

Trends Amongst Japanese Travelers Amidst the Effects of COVID-19 (Part 23)

Produced from Results of the JTBF Travelers Survey

June 30, 2023

Japan Travel Bureau Foundation
Tourism Research Dept.

Note: As of Part 23, "During the COVID-19 Epidemic" has been changed to "Amidst the Effects of COVID-19."

Survey Results

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Survey Summary

Survey title : JTBF Travel Statistics Survey2022・2023 【Overall Survey】

Survey target : Men and women aged 16 to 79 nationwide (selected from survey company panels)

Survey method : web survey

Survey item : Status of travel every three months, future travel plans/and intents, impacts of COVID-19 on daily life, etc.

■ First quarter survey (October 2022 survey) Survey period: July to September 2022 Survey period: October 1 to October 6, 2022

Age (years)	Male								Female								合計
	16-19	20-29	30-39	40-49	50-59	60-69	70-79	計	16-19	20-29	30-39	40-49	50-59	60-69	70-79	計	
Respondents (Individuals)	125	1,072	1,407	1,971	1,900	1,585	1,740	9,800	107	1,144	1,396	1,907	1,956	1,828	1,862	10,200	20,000
Composition Ratio (%)	0.6	5.4	7.0	9.9	9.5	7.9	8.7	49.0	0.5	5.7	7.0	9.5	9.8	9.1	9.3	51.0	100.0

■ Second quarter survey (January 2023 survey) Survey period: October to December 2022 Survey period: January 6 to January 13, 2023

Age (years)	Male								Female								合計
	16-19	20-29	30-39	40-49	50-59	60-69	70-79	計	16-19	20-29	30-39	40-49	50-59	60-69	70-79	計	
Respondents (Individuals)	158	1,080	1,404	1,950	1,868	1,602	1,668	9,730	120	1,132	1,485	2,040	1,843	1,774	1,876	10,270	20,000
Composition Ratio (%)	0.8	5.4	7.0	9.8	9.3	8.0	8.3	48.7	0.6	5.7	7.4	10.2	9.2	8.9	9.4	51.4	100.0

■ Second quarter survey (May 2023 survey) Survey period: January to March 2023 Survey period: May 19 to May 24, 2023

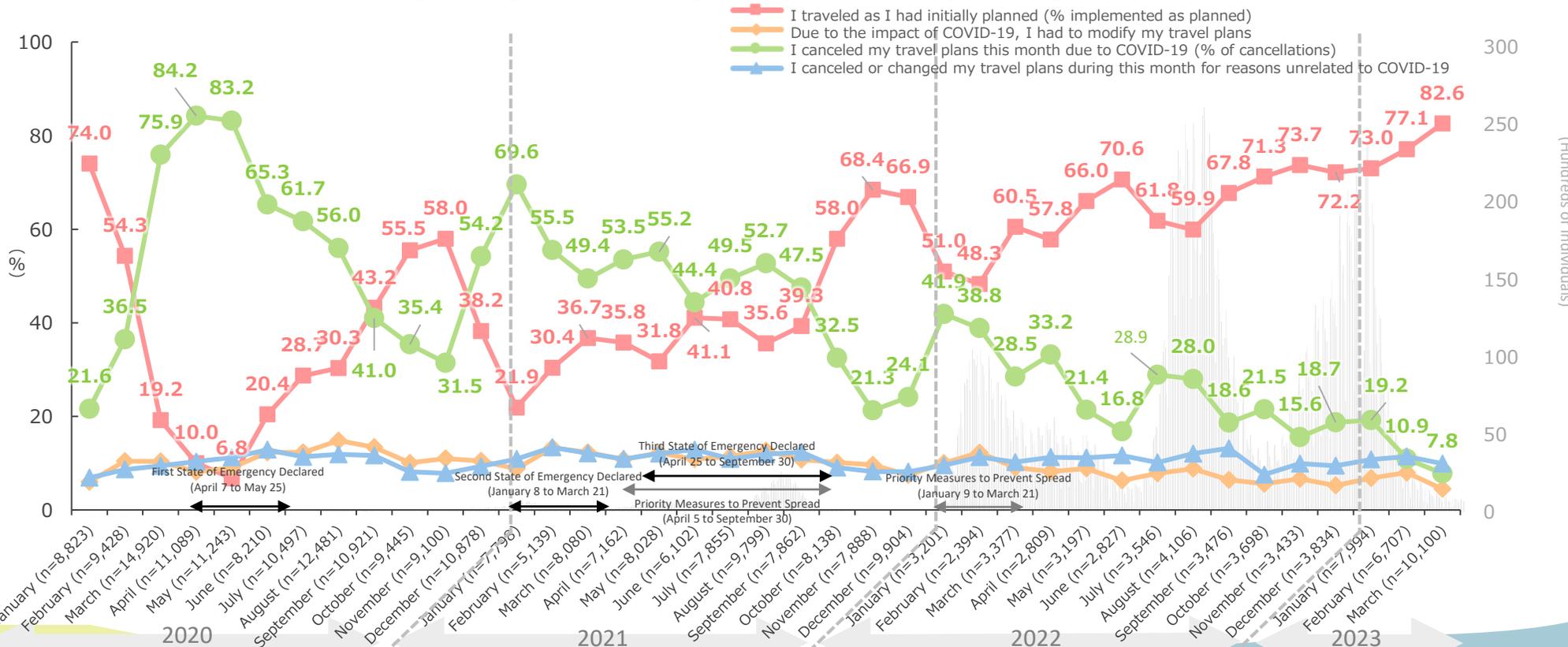
Age (years)	Male								Female								合計
	16-19	20-29	30-39	40-49	50-59	60-69	70-79	計	16-19	20-29	30-39	40-49	50-59	60-69	70-79	計	
Respondents (Individuals)	190	3,256	4,207	5,347	4,501	3,970	3,934	25,405	277	3,373	4,014	4,832	4,152	4,065	3,882	24,595	50,000
Composition Ratio (%)	0.4	6.5	8.4	10.7	9.0	7.9	7.9	50.8	0.6	6.7	8.0	9.7	8.3	8.1	7.8	49.2	100.0

※See (Part 10) for the 2020 sample, (16) for the 2021 sample, and (21) for the April/July 2022 survey sample.

"% Traveled as Planned" for Domestic Travel Exceeded 80% in March 2023, a Record High

- The rate of carrying out domestic travel as planned was as low as 6.8% in the initial phase of the COVID-19 crisis (May 2020) and has since fluctuated in response to the issuance of states of emergency and the spread of infections. Despite periods of increasing infection rates, since October 2021 the rate of travel as-planned has consistently been higher than the cancellation rate.
- In March 2023, the rate of travel as planned exceeded 80%, the highest ratio since the start of the survey. The cancellation rate due to COVID-19 also dropped to single digits for the first time since the survey began, at 7.8%, indicating that the situation for domestic travel is gradually returning to pre-pandemic conditions

Q. Did you cancel or postpone any domestic sightseeing or recreational travel due to COVID-19? (Includes one-day trips; only answered by those who were planning to travel) [Multiple answers]

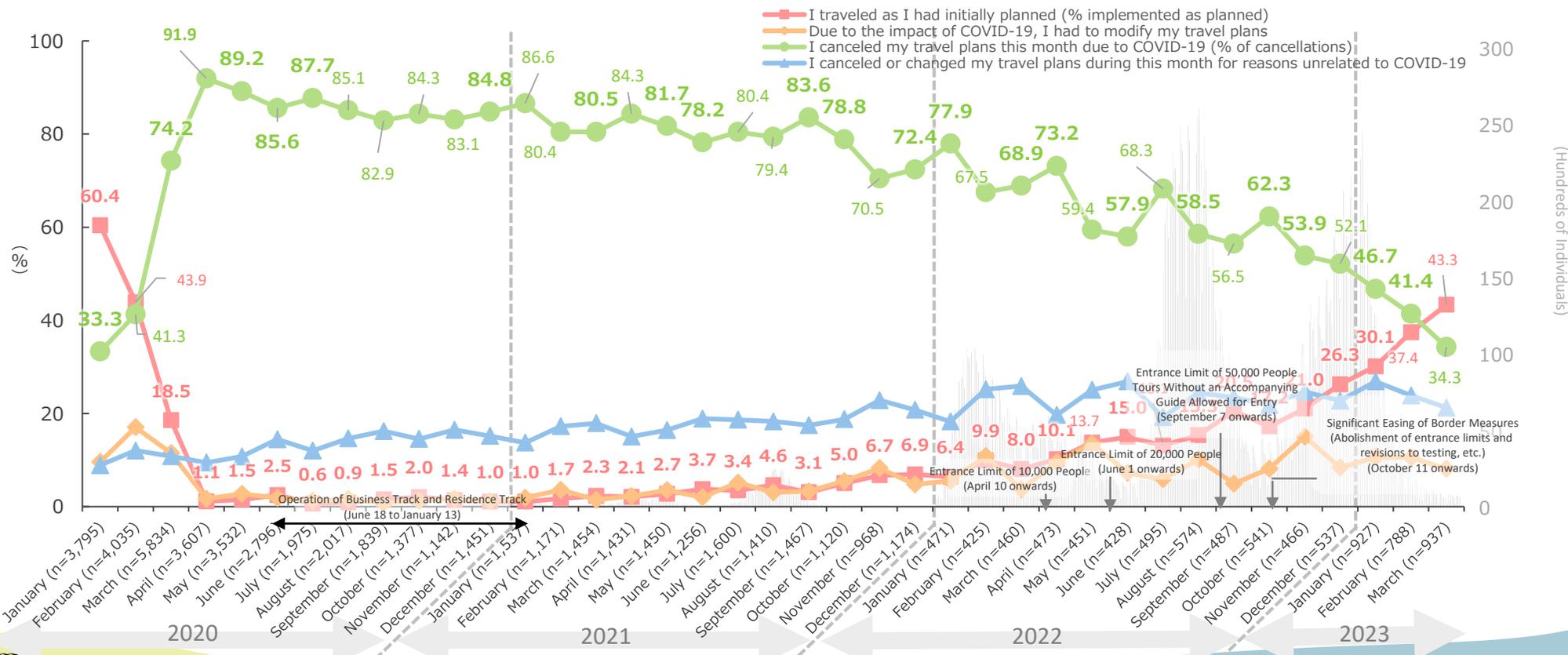


Note: Periods of State of Emergency and Priority Measures to Prevent Spread are based on the "Basic Response Policies" from the Novel Coronavirus Infectious Diseases Control Promotion Office, Cabinet Secretariat's Novel Coronavirus Infectious Diseases Control website. Numbers of new positive cases in Japan were based on data from the Ministry of Health, Labour and Welfare.

Rise in "Traveled As Planned" for Overseas Travel **Following Easing of Border Measures**

- The rate of travel as planned for overseas travel was less than 10% from April 2020 to March 2022, due to factors such as entry restrictions and strengthened border measures. Since April 2022, the rate has gradually increased due to the progressive easing of border measures, such as raising or abolishing the limit on the number of entrants and revising entry tests. By March 2023, the rate exceeded 40%, surpassing the cancellation rate for the first time since February 2020.
- The cancellation rate was between 70% and 80% in 2020 and 2021 but has gradually decreased since 2022. In March 2023, it dropped to 34.3%, returning to levels seen in the initial stages of the COVID-19 crisis in January 2020.

Q. Did you cancel or postpone any overseas sightseeing or recreational travel due to COVID-19? (Includes one-day trips; only answered by those who were planning to travel) [Multiple answers]

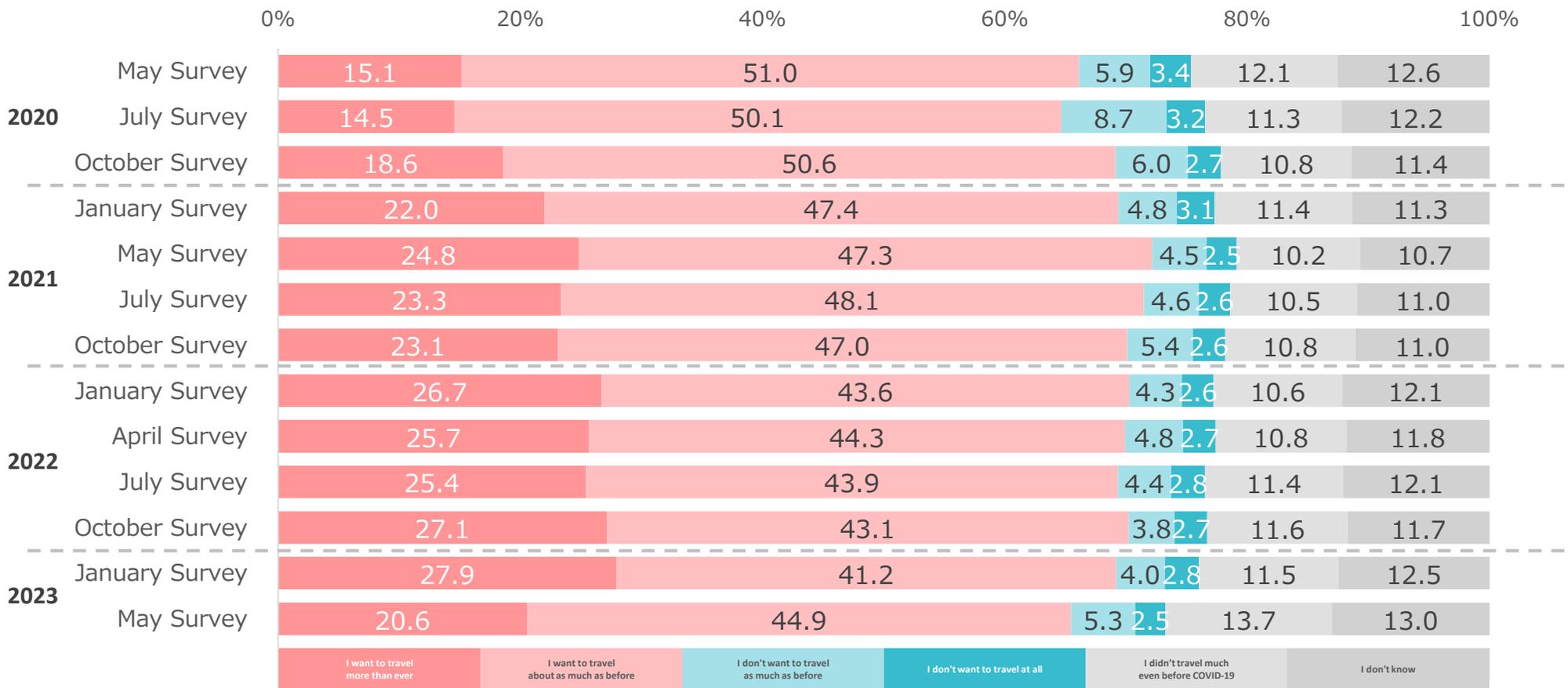


Note: Operation period for Business Track and Residence Track: Based on the "New Measures for Strengthening Border Measures (7)" from the Novel Coronavirus Infectious Diseases Control website. Number of new positive cases in Japan: Based on data from the Ministry of Health, Labour and Welfare

Respondents “Want to Travel More Than Ever” After the End of COVID-19, According to January 2023 Survey

- When asked about their travel intentions after COVID-19 is contained in the January 2023 survey, the number of respondents who said they want to travel "more than ever" was at an all-time high since the survey began.

Q. Do you want to travel after COVID-19 is contained (or if you feel it has been contained)?

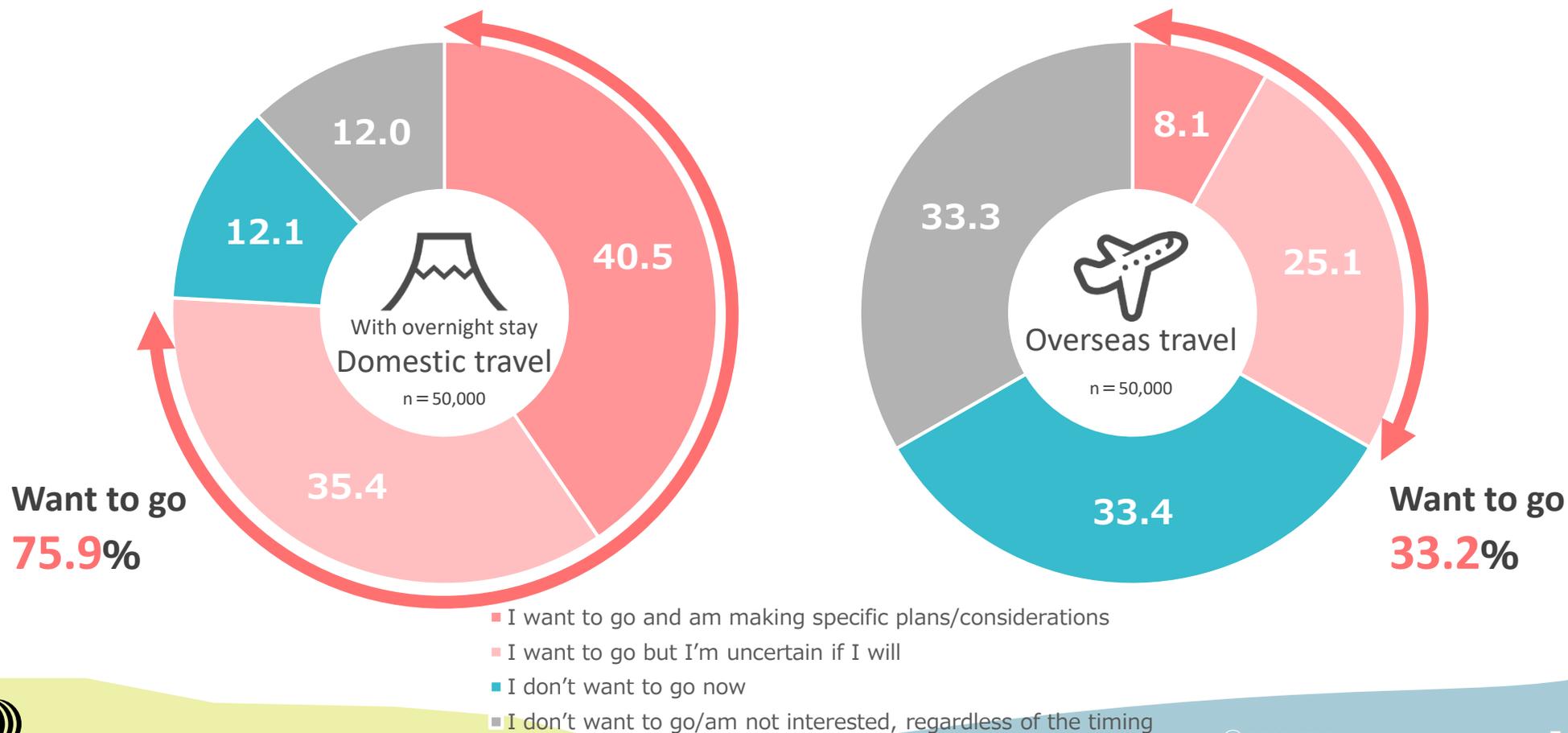


Note: Surveys from May 2020 to January 2022 and May 2023: n=50,000, Surveys from April 2022 to January 2023: n=20,000
 Note: The question was changed in the May 2023 survey from "Would you like to travel after COVID-19 is contained?" to "Would you like to travel if you feel COVID-19 is contained?"

Three-Quarters Want to Travel Domestically, While Only One-Third Want to Travel Overseas

- Within the next year, 40.5% of respondents want to go on a domestic trip and are “making specific plans/considerations”, and 35.4% answered “I want to go but I’m uncertain if I will.” Combined, those who want to travel exceeded 75%.
- On the other hand, the proportion who want to go on overseas trips was only 33.2%. Those who "don't want to go now" (33.4%) and "don't want to go/am not interested, regardless of the timing" (33.3%) each make up about 30% of respondents.

Q. Do you want to go on a tourism or recreation trip within the next year? [May 2023 Survey]



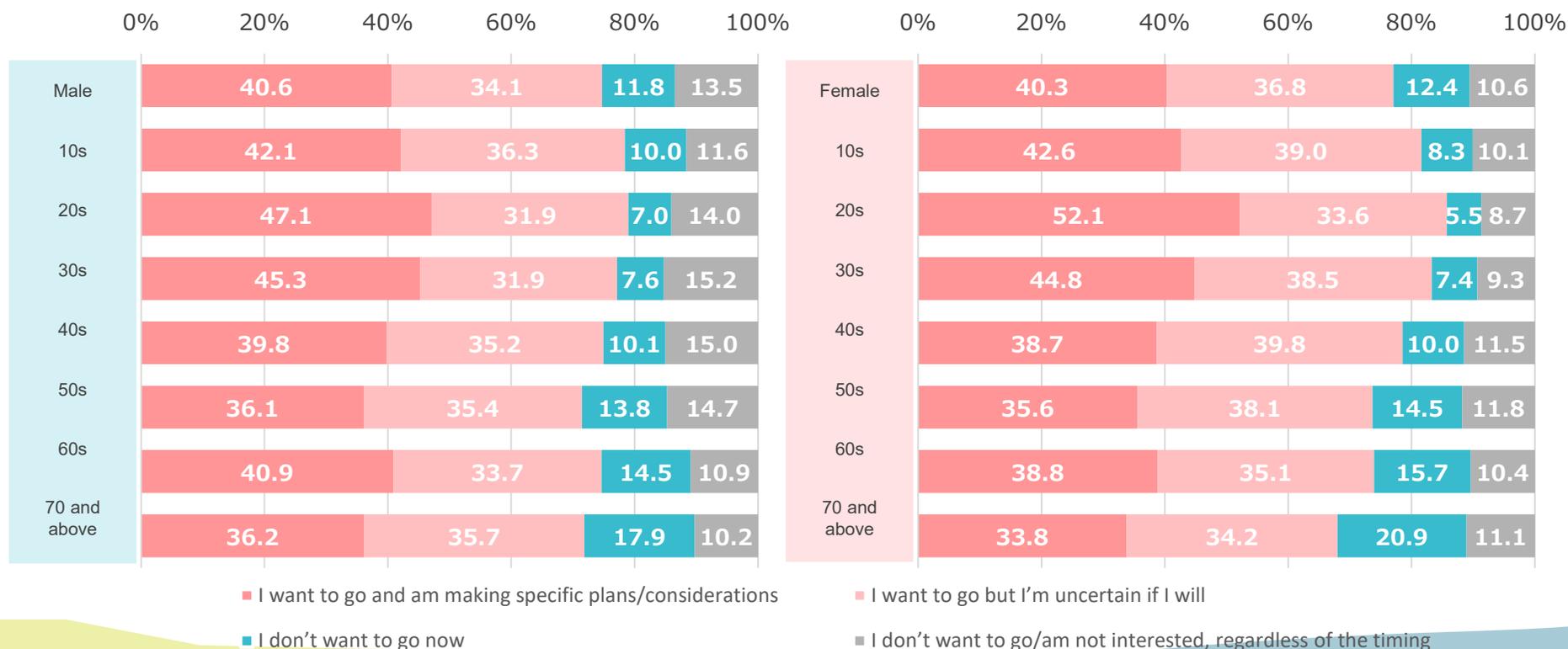
High Intent to Travel Domestically Among People in Their 20s; About Half Are Specifically Considering It

- When examining intent to travel domestically within the next year by gender and age group, those answering “I want to go and am making specific plans/considerations” are especially high among people in their 20s: at 52.1% for women and 47.1% for men.
- The proportion of those who responded “don’t want to go now” increased from between those in their 20s to those over 70 for both genders, and was particularly noticeable among women.

Q. Do you want to go on a tourism or recreation trip within the next year? [May 2023 Survey]



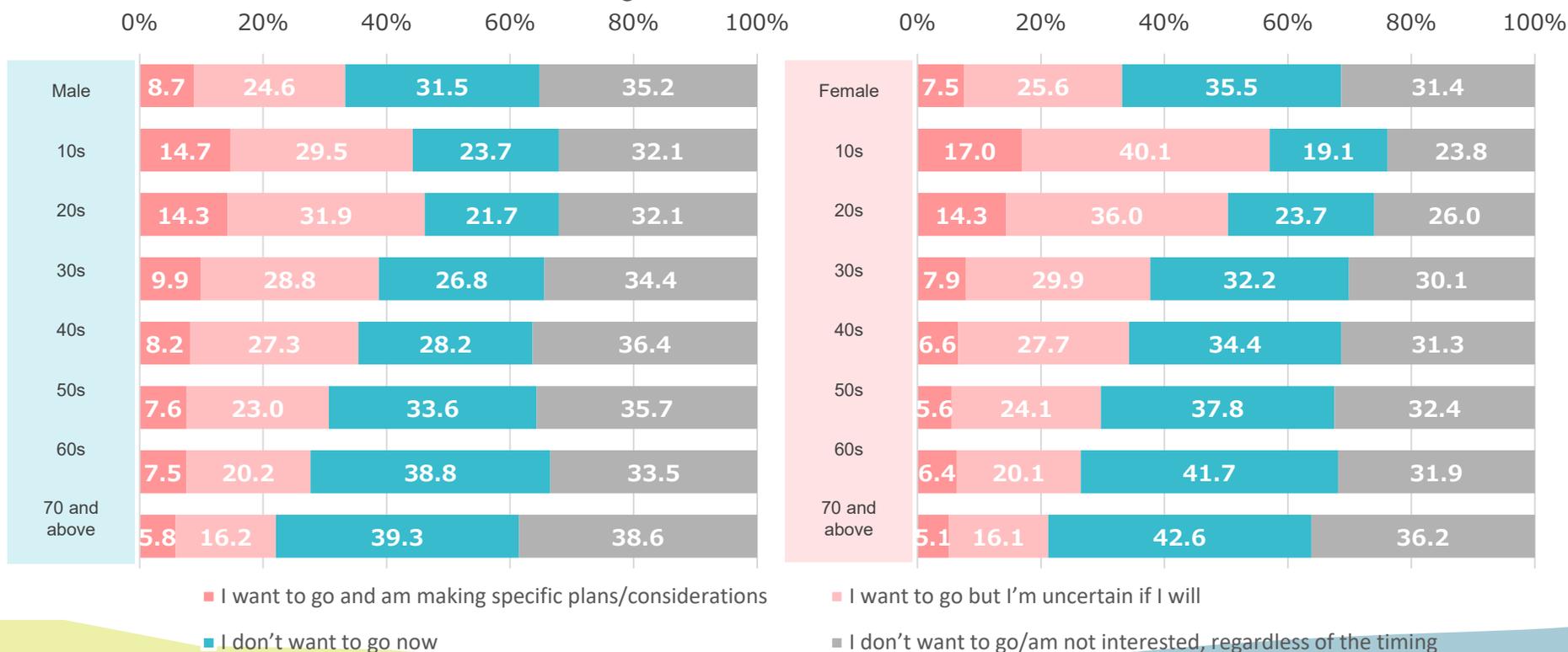
Want to go on a domestic trip with overnight stay



High Intent to Travel Internationally **Among Teens to 20-Year-Olds**

- For overseas travel intentions within the next year, the percentage of those answering "I want to go and am making specific plans/considerations" was highest amongst teenagers for both genders, followed by people in their 20s. Those who responded "I want to go but I'm uncertain if I will" make up 30-40% among those aged between teens to 20s. This is higher than in other age groups when combined with those who "want to go."
- The proportion of those who answered "don't want to go now" is around 40% for both men and women aged 60 and over. This suggests that it will take longer for older populations to return to overseas travel compared to the younger populations.

Q. Do you want to go on a tourism or recreation trip within the next year? [May 2023 Survey]



Top Reason for Hesitating to Travel Overseas is "Feels Expensive Due to Weaker Yen and Rising Global Prices"

- The top reason for hesitating to go on overseas trips was "feels expensive due to a weaker yen and rising global prices," making up 40.7%, and accounting for 30-45% across all gender and age groups. The second highest reason was "cannot afford/want to save money," and the third was "difficult to find the time to travel"
- The response "cannot afford/want to save money" was high among teenagers, and "difficult to find the time to travel" as high among those in their 20s and 30s. However, the proportion of people who responded "Nervous about COVID-19," "Worried about whether it's safe to travel," and "Lost interest in overseas travel due to the pandemic" increased along with age.

Q. Please share the reasons why you don't want to or are hesitant about going on overseas tourism or recreation trips. [May 2023 Survey]

(For those who answered they are hesitant about going or don't want to go on overseas trips within the next year only)

	Feels expensive due to a weaker yen and rising global prices	Cannot afford/want to save money	Difficult to find the time to travel	Nervous about COVID-19	Uncertain about health and safety standards at the destination	Worried about whether it's safe to travel	Turned off by the hassle of international entry protocols	Prefer to travel domestically	Concerned about the lack of support for Japanese visitors at the destination	Find it troublesome to book flights and accommodations	Lost interest in overseas travel due to the pandemic	No countries/regions I want to visit	Apprehensive about prejudice and slander	Other	No reason in particular
Total (n=29,264)	40.7	25.3	24.9	20.7	20.4	17.4	16.9	16.5	10.1	10.0	9.5	8.5	4.3	4.8	13.0
Male (n=14,233)	39.4	23.4	23.6	17.4	17.4	15.3	14.8	16.8	9.5	9.2	7.9	10.0	4.1	3.8	15.2
Teens (n=101)	33.7	34.7	25.7	13.9	13.9	14.9	14.9	21.8	14.9	13.9	5.9	11.9	4.0	1.0	16.8
20s (n=1,747)	36.2	28.9	28.3	11.0	17.6	12.4	15.2	17.4	13.9	14.6	4.9	10.8	5.7	3.0	16.5
30s (n=2,340)	39.7	26.8	29.6	14.6	16.8	14.2	15.4	17.8	11.4	11.5	5.8	9.0	5.2	4.4	13.1
40s (n=2,966)	39.9	24.6	27.0	14.8	15.5	13.0	14.0	14.6	8.7	8.5	5.5	9.1	4.3	3.9	16.0
50s (n=2,550)	39.6	21.4	25.1	16.5	14.5	13.6	13.3	14.3	7.3	7.1	6.9	10.3	3.4	3.5	17.7
60s (n=2,342)	39.1	20.0	20.3	21.0	18.7	17.3	14.9	18.1	8.5	7.9	9.2	10.5	3.5	3.5	14.6
70s and above (n=2187)	41.4	19.2	10.6	26.4	22.9	21.7	16.3	19.8	8.6	7.2	15.6	10.9	3.0	4.0	13.1
Female (n=15,031)	42.0	27.2	26.1	23.9	23.1	19.4	18.9	16.2	10.7	10.7	11.1	6.9	4.5	5.8	10.9
Teens (n=164)	34.8	42.1	24.4	12.2	17.1	11.0	18.9	12.8	15.9	22.6	4.3	9.8	3.7	4.3	18.3
20s (n=2,013)	36.5	31.6	34.3	16.3	22.2	12.2	22.1	15.8	13.5	14.6	3.5	7.3	4.7	6.3	11.3
30s (n=2,490)	41.1	32.5	31.1	18.9	23.7	17.3	19.4	15.9	11.2	12.0	6.1	5.7	5.2	9.2	11.3
40s (n=3,001)	43.9	32.0	32.0	21.2	18.2	16.3	17.7	15.5	8.7	9.7	7.7	6.0	4.9	4.7	10.9
50s (n=2,573)	42.7	27.9	28.3	24.3	22.6	19.8	18.1	15.0	9.0	9.4	11.4	6.8	4.7	4.6	11.0
60s (n=2,510)	44.8	20.0	19.4	28.9	27.3	23.3	18.5	17.5	11.2	10.6	14.9	7.5	4.0	5.1	10.2
70s and above (n=2280)	41.8	17.0	10.4	34.3	26.3	28.1	18.8	18.1	11.4	7.7	23.7	8.5	3.6	5.2	10.2

Less Than 10% "Very Anxious About COVID-19" as of May 2023

- The proportion of people who feel anxious about COVID-19 has significantly decreased from the initial stage of the pandemic (May 2020), with those who "feel very anxious" falling below 10% as of May 2023. Including those who feel "somewhat anxious," the total percentage of people who "feel anxious" is also less than half of respondents.
- The proportion of people who "do not feel anxious ('not anxious at all' + 'not too anxious')" reached its highest point since the survey began, at 32.6%, in May 2023.

Q. Are you anxious about COVID-19?



Note: Surveys from May 2020 to January 2022 and May 2023: n=50,000, Surveys from April 2022 to January 2023: n=20,000

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Concern about Self or Family Member Becoming Infected **Still Top at About 90%**

- The content of anxieties during the COVID-19 crisis shows that "concern about self or family member becoming infected" has consistently been around 90% since the survey began, remaining at the top over throughout the three years. On the other hand, anxieties related to "Future changes in lifestyle, such as refraining from going out," "economic downturn in Japan," "global economic downturn," and "difficulty in obtaining daily necessities" have decreased by more than 20 points since May 2020.
- The concern about "decline in tourism areas" was at 26.7% in May 2020 but has decreased by about 15 points to 12.4% in January 2023.

Q. What is making you anxious about COVID-19? (Only those who feel anxious) [Multiple answers] (%)

		Self or family member becoming infected	Becoming prolonged and unsure when it will end	Collapse of medical system	Economic downturn in Japan	Risk of infecting others	★	★	Future changes in lifestyle, such as refraining from going out	Family financial difficulties due to reduced income or respondent or family members losing employment	Global economic downturn	★	Impacts on own mental/physical condition	★	Economic downturn in surrounding society	★	Concerns about family members who live elsewhere	Response from authorities	The state of politics	Uncertainty about when work and school will resume	Difficulty in obtaining necessary daily necessities	Decline in tourism areas	Differences in awareness of COVID-19 compared to others around me	Self and family isolated from society	Discrimination, prejudice, and slander against people with COVID-19*	Societal values transforming	Loss of hope towards life	Other
2020	May Survey (n=44,597)	92.6	71.2	55.0	56.0	-	-	47.0	37.8	40.5	-	37.2	-	30.0	26.5	28.9	32.7	26.7	-	8.0	-	14.2	7.7	1.1				
	July Survey (n=43,169)	91.9	67.0	39.7	48.9	-	-	38.3	30.0	34.6	-	32.3	-	25.9	21.9	11.5	19.9	27.0	-	8.2	-	13.6	6.8	0.9				
	October Survey (n=40,091)	93.1	61.5	33.0	43.6	-	-	31.7	27.5	29.7	-	27.9	-	19.9	16.0	7.7	13.6	21.7	-	10.2	-	13.8	7.4	0.8				
2021	January Survey (n=43,503)	93.9	65.3	59.6	45.8	-	-	37.0	31.5	30.3	-	30.0	-	28.0	25.0	8.0	13.0	22.4	-	9.1	-	12.4	8.8	0.9				
	May Survey (n=42,358)	92.7	62.5	50.3	40.7	32.3	33.3	37.1	27.4	22.3	18.6	24.7	26.3	25.1	25.1	19.6	8.7	24.2	-	11.7	25.6	11.4	7.9	0.6				
	July Survey (n=40,086)	90.8	60.0	38.3	37.8	30.0	31.9	34.6	23.7	21.0	18.8	23.3	23.5	22.4	22.2	17.8	7.2	24.6	-	11.2	22.5	11.7	6.9	0.5				
	October Survey (n=39,134)	91.5	57.3	41.3	36.1	31.8	24.3	32.9	23.6	21.0	19.6	22.2	23.0	18.9	17.6	18.5	8.6	21.2	-	11.7	22.2	11.4	7.3	0.5				
2022	January Survey (n=39,613)	92.0	58.0	41.3	37.6	32.8	23.9	34.5	23.4	23.3	19.5	22.7	22.3	16.7	14.9	17.4	11.9	20.7	-	10.4	21.1	9.8	6.3	0.5				
	April Survey (n=13,832)	90.1	56.8	25.6	37.1	26.3	20.9	28.0	22.5	22.5	16.7	21.2	18.4	13.6	12.8	16.0	11.4	17.5	9.9	11.0	13.8	10.1	5.5	0.6				
	July Survey (n=12,564)	89.4	51.5	23.4	35.8	24.0	19.9	26.1	21.5	20.6	17.5	20.1	17.1	14.9	14.0	14.4	11.8	15.8	9.4	9.9	13.1	9.6	5.4	0.5				
	October 2022 Survey (n=11,052)	89.9	49.7	28.4	34.5	24.5	20.7	23.3	21.1	17.8	17.9	19.3	16.8	15.8	14.7	13.5	11.5	14.2	9.7	10.2	10.7	9.0	5.2	0.8				
2023	January 2023 Survey (n=12,040)	89.7	51.5	36.1	34.2	23.5	22.3	21.4	20.2	20.1	19.6	19.4	17.0	16.0	14.8	13.4	12.7	12.4	9.9	9.4	9.1	8.6	5.4	0.8				

Notes: 1. Sorted based on the January 2023 survey, 2. ★ indicates added from the 2021 fiscal year survey, ◆ indicates added from the 2022 fiscal year survey, 3. This question was asked up to the January 2023 survey

97% Perform COVID-19 Measures as of January 2023

- Amongst daily measures to prevent COVID-19 over the past three years, "wearing masks when going out" has consistently been implemented at a high level, exceeding 90%. Measures such as "hand washing and gargling" and "using alcohol sanitizers at areas visited" have also continued at a relatively high level, although they have decreased compared to the periods when they were most commonly used (handwashing, etc.: May 2020, alcohol sanitizing: May 2021). As of January 2023, 97% of respondents were implementing some kind of measures against COVID-19.
- On the other hand, measures that were highlighted during the early stages of the pandemic, such as "refrain from going out needlessly," "refrain from travel/recreation," and "refrain from eating out," have significantly decreased.

Q. What measures are you taking in your daily life against COVID-19? [Multiple answers]

		(%)																														
		Wear a mask when going out	Encourage use of and thoroughly use alcohol sanitizing sprays installed at Encouraging and thoroughly practicing hand washing and gargling.	Am or will be vaccinated	Carry alcohol sanitizer (spray, wipes, etc.)	Avoiding densely populated spaces	Avoiding enclosed spaces with poor ventilation	Social distance	Try to get enough sleep, nutrition, and exercise.	Try not to touch items that are touched by many people (door knobs, railings, etc.)	Refrain from going out needlessly	Refrain from travel/recreation	Refrain from eating out	Avoid close contact settings that may lead to conversation	Ensure safety when eating and drinking (eat silently or alone, use masks, while dining, small group meals, etc.)	Refrain from eating out	Using cashless payments (credit cards, electronic money, barcode payments, etc.)	Check body temperature daily	Refrain from using public transportation	Check information provided by the government and experts on measures to combat COVID-19	Reduce the frequency of outings, even to daily needs such as grocery shopping	Refraining from seeing loved ones, family, or friends who do not live with m	Refrain from going shopping for anything other than groceries and daily	Perform PCR and antigen testing as appropriate	Use take-out or delivery instead of eating out	Wash body as soon as I get home	Sanitize clothes, bags, cell phones, and other belongings as soon as I get home	Download contact tracing applications such as COCOA	Refrain from going to parks	Other	Not doing anything in particular	
2020	May Survey	93.9	82.0	65.9	-	54.2	71.6	62.3	55.9	40.3	47.7	72.1	65.4	-	46.7	64.3	-	22.1	-	37.0	43.3	43.2	38.6	41.2	-	22.0	-	-	26.5	-	0.4	1.5
	July Survey	94.9	77.3	68.4	-	57.7	63.0	52.7	51.4	30.0	42.2	53.7	55.7	-	37.1	45.7	-	19.5	-	26.9	31.5	25.9	25.3	22.9	-	15.0	-	-	11.3	-	0.2	1.8
	October Survey	96.0	76.0	71.3	-	60.1	62.3	51.2	50.7	28.1	40.0	45.8	48.9	-	37.3	40.3	-	20.0	-	24.0	24.9	19.9	23.4	17.5	-	12.6	-	-	7.7	-	0.2	1.7
2021	January Survey	97.4	79.1	74.4	-	63.4	67.5	52.4	55.7	34.1	44.0	58.6	60.1	-	42.9	51.4	-	24.8	-	27.4	32.8	26.6	32.2	24.8	-	16.8	-	-	10.7	-	0.3	1.3
	May Survey	96.5	75.8	75.6	-	57.1	67.4	52.8	55.6	31.2	43.9	56.8	60.8	41.6	43.6	52.1	35.7	32.3	25.8	34.1	27.5	25.4	33.9	24.7	-	19.1	9.6	9.8	11.6	14.2	0.2	1.7
	July Survey	95.9	74.4	74.3	-	54.7	65.3	50.9	53.5	30.1	42.2	51.1	56.9	40.0	41.3	48.5	33.2	31.0	23.8	30.6	24.8	22.0	30.7	20.9	-	16.5	9.4	8.7	9.7	12.6	0.2	2.0
	October Survey	95.9	74.7	75.4	-	56.4	66.7	52.6	54.8	30.5	43.2	52.3	56.1	42.2	43.0	49.7	33.0	32.4	24.5	31.7	24.6	23.3	30.9	22.2	-	17.7	9.8	9.3	10.2	12.0	0.2	2.0
2022	January Survey	95.7	74.1	73.8	-	54.8	62.0	46.1	49.3	31.0	39.5	46.2	51.2	38.3	36.3	41.9	30.8	28.3	20.7	26.1	23.0	20.1	24.1	18.4	-	13.5	7.9	8.0	7.9	9.0	0.1	2.2
	April Survey	94.8	70.2	70.1	56.7	53.7	57.3	45.1	45.1	28.9	35.8	37.8	40.9	35.1	34.2	35.0	27.1	25.0	19.0	21.5	16.7	16.5	19.1	14.9	6.9	10.9	7.1	6.8	5.8	8.5	0.2	2.4
	July Survey	92.8	66.6	66.1	53.1	50.1	50.6	39.1	38.6	28.5	31.5	29.3	31.6	29.5	29.1	26.7	23.9	22.4	16.7	16.6	13.2	12.8	13.1	11.3	6.4	7.9	7.0	5.4	4.3	7.6	0.2	3.0
	October Survey	92.9	66.9	66.8	52.4	50.3	50.1	39.1	37.8	27.3	31.0	28.4	29.3	29.4	28.4	25.8	23.5	21.6	16.7	16.2	12.7	12.1	13.1	10.0	7.4	7.9	6.6	5.3	3.9	5.5	0.1	3.2
2023	January Survey	92.8	67.2	64.2	49.9	49.1	49.1	37.6	35.7	30.8	30.1	28.5	28.4	28.1	27.1	24.3	22.4	20.4	15.6	14.6	12.6	12.3	11.8	10.4	8.3	6.9	5.9	5.1	3.6	2.6	0.2	3.3

Note: 1. Surveys from May 2020 to January 2022: n=50,000, Surveys from April 2022 to January 2023: n=20,000, 2. Sorted based on the January 2023 survey, 3. ★ indicates added from the 2021 fiscal year survey, ◆ indicates added from the 2022 fiscal year survey, 4. This question was asked up to the January 2023 survey

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NAKA Nanae, GOKITA Reiko, MEDAI Nagi

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