

Survey on the Impact of COVID-19 on Enterprise Management

(October 2020 Survey, 2nd wave)

This is a translation of questionnaire for an internet monitor enterprise survey conducted in Japanese.

Q1 Please select the option that best describes changes in your company's production, sales, etc. and personnel expenses **compared to the same month of the previous year** for each month from May to September.

*If your company is in the manufacturing industry, compare figures for production. If it is in the finance industry or insurance industry, compare ordinary income. For all other industries, compare sales (total receipts).

=====Options=====

Increase

Almost the same

Decrease

Cannot be compared with same month of previous year*

*Cases such as those business had not yet been started in the same month of the previous year.

Q1_1 targets respondents who selected "Increased" or "Decreased" in Q1_1_1.

Q1_1 If there was an increase or decrease in production, sales, etc. in Q1_1_1, please indicate the degree of increase or decrease (around 10% to 100%) compared to the same month of the previous year for each month from May to September.

*If your company is in the manufacturing industry, compare figures for production. If it is in the finance industry or insurance industry, compare ordinary income. For all other industries, compare sales (total receipts).

=====Options=====

Around 10% Around 20% Around 30% Around 40% Around 50%

Around 60% Around 70% Around 80% Around 90% Around 10% or more

Q1_2 targets respondents who selected “Increased” or “Decreased” in Q1_2_1.

Q1_2 If there was an increase or decrease in personnel expenses in Q1_2_1, please indicate the degree of increase or decrease (around 10% to 100%) compared to the same month of the previous year for each month from May to September.

*If your company is in the manufacturing industry, compare figures for production. If it is in the finance industry or insurance industry, compare ordinary income. For all other industries, compare sales (total receipts).

=====Options=====

Around 10% Around 20% Around 30% Around 40% Around 50%

Around 60% Around 70% Around 80% Around 90% Around 10% or more

Q1_1 Production, sales, etc.

	Increase	Almost the same	Decrease	Cannot be compared with same month of previous year*	The degree of increase or decrease compared to the same month of the previous year
May					Around ()%
June					Around ()%
July					Around ()%
August					Around ()%
September					Around ()%

Q1_2 Personnel expenses

	Increase	Almost the same	Decrease	Cannot be compared with same month of previous year*	The degree of increase or decrease compared to the same month of the previous year
May					Around ()%
June					Around ()%
July					Around ()%
August					Around ()%
September					Around ()%

Q2

Q2_1_1 Please select the best response for the state of your company's production, sales, etc. in September **compared with those in May** (during the state of emergency).

=====Options=====

Increase

Almost the same

Decrease

Cannot be compared with same month of previous year*

*Cases such as those business had not yet been started in the same month of the previous year.

Q2_1_2 If there was an increase or decrease in production, sales, etc. in September, please indicate the degree of increase or decrease (around 10% to 100%) **compared with those in May.**

=====Options=====

Around 10% Around 20% Around 30% Around 40% Around 50%

Around 60% Around 70% Around 80% Around 90% Around 10% or more

Q2_2

(1) From the following list, please select all items that were factors behind the change in production, sales, etc. **compared to the same month the previous year** described in Q1.

(2) From the following list, please select all items that were factors behind the change in production, sales, etc. in September **compared with those in May** in described in Q2_2_1.

Q2_2

	(1) Compared with the same month of the previous year	(2) Compared with May
Being subject to the voluntary restriction request due to the April-May state of emergency declaration, or its residual effect.		
Business restriction request issued by national or local government (reduction of business hours,		

etc.)		
Business suspension request issued by the industry.		
Clients being affected by COVID-19.		
Import/export affected by COVID-19.		
Directly affected by immigration restrictions (aviation, passengers, travel, tourism, etc.).		
Disruption of business activities due to discontinuation of production in overseas supply chains, etc.		
Affected by spread of COVID-19 overseas (lockdowns, etc.).		
Influence of decline in consumption and other forms of demand due to voluntary restrictions in public life.		
Demand (consumption, etc.) increased due to voluntary restrictions in public life (home delivery demand, etc.).		
State of emergency declaration rescinded.		
Relaxation of voluntary restrictions in public life.		
Demand for COVID-19-related consumption (masks, etc.) increased.		
Implementation of the Go To Campaign (demand stimulation measure)		
Demand was stimulated by one-time fixed-amount benefit.		
Business performance was already poor.		
Other (Specify)	()	()

Q3 targets respondents who selected “Decreased” in Q1.

Q3 If your company's personnel expenses "decreased" (respondents who selected "decrease" in any month between May and September), please select all actions your company have taken in connection with reducing personnel expenses.

* Dispatched worker-related here are included among labor cost items although their costs are usually not considered personnel expenses.

	Reduction of overtime
	Reduction of scheduled working hours
	Curtailement / suspension of hiring of new graduates
	Curtailement / suspension of mid-career hiring
	Reduction / suspension of bonus payments
	Reduction in workers' compensation (other than bonuses)
	Temporary closure (furlough)
	Calling for voluntary retirement
	Dismissal of regular employees
	Suspension of extension of employment or rehiring of elderly workers
	Dismissal or non-renewal of contracts of non-regular employees
	Reduction of dispatched workers (*) through mid-term termination of contracts
	Reduction of dispatched workers through non-renewal of contracts
	Reduction of dispatched workers through curtailement or suspension of new contracts
	Requested and received dispatch fee reduction from dispatching agency
()	Other forms of employment adjustment (Specify)
	Not implementing employment adjustment measures

Q4

Q4_1 Currently (as of the end of September), what is your company's situation with regard to overstaffing or understaffing in total and each of the worker category?

=====Options=====

Overstaffed

Somewhat overstuffed

Optimal

Somewhat understaffed

Understaffed

No one is applicable

=====items=====

Total

Regular employees

Part-time workers / Contract workers

Dispatched workers

Q4_1

	Overstaffed	Somewhat overstuffed	Optimal	Somewhat understaffed	Understaffed	No one is applicable
Total						
Regular employees						
Part-time workers / Contract workers						
Dispatched workers						

Q4_2 targets respondents who selected “Overstaffed” or “Somewhat overstuffed” in Q4_1.

Q4_2 If your company's situation is "Overstaffed" or "Somewhat overstaffed" in total or any of worker categories in Q4_1, what are the reasons for the current overstaffing? Please select all that apply. Also, select one that seems most applicable.

	Applicable	Most applicable
Workers are highly capable/skilled and difficult to newly recruit once dismissed.		
Expected personnel shortage in the future.		
Surplus can be solved by allowing employee attrition (non-replacement of retired workers).		
Can respond with measures other than personnel cuts (reducing working hours, wage cuts, etc.).		
Can respond with measures such as business closures, etc. by using government support (Employment Adjustment Subsidy, etc.)		
Dismissal is difficult due to Japan's strict legal regulations (including a judicially created theory).		
Maintaining employment is an enterprise's social responsibility.		
Dismissing workers will diminish our corporate reputation		
Employment maintenance is part of corporate culture.		
Labor union, etc. demands employment maintenance.		
For employees' sake (because dismissal takes away their livelihood).		
Expected improvement in demand in the future.		
The current extent of the surplus does not require employment adjustment.		
Surplus remains despite implementing all possible employment adjustment.		
Other (Specify)	()	()

Q5 Assuming that current levels of production, sales, etc. continue in the future, how many months do you think your company can maintain employment at the current levels?

Select the option that best applies.

=====Options=====

	Employment cuts already implemented.
	Around 2 to 3 months.
	Around 6 months.
	Around 1 year.
	Around 2 years.
	More than two years (no immediate plans for employment cuts).
	Employment cuts are unnecessary.

Q6 In each month from May to September, did your company carry out any of the following measures in relation to business operations and employees' working environment? Please select all that apply for the month in question. Also, among the measures carried out in each month, please select the item that was most effective from the standpoint of compatibility between preventing the spread of COVID-19 and maintaining business operations.

(Response example) The case there were measures carried out in June, July, and August

	May	June	July	August	September	Most effective
Shortening of working hours (reduction of working days)	1	①	①	①	1	

Q6

		May	June	July	August	September	Most effective
Business operations	Suspension of business operations						
	Shortening of working hours (reduction of working days)						
	Shortening of working hours (reduction of hours per day)						
	Measures against COVID-19 infection (limiting number of people admitted, reducing number of seats, etc. to facilitate physical distancing)						
	Starting, or increasing, the outsourcing of business operations (such as delivery and IT)						

Q6

		May	June	July	August	September	Most effective
Employees' working environment	Implementation of working from home (teleworking)						
	Measures to prevent employee infection (taking temperatures, disinfection, supplying plastic partitions and face shields, etc.)						
	Granting special paid leave (excluding annual paid leave)						
	Dispatching of employees to other enterprises or industries						
	Increase in employees' working hours (increased activity in delivery, IT etc.)						
	Increase in mid-career hiring (increased activity in delivery, IT etc.)						

Q6

Not implementing any of the above measures							
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Q7

Q7_1_1 Are there workers (including those on leave) in each category in each month from May to September? Note that it is not acceptable that you select “Had no workers in this category prior to May” for all worker categories.

=====Options=====

Had workers prior to May

Had no worker prior to May (Exclusion)

=====Items=====

Regular employees

Part-time workers / Contract workers

Dispatched workers

Q7_1_1

	Had workers prior to May	Had no worker prior to May
Regular employees		
Part-time workers / Contract workers		
Dispatched workers		

Q7_1_2 For workers (including those on leave) in each category in each month from May to September, please select the response that best describes the increase or decrease compared to the same month the previous year (if the number of those workers decreased to 0, select “decreased”).

Q7_1_2_1 Total

	Increased	Almost the	Decreased
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		same	
May			
June			
July			
August			
September			

Q7_1_2_2 Regular employees

	Increased	Almost the same	Decreased
May			
June			
July			
August			
September			

Q7_1_2_3 Part-time workers/Contract workers

	Increased	Almost the same	Decreased
May			
June			
July			
August			
September			

Q7_1_2_4 Dispatched workers

	Increased	Almost the same	Decreased
May			
June			
July			
August			
September			

Q7_2 For workers (including those on leave) in each category in each month from May to September, please answer the current number (or approximate number) of workers (most recently, including September).

	Number of workers
Worker total	_____ (persons)
Regular employees	_____ (persons)
Part-time workers / Contract workers	_____ (persons)
Dispatched workers	_____ (persons)

Q8

Q8_1 (1) Please select all of the following COVID-19-related business support measures that your company has already applied for.

Q8_1 (2) Please select all of the following COVID-19-related business support measures that your company has not yet applied for but are considering applying for in the future.

Q8_2 If there are COVID-19-related business support measures that your company has already applied for, in which month did your company first apply for them? (Use pull-down menu for February through September).

=====Options=====

Before Dec. 2020 Jan. 2021 Feb. 2021

Mar. 2021 April 2021 May 2021

Q8

	(1) Already applied for		(2) Considering applying for
	Already applied for	The month that the measure was first applied for	
Sustainability Subsidy (2 million yen for business operators whose sales have decreased, etc.)			
Grant for businesses cooperating with prefectures' requests for temporary closures or shortening of business hours			
Benefits, subsidies, loans, etc., from prefectures, etc., other than those listed above			
Japan Finance Corporation and private financial institutions' financial support through Special Coronavirus Loans and Safety Net Guarantees			
Employment Adjustment Subsidy (allowances, etc., for maintaining employment of workers during closures)			
Allowances in response to elementary school closures, etc. (support for business operators who give paid leave to parents)			
Subsidy to support promotion of work style reforms (support for introduction of telework, etc.)			
Deferment of payment of national and local taxes, employees' pension and insurance premiums, etc.			
Reduction of or exemption from property taxes and other taxes			
Corporate tax refunds by carry-back of losses			
Deferment of utility payments (water, electricity, gas, telephone, etc.)			
Rent support benefit			
Other (Specify:)			

Not considering applying for any programs			
Have not yet decided / not sure			

Q9

Q9_1 This question concerns your company's outlook for the future. When does your company anticipate that its business performance will recover and return to its previous level? Or does your company think it will not recover? Please indicate the appropriate response option.

	Already recovered and returned to the previous level.
	Expect to recover and return to the previous level within three months.
	Expect to recover and return to the previous level within six months.
	Expect it will take between six months and one year to recover and return to the previous level.
	Expect it will take between one and two years to recover and return to the previous level.
	Expect it will take more than two years to recover and return to the previous level.
	Do not expect to recover (will not return to the previous level, cannot see path to recovery).
	Not sure.
	Business performance has not declined.

Q9_2 Based on this outlook, please indicate the appropriate response option for each item regarding your company's situation thus far and thoughts on future business continuity.

=====Options=====

Thus far

In the future

Q9_2

	Thus far	In the future
Have continued (intend to continue) business operations at an expanded scale.		
Have continued (intend to continue) business operations at the current level.		
Have continued (intend to continue) business operations at a smaller scale.		
Have launched (intend to launch) new business and continue(d) business operations.		
Intend to discontinue business operations.	-	
Not sure.	-	

Q10

Q10 targets respondents who selected any items except “Intend to discontinue business operations” or “Do not know” on Q9_2.

Q10 Which business measures has your company taken thus far, and which does your company intend to take, in continuing business? Please select all that apply.

=====Options=====

Thus far

In the future

Q10

	Thus far	In the future
Newly launching mail-order sales over the Internet		
Expansion of mail-order sales over the Internet		
New development and expansion of sales channels (other than online channels)		
Development/sales of products in line with government		

demand stimulation measures (Go To campaign, etc.)		
Development/sales of products useful for COVID-19 preventive measures		
Development/sales of products in response to rising demand due to increased time spent at home		
Reviewing overseas supply chains (switching to domestic production, etc.)		
Expansion of domestic production structure		
Reduction of domestic production structure		
Expansion of domestic sales structure		
Reduction of domestic sales structure		
Expansion of overseas production structure		
Reduction of overseas production structure		
Expand overseas sales network		
Reduction of overseas sales structure		
Other (Specify)	()	()
No special approaches for business continuation (business as usual)		