

Trends Amongst Japanese Travelers During the COVID-19 Epidemic (Part 17)

Produced from Results of the JTBF Travelers Survey

March 14, 2022

Japan Travel Bureau Foundation
Tourism Culture Vitalization Dept.,
Tourism Research Dept.

Survey Results

- 1. Intent to Travel During COVID-19** ... p.4

- 2. Deciding to Travel During COVID-19** ... p.8
 - (1) Awareness of national and local government requests
 - (2) Matters impacting domestic travel
 - (3) Conditions for traveling overseas

- 3. Regions Where Respondents Want to/Don't Want to Visit** ... p.12

Survey Summary

Survey title: JTBF Travel Attitude Survey

Survey target: Men and women aged 18 to 79 nationwide (selected from survey company panels)

Survey method: Self-administered mail surveys*

■ May 2021 Survey Survey Period: May 26 to June 16, 2021

	Male								Female								
Age (years)	18-19	20-29	30-39	40-49	50-59	60-69	70-79	Subtotal	18-19	20-29	30-39	40-49	50-59	60-69	70-79	Subtotal	Total
Respondents (Individuals)	14	108	126	151	113	127	110	749	13	103	105	132	106	149	116	724	1,473
Composition Ratio (%)	1.0	7.3	8.6	10.3	7.7	8.6	7.5	50.8	0.9	7.0	7.1	9.0	7.2	10.1	7.9	49.2	100.0

■ December 2021 Survey Survey Period: November 24 to December 30, 2021

	Male								Female								
Age (years)	18-19	20-29	30-39	40-49	50-59	60-69	70-79	Subtotal	18-19	20-29	30-39	40-49	50-59	60-69	70-79	Subtotal	Total
Respondents (Individuals)	19	75	102	135	114	152	97	694	20	84	112	150	123	145	132	766	1,460
Composition Ratio (%)	1.3	5.1	7.0	9.2	7.8	10.4	6.6	47.5	1.4	5.8	7.7	10.3	8.4	9.9	9.0	52.5	100.0

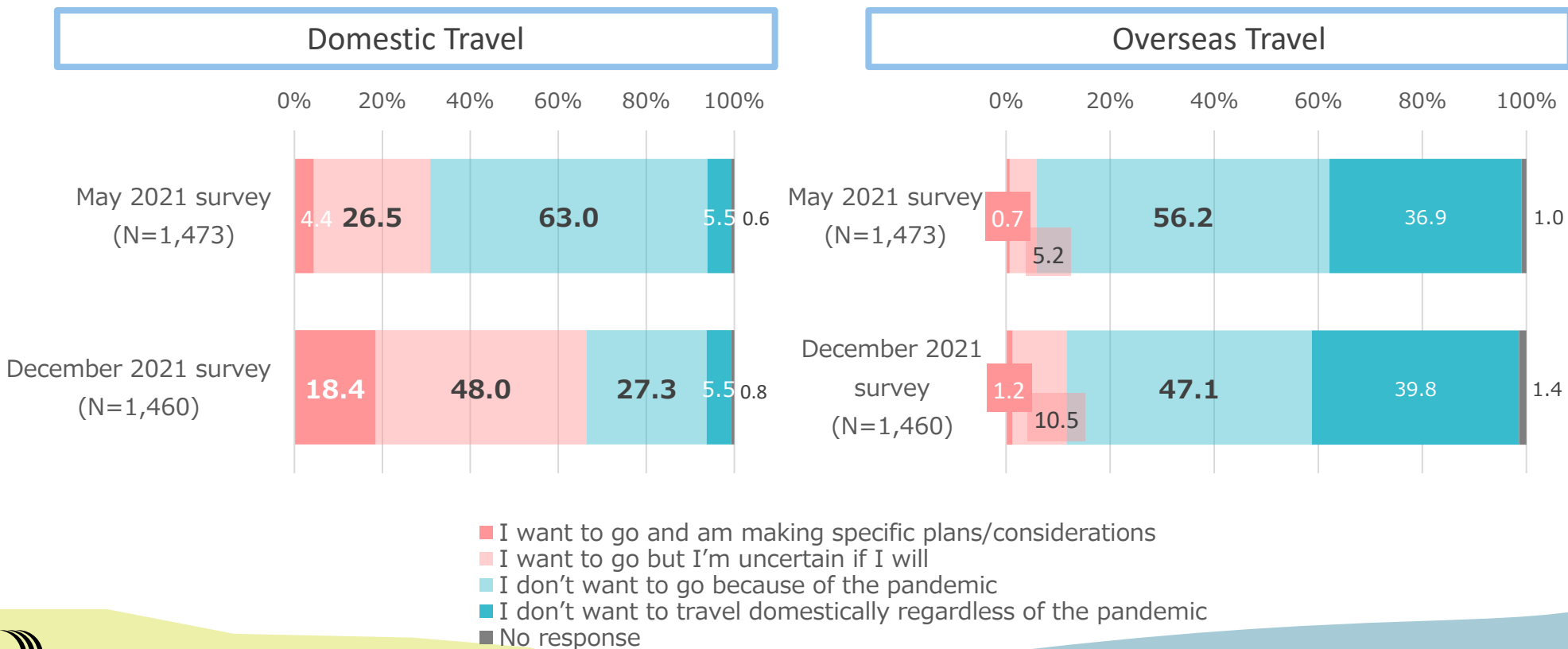
Note: Households were extracted from a residential map database with respondents based on the population at the time of the census. This method allowed us to select survey targets without regional or gender age bias.

The survey was then sent by mail, and respondents were asked to fill out the questionnaire by themselves.

Travel During COVID-19 **More than 60% Want to Travel Domestically**

- Survey respondents were asked if they wanted go on sightseeing/recreational trips during the current pandemic. In the May 2021 survey, more than 60% responded “I don’t want to travel because of the pandemic” but in the December 2021 survey, this decreased to less than 30%. Instead, the total percentage answering “I want to go and am making specific plans/considerations” and “I want to go but I’m uncertain if I will” increased to more than 60%. Intent to travel in-country, therefore, appears to be recovering to some extent.
- For overseas trips those responding they “Want to go (I want to go and am making specific plans/considerations + I want to go but I’m uncertain if I will)” remained at approximately 10% in the December survey, showing many were still cautious.

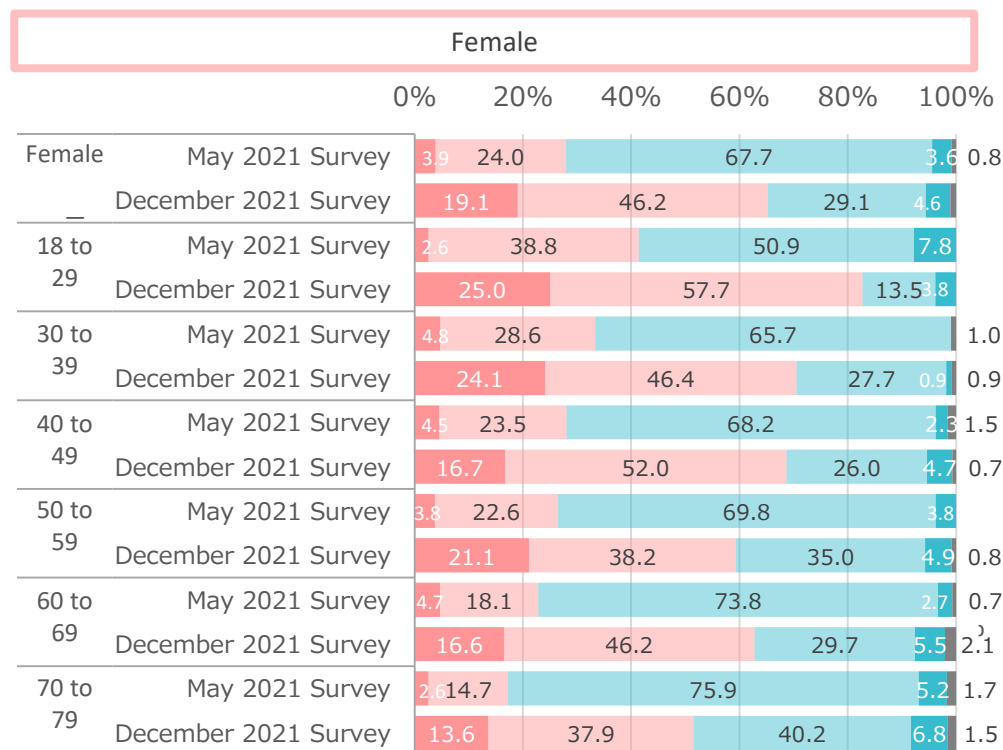
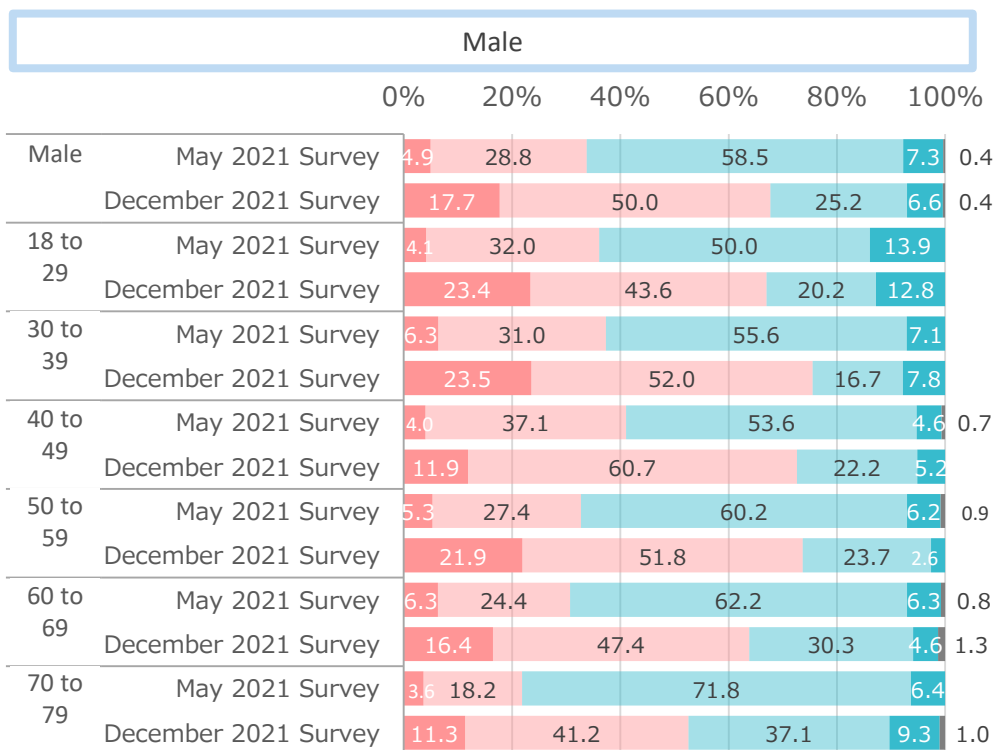
Q. Do you want to go on a sightseeing/recreational trip during the current pandemic?



Domestic Travel During COVID-19: Females in 20s Want to Go, Those in 70s Remain Cautious

- In the December 2021 survey, more than 60% of both male and female respondents answered “Want to go (I want to go and am making specific plans/considerations + I want to go but I’m uncertain if I will)” for domestic trips.
- In the December 2021 survey, the majority of respondents answering "Want to go" were men between 30 and 50 and women between 20 to 30, with women in their 20s in particular accounting for more than 80%. On the other hand, approximately 40% of both male and female respondents in their 70s answered “I don’t want to go because of the pandemic,” indicating a cautious attitude, as in the May 2021 survey.

Q. Do you want to go on a domestic sightseeing/recreational trip during the current pandemic? (By sex and age)



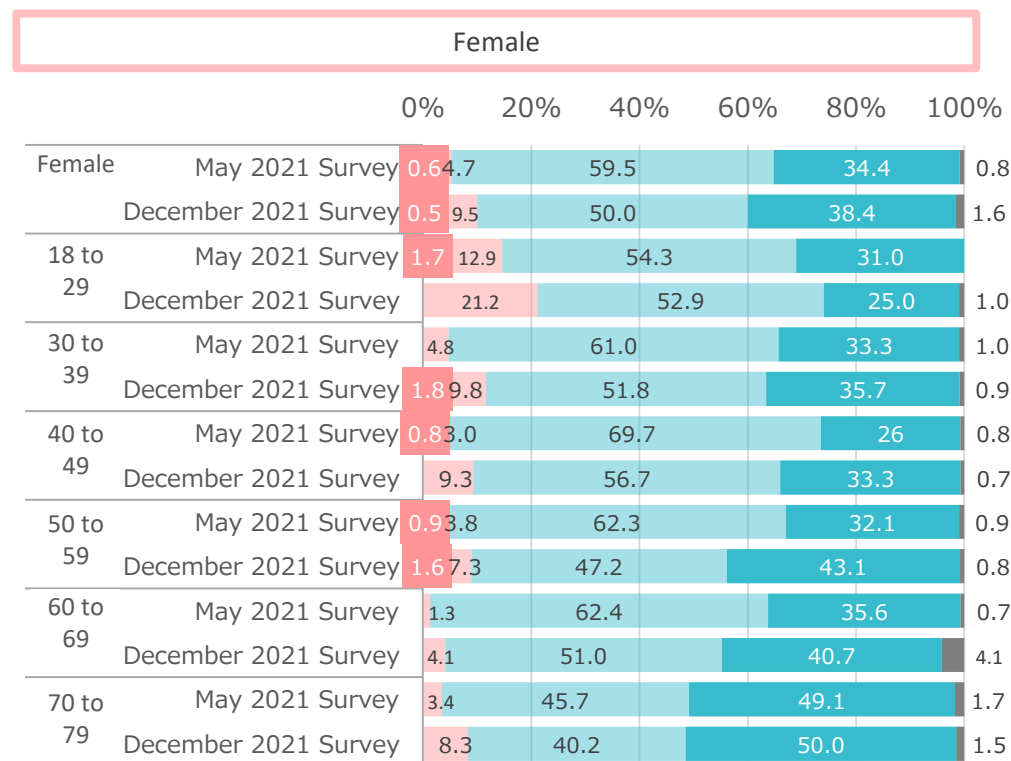
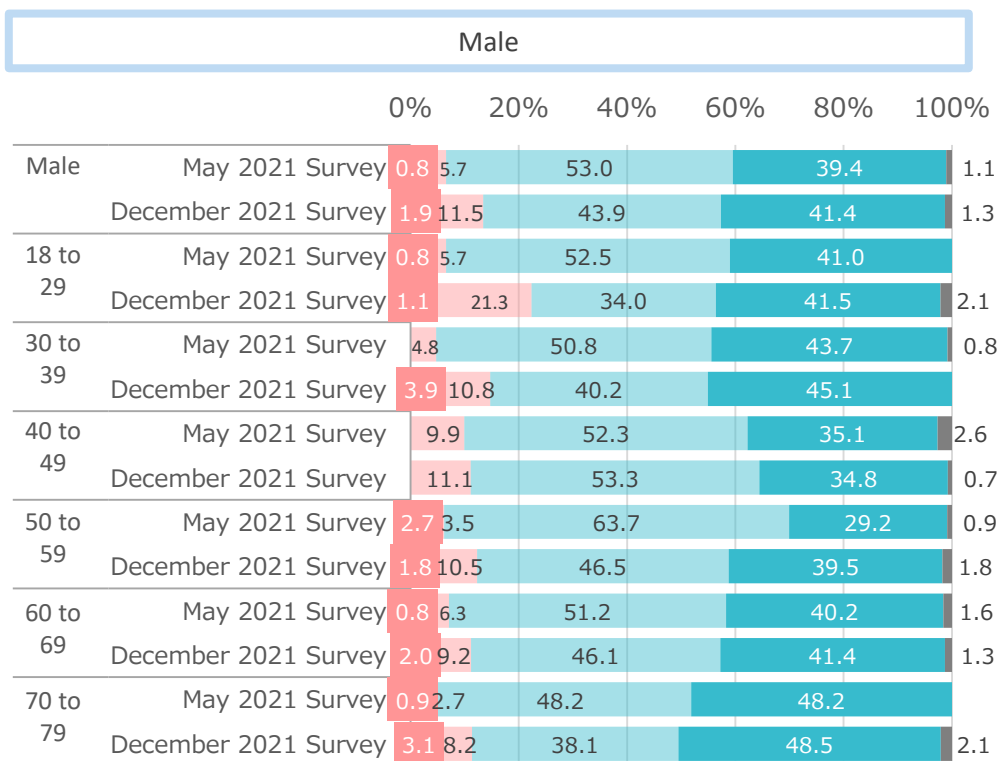
■ I want to go and am making specific plans/considerations
■ I don't want to go because of the pandemic
■ No response

■ I want to go but I'm uncertain if I will
■ I don't want to travel domestically regardless of the pandemic

Overseas Travel During COVID-19: Approx. 10% of Men and Women Want to Go

- When asked about their desire to travel internationally, although both men and women showed increases compared to the May 2021 survey “Want to go (I want to go and am making specific plans/considerations + I want to go but I’m uncertain if I will)” remained at around 10%.
- By age group, all generations were cautious about traveling abroad during COVID-19, although more than 20% of respondents in their 20s wanted to go.

Q. Do you want to go on an overseas sightseeing/recreational trip during the current pandemic? (By sex and age)



■ I want to go and am making specific plans/considerations
■ I don't want to go because of the pandemic
■ I don't want to travel overseas regardless of the pandemic
■ No response

■ I want to go but I'm uncertain if I will
■ I don't want to travel overseas regardless of the pandemic

Intent to Travel Domestically: Improving Trends Regardless of Typical Frequency

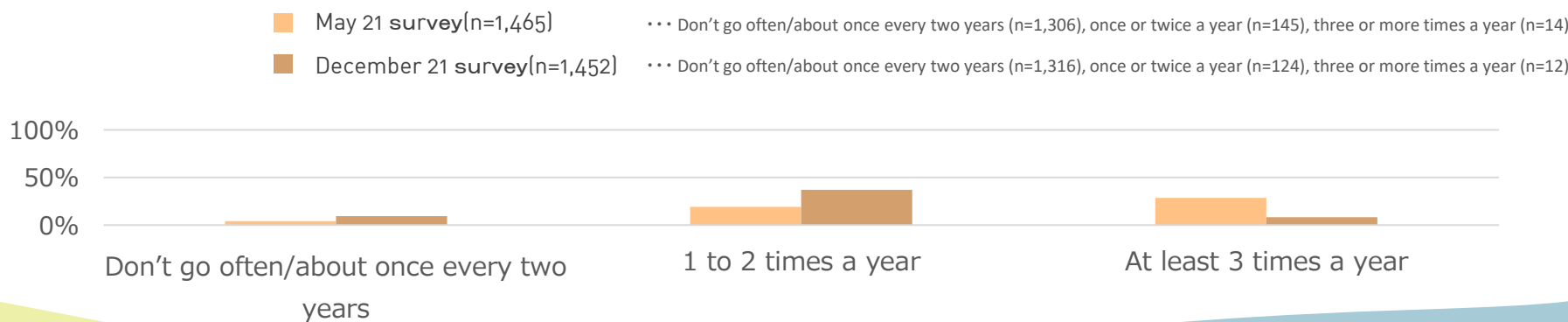
- Examining those answering “Want to go (I want to go and am making specific plans/considerations + I want to go but I’m uncertain if I will)” shows domestic travel is recovering, with an increase in intent between the May and December 2021 surveys, for both infrequent and frequent travelers.
- For international travel, increased intent was only seen amongst those who travel once or twice a year, as with domestic travel.

Those answering they “want to go” on sightseeing/recreational trips in the current COVID-19 pandemic (per-usual frequency of travel)

Domestic Travel



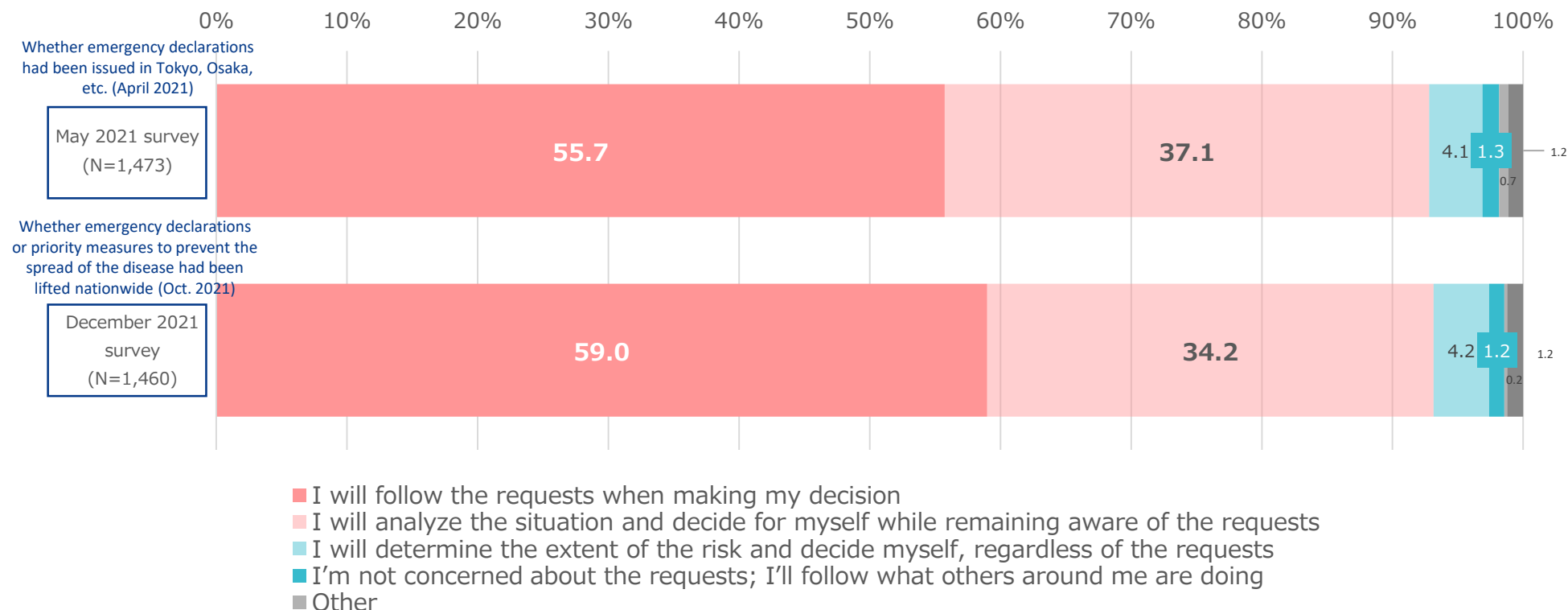
Overseas Travel



Regardless of Status of Requests, 60% Follow When Deciding

- When asked whether national and local government requests impact their decision to travel, nearly 60% of respondents in both the May 2021 and December 2021 surveys said they follow the requests when making travel decisions.
- While a state of emergency was declared in some areas in May 2021, all requests were lifted in December 2021. However, there was no significant difference in awareness of government requests.

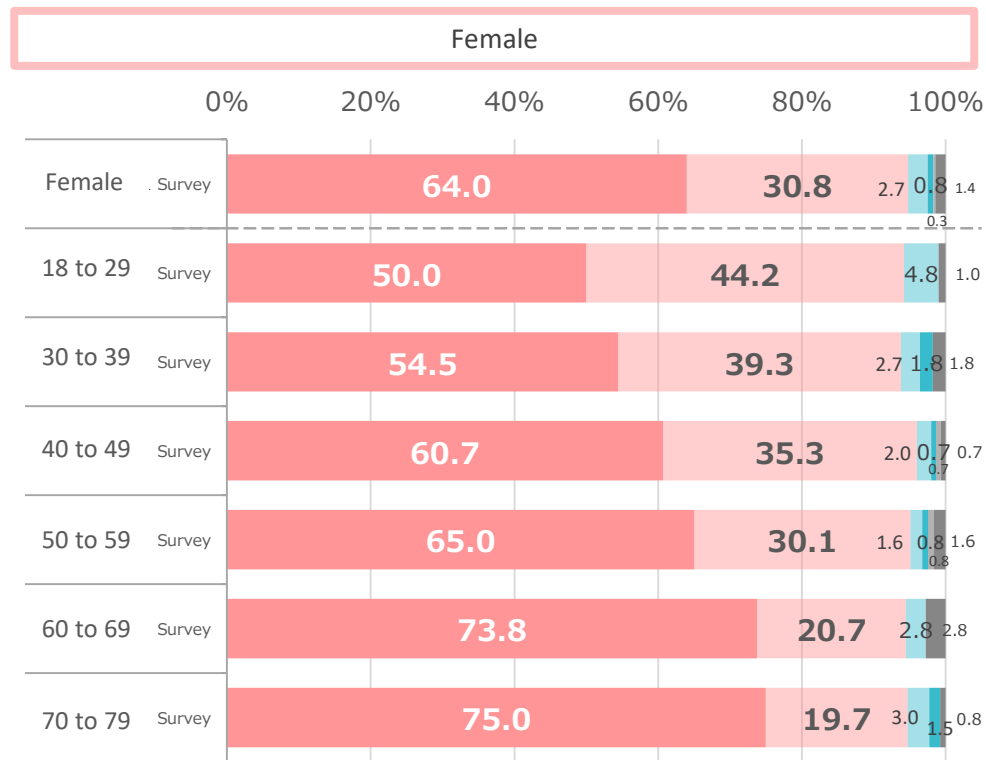
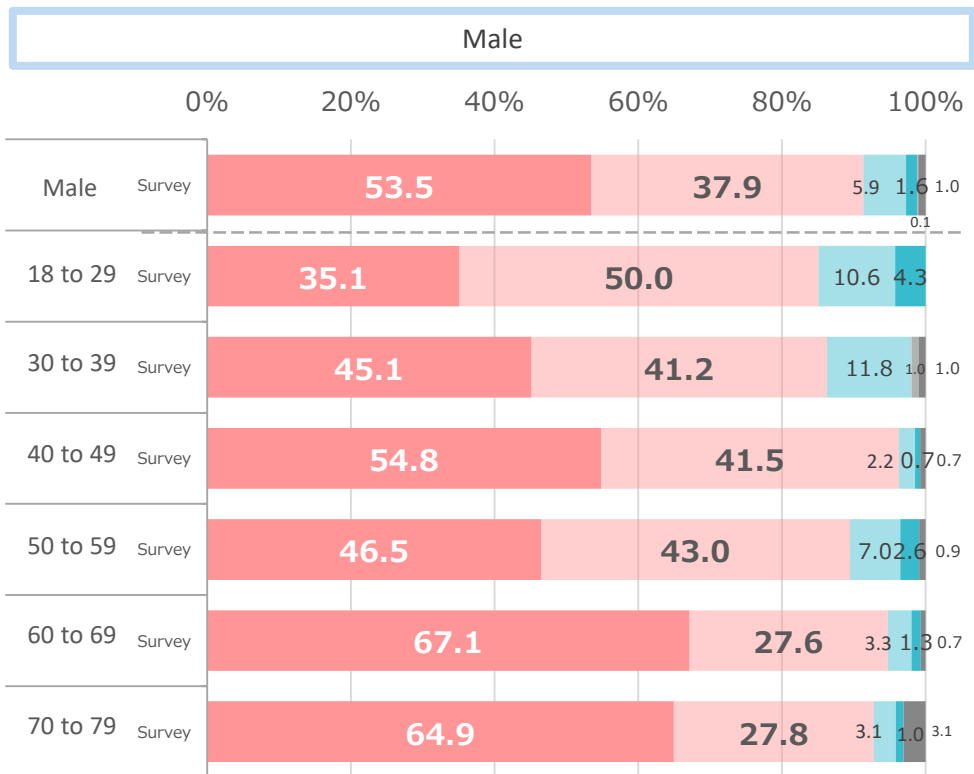
Q. To what extent does your awareness of requests from national or local governments (e.g., refraining from going out, refraining from travel) impact your decision to travel?



Requests from National and Local Governments: **Women Tend to Follow More**

- Examining attitudes towards these requests by gender, 50% of men and 60% of women said they would "Follow the request when deciding," indicating that women were more likely than men to follow these requests in all age groups.
- Among women, "Follow the request when deciding" increased with age, with more than 60% of men in their 60s and older also indicating they would follow these requests.

Q. To what extent does your awareness of requests from national or local governments (e.g., refraining from going out, refraining from travel) impact your decision to travel? <December 2021 Survey>



■ I will follow the requests when making my decision
■ I will determine the extent of the risk and decide myself, regardless of the requests
■ Other

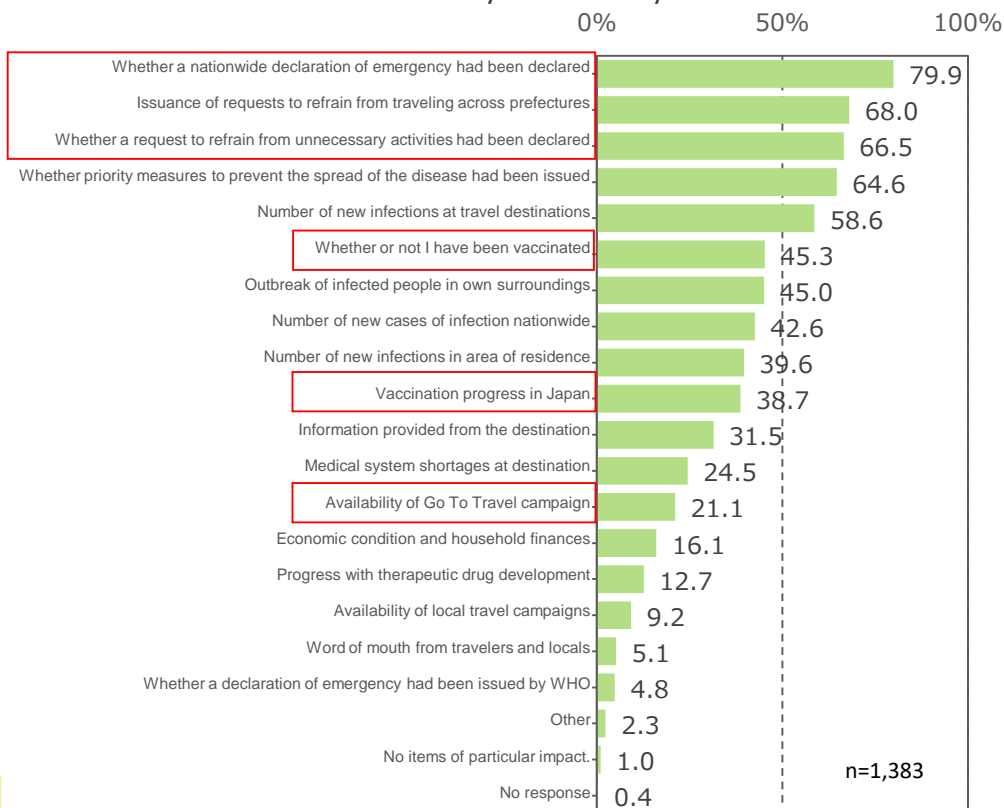
■ I will analyze the situation and decide for myself while remaining aware of the requests
■ I'm not concerned about the requests; I'll follow what others around me are doing
■ No response

Declarations of Emergency Strongly Impact Domestic Travel Decisions

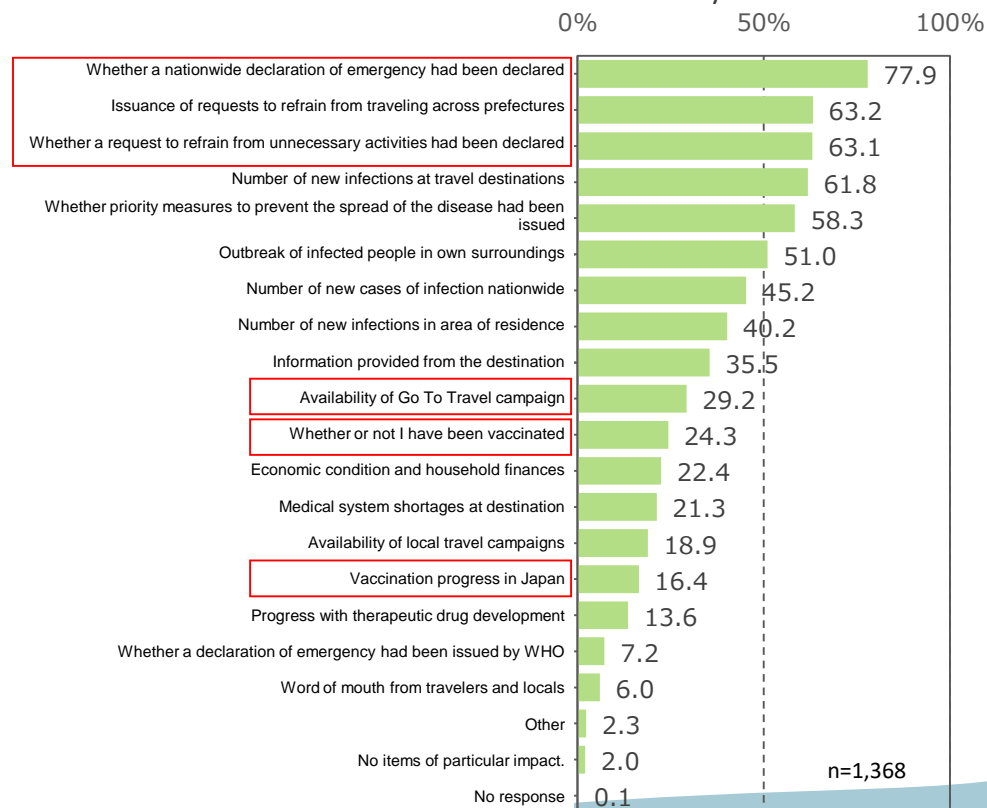
- As in the May 2021 survey, the top three items affecting domestic travel were "Declarations of a state of emergency," "Requests to refrain from traveling across prefectures" and "Requests to refrain from going out".
- Items that dropped in ranking compared to the May 2021 survey included "Whether or not I have been vaccinated" and "Vaccination progress in Japan". This may be due to a relative decline in the emphasis placed on items related to vaccines as a result of progress with vaccination in Japan. Conversely, "Availability of Go To Travel campaign" moved up in the rankings, indicating that expectations for travel support measures are rising.

Q. What matters influenced your decision to travel domestically during the current pandemic? [Multiple answers]

<May 2021 Survey>



<December 2021 Survey>

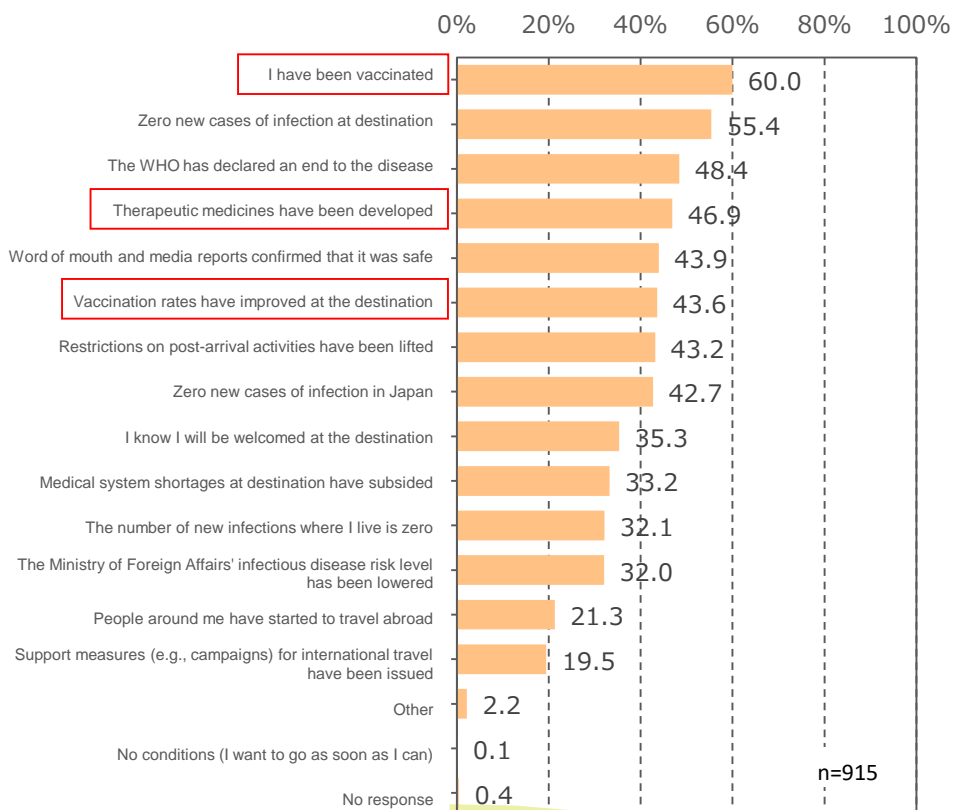


Conditions for Overseas Travel: Zero Infections at Destination at Top

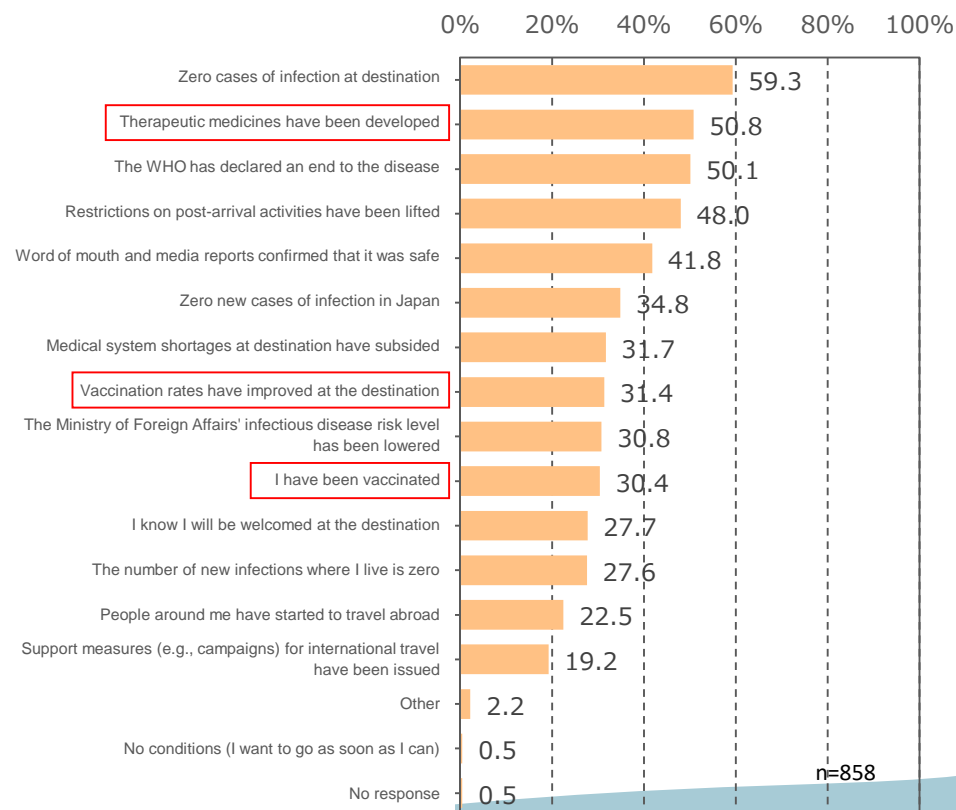
- As vaccinations have now progressed in Japan, "I have been vaccinated" decreased from 60% to 30%, and "Vaccination rates have improved at the destination" also dropped down the rankings. In their place, "Therapeutic drug development" moved up in the rankings to second place.
- The top responses were "Zero new cases of infection at destination" and "The WHO has declared an end to the disease" as in the May 2021 survey.

Q. After travel restrictions and destination entry restrictions have been eased, what conditions would need to be met for you to travel internationally?

[Multiple answers] <May 2021 Survey>



<December 2021 Survey>

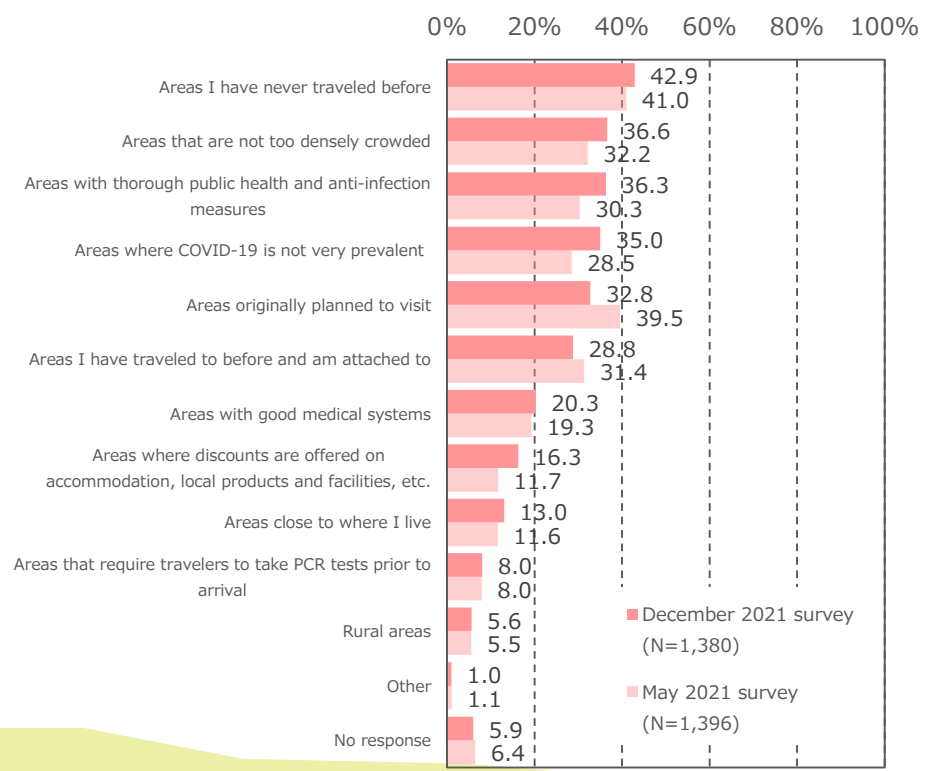


Choosing a Destination: Infection Countermeasures/Avoiding Closed Spaces are Preconditions

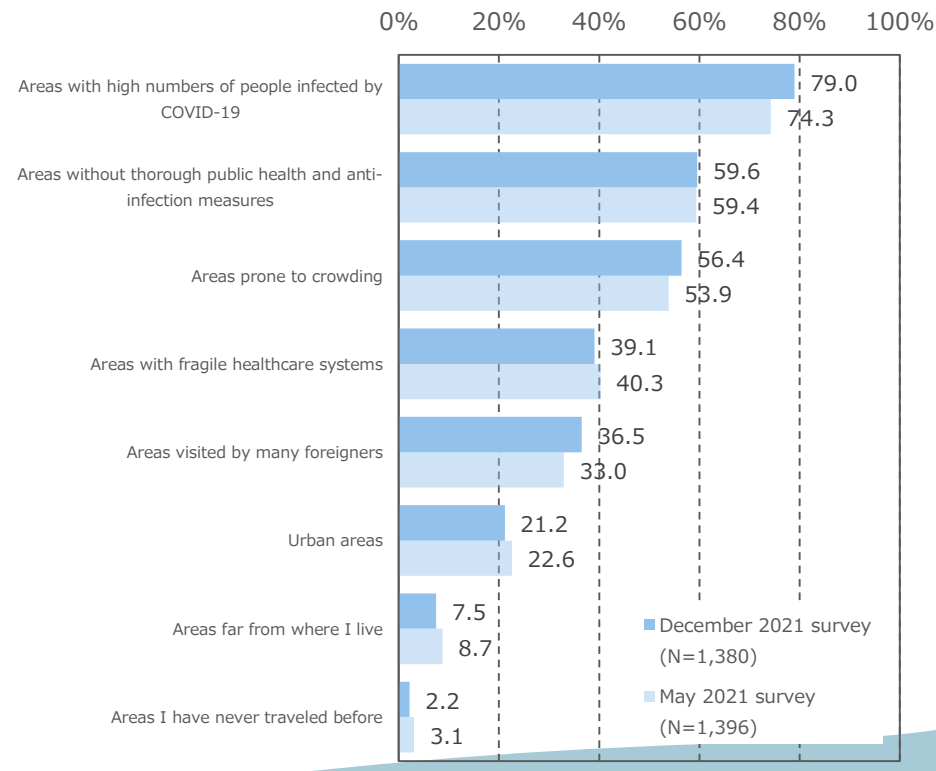
- Top destinations for future trips included "Areas I have never traveled to before" and "Areas that are not too densely crowded" while the top destinations to avoid were "Areas with many infections," "Areas without thorough public health and anti-infection measures" and "Areas that are likely to be crowded". This result is largely unchanged from the May 2021 survey.
- The above suggests that while travelers want to visit areas they have never traveled to before, they also want to avoid areas where there is concern about transmission of COVID-19. In the future, it will be important for tourist destinations to communicate their unique attractions to attract travelers, while implementing thorough measures to prevent infectious diseases as a matter of course.

Q. Which areas would you like to/not like to visit in the future? [Multiple answers]

Areas respondents want to visit



Areas respondents don't want to visit



Trends Amongst Japanese Travelers During the COVID-19 Epidemic (Part 17)

Produced from Results of the JTBF Travelers Survey

Published on March 14, 2022

Japan Travel Bureau Foundation

Tourism Culture Vitalization Dept., Tourism Research Dept.

GOKITA Reiko, YASUHARA Arisa, NAKA Nanae

- This document is copyrighted and is protected under the Copyright Act.
When quoting this document, please be sure to clearly indicate the source in accordance with the Copyright Act.
- If you wish to reprint or reproduce this document in whole or in part, you must obtain permission from the copyright holder, so please contact us below.

Division of Tourism and Culture Promotion, Japan Travel Bureau Foundation

Website: <https://www.jtb.or.jp/>