Trends Amongst Japanese Travelers During the COVID-19 Epidemic (Part 10)

Produced from Results of JTBF Travelers Survey

April 7, 2021

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

Survey Results

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(1) Impacts on Travel During COVID-19 ・・・ p.4

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Survey Summary

Survey title: JTBF Traveler Trends Survey 2020 [Overall Survey]
Survey target: Men and women aged 16 to 79 nationwide (selected from survey company panels)
Survey method: Online survey
Survey items: Status of travel every three months, future travel plans and intents, impacts of COVID-19 on daily life, etc.

■ First Quarter Survey (May 2020) Period covered by survey: January to March 2020 Survey period: May 1 to May 11, 2020

	Male								Female								
Age (years)	16-19	20-29	30-39	40-49	50-59	60-69	70-79	Subtotal	16-19	20-29	30-39	40-49	50-59	60-69	70-79	Subtotal	Total
Respondents (Individuals)	783	2,473	3,873	6,481	4,555	3,978	3,729	25,872	801	2,667	3,801	5,575	4,501	3,943	2,840	24,128	50,000
Composition Ratio (%)	1.6	4.9	7.7	13.0	9.1	8.0	7.5	51.7	1.6	5.3	7.6	11.2	9.0	7.9	5.7	48.3	100.0

■ Second Quarter Survey (July 2020) Period covered by survey: April to June 2020 Survey period: July 9 to July 15, 2020

	Male								Female								
Age (years)	16-19	20-29	30-39	40-49	50-59	60-69	70-79	Subtotal	16-19	20-29	30-39	40-49	50-59	60-69	70-79	Subtotal	Total
Respondents (Individuals)	592	3,605	2,201	4,280	3,316	3,672	3,603	21,269	1,149	3,443	3,995	6,502	5,553	4,806	3,283	28,731	50,000
Composition Ratio (%)	1.2	7.2	4.4	8.6	6.6	7.3	7.2	42.5	2.3	6.9	8.0	13.0	11.1	9.6	6.6	57.5	100.0

■ Third Quarter Survey (October 2020) Period covered by survey: July to September 2020 Survey period: October 1 to October 7, 2020

	Male								Female								
Age (years)	16-19	20-29	30-39	40-49	50-59	60-69	70-79	Subtotal	16-19	20-29	30-39	40-49	50-59	60-69	70-79	Subtotal	Total
Respondents (Individuals)	512	2,957	3,755	5,210	4,249	3,988	3,360	24,031	672	2,808	3,744	6,009	4,910	4,829	2,997	25,969	50,000
Composition Ratio (%)	1.0	5.9	7.5	10.4	8.5	8.0	6.7	48.1	1.3	5.6	7.5	12.0	9.8	9.7	6.0	51.9	100.0

■ Fourth Quarter Survey (January 2021) Period covered by survey: October to December 2020 Survey period: January 7 to January 14, 2021

	Male								Female								
Age (years)	16-19	20-29	30-39	40-49	50-59	60-69	70-79	Subtotal	16-19	20-29	30-39	40-49	50-59	60-69	70-79	Subtotal	Total
Respondents (Individuals)	554	3,441	4,371	5,325	4,289	3,732	2,949	24,661	975	3,704	4,314	5,143	3,878	4,040	3,285	25,339	50,000
Composition Ratio (%)	1.1	6.9	8.7	10.7	8.6	7.5	5.9	49.3	2.0	7.4	8.6	10.3	7.8	8.1	6.6	50.7	100.0

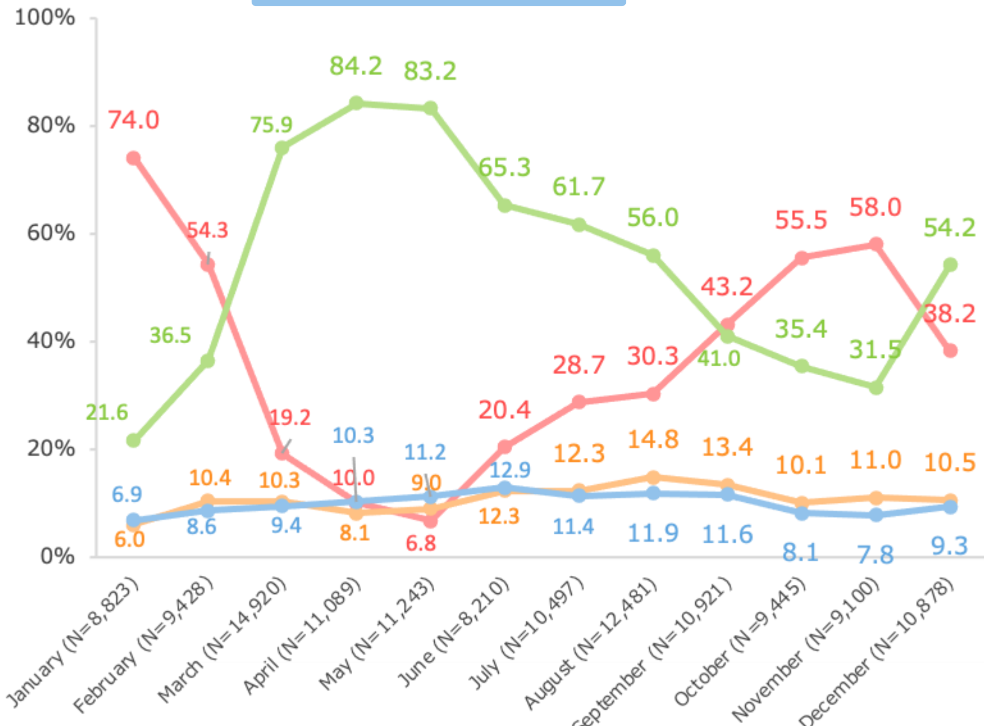
Cancellations Pealed in April and May, Decreased, then Increased Again in December

- The percentage of respondents who answered, "I canceled my travel plans this month due to COVID-19" peaked at over 80% in April and May for domestic travel, then declined through November, increasing again in December during the third wave. On the other hand, cancellations for overseas travel exceeded 90% in April and have remained almost unchanged since. There was a clear difference between domestic and overseas travel over the course of a year.

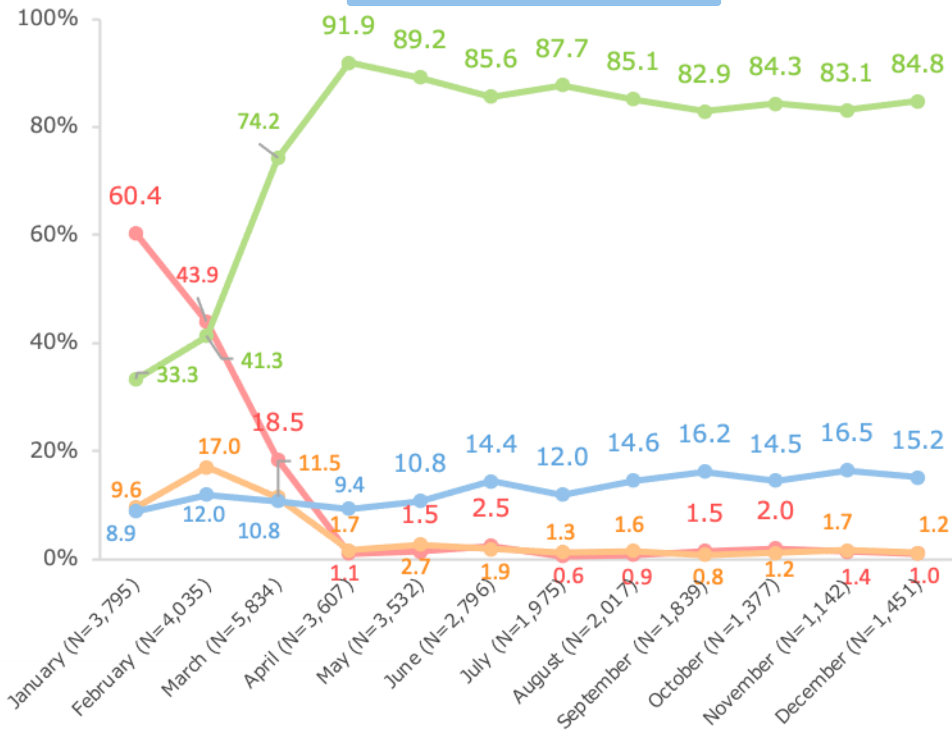
Q. Did you cancel any sightseeing or recreational travel due to COVID-19?

(Includes one-day trips; only answered by those who were planning to travel) [Multiple answers]

Domestic Travel



Overseas Travel



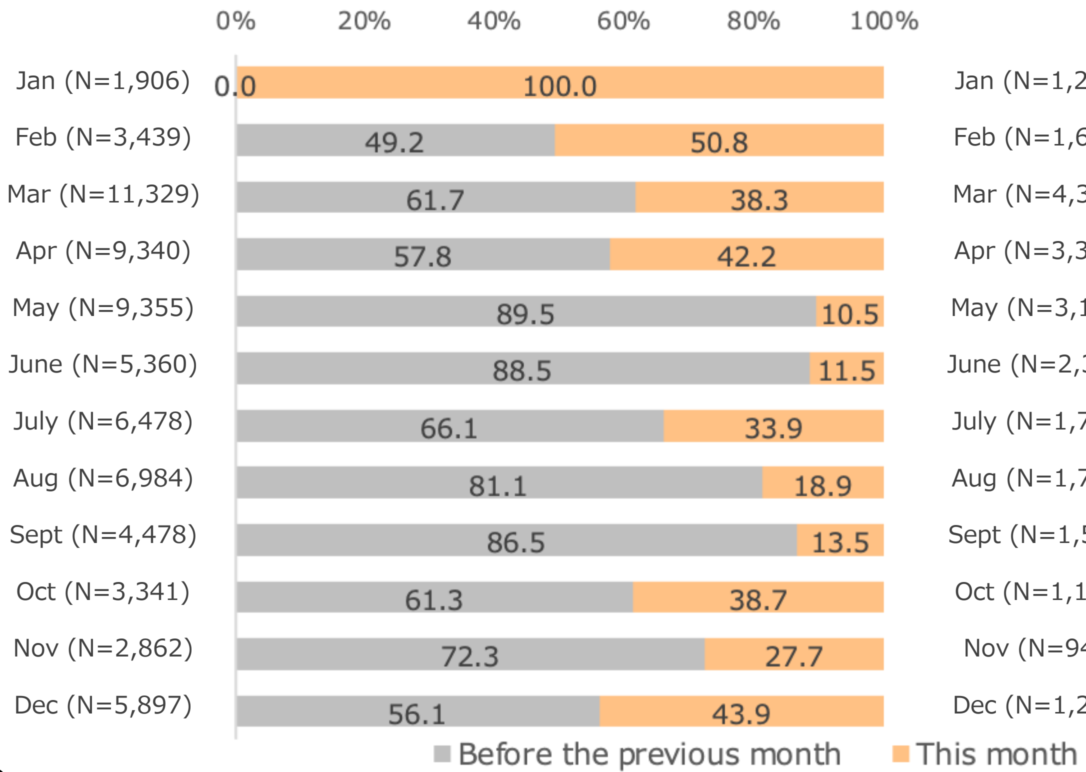
I traveled as I had initially planned.
I canceled my travel plans this month due to COVID-19
Due to the impact of COVID-19, I had to modify my travel plans
I canceled or changed my travel plans during this month for reasons unrelated to COVID-19

>40% Canceled Domestic Travel Plans in December (Current Month)

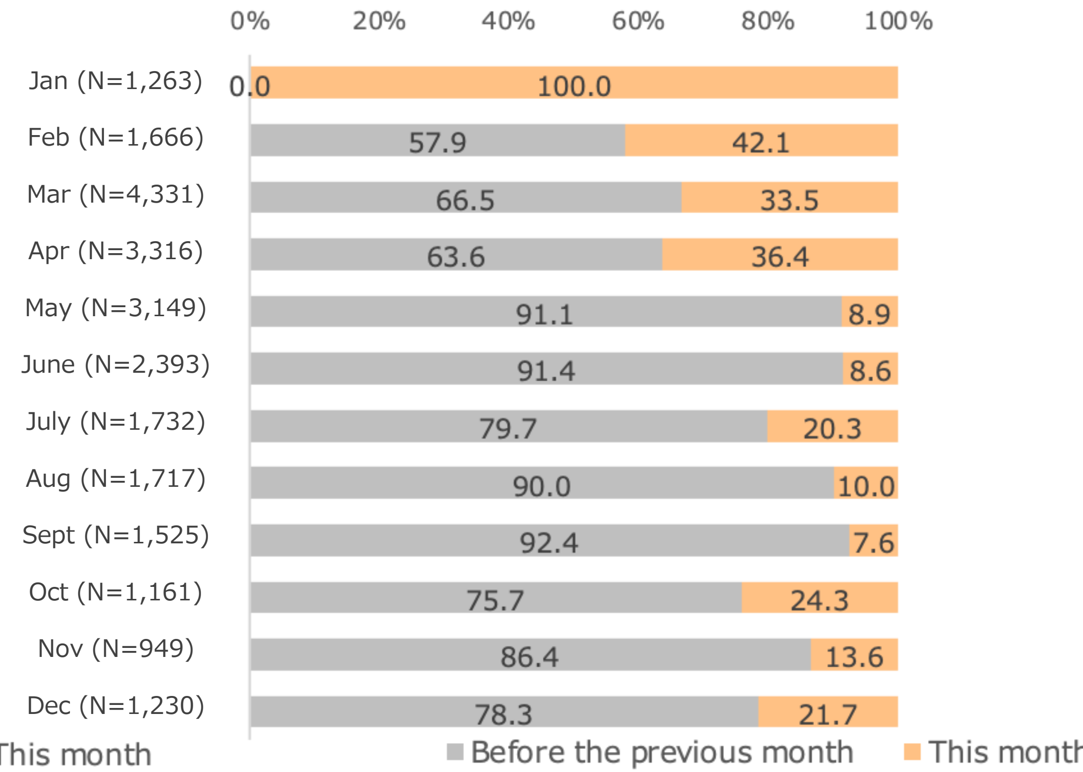
- For timing of cancellations, there was an extra increase in those responding that they reconsidered their domestic/international travel plans during the period from October to December when the number of infections rose again. In December, when there was concern about the reemergence of COVID-19, the percentage of people who decided to cancel domestic travel in that month exceeded 40%, which was the same level as in April, when the first emergency was declared.

Q. When did you decide to cancel your trip? (Only for those who canceled due to COVID-19)

Domestic Travel



Overseas Travel



Avoiding Infection Risk Was Primary Reason Throughout Year

- Examining reasons for canceling travel, the most common reason given throughout the year for both domestic and overseas travel was to avoid infection risk. In addition, a higher percentage of respondents cited avoiding infection risk as a reason for canceling domestic travel than for overseas travel.
- In April and May, when the state of emergency was in force, more than 40% of domestic travelers cited "Government's request to refrain from unnecessary activities" as the reason for cancellation, but in December, when people were asked to refrain from traveling during the year-end and New Year holidays, this was only 30%, lower than during the state of emergency.

Q. Please select the reasons that influenced your decision to cancel. (Only for those who canceled due to COVID-19) [Multiple answers]

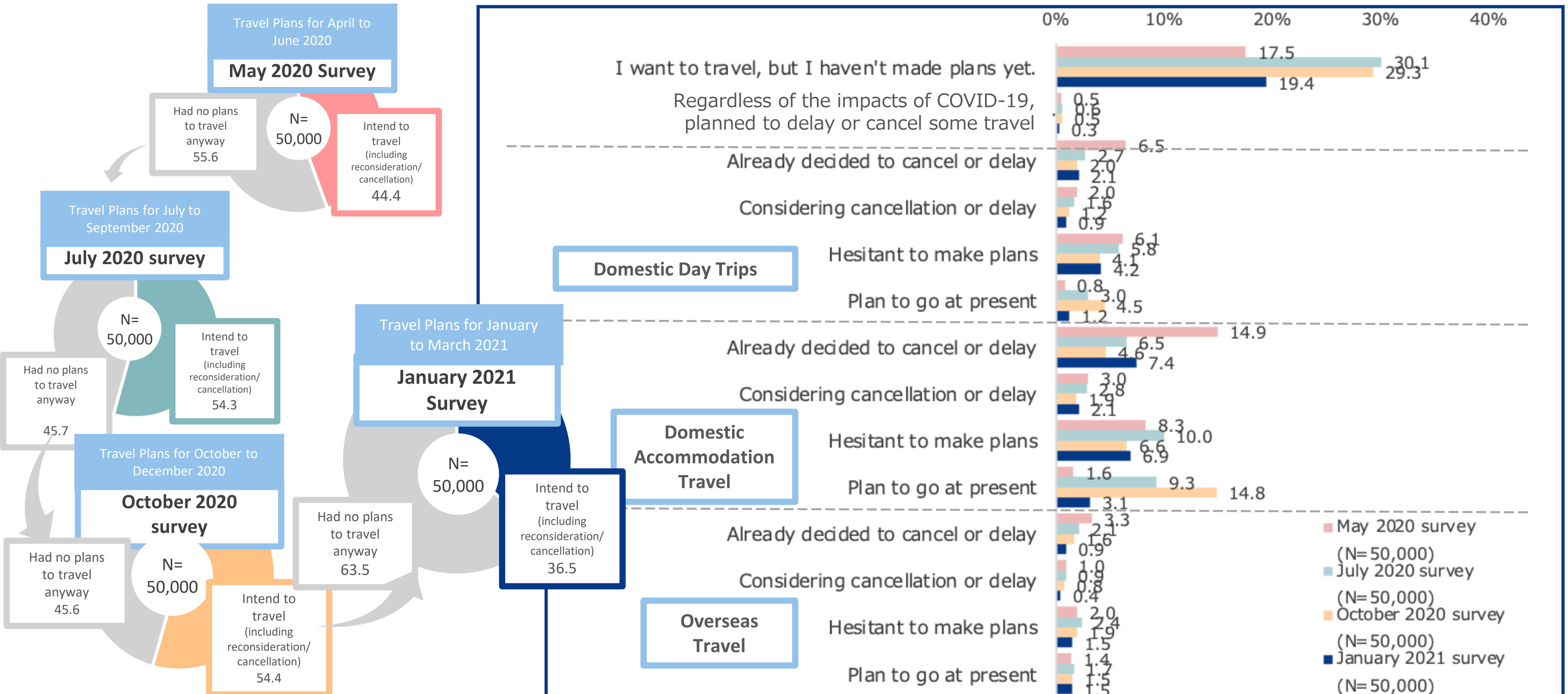
(%)

		Avoiding risk of infection to self	Avoiding risk of infection to companions	Avoiding risk of infection to other people (travelers, staff, etc.) during trip	Government's request to refrain from unnecessary activities	To avoid being criticized by others	Advice from family, friends, etc.	Travel companion's intent	Cancellation of an event, etc. that was the purpose of the trip	Restrictions on travel acceptance at destination	Cancellation of a tour, etc.	Economic factors due to COVID-19	Destination travel restrictions	Grew busy due to COVID-19	Other
Domestic Travel	Jan (N=1,906)	80.5	49.4	40.6	18.0	17.6	16.7	12.1	10.2	7.2	6.7	6.1	6.9	6.1	0.7
	Feb (N=3,439)	80.1	53.2	44.8	21.2	16.4	16.4	12.0	12.8	6.3	5.6	3.5	4.5	4.2	0.8
	Mar (N=11,329)	81.2	58.0	51.1	34.6	18.6	18.0	12.7	18.6	10.0	5.4	3.4	6.1	3.7	0.8
	Apr (N=9,430)	79.7	53.6	46.3	44.4	23.6	16.8	11.2	17.0	14.2	6.7	3.5	10.1	3.6	0.7
	May (N=9,355)	79.2	55.7	48.2	51.1	23.1	14.6	10.5	16.4	15.4	5.7	3.7	10.6	3.4	0.9
	June (N=5,360)	75.6	48.6	42.8	36.5	20.7	14.1	10.2	18.6	15.0	8.1	4.4	11.8	4.0	1.1
	July (N=6,478)	79.1	53.3	45.6	31.2	26.9	17.0	11.8	14.3	10.1	6.1	5.3	7.5	3.6	0.8
	Aug (N=6,984)	78.3	55.9	49.1	29.1	27.3	17.4	10.9	11.3	7.8	4.0	5.4	5.6	2.9	1.0
	Sept (N=4,478)	76.8	50.8	43.1	24.4	23.7	15.5	11.4	12.6	7.5	5.2	5.2	6.3	3.0	1.1
	Oct (N=3,347)	81.8	54.8	41.7	20.1	18.8	12.0	10.0	8.2	4.9	4.0	4.0	4.6	3.6	1.8
	Nov (N=2,862)	80.3	52.5	40.6	20.4	19.5	13.0	10.8	7.1	4.6	4.0	3.9	3.6	3.5	1.6
	Dec (N=5,897)	77.7	56.0	47.3	27.0	20.8	14.9	10.4	5.7	4.1	3.6	3.2	2.9	2.4	3.0
Overseas Travel	Jan (N=1,263)	75.9	45.5	39.7	15.7	14.9	18.2	11.8	13.3	7.4	8.9	8.6	8.9	7.3	0.7
	Feb (N=1,666)	80.9	52.7	43.5	18.1	15.2	17.9	11.6	11.5	8.8	6.8	5.0	7.0	4.8	1.1
	Mar (N=4,331)	82.1	58.0	47.8	27.8	18.0	20.0	13.2	14.5	14.9	8.2	4.3	11.5	4.6	0.9
	Apr (N=3,316)	78.7	49.4	40.2	30.9	19.1	15.6	10.3	13.4	16.8	9.3	3.1	13.8	2.9	0.5
	May (N=3,149)	78.3	51.1	41.4	34.0	18.3	14.4	9.7	12.5	18.9	8.7	3.1	16.3	2.9	0.5
	June (N=2,393)	77.0	44.6	36.6	26.9	16.3	13.5	8.7	13.4	19.6	10.5	3.5	18.3	2.7	0.7
	July (N=1,732)	74.1	42.9	34.2	22.4	17.5	12.9	7.6	7.6	24.2	9.5	2.9	19.7	2.2	0.5
	Aug (N=1,717)	74.1	44.8	34.9	22.1	17.6	11.8	6.9	7.2	23.7	6.9	3.0	19.7	2.1	0.8
	Sept (N=1,525)	73.8	42.0	31.1	20.1	16.1	10.7	6.6	6.8	23.3	8.8	2.6	19.9	1.8	1.2
	Oct (N=1,161)	77.6	43.2	32.5	15.8	12.5	10.6	7.8	5.9	16.3	7.5	2.8	10.3	3.0	0.9
	Nov (N=949)	76.7	39.3	29.8	14.0	11.4	9.8	5.8	4.8	14.4	6.4	3.0	10.9	2.3	1.2
	Dec (N=1,230)	76.8	44.8	33.9	17.2	13.2	11.2	6.7	4.9	15.7	5.1	3.3	11.5	2.8	1.8

More than 60% Originally had no Travel Plans During Jan. to Mar. 2021

- Examining plans for the next three months, even considering that January to March is the season with the lowest number of sightseeing trips, the percentage of respondents who answered "Originally had no plans to travel" was over 60%, the highest since the survey began.
- In the January survey, the percentage of respondents who answered "Want to travel but have not made plans yet" dropped to 20%, down about 10 points from the July and October surveys. The percentage of respondents who answered "Currently plan to take an overnight trip" in Japan decreased by more than 10 points from the October survey. We believe that the declaration of a state of emergency impacted these decisions.

Q. Please indicate your plans for sightseeing/recreational travel in the next 3 months. [Multiple answers]



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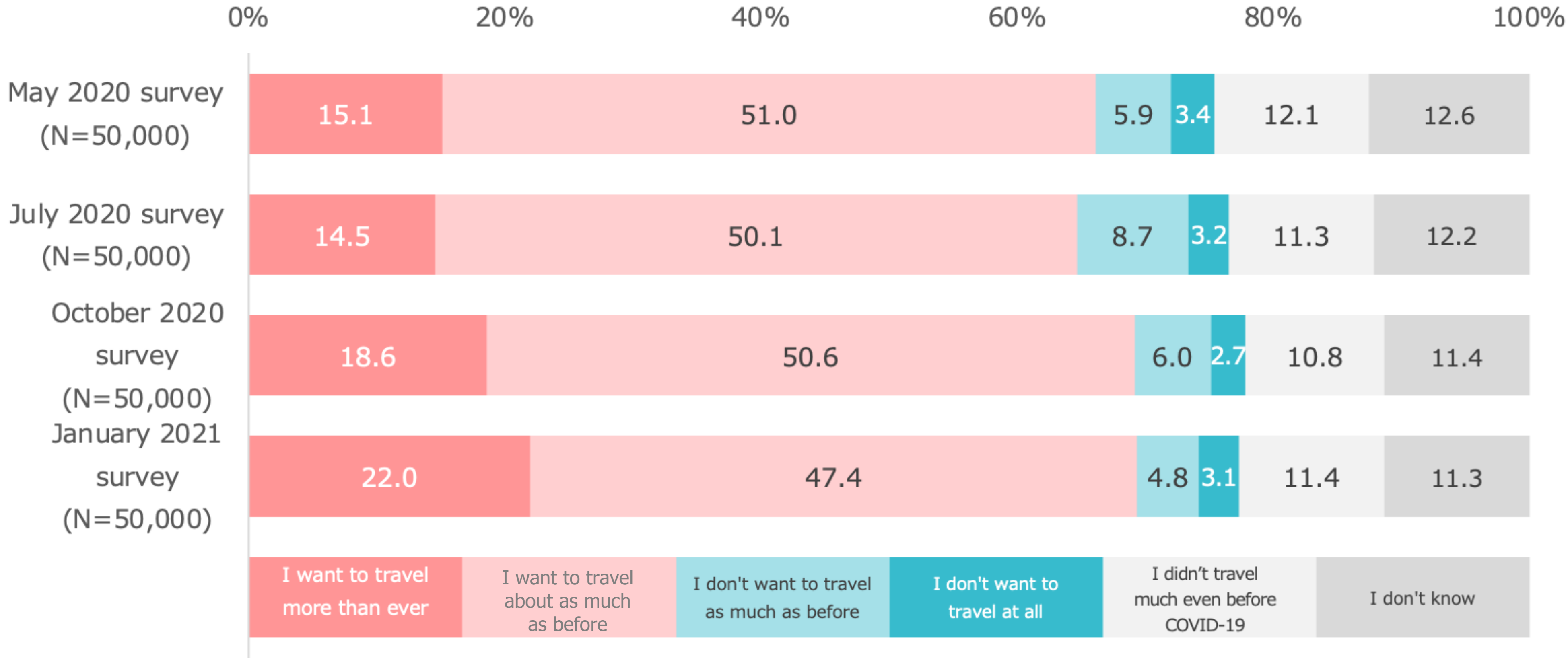
"Want to Travel More than Ever" Increases After COVID-19

- When asked about their travel intentions after COVID-19 is contained, more than 20% of respondents in the January survey responded that they wanted to travel more than ever, the highest percentage in the survey. The "don't want to travel" group, which answered "I don't want to travel as much as I used to" or "I don't want to travel at all," accounted for only 8% of the total, the lowest percentage.
- The travel intentions for the last three months, shown on the previous page, were low due to the declaration of a state of emergency and the increase in the number of infections, but from the long-term perspective of travel intentions after COVID-19 is contained, intent to travel is increasing.

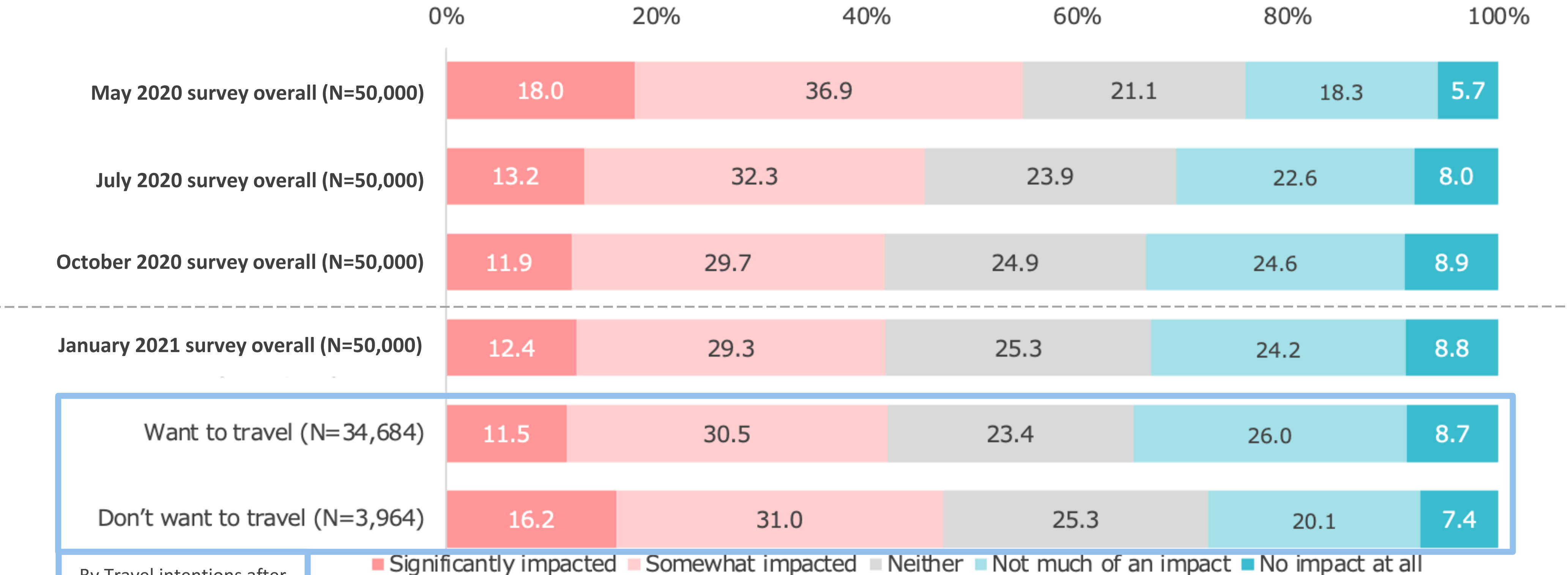
Q. Do you want to travel after COVID-19 is contained?



Impact on Household Finances in the January Survey is Same as October

- The impact of COVID-19 on household finances was about the same in the January survey as in the previous survey.
- Comparing the "Want to travel" and "Don't want to travel" groups, the "Don't want to travel" group, as in previous surveys, had a higher percentage of "Significantly impacted”.

Q. Has the COVID-19 epidemic impacted your household finances?



Want to travel: [Want to travel more than ever] + [Want to travel about as much as before]
Don’t want to travel: [Don’t want to travel as much as before] + [Don’t want to travel at all]

Note: The results of the July and October surveys on the impact on household finances per-travel intent after COVID-19 is contained are shown in Part 6 and Part 8, respectively.

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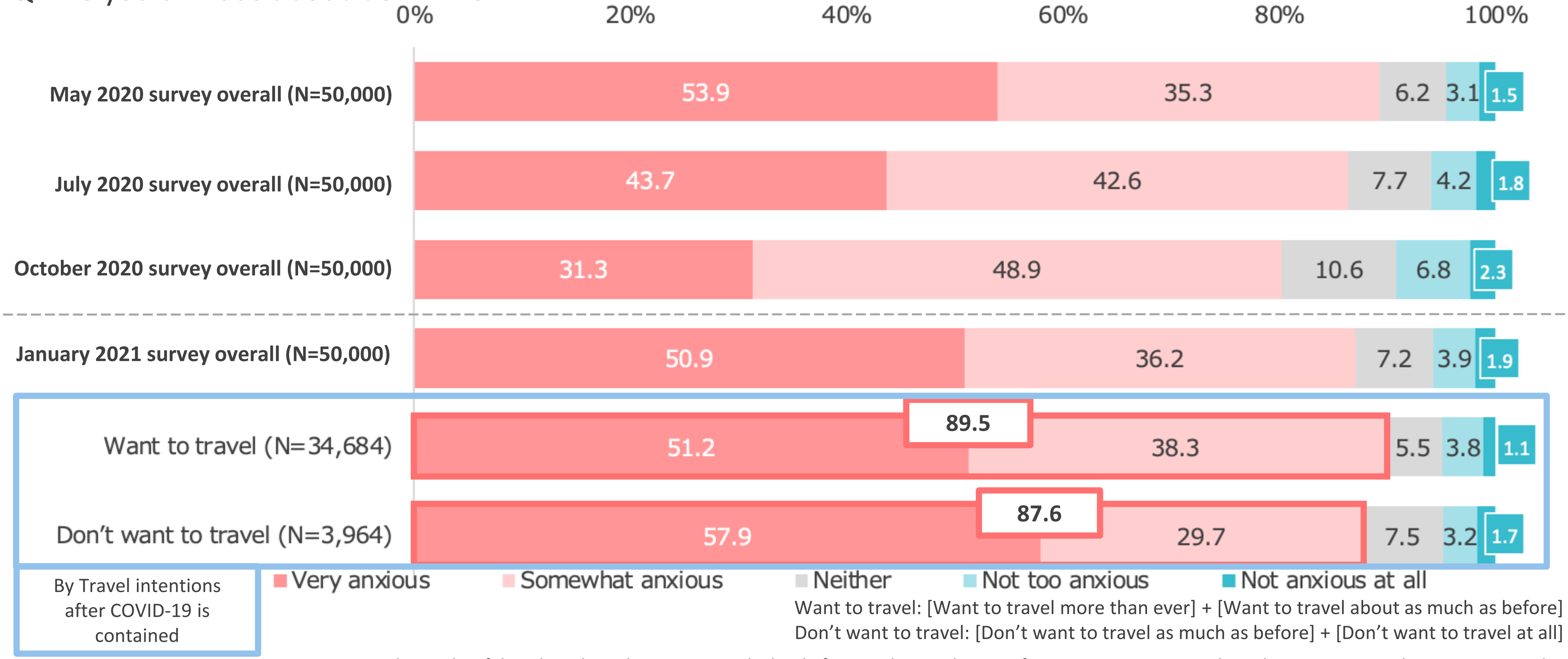
Another Increase in Anxiety in January's Survey

- Regarding the level of anxiety about COVID-19, The percentage of respondents who answered, "I feel anxious" (Very anxious + Somewhat anxious) decreased from the May survey to the October survey, but then increased to about 90%.
- In terms of travel intentions after COVID-19 is contained, "I feel anxious" was the same among the "Want to travel" and "Don't want to travel" groups, but "Very anxious" was higher among the "Don't want to travel" group.

Q. Are you anxious about COVID-19?



Want to travel: [Want to travel more than ever] + [Want to travel about as much as before]
Don't want to travel: [Don't want to travel as much as before] + [Don't want to travel at all]

Note: The results of the July and October surveys on the level of anxiety by travel intent after COVID-19 is contained are shown in Part 6 and Part 8, respectively.

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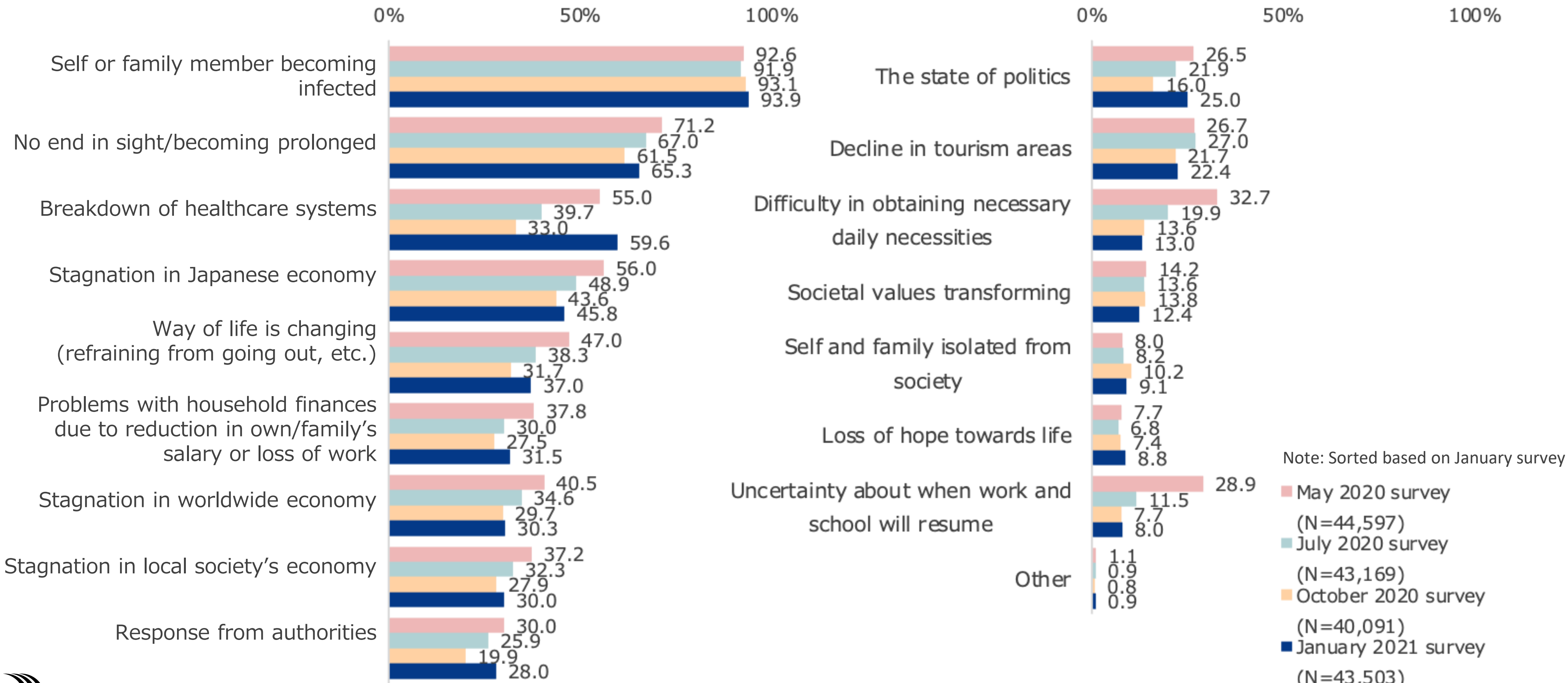
Anxiety About Self or Family Becoming Infected Highest Since Survey Began

- Anxiety around COVID-19 continued to exceed 90% for "Self or family member becoming infected," the highest percentage since the survey began in January. About 60% of the respondents felt anxious about the health care system collapsing, up 25 points from the October survey.

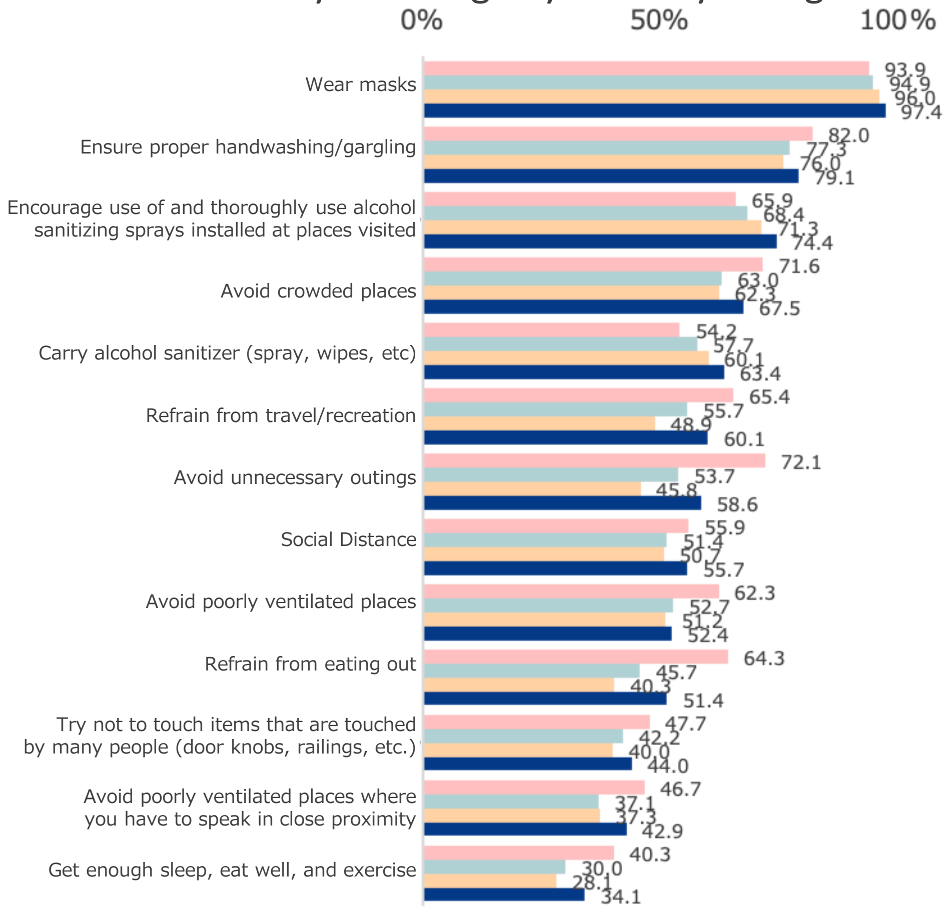
Q. What is making you anxious about COVID-19 (Only those who feel anxious) [Multiple answers]

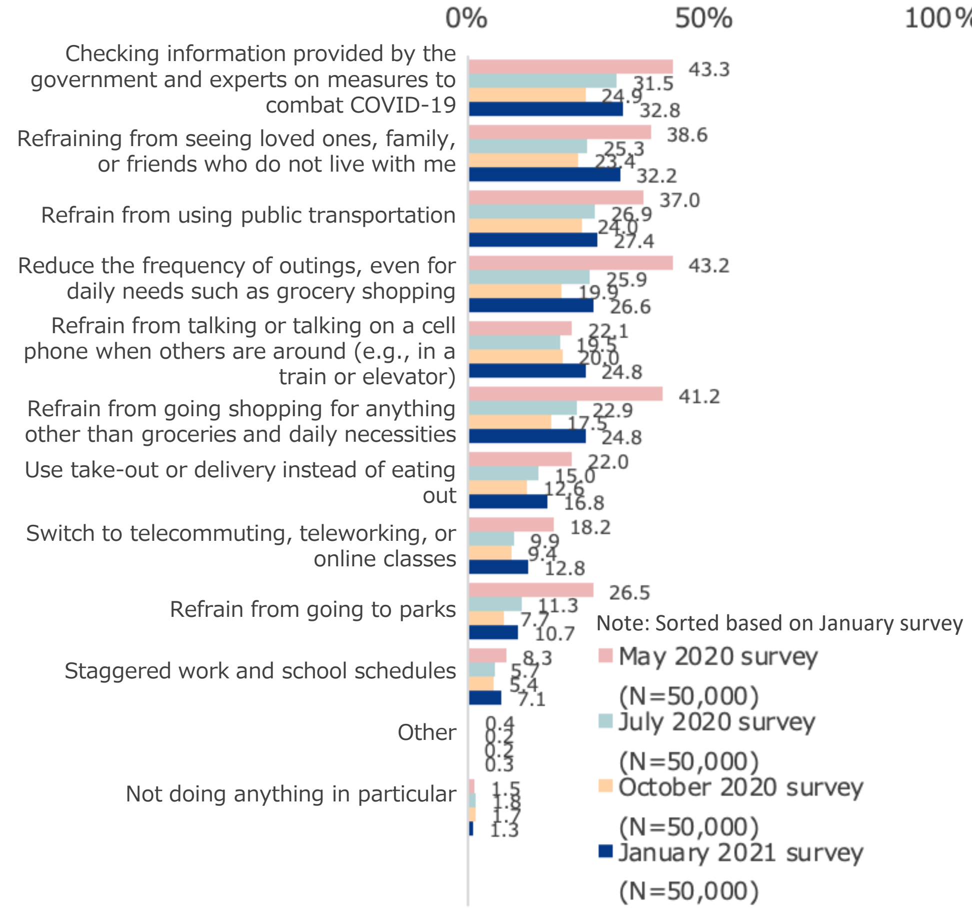


Masks and Sterilization Becoming More Thorough, 97% Wearing Masks in January

- The most common measure taken in daily life against COVID-19 was "wearing a mask," at over 90%, and this percentage has been increasing since the survey began. The number of respondents who answered, "Encourage use of and thoroughly use alcohol sanitizer sprays installed at places visited" and "Carry alcohol sanitizer" increased by nearly 10 points from the May survey to the January survey, indicating that thoroughness has improved.
- The number of respondents who said they would "Refrain from travel/recreation" decreased from the May survey to the October survey, but increased again in the January survey.

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





Note: Sorted based on January survey

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