | 5.9   | 19.0  | 20.7  | 2.4   | 21.9   | 2.8                                 | 10.3  | 4.2  | 4.9 |   |
| Of the above, impacts that currently continue                                 | 482                                       | 55.4  | 42.1  | 4.6   | 10.2  | 12.7  | 1.0   | 15.6   | 1.0                                 | 5.8   | 1.9  | 1.7 |   |
| Sex   | Male                                      | 359   | 39.8  | 4.7   | 9.7   | 9.7   | 0.8   | 13.6   | 0.8                                 | 5.3   | 1.7  | 1.4 |   |
|   | Female                                    | 123   | 68.3  | 48.8  | 11.4  | 21.1  | 1.6   | 21.1   | 1.6                                 | 7.3   | 2.4  | 2.4 |   |
| Age group   | 20-29 years old                           | 19  | 52.6  | 31.6  | 26.3  | 21.1  | -   | 21.1   | 5.3                                 | 5.3   | -  | -   |   |
|   | 30-39 years old                           | 74  | 60.8  | 40.5  | 8.1   | 12.2  | 2.7   | 20.3   | 2.7                                 | 6.8   | 5.4  | -   |   |
|   | 40-49 years old                           | 149   | 49.7  | 38.3  | 8.7   | 10.1  | 0.7   | 12.1   | 0.7                                 | 4.0   | 2.0  | 3.4 |   |
|   | 50-59 years old                           | 159   | 55.3  | 40.3  | 12.6  | 10.7  | 1.3   | 17.6   | 0.6                                 | 7.5   | 0.6  | 1.3 |   |
| Region of residence   | 60-64 years old                           | 81  | 61.7  | 56.8  | 6.2   | 19.8  | -   | 12.3   | -                                   | 4.9   | 1.2  | 1.2 |   |
|   | Tokyo metropolitan area                   | 149   | 59.1  | 45.0  | 12.8  | 17.4  | 2.7   | 18.1   | -                                   | 9.4   | 2.7  | 2.0 |   |
|   | Chubu or Kansai area                      | 161   | 53.4  | 42.9  | 9.3   | 11.2  | 0.6   | 17.4   | 1.2                                 | 5.0   | 1.9  | 1.2 |   |
|   | Others                                    | 172   | 54.1  | 39.0  | 8.7   | 9.9   | -   | 11.6   | 1.7                                 | 3.5   | 1.2  | 1.7 |   |
| Main occupation<br>Status as of April 1, 2020                                 | Professional and engineering workers      | 169   | 57.4  | 40.2  | 14.8  | 17.2  | 1.2   | 19.5   | 1.8                                 | 7.7   | 1.2  | 1.8 |   |
|   | Clerical workers                          | 32  | 40.6  | 31.3  | 6.3   | 3.1   | -   | 3.1  | -                                   | -   | 3.1  | 3.1 |   |
|   | Sales workers                             | 48  | 70.8  | 58.3  | 10.4  | 22.9  | 2.1   | 22.9   | -                                   | 6.3   | 10.4   | 4.2 |   |
|   | Service workers                           | 85  | 65.9  | 52.9  | 5.9   | 9.4   | -   | 17.6   | 2.4                                 | 3.5   | -  | -   |   |
|   | Production/skilled workers                | 20  | 45.0  | 40.0  | 15.0  | 10.0  | -   | 20.0   | -                                   | 5.0   | -  | -   |   |
|   | Transport and machine operation workers   | 10  | 70.0  | 60.0  | 10.0  | 10.0  | -   | 20.0   | -                                   | 20.0  | -  | -   |   |
|   | Construction and mining workers           | 36  | 44.4  | 41.7  | 13.9  | 5.6   | 2.8   | 11.1   | -                                   | 2.8   | -  | 5.6 |   |
|   | Carrying, cleaning, and packaging workers | 14  | 42.9  | 28.6  | 7.1   | -   | -   | 7.1  | -                                   | 7.1   | -  | -   |   |
|   | Others                                    | 60  | 43.3  | 30.0  | 3.3   | 11.7  | 1.7   | 5.0  | -                                   | 6.7   | 1.7  | -   |   |
|   | Do not know                               | 8   | 37.5  | 12.5  | -   | -   | -   | 12.5   | -                                   | -   | -  | -   |   |
| Household income in 2019  | Less than 3 million yen                   | 104   | 54.8  | 38.5  | 5.8   | 8.7   | 1.9   | 19.2   | 1.0                                 | 5.8   | -  | -   |   |
|   | 3 million yen to less than 5 million yen  | 118   | 65.3  | 54.2  | 19.5  | 14.4  | 0.8   | 16.1   | 0.8                                 | 9.3   | 2.5  | 2.5 |   |
|   | 5 million yen to less than 7 million yen  | 77  | 58.4  | 44.2  | 10.4  | 13.0  | 1.3   | 14.3   | 1.3                                 | 1.3   | 2.6  | 2.6 |   |
|   | 7 million yen or more                     | 91  | 47.3  | 33.0  | 6.6   | 12.1  | -   | 12.1   | 1.1                                 | 6.6   | 2.2  | 2.2 |   |
| Do not know   | 92  | 48.9  | 38.0  | 6.5   | 15.2  | 1.1   | 15.2  | 1.1  | 4.3                                 | 2.2   | 1.1  |     |   |

Figure 5. Continued

|   |  | N    | Total of "there was an impact" and "there is a continuing impact" | Difficulty in moving as a result of prohibition of overseas travel, order to return to Japan, or request to refrain from going outside | Closure of business establishment or change of work location associated with burden of rent, etc. | Deterioration of cash flow/danger of going out of business | Increase in burden of dealing with work from home/telecommuting by client | Balancing/adjusting daily life with work "school closures," "dispersed school attendance," or "shortened lessons" | Increased burden of hygiene management to control infections, etc. | Other | None in particular |
|---|--|------|---|--|---|--|---|---|--|-------|--------------------|
| All impacts affecting respondent from the time that COVID-19 infections began |  | 575  | 62.3  | 3.3  | 0.7   | 8.3  | 3.3   | 2.6   | 16.5   | 1.2   | 5.8                |
| Of the above, impacts that currently continue                                 |  | 482  | 55.4  | 1.7  | 0.2   | 5.6  | 1.9   | 0.2   | 12.0   | 1.2   | 5.8                |
| Sex   | Male                                     | 359  | 51.0  | 0.8  | -   | 5.0  | 1.9   | 0.3   | 8.1  | 1.1   | 6.4                |
|   | Female                                   | 123  | 68.3  | 4.1  | 0.8   | 7.3  | 1.6   | -   | 23.6   | 1.6   | 4.1                |
| Age group   | 20-29 years old                          | 19   | 52.6  | -  | -   | 15.8   | 5.3   | -   | 15.8   | -     | 10.5               |
|   | 30-39 years old                          | 74   | 60.8  | 1.4  | 1.4   | 2.7  | 1.4   | -   | 18.9   | -     | 6.8                |
|   | 40-49 years old                          | 149  | 49.7  | 2.0  | -   | 6.0  | 1.3   | 0.7   | 12.1   | 0.7   | 3.4                |
|   | 50-59 years old                          | 159  | 55.3  | 1.9  | -   | 7.5  | 1.9   | -   | 10.7   | 3.1   | 7.5                |
|   | 60-64 years old                          | 81   | 61.7  | 1.2  | -   | 1.2  | 2.5   | -   | 7.4  | -     | 4.9                |
| Region of residence   | Tokyo metropolitan area                  | 149  | 59.1  | 3.4  | 0.7   | 6.0  | 3.4   | -   | 10.1   | 0.7   | 4.0                |
|   | Chubu or Kansai area                     | 161  | 53.4  | 1.2  | -   | 5.6  | 0.6   | -   | 9.9  | 1.2   | 6.8                |
|   | Others                                   | 172  | 54.1  | 0.6  | -   | 5.2  | 1.7   | 0.6   | 15.7   | 1.7   | 6.4                |
| Main occupation   | Professional and engineering workers     | 169  | 57.4  | 4.1  | -   | 6.5  | 3.0   | -   | 13.0   | 2.4   | 6.5                |
|   | Clerical workers                         | 32   | 40.6  | 3.1  | -   | 3.1  | 3.1   | -   | 9.4  | -     | -                  |
|   | Sales workers                            | 48   | 70.8  | -  | -   | 6.3  | 6.3   | 2.1   | 10.4   | -     | 4.2                |
|   | Service workers                          | 85   | 65.9  | -  | -   | 3.5  | -   | -   | 21.2   | 1.2   | 3.5                |
|   | Production/skilled workers               | 20   | 45.0  | -  | -   | 5.0  | -   | -   | 10.0   | -     | 5.0                |
|   | Transport and machine operation workers  | 10   | 70.0  | -  | -   | 10.0   | -   | -   | 30.0   | -     | -                  |
|   | Construction and mining workers          | 36   | 44.4  | -  | -   | 2.8  | -   | -   | -  | -     | 16.7               |
|   | Caring, cleaning, and packaging workers  | 14   | 42.9  | -  | -   | 7.1  | -   | -   | 7.1  | -     | 7.1                |
|   | Others                                   | 60   | 43.3  | -  | -   | 8.3  | -   | -   | 6.7  | 1.7   | 6.7                |
|   | Do not know                              | 8    | 37.5  | -  | -   | -  | -   | -   | -  | -     | -                  |
| Household income in 2019  | Less than 3 million yen                  | 104  | 54.8  | 1.9  | 1.0   | 11.5   | 1.0   | -   | 14.4   | 1.0   | 6.7                |
|   | 3 million yen to less than 5 million yen | 118  | 65.3  | 1.7  | -   | 3.4  | 3.4   | 0.8   | 13.6   | 0.8   | 4.2                |
|   | 5 million yen to less than 7 million yen | 77   | 58.4  | 1.3  | -   | 5.2  | 1.3   | -   | 13.0   | 1.3   | 9.1                |
|   | 7 million yen or more                    | 91   | 47.3  | 2.2  | -   | 2.2  | 2.2   | -   | 11.0   | 1.1   | 4.4                |
| Do not know   | 92                                       | 48.9 | 1.1   | -  | 5.4   | 1.1  | -   | 7.6   | 2.2  | 5.4   |                    |

Figure 6. Situations experienced while working as a freelance worker between the time COVID-19 infections began and the present time

|     |   | (Multiple responses) |  |   |  |   |   |  |  |   |  |  | (%)  |
|-----|---|----------------------|--|---|--|---|---|--|--|---|--|--|--|
| Sex | N | Total                | Received subsidy, etc. from national or local government | Accounts receivable became uncollectable (in full or partially) | Took out a new loan from bank, consumer lending company, etc. due to insufficient funds for work | Used own or family's savings to secure operating funds for work | Curtailed own or family's living expense to secure operating funds for work | Doubts about creditworthiness by business partner hindered business operations | Scaled back or abandoned plans for future business expansion or capital investment | Became delinquent in paying rent or tenant fee of work office | Moved work office to a place with lower rent, etc. | Had work telephone service or office utilities suspended | Did not experience any of the situations mentioned at left |
|     |   | 47.0                 | 25.4   | 2.1   | 3.1  | 13.4  | 16.5  | 0.5  | 4.9  | 0.7   | 0.2  | 0.3  | 53.0   |
|     |   | 575                  | 25.4   | 2.1   | 3.1  | 13.4  | 16.5  | 0.5  | 4.9  | 0.7   | 0.2  | 0.3  | 53.0   |
|     |   | 411                  | 24.8   | 1.9   | 2.7  | 10.5  | 15.3  | 0.2  | 4.6  | 0.5   | 0.2  | 0.2  | 54.7   |
|     |   | 164                  | 26.8   | 2.4   | 4.3  | 20.7  | 19.5  | 1.2  | 5.5  | 1.2   | -  | 0.6  | 48.8   |
|     |   | 22                   | 31.8   | -   | -  | 22.7  | 22.7  | -  | 9.1  | 4.5   | -  | -  | 45.5   |
|     |   | 90                   | 34.4   | 3.3   | 2.2  | 12.2  | 16.7  | -  | 5.6  | -   | 1.1  | -  | 45.6   |
|     |   | 176                  | 23.9   | 1.7   | 2.3  | 11.9  | 17.0  | 1.1  | 3.4  | 0.6   | -  | 0.6  | 55.1   |
|     |   | 188                  | 27.1   | 2.7   | 3.7  | 14.4  | 14.9  | 0.5  | 5.9  | 1.1   | -  | 0.5  | 54.3   |
|     |   | 99                   | 23.2   | 1.0   | 5.1  | 13.1  | 17.2  | -  | 4.0  | -   | -  | -  | 55.6   |
|     |   | 178                  | 36.0   | 3.4   | 1.1  | 18.0  | 18.0  | -  | 7.3  | 1.7   | -  | 0.6  | 47.2   |
|     |   | 190                  | 23.7   | -   | 4.2  | 8.9   | 14.2  | 0.5  | 3.7  | -   | 0.5  | -  | 57.4   |
|     |   | 207                  | 25.6   | 2.9   | 3.9  | 13.5  | 17.4  | 1.0  | 3.9  | 0.5   | -  | 0.5  | 54.1   |
|     |   | 186                  | 31.2   | 3.8   | 1.6  | 12.9  | 16.7  | -  | 5.4  | 0.5   | -  | -  | 52.2   |
|     |   | 49                   | 18.4   | 2.0   | 2.0  | 8.2   | 12.2  | -  | 4.1  | 2.0   | -  | 2.0  | 71.4   |
|     |   | 58                   | 29.3   | 1.7   | 8.6  | 22.4  | 29.3  | -  | 8.6  | 1.7   | -  | 1.7  | 43.1   |
|     |   | 106                  | 27.4   | 2.8   | 5.7  | 17.9  | 17.9  | 1.9  | 2.8  | 0.9   | 0.9  | -  | 41.5   |
|     |   | 23                   | 34.8   | -   | -  | 4.3   | 13.0  | -  | 4.3  | -   | -  | -  | 60.9   |
|     |   | 11                   | 9.1  | -   | 9.1  | 9.1   | 18.2  | -  | -  | -   | -  | -  | 54.5   |
|     |   | 41                   | 31.7   | -   | 2.4  | 9.8   | 9.8   | 2.4  | 7.3  | -   | -  | -  | 46.3   |
|     |   | 16                   | 25.0   | -   | -  | -   | 6.3   | -  | 6.3  | -   | -  | -  | 68.8   |
|     |   | 72                   | 20.8   | -   | -  | 13.9  | 15.3  | -  | 4.2  | -   | -  | -  | 63.9   |
|     |   | 13                   | 15.4   | -   | 7.7  | 7.7   | 7.7   | -  | -  | -   | -  | -  | 61.5   |
|     |   | 124                  | 34.7   | 3.2   | 5.6  | 16.1  | 24.2  | 0.8  | 5.6  | 0.8   | 0.8  | -  | 48.4   |
|     |   | 146                  | 29.5   | 1.4   | 2.7  | 14.4  | 18.5  | 1.4  | 4.1  | 1.4   | -  | -  | 49.3   |
|     |   | 88                   | 25.0   | -   | 2.3  | 11.4  | 12.5  | -  | 5.7  | -   | -  | -  | 58.0   |
|     |   | 102                  | 25.5   | 4.9   | 2.9  | 12.7  | 10.8  | -  | 4.9  | -   | -  | -  | 53.9   |
|     |   | 115                  | 19.1   | 0.9   | 1.7  | 11.3  | 13.9  | -  | 4.3  | 0.9   | -  | 0.9  | 58.3   |

### **III. Findings from the survey results of all valid respondents**

#### **More than 30% of employees and more than 40% of freelance workers anticipate decreased annual income for 2020. (Figure 7)**

The survey asked all valid respondents (employees of private enterprises [N=4,307] and freelance workers [N=575]) about their expectations vis-à-vis their annual income for 2020 (pretax) in comparison with their income for 2019 (pretax). The response “will decrease” was indicated by 46.6% of freelance workers, as opposed to 31.9% of employees (regular employees: 33.4%, non-regular employees: 29.0%).

#### **More than 40% of freelance workers and households with annual income of less than 3 million yen saw their household income and expenditures for the past three months fall into the red. (Figure 8)**

When the survey asked all valid respondents (same as above) about their household income and expenditures for the past three months (September to November 2020), the percentage that responded “deficit” (the total of “significant deficit” and “slight deficit”) was above 40% for “freelance workers” with 43.0%, respondents whose household income for 2019 was “less than 3 million yen” with 43.1%, and respondents who “have circumstances” that make full-time work difficult such as childcare, nursing care, illness (hospital visits), disability, etc. with 44.0%. Excess in deficits, obtained by subtracting the “deficit total” from the “surplus total”, was, in the same order, -23.8 percentage points, -30.7 percentage points, and 23.3 percentage points. Additionally, the percentage that responded “deficit” when the household’s breadwinner or method of maintaining household finances “changed” due to the effects of COVID-19 (4.6% of the total) exceeded three-fourths at 76.7% with the excess in deficits reached -70.4 percentage points. This made it clear that the effects of COVID-19 are directly impacting the economically disadvantaged.

Figure 7. Annual income expectations for 2020 in comparison with annual income for 2019

|   | N     | Annual income for 2020 (pretax) in comparison with annual income for 2019 (pretax) |                            |                                  |                                  |                                  |                            |                                  |                            |                                  |                                |                                  | Total of "increase" | Total of "decrease" |
|---|-------|--|----------------------------|----------------------------------|----------------------------------|----------------------------------|----------------------------|----------------------------------|----------------------------|----------------------------------|--------------------------------|----------------------------------|---------------------|---------------------|
|   |       | Will decrease by 90% or more   | Will decrease by about 80% | Will decrease by about 70 to 80% | Will decrease by about 60 to 70% | Will decrease by about 50 to 60% | Will decrease by about 40% | Will decrease by about 30 to 40% | Will increase by about 20% | Will increase by about 30 to 40% | Will increase by more than 50% | Not yet been decided/Do not know |                     |                     |
|   | 4,882 | 1.3  | 1.9                        | 3.3                              | 7.7                              | 19.4                             | 47.8                       | 5.0                              | 0.9                        | 0.6                              | 10.7                           | 1.5                              | 33.6                | 6.5                 |
| Sex   |       |  |                            |                                  |                                  |                                  |                            |                                  |                            |                                  |                                |                                  |                     |                     |
| Male  | 2,722 | 1.3  | 2.0                        | 3.1                              | 7.7                              | 21.7                             | 46.1                       | 5.1                              | 0.9                        | 0.7                              | 10.2                           | 1.1                              | 35.8                | 6.8                 |
| Female  | 2,160 | 1.3  | 1.8                        | 3.6                              | 7.7                              | 16.5                             | 49.8                       | 4.8                              | 0.9                        | 0.4                              | 11.3                           | 2.0                              | 30.8                | 6.1                 |
| Circumstances of childcare, etc.  |       |  |                            |                                  |                                  |                                  |                            |                                  |                            |                                  |                                |                                  |                     |                     |
| Have circumstances  | 605   | 2.6  | 3.5                        | 8.6                              | 10.6                             | 16.4                             | 38.5                       | 3.8                              | 1.0                        | 1.2                              | 10.7                           | 3.1                              | 41.7                | 6.0                 |
| Do not have circumstances   | 4,277 | 1.1  | 1.7                        | 2.6                              | 7.3                              | 19.8                             | 49.1                       | 5.1                              | 0.9                        | 0.5                              | 10.7                           | 1.3                              | 32.5                | 6.5                 |
| Age group   |       |  |                            |                                  |                                  |                                  |                            |                                  |                            |                                  |                                |                                  |                     |                     |
| 20-29 years old   | 825   | 1.2  | 1.9                        | 4.1                              | 6.9                              | 17.8                             | 40.6                       | 5.9                              | 2.2                        | 1.2                              | 14.8                           | 3.3                              | 32.0                | 9.3                 |
| 30-39 years old   | 1,081 | 0.8  | 1.7                        | 3.7                              | 9.2                              | 18.7                             | 44.7                       | 6.1                              | 1.3                        | 0.5                              | 11.8                           | 1.6                              | 34.0                | 7.9                 |
| 40-49 years old   | 1,401 | 1.1  | 1.3                        | 2.1                              | 7.9                              | 20.5                             | 49.8                       | 5.4                              | 0.4                        | 0.5                              | 10.1                           | 0.9                              | 33.0                | 6.3                 |
| 50-59 years old   | 1,135 | 1.8  | 2.5                        | 2.8                              | 6.9                              | 20.7                             | 51.0                       | 3.8                              | 0.3                        | 0.4                              | 8.8                            | 1.1                              | 34.6                | 4.5                 |
| 60-64 years old   | 440   | 1.6  | 3.2                        | 5.9                              | 7.0                              | 17.3                             | 53.9                       | 2.0                              | 0.9                        | 0.2                              | 6.8                            | 1.1                              | 35.0                | 3.2                 |
| Region of residence   |       |  |                            |                                  |                                  |                                  |                            |                                  |                            |                                  |                                |                                  |                     |                     |
| Tokyo metropolitan area   | 1,503 | 1.7  | 1.5                        | 3.8                              | 8.4                              | 18.4                             | 47.8                       | 5.5                              | 1.1                        | 0.6                              | 10.2                           | 1.2                              | 33.7                | 7.1                 |
| Chubu or Kansai area  | 1,665 | 1.2  | 2.2                        | 2.7                              | 7.1                              | 19.8                             | 47.1                       | 4.9                              | 1.0                        | 0.7                              | 11.5                           | 1.8                              | 33.0                | 6.6                 |
| Others  | 1,714 | 1.0  | 2.1                        | 3.5                              | 7.6                              | 20.0                             | 48.4                       | 4.6                              | 0.7                        | 0.4                              | 10.3                           | 1.5                              | 34.1                | 5.7                 |
| Type of employment  |       |  |                            |                                  |                                  |                                  |                            |                                  |                            |                                  |                                |                                  |                     |                     |
| Regular employees   | 2,848 | 0.8  | 1.1                        | 1.7                              | 6.9                              | 22.9                             | 49.4                       | 5.6                              | 0.8                        | 0.4                              | 9.6                            | 1.0                              | 33.4                | 6.7                 |
| Non-regular employees (total)   | 1,459 | 1.6  | 1.9                        | 4.0                              | 6.6                              | 14.9                             | 51.3                       | 4.8                              | 1.1                        | 0.8                              | 10.8                           | 2.2                              | 29.0                | 6.7                 |
| Freelance workers   | 575   | 3.0  | 6.3                        | 9.6                              | 14.4                             | 13.4                             | 30.8                       | 2.4                              | 1.0                        | 1.0                              | 16.0                           | 2.1                              | 46.6                | 4.5                 |
| Main occupation   |       |  |                            |                                  |                                  |                                  |                            |                                  |                            |                                  |                                |                                  |                     |                     |
| Administrative and managerial workers (section manager level or higher) | 378   | 1.1  | 2.1                        | 1.1                              | 5.8                              | 23.8                             | 52.9                       | 7.4                              | 1.1                        | 0.3                              | 3.4                            | 1.1                              | 33.9                | 8.7                 |
| Professional and engineering workers                                    | 1,290 | 1.6  | 2.6                        | 4.0                              | 6.0                              | 19.1                             | 48.1                       | 6.2                              | 1.3                        | 0.7                              | 9.3                            | 1.2                              | 33.2                | 8.2                 |
| Clerical workers  | 1,092 | 1.2  | 0.6                        | 2.5                              | 6.4                              | 19.7                             | 54.6                       | 3.8                              | 0.7                        | 0.3                              | 8.7                            | 1.5                              | 30.4                | 4.9                 |
| Sales workers   | 644   | 0.3  | 1.9                        | 2.3                              | 9.6                              | 18.6                             | 46.9                       | 5.1                              | 0.9                        | 0.5                              | 12.4                           | 1.4                              | 32.8                | 6.5                 |
| Service workers   | 549   | 1.6  | 2.2                        | 5.8                              | 11.8                             | 17.3                             | 41.0                       | 3.3                              | 0.4                        | 0.7                              | 13.5                           | 2.4                              | 38.8                | 4.4                 |
| Security workers  | 21    | -  | -                          | -                                | 23.8                             | -                                | 42.9                       | 4.8                              | -                          | 4.8                              | 19.0                           | 4.8                              | 23.8                | 9.5                 |
| Production/skilled workers  | 365   | 0.5  | 1.4                        | 1.9                              | 9.6                              | 24.7                             | 41.9                       | 4.4                              | 0.8                        | 0.3                              | 13.2                           | 1.4                              | 38.1                | 5.5                 |
| Transport and machine operation workers                                 | 104   | 1.9  | 5.8                        | 5.8                              | 9.6                              | 27.9                             | 30.8                       | 2.9                              | -                          | -                                | 15.4                           | -                                | 51.0                | 2.9                 |
| Construction and mining workers   | 76    | 3.9  | 1.3                        | 5.3                              | 10.5                             | 10.5                             | 43.4                       | 2.6                              | -                          | -                                | 21.1                           | 1.3                              | 31.6                | 2.6                 |
| Carrying, cleaning, and packaging workers                               | 154   | 2.6  | 0.6                        | 3.2                              | 5.2                              | 14.9                             | 50.6                       | 4.5                              | 1.9                        | 3.2                              | 11.7                           | 1.3                              | 26.6                | 9.7                 |
| Others  | 173   | 1.7  | 4.6                        | 4.6                              | 6.9                              | 15.6                             | 43.9                       | 7.5                              | 0.6                        | -                                | 11.0                           | 3.5                              | 33.5                | 8.1                 |
| Household income for 2019   |       |  |                            |                                  |                                  |                                  |                            |                                  |                            |                                  |                                |                                  |                     |                     |
| Do not know   | 36    | -  | 2.8                        | 8.3                              | 5.6                              | 8.3                              | 22.2                       | -                                | -                          | 2.8                              | 50.0                           | -                                | 25.0                | 2.8                 |
| Less than 3 million yen   | 724   | 1.8  | 1.9                        | 6.5                              | 9.1                              | 16.0                             | 43.2                       | 3.7                              | 1.2                        | 1.4                              | 13.1                           | 1.9                              | 35.4                | 6.4                 |
| 3 million yen to less than 5 million yen                                | 1,149 | 1.4  | 1.8                        | 2.9                              | 9.1                              | 21.4                             | 48.7                       | 4.1                              | 1.0                        | 0.4                              | 7.5                            | 1.7                              | 36.6                | 5.6                 |
| 5 million to less than 7 million yen                                    | 931   | 1.2  | 2.3                        | 3.7                              | 7.2                              | 23.3                             | 49.2                       | 5.2                              | 0.6                        | 0.2                              | 6.7                            | 0.5                              | 37.6                | 6.0                 |
| 7 million yen or more   | 1,297 | 0.8  | 1.4                        | 2.0                              | 7.5                              | 20.7                             | 53.6                       | 7.0                              | 1.1                        | 0.4                              | 4.5                            | 1.2                              | 32.3                | 8.5                 |
| Do not know   | 781   | 1.5  | 2.6                        | 2.8                              | 5.2                              | 12.8                             | 39.3                       | 3.8                              | 0.4                        | 0.8                              | 28.2                           | 2.6                              | 25.0                | 5.0                 |

Figure 8. Household income and expenditures in the past three months

|                                       |  | (%)   |  |  |               |  |  |             |               |               |                               | (Percentage points) |
|---------------------------------------|--|-------|--|--|---------------|--|--|-------------|---------------|---------------|-------------------------------|---------------------|
|                                       |  | N     | Significant surplus (income exceeds expenditure by a significant margin) | Slight surplus (income exceeds expenditure by a slight margin) | Breaking even | Slight deficit (expenditure exceeds income by a slight margin) | Significant deficit (expenditure exceeds income by a significant margin) | Do not know | Surplus total | Deficit total | Surplus total — deficit total |                     |
| Total                                 |  | 4,882 | 5.6  | 22.7   | 32.9          | 18.2   | 10.5   | 10.1        | 28.3          | 28.7          | ▲0.3                          |                     |
| Sex                                   | Male                                     | 2,722 | 6.2  | 21.9   | 33.9          | 18.7   | 9.5  | 9.8         | 28.1          | 28.1          | 0.0                           |                     |
|                                       | Female                                   | 2,160 | 4.8  | 23.8   | 31.7          | 17.5   | 11.8   | 10.4        | 28.6          | 29.4          | ▲0.7                          |                     |
| Circumstances of childcare, etc.      | Have circumstances                       | 605   | 3.1  | 17.5   | 27.9          | 26.1   | 17.9   | 7.4         | 20.7          | 44.0          | ▲23.3                         |                     |
|                                       | Do not have circumstances                | 4,277 | 6.0  | 23.5   | 33.6          | 17.0   | 9.5  | 10.4        | 29.4          | 26.5          | 2.9                           |                     |
| Age group                             | 20-29 years old                          | 825   | 6.4  | 24.1   | 29.1          | 13.9   | 9.1  | 17.3        | 30.5          | 23.0          | 7.5                           |                     |
|                                       | 30-39 years old                          | 1,081 | 6.1  | 23.9   | 32.4          | 18.5   | 9.5  | 9.6         | 30.0          | 28.0          | 1.9                           |                     |
|                                       | 40-49 years old                          | 1,401 | 4.9  | 21.8   | 34.8          | 19.1   | 10.3   | 9.2         | 26.6          | 29.3          | ▲2.7                          |                     |
|                                       | 50-59 years old                          | 1,135 | 5.9  | 22.3   | 33.2          | 18.9   | 11.7   | 7.9         | 28.2          | 30.7          | ▲2.5                          |                     |
|                                       | 60-64 years old                          | 440   | 4.5  | 21.6   | 34.5          | 20.5   | 13.2   | 5.7         | 26.1          | 33.6          | ▲7.5                          |                     |
| Region of residence                   | Tokyo metropolitan area                  | 1,503 | 6.7  | 25.0   | 30.8          | 16.1   | 11.8   | 9.6         | 31.7          | 27.9          | 3.7                           |                     |
|                                       | Chubu or Kansai area                     | 1,665 | 6.7  | 21.1   | 35.8          | 16.8   | 9.1  | 10.6        | 27.8          | 25.8          | 2.0                           |                     |
| Type of employment                    | Others                                   | 1,714 | 3.6  | 22.3   | 32.0          | 21.4   | 10.7   | 10.0        | 26.0          | 32.1          | ▲6.1                          |                     |
|                                       | Regular employees                        | 2,848 | 7.1  | 26.1   | 33.3          | 16.7   | 7.4  | 9.3         | 33.2          | 24.2          | 9.0                           |                     |
|                                       | Non-regular employees (total)            | 1,459 | 3.4  | 19.2   | 34.1          | 18.4   | 13.4   | 11.5        | 22.5          | 31.8          | ▲9.3                          |                     |
|                                       | Freelance workers                        | 575   | 4.0  | 15.1   | 27.8          | 24.5   | 18.4   | 10.1        | 19.1          | 43.0          | ▲23.8                         |                     |
|                                       | Less than 3 million yen                  | 724   | 1.4  | 11.0   | 36.3          | 21.8   | 21.3   | 8.1         | 12.4          | 43.1          | ▲30.7                         |                     |
| Household income for 2019             | 3 million yen to less than 5 million yen | 1,149 | 3.6  | 21.1   | 34.6          | 25.2   | 10.4   | 5.0         | 24.7          | 35.6          | ▲10.9                         |                     |
|                                       | 5 million to less than 7 million yen     | 931   | 5.0  | 25.6   | 37.7          | 17.8   | 8.6  | 5.3         | 30.6          | 26.4          | 4.2                           |                     |
|                                       | 7 million yen or more                    | 1,297 | 12.0   | 34.5   | 29.5          | 11.8   | 5.7  | 6.4         | 46.6          | 17.5          | 29.1                          |                     |
| Change of household breadwinner, etc. | Do not know                              | 781   | 2.6  | 12.9   | 27.1          | 15.5   | 10.9   | 31.0        | 15.5          | 26.4          | ▲10.9                         |                     |
|                                       | Changed                                  | 449   | 3.1  | 13.4   | 22.5          | 29.8   | 26.5   | 4.7         | 16.5          | 56.3          | ▲39.9                         |                     |
|                                       | Of this, due to effects of COVID-19      | 223   | 0.9  | 5.4  | 15.2          | 35.4   | 41.3   | 1.8         | 6.3           | 76.7          | ▲70.4                         |                     |
|                                       | Did not change                           | 4,433 | 5.9  | 23.7   | 34.0          | 17.0   | 8.9  | 10.6        | 29.6          | 25.9          | 3.7                           |                     |



**More than 80% of the total expressed anxiety about “inability to see when infections will abate” and “worsening economic situation.” (Figure 9)**

The survey asked all valid respondents about their anxiety concerning income, losing employment, etc. 85.9% indicated that they felt anxiety (the total of “considerably anxious” and “somewhat anxious”), while only 11.2% indicated that they felt no anxiety (the total of “not very anxious” and “not anxious at all”). Responses indicating anxiety with respect to “own infection” and “worsening economic situation” are high at 80.2% and 80.0%, respectively. The percentage indicating anxiety with respect to “difficulty in daily life associated with decreased income” stands at 60.6%, while that for anxiety about “losing employment during the coming year” is 45.7%.

Looking at personal attributes, anxiety with respect to “inability to see when infections will abate,” “own infection,” and “worsening economic situation” shows a tendency to rise with older age groups. Meanwhile, anxiety associated with “difficulty in daily life associated with decreased income” and “losing employment during the coming year” is higher for non-regular employees (61.3% and 47.6%, respectively) than for regular employees (57.9% and 42.7%) and high for “freelance workers” (72.7% and 55.1%). Furthermore, anxiety in these two areas shows a tendency to rise with lower 2019 household income groups. Specifically, the percentages indicating anxiety are 52.4% and 36.6%, respectively, for the “7 million yen or more” household income group and 67.1% and 55.5% for the “less than 3 million yen” group.

Figure 9. Degree of anxiety relating to "difficulty in daily life associated with decreased income," etc.

|  | N     | ① Inability to see when infections will abate |                   |                  |                    |             |                    | ② Own infection      |                   |                  |                    |             |                    | ③ Difficulty in daily life associated with decreased income |                   |                  |                    |             |                    |     |      |      |  |
|--|-------|---|-------------------|------------------|--------------------|-------------|--------------------|----------------------|-------------------|------------------|--------------------|-------------|--------------------|---|-------------------|------------------|--------------------|-------------|--------------------|-----|------|------|--|
|  |       | Considerably anxious                          | Some-what anxious | Not very anxious | Not anxious at all | Do not know | Total of "anxious" | Considerably anxious | Some-what anxious | Not very anxious | Not anxious at all | Do not know | Total of "anxious" | Considerably anxious  | Some-what anxious | Not very anxious | Not anxious at all | Do not know | Total of "anxious" |     |      |      |  |
| Total                                    | 4,882 | 46.0  | 39.9              | 8.9              | 2.3                | 2.9         | 85.9               | 11.2                 | 33.3              | 46.9             | 13.7               | 3.2         | 2.9                | 80.2  | 16.9              | 24.3             | 36.3               | 28.0        | 6.9                | 4.5 | 60.6 | 34.9 |  |
| Sex                                      |       |   |                   |                  |                    |             |                    |                      |                   |                  |                    |             |                    |   |                   |                  |                    |             |                    |     |      |      |  |
| Male                                     | 2,722 | 39.4  | 42.2              | 11.3             | 3.2                | 3.8         | 81.6               | 14.5                 | 28.0              | 47.1             | 16.5               | 4.6         | 3.9                | 75.1  | 21.1              | 23.4             | 35.0               | 28.7        | 7.8                | 5.1 | 58.4 | 36.5 |  |
| Female                                   | 2,160 | 54.3  | 37.1              | 5.9              | 1.1                | 1.7         | 91.3               | 7.0                  | 40.0              | 46.7             | 10.0               | 1.5         | 1.7                | 86.8  | 11.6              | 25.3             | 38.0               | 27.1        | 5.7                | 3.8 | 63.3 | 32.9 |  |
| Circumstances of childcare, etc.         |       |   |                   |                  |                    |             |                    |                      |                   |                  |                    |             |                    |   |                   |                  |                    |             |                    |     |      |      |  |
| Do not have circumstances                | 605   | 53.2  | 37.7              | 7.3              | 0.8                | 1.0         | 90.9               | 8.1                  | 43.5              | 42.1             | 11.9               | 1.8         | 0.7                | 85.6  | 13.7              | 32.7             | 40.8               | 21.0        | 3.1                | 2.3 | 73.6 | 24.1 |  |
| Have circumstances                       | 4,277 | 45.0  | 40.3              | 9.1              | 2.5                | 3.1         | 85.2               | 11.6                 | 31.9              | 47.6             | 13.9               | 3.4         | 3.2                | 79.5  | 17.3              | 23.1             | 35.7               | 29.0        | 7.4                | 4.8 | 58.8 | 36.4 |  |
| Age group                                |       |   |                   |                  |                    |             |                    |                      |                   |                  |                    |             |                    |   |                   |                  |                    |             |                    |     |      |      |  |
| 20-29 years old                          | 825   | 44.4  | 37.1              | 11.5             | 2.9                | 4.1         | 81.5               | 14.4                 | 33.8              | 42.1             | 16.0               | 4.4         | 3.8                | 75.9  | 20.4              | 26.8             | 32.2               | 28.4        | 9.5                | 5.1 | 59.0 | 35.9 |  |
| 30-39 years old                          | 1,081 | 43.8  | 39.8              | 9.9              | 3.1                | 3.5         | 83.5               | 13.0                 | 35.3              | 43.1             | 13.9               | 4.1         | 3.6                | 78.4  | 17.9              | 26.6             | 36.4               | 26.2        | 6.3                | 4.5 | 63.0 | 32.5 |  |
| 40-49 years old                          | 1,401 | 45.8  | 41.0              | 8.3              | 2.2                | 2.7         | 86.8               | 10.5                 | 33.6              | 48.3             | 12.5               | 2.6         | 2.9                | 81.9  | 15.1              | 25.8             | 35.8               | 27.8        | 5.5                | 5.1 | 61.6 | 33.3 |  |
| 50-59 years old                          | 1,135 | 49.2  | 39.5              | 7.8              | 1.5                | 2.1         | 88.6               | 9.3                  | 32.1              | 50.0             | 13.2               | 2.7         | 2.0                | 82.0  | 15.9              | 21.9             | 38.9               | 29.3        | 5.8                | 4.0 | 60.9 | 35.2 |  |
| 60-64 years old                          | 440   | 46.8  | 43.6              | 6.6              | 1.6                | 1.4         | 90.5               | 8.2                  | 29.8              | 53.0             | 13.6               | 2.0         | 1.6                | 82.7  | 15.7              | 15.0             | 38.6               | 32.5        | 10.9               | 3.0 | 53.6 | 43.4 |  |
| Region of residence                      |       |   |                   |                  |                    |             |                    |                      |                   |                  |                    |             |                    |   |                   |                  |                    |             |                    |     |      |      |  |
| Tokyo metropolitan area                  | 1,503 | 45.3  | 39.5              | 8.8              | 2.9                | 3.5         | 84.8               | 11.8                 | 34.1              | 45.6             | 12.9               | 4.3         | 3.2                | 79.6  | 17.2              | 25.7             | 34.5               | 27.3        | 7.6                | 4.9 | 60.2 | 34.9 |  |
| Chubu or Kansai area                     | 1,665 | 44.5  | 41.4              | 8.8              | 2.0                | 3.2         | 85.9               | 10.9                 | 32.1              | 48.1             | 13.9               | 2.7         | 3.2                | 80.2  | 16.6              | 22.6             | 37.0               | 28.9        | 6.7                | 4.9 | 59.6 | 35.6 |  |
| Others                                   | 1,714 | 48.0  | 38.9              | 9.0              | 2.0                | 2.0         | 86.9               | 11.0                 | 33.9              | 46.9             | 14.1               | 2.8         | 2.3                | 80.8  | 16.9              | 24.7             | 37.2               | 27.7        | 6.5                | 3.9 | 61.9 | 34.2 |  |
| Type of employment                       |       |   |                   |                  |                    |             |                    |                      |                   |                  |                    |             |                    |   |                   |                  |                    |             |                    |     |      |      |  |
| Regular employees                        | 2,848 | 43.6  | 40.4              | 10.4             | 2.5                | 3.1         | 84.0               | 12.9                 | 32.1              | 47.1             | 14.3               | 3.4         | 3.1                | 79.2  | 17.7              | 22.3             | 35.6               | 30.1        | 7.5                | 4.5 | 57.9 | 37.6 |  |
| Non-regular employees (total)            | 1,459 | 51.5  | 37.6              | 6.9              | 1.6                | 2.3         | 89.1               | 8.6                  | 38.2              | 44.3             | 12.3               | 2.6         | 2.7                | 82.5  | 14.9              | 25.1             | 36.2               | 28.0        | 6.0                | 4.7 | 61.3 | 34.1 |  |
| Freelance workers                        | 575   | 44.0  | 43.5              | 6.8              | 2.8                | 3.0         | 87.5               | 9.6                  | 27.0              | 52.5             | 14.3               | 3.7         | 2.6                | 79.5  | 17.9              | 32.0             | 40.2               | 17.7        | 5.9                | 4.2 | 72.2 | 23.7 |  |
| Less than 3 million yen                  | 724   | 47.9  | 36.7              | 8.3              | 2.8                | 4.3         | 84.7               | 11.0                 | 38.5              | 39.4             | 14.5               | 4.1         | 3.5                | 77.9  | 18.6              | 34.1             | 33.0               | 22.1        | 5.2                | 5.5 | 67.1 | 27.3 |  |
| 3 million yen to less than 5 million yen | 1,149 | 45.7  | 39.4              | 9.8              | 2.6                | 2.4         | 85.1               | 12.4                 | 33.4              | 46.7             | 14.9               | 2.6         | 2.3                | 80.2  | 17.5              | 26.5             | 38.3               | 25.7        | 6.0                | 3.6 | 64.8 | 31.7 |  |
| 5 million to less than 7 million yen     | 931   | 49.1  | 38.2              | 9.3              | 1.8                | 1.5         | 87.3               | 11.2                 | 33.8              | 46.6             | 14.5               | 3.1         | 1.9                | 80.5  | 17.6              | 23.0             | 38.3               | 28.2        | 7.1                | 3.3 | 61.3 | 35.3 |  |
| 7 million yen or more                    | 1,297 | 41.5  | 45.3              | 9.3              | 2.4                | 1.5         | 86.7               | 11.7                 | 29.5              | 52.1             | 13.3               | 3.7         | 1.4                | 81.6  | 17.0              | 16.5             | 35.9               | 35.3        | 9.8                | 2.5 | 52.4 | 45.1 |  |
| Change of household breadwinner, etc.    |       |   |                   |                  |                    |             |                    |                      |                   |                  |                    |             |                    |   |                   |                  |                    |             |                    |     |      |      |  |
| Do not know                              | 781   | 48.4  | 36.9              | 6.9              | 1.8                | 6.0         | 85.3               | 8.7                  | 34.2              | 45.8             | 10.6               | 2.6         | 6.8                | 80.0  | 13.2              | 26.4             | 34.8               | 24.5        | 4.7                | 9.6 | 61.2 | 29.2 |  |
| Changed                                  | 449   | 51.4  | 38.5              | 6.9              | 1.3                | 1.8         | 90.0               | 8.2                  | 34.5              | 48.3             | 13.6               | 1.8         | 1.8                | 82.9  | 15.4              | 39.9             | 36.5               | 18.3        | 3.6                | 1.8 | 76.4 | 21.8 |  |
| Of this, due to effects of COVID-19      | 223   | 57.4  | 37.2              | 3.6              | 0.9                | 0.9         | 94.6               | 4.5                  | 38.1              | 45.3             | 13.5               | 1.8         | 1.3                | 83.4  | 15.2              | 59.2             | 32.3               | 6.7         | 1.3                | 0.4 | 91.5 | 8.1  |  |
| Did not change                           | 4,433 | 45.4  | 40.1              | 9.1              | 2.4                | 3.0         | 85.5               | 11.5                 | 33.2              | 46.8             | 13.7               | 3.4         | 3.0                | 80.0  | 17.0              | 22.7             | 36.3               | 29.0        | 7.2                | 4.8 | 59.0 | 36.2 |  |

Figure 9. Continued

|  | N     | ④ Losing employment during the coming year |                   |                         |             |                    |                        | ⑤ Worsening economic situation |                   |                         |             |                    |                        |      |      |
|--|-------|--|-------------------|-------------------------|-------------|--------------------|------------------------|--------------------------------|-------------------|-------------------------|-------------|--------------------|------------------------|------|------|
|  |       | Considerably anxious                       | Some-what anxious | Not very anxious at all | Do not know | Total of "anxious" | Total of "not anxious" | Considerably anxious           | Some-what anxious | Not very anxious at all | Do not know | Total of "anxious" | Total of "not anxious" |      |      |
|  | 4,882 | 17.6                                       | 28.0              | 34.5                    | 13.4        | 6.5                | 45.7                   | 47.8                           | 34.9              | 45.0                    | 12.4        | 2.9                | 4.7                    | 80.0 | 15.3 |
| Sex                                      |       |  |                   |                         |             |                    |                        |                                |                   |                         |             |                    |                        |      |      |
| Male                                     | 2,722 | 16.0                                       | 27.8              | 34.7                    | 14.6        | 6.9                | 43.8                   | 49.3                           | 33.0              | 43.6                    | 14.3        | 3.8                | 5.3                    | 76.6 | 18.1 |
| Female                                   | 2,160 | 19.7                                       | 28.4              | 34.2                    | 11.8        | 6.0                | 48.1                   | 46.0                           | 37.4              | 46.9                    | 10.0        | 1.8                | 4.0                    | 84.3 | 11.8 |
| Circumstances of childcare, etc.         | 605   | 23.6                                       | 32.9              | 27.6                    | 10.6        | 5.3                | 56.5                   | 38.2                           | 42.5              | 40.7                    | 12.4        | 1.8                | 2.6                    | 83.1 | 14.2 |
| Do not have circumstances                | 4,277 | 16.8                                       | 27.4              | 35.4                    | 13.7        | 6.7                | 44.1                   | 49.2                           | 33.9              | 45.7                    | 12.4        | 3.1                | 5.0                    | 79.5 | 15.5 |
| 20-29 years old                          | 825   | 18.3                                       | 26.2              | 32.6                    | 15.9        | 7.0                | 44.5                   | 48.5                           | 31.4              | 42.8                    | 15.9        | 4.1                | 5.8                    | 74.2 | 20.0 |
| 30-39 years old                          | 1,081 | 19.4                                       | 28.7              | 31.4                    | 14.3        | 6.2                | 48.1                   | 45.7                           | 34.0              | 44.8                    | 13.3        | 3.2                | 4.6                    | 78.8 | 16.6 |
| 40-49 years old                          | 1,401 | 19.0                                       | 27.7              | 35.3                    | 11.4        | 6.6                | 46.7                   | 46.8                           | 36.2              | 45.4                    | 11.3        | 2.6                | 4.4                    | 81.6 | 14.0 |
| 50-59 years old                          | 1,135 | 15.6                                       | 29.8              | 36.7                    | 11.0        | 7.0                | 45.4                   | 47.7                           | 37.3              | 45.4                    | 10.3        | 2.1                | 4.9                    | 82.6 | 12.4 |
| 60-64 years old                          | 440   | 12.7                                       | 26.6              | 37.3                    | 18.4        | 5.0                | 39.3                   | 55.7                           | 33.6              | 48.0                    | 12.5        | 2.7                | 3.2                    | 81.6 | 15.2 |
| Tokyo metropolitan area                  | 1,503 | 19.8                                       | 26.0              | 34.1                    | 14.0        | 6.0                | 45.8                   | 48.2                           | 35.2              | 44.0                    | 12.0        | 3.5                | 5.2                    | 79.2 | 15.6 |
| Chubu or Kansai area                     | 1,665 | 15.4                                       | 28.9              | 34.7                    | 13.5        | 7.4                | 44.3                   | 48.2                           | 33.3              | 46.0                    | 12.7        | 2.6                | 5.4                    | 79.3 | 15.3 |
| Others                                   | 1,714 | 17.8                                       | 29.0              | 34.5                    | 12.6        | 6.1                | 46.8                   | 47.1                           | 36.3              | 45.0                    | 12.5        | 2.6                | 3.6                    | 81.3 | 15.1 |
| Regular employees                        | 2,848 | 15.6                                       | 27.2              | 36.2                    | 14.7        | 6.4                | 42.7                   | 50.8                           | 33.3              | 45.4                    | 13.5        | 3.4                | 4.5                    | 78.7 | 16.9 |
| Non-regular employees (total)            | 1,459 | 20.2                                       | 27.4              | 34.1                    | 12.0        | 6.3                | 47.6                   | 46.1                           | 36.0              | 45.1                    | 11.9        | 2.1                | 4.9                    | 81.1 | 14.0 |
| Freelance workers                        | 575   | 21.2                                       | 33.9              | 27.1                    | 10.3        | 7.5                | 55.1                   | 37.4                           | 40.5              | 43.0                    | 8.3         | 2.8                | 5.4                    | 83.5 | 11.1 |
| Less than 3 million yen                  | 724   | 28.2                                       | 27.3              | 26.8                    | 10.9        | 6.8                | 55.5                   | 37.7                           | 39.2              | 40.1                    | 12.4        | 2.5                | 5.8                    | 79.3 | 14.9 |
| 3 million yen to less than 5 million yen | 1,149 | 18.0                                       | 30.9              | 33.1                    | 12.1        | 5.9                | 48.9                   | 45.2                           | 35.9              | 45.2                    | 13.1        | 2.2                | 3.7                    | 81.0 | 15.3 |
| 5 million to less than 7 million yen     | 931   | 16.4                                       | 28.0              | 35.8                    | 15.0        | 4.7                | 44.5                   | 50.8                           | 36.0              | 45.1                    | 11.5        | 3.0                | 4.4                    | 81.1 | 14.5 |
| 7 million yen or more                    | 1,297 | 11.5                                       | 25.1              | 41.5                    | 17.7        | 4.2                | 36.6                   | 59.1                           | 31.2              | 49.0                    | 13.6        | 3.5                | 2.6                    | 80.2 | 17.2 |
| Do not know                              | 781   | 18.8                                       | 29.3              | 30.5                    | 8.3         | 13.1               | 48.1                   | 38.8                           | 34.4              | 42.9                    | 10.4        | 3.2                | 9.1                    | 77.3 | 13.6 |
| Changed                                  | 449   | 26.3                                       | 33.2              | 24.3                    | 10.7        | 5.6                | 59.5                   | 35.0                           | 43.0              | 41.2                    | 10.5        | 2.0                | 3.3                    | 84.2 | 12.5 |
| Of this, due to effects of COVID-19      | 223   | 39.0                                       | 38.1              | 15.2                    | 3.6         | 4.0                | 77.1                   | 18.8                           | 55.6              | 34.1                    | 6.3         | 0.9                | 3.1                    | 89.7 | 7.2  |
| Did not change                           | 4,433 | 16.7                                       | 27.5              | 35.5                    | 13.6        | 6.6                | 44.3                   | 49.1                           | 34.1              | 45.4                    | 12.6        | 3.0                | 4.8                    | 79.5 | 15.6 |
| Household income for 2019                |       |  |                   |                         |             |                    |                        |                                |                   |                         |             |                    |                        |      |      |
| Less than 3 million yen                  | 724   | 28.2                                       | 27.3              | 26.8                    | 10.9        | 6.8                | 55.5                   | 37.7                           | 39.2              | 40.1                    | 12.4        | 2.5                | 5.8                    | 79.3 | 14.9 |
| 3 million yen to less than 5 million yen | 1,149 | 18.0                                       | 30.9              | 33.1                    | 12.1        | 5.9                | 48.9                   | 45.2                           | 35.9              | 45.2                    | 13.1        | 2.2                | 3.7                    | 81.0 | 15.3 |
| 5 million to less than 7 million yen     | 931   | 16.4                                       | 28.0              | 35.8                    | 15.0        | 4.7                | 44.5                   | 50.8                           | 36.0              | 45.1                    | 11.5        | 3.0                | 4.4                    | 81.1 | 14.5 |
| 7 million yen or more                    | 1,297 | 11.5                                       | 25.1              | 41.5                    | 17.7        | 4.2                | 36.6                   | 59.1                           | 31.2              | 49.0                    | 13.6        | 3.5                | 2.6                    | 80.2 | 17.2 |
| Change of household breadwinner, etc.    |       |  |                   |                         |             |                    |                        |                                |                   |                         |             |                    |                        |      |      |
| Did not change                           | 4,433 | 16.7                                       | 27.5              | 35.5                    | 13.6        | 6.6                | 44.3                   | 49.1                           | 34.1              | 45.4                    | 12.6        | 3.0                | 4.8                    | 79.5 | 15.6 |

## Outline of the Survey

### **“Survey on the Impact that Spreading Novel Coronavirus Infection Has on Work and Daily Life”**

#### **1. Object**

To grasp the impacts that the COVID-19 pandemic and measures to control it are having on workers' jobs and daily living, JILPT formed a survey panel in joint research with the Rengo Research Institute for Advancement of Living Standards (RENGO-RIALS). The core of the panel in the April Survey is the respondents of RENGO-RIALS's "The 39th Short-Term Survey of Workers in Japan 'Immediate Report concerning COVID-19'" (<https://www.rengo-soken.or.jp/work/>). JILPT conducted internet surveys of individuals on three occasions in 2020. In late May to early June (the "May 2020 Survey," namely, the first JILPT survey), and in early August (the "August 2020 Survey," the second JILPT survey), and in December (the "December 2020 Survey," the third JILPT survey). The December 2020 Survey, coupling with the respondents of April, May, and August surveys, was conducted by using the same framework to grasp subsequent trends.

Looking at developments pertaining to COVID-19, limitations on behavior (in the forms of reducing commutes, suspending business, and refraining from going outside) were incrementally relaxed after the government fully lifted its "declaration of a state of emergency" of April 7 to May 25, 2020, and economic activities to keep the economy afloat, such as the Go To Travel campaign, were undertaken. However, with the arrival of winter, a third wave of COVID-19 struck that set new records in terms of case numbers. This new wave led to the issuance of another "declaration of a state of emergency" (until February 7) in four prefectures of the Tokyo metropolitan area on January 8, 2021, and seven additional prefectures on January 13. (Then it extended one more month in ten prefectures including Tokyo and Osaka on February 2 and was lifted in 6 prefectures on February 28. On March 21, the government fully lifted the declaration).

#### **2. Surveyed persons (sample)**

The survey targeted "employees of private enterprises" and "freelance workers" (independent workers who are not shop owners and who do not have employees [excluding those in agriculture, forestry, or fishery]) from among people registered monitors of an internet survey company who are aged at least 20 years old but no more than 64 years old who were residing in Japan as of April 1, 2020 (including people who became unemployed on or after April 1, 2020, and up to the time of the survey if they satisfy the above requirement).

Using the Employment Status Survey as the basis in both cases, we conducted stratified allocated collection for "employees of private enterprises" by sex × age group × residential region block × by regular/non-regular employee status (by 180 cells), and for "freelance workers" by sex × age group × residential region block (by 90 cells). We then prepared panel data with the December 2020 Survey by delivering and collecting surveys with priority given to respondents who responded to each of the April, May, and August surveys. We also conducted supplementary deliveries and collections to obtain portions missing from overall target numbers.

**3. Survey period**

December 12 to 17, 2020

**4. Survey method**

Internet survey (write-in responses on a web browser screen)

**5. Number of valid responses**

“Employees of private enterprises”: 4,307 (2,760 respondents to each of the April, May, August, and December surveys + 1,547 others)

“Freelance workers”: 575 (13 fewer than the target number)

**6. Survey results**

May 2020 Survey

<https://www.jil.go.jp/english/special/covid-19/survey/documents/20200610.pdf>

Report on May 2020 Survey results (*Japan Labor Issues*, vol.4, no.27)

<https://www.jil.go.jp/english/jli/documents/2020/027-03.pdf>

August 2020 Survey

<https://www.jil.go.jp/english/special/covid-19/survey/documents/20200826.pdf>

Response rate:

| "Employees of private enterprises" (N=4,307) (regular employees N=2,848, non-regular employees N=1,459) |   |      |      |                                      | "   |  |      |      |      |
|---|---|------|------|--------------------------------------|---|--|------|------|------|
|   |   |      |      |                                      | Region of residence   |  |      |      |      |
|   |   |      |      |                                      | Income for entire household (including tax) during the past 1 year (January 1 to December 31, 2019) |  |      |      |      |
|   |   |      |      |                                      | Do not know   |  |      |      |      |
| Sex   | Male  | 53.7 | 67.7 | 26.3                                 | Region of residence   | Hokkaido                                 | 3.9  | 3.8  | 4.2  |
|   | Female  | 46.3 | 32.3 | 73.7                                 |   | Tohoku                                   | 6.7  | 7.0  | 6.2  |
| Age group   | 20-29 years old   | 18.6 | 19.2 | 17.6                                 |   | North Kanto                              | 5.4  | 5.3  | 5.5  |
|   | 30-39 years old   | 23.0 | 25.4 | 18.4                                 |   | Tokyo metropolitan area                  | 30.8 | 31.0 | 30.4 |
|   | 40-49 years old   | 28.4 | 29.2 | 26.9                                 |   | Chubu                                    | 18.6 | 18.8 | 18.1 |
|   | 50-59 years old   | 22.0 | 21.9 | 22.2                                 |   | Kansai area                              | 15.7 | 15.1 | 16.7 |
|   | 60-64 years old   | 7.9  | 4.4  | 14.8                                 |   | Chugoku                                  | 5.6  | 5.7  | 5.3  |
| Marital status and with/without dependent child   | Married (having wife or husband) including common-law marriage with child | 32.1 | 34.0 | 28.3                                 |   | Shikoku                                  | 2.7  | 2.8  | 2.5  |
|   | Married (with spouse) including common-law marriage without child         | 18.3 | 17.1 | 20.8                                 |   | Kyushu/Okinawa                           | 10.7 | 10.5 | 11.1 |
|   | Married (separated or bereaved) with child (widow or divorced)            | 5.8  | 5.5  | 6.4                                  | Income for entire household (including tax) during the past 1 year (January 1 to December 31, 2019) | Less than 3 million yen                  | 13.9 | 8.3  | 24.9 |
|   | Married (separated or bereaved) without child                             | 5.5  | 4.9  | 6.7                                  |   | 3 million yen to less than 5 million yen | 23.3 | 25.2 | 19.6 |
|   | Never married with child  | 0.5  | 0.4  | 0.7                                  |   | 5 million to less than 7 million yen     | 19.6 | 21.7 | 15.4 |
| Never married without child   | 37.8  | 38.1 | 37.1 | 7 million to less than 9 million yen |   | 12.6                                     | 14.4 | 9.0  |      |
| Do not have circumstances   | 88.2  | 93.0 | 78.7 | 9 million yen or more                |   | 15.2                                     | 17.9 | 9.9  |      |
| Circumstances of childcare, nursing care, etc.*   | Have circumstances  | 11.8 | 7.0  | 21.3                                 | Do not know   | 15.5                                     | 12.5 | 21.2 |      |
|   | Do not have circumstances   | 88.2 | 93.0 | 78.7                                 |   |  |      |      |      |

\*The survey asked about the existence of circumstances that make full-time work difficult such as childcare, nursing care, illness, hospital visits and disability, etc.

| "Freelance workers" (N=575)                     |   |                                      | "   |  |      |
|---|---|--------------------------------------|---|--|------|
|   |   |                                      | Region of residence   |  |      |
|   |   |                                      | Income for entire household (including tax) during the past 1 year (January 1 to December 31, 2019) |  |      |
|   |   |                                      | Do not know   |  |      |
| Sex   | Male  | 71.5                                 | Region of residence   | Hokkaido                                 | 3.5  |
|   | Female  | 28.5                                 |   | Tohoku                                   | 6.8  |
| Age group                                       | 20-29 years old   | 3.8                                  |   | North Kanto                              | 5.0  |
|   | 30-39 years old   | 15.7                                 |   | Tokyo metropolitan area                  | 31.0 |
|   | 40-49 years old   | 30.6                                 |   | Chubu                                    | 16.7 |
|   | 50-59 years old   | 32.7                                 |   | Kansai area                              | 16.3 |
|   | 60-64 years old   | 17.2                                 |   | Chugoku                                  | 5.2  |
| Marital status and with/without dependent child | Married (having wife or husband) including common-law marriage with child | 21.4                                 |   | Shikoku                                  | 3.1  |
|   | Married (with spouse) including common-law marriage without child         | 21.7                                 |   | Kyushu/Okinawa                           | 12.3 |
|   | Married (separated or bereaved) with child (widow or divorced)            | 2.8                                  | Income for entire household (including tax) during the past 1 year (January 1 to December 31, 2019) | Less than 3 million yen                  | 21.6 |
|   | Married (separated or bereaved) without child                             | 8.0                                  |   | 3 million yen to less than 5 million yen | 25.4 |
|   | Never married with child  | 0.3                                  |   | 5 million to less than 7 million yen     | 15.3 |
| Never married without child                     | 45.7  | 7 million to less than 9 million yen |   | 6.4                                      |      |
| Do not have circumstances                       | 83.3  | 9 million yen or more                |   | 11.3                                     |      |
| Circumstances of childcare, nursing care, etc.* | Have circumstances  | 16.7                                 | Do not know   | 20.0                                     |      |
|   | Do not have circumstances   | 83.3                                 |   |  |      |