

Trends Amongst Japanese Travelers During the COVID-19 Epidemic (Part 11)

Produced from Results of JTBF Travelers Survey

April 14, 2021

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

Survey Results

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Note: The results of this survey are based on trips taken (trips = Answers by those who took multiple trips during the survey period, providing answers for each trip)

Survey Summary

Survey title: JTBF Traveler Trends Survey 2020 [Trip Survey]

Survey target: Men and women aged 16 to 79 nationwide who took a sightseeing or recreational trips during the survey period (selected from survey company panels)

Survey method: Online survey

Survey categories: Impact of COVID-19 on travel, psychological condition and travel-related measures, etc.

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

Age (years)	Male								Female								Total
	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	
Respondents (Individuals)	35	117	130	155	124	113	94	768	24	98	100	123	113	109	116	683	1,451
Composition Ratio (%)	2.4	8.1	9.0	10.7	8.5	7.8	6.5	52.9	1.7	6.8	6.9	8.5	7.8	7.5	8.0	47.1	100.0
Trips (Number)	50	178	192	235	189	174	131	1,149	28	151	129	166	147	156	154	931	2,080
Composition Ratio (%)	2.4	8.6	9.2	11.3	9.1	8.4	6.3	55.2	1.3	7.3	6.2	8.0	7.1	7.5	7.4	44.8	100.0

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

Age (years)	Male								Female								Total
	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	
Respondents (Individuals)	25	88	88	103	89	82	76	551	22	63	74	99	83	91	86	518	1,069
Composition Ratio (%)	2.3	8.2	8.2	9.6	8.3	7.7	7.1	51.5	2.1	5.9	6.9	9.3	7.8	8.5	8.0	48.5	100.0
Trips (Number)	31	125	122	148	119	104	101	750	25	78	95	122	105	118	108	651	1,401
Composition Ratio (%)	2.2	8.9	8.7	10.6	8.5	7.4	7.2	53.5	1.8	5.6	6.8	8.7	7.5	8.4	7.7	46.5	100.0

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

Age (years)	Male								Female								Total
	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	
Respondents (Individuals)	26	77	83	105	82	84	74	531	21	61	75	96	84	87	88	512	1,043
Composition Ratio (%)	2.5	7.4	8.0	10.1	7.9	8.1	7.1	50.9	2.0	5.8	7.2	9.2	8.1	8.3	8.4	49.1	100.0
Trips (Number)	40	111	114	160	128	123	106	782	28	90	95	142	133	136	124	748	1,530
Composition Ratio (%)	2.6	7.3	7.5	10.5	8.4	8.0	6.9	51.1	1.8	5.9	6.2	9.3	8.7	8.9	8.1	48.9	100.0

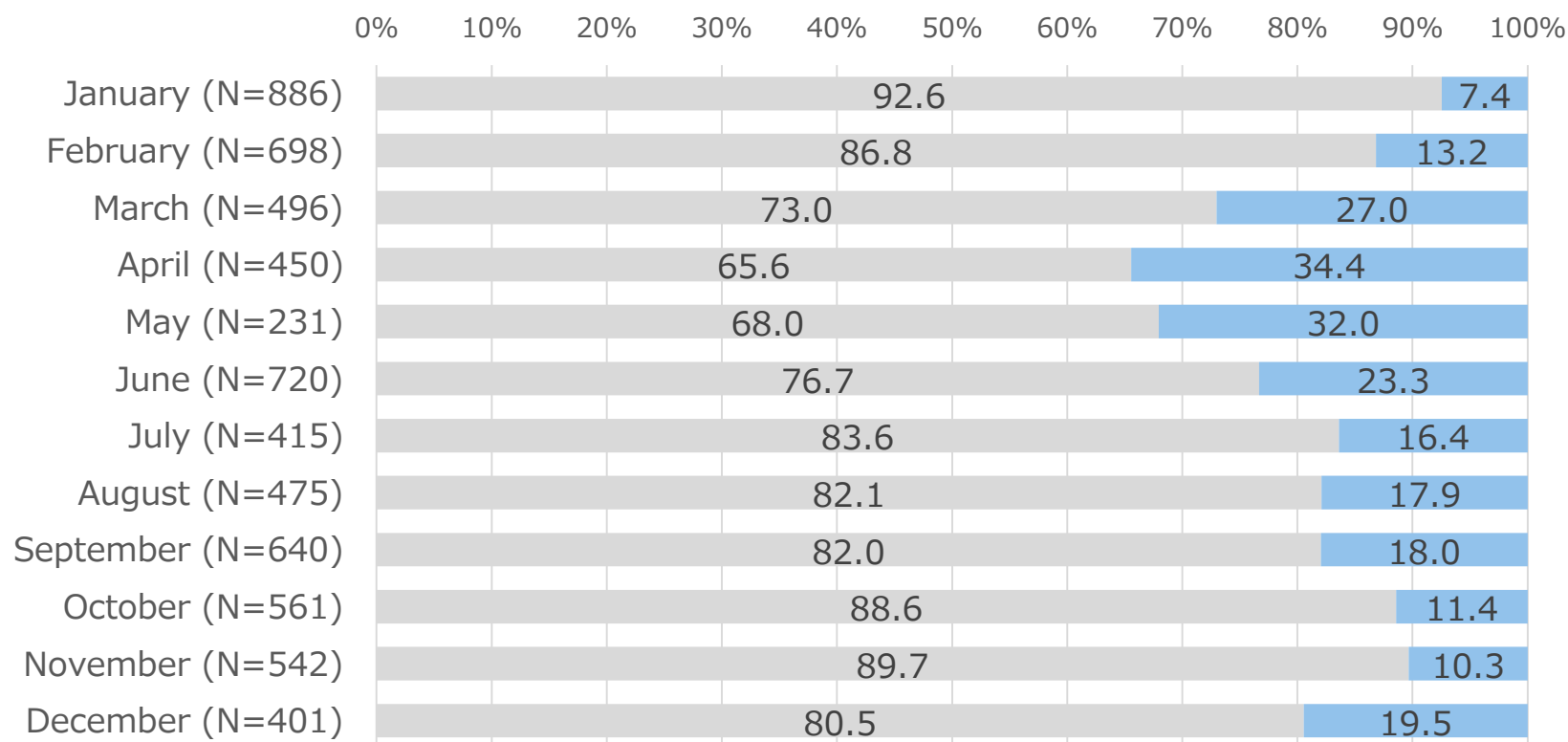
■ Fourth Quarter Survey (January 2021) Period covered by the survey: October to December 2020 Survey period: January 7 to January 14, 2021

Age (years)	Male								Female								Total
	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	
Respondents (Individuals)	24	70	85	98	82	81	74	514	20	60	71	94	83	86	88	502	1,016
Composition Ratio (%)	2.4	6.9	8.4	9.6	8.1	8.0	7.3	50.6	2.0	5.9	7.0	9.3	8.2	8.5	8.7	49.4	100.0
Trips (Number)	31	97	124	143	133	128	121	777	29	80	91	134	132	138	123	727	1,504
Composition Ratio (%)	2.1	6.4	8.2	9.5	8.8	8.5	8.0	51.7	1.9	5.3	6.1	8.9	8.8	9.2	8.2	48.3	100.0

Changes to Travel Plans **Increase again in December**

- The percentage of respondents who changed their travel plans due to COVID-19 decreased from a peak of 35% in April to 15% in July. In August and September, the percentage increased slightly to just under 20%, but in October and November, this figure dropped to 10%. However, this was followed by another increase to 20% in December.
- April and May were when the first state of emergency was declared, and August and December were months when there was concern about the reemergence of COVID-19. In-line with the spread of infection, trends toward changing the details of trips began to be seen.

Q. How did COVID-19 affect how you traveled? (Domestic Travel)



■ I traveled as planned

■ I changed my plans, including the details of my trip, but still went

Most Common Changes Due to COVID-19 During Year were **Activities and Destinations**

- Excepting August, the most common changes in domestic travel due to COVID-19 were activities and destinations. August, saw the highest percentage of respondents (35%) changing their domestic travel destination, suggesting that many changed their destination from a relatively distant place to a nearby place during the summer vacation.
- The percentage of respondents who changed their travel destination from overseas to domestic was 10 to 20% from January to May but remained below 10% from June (excluding October). This can be attributed to the fact that overseas travel was no longer a candidate in the initial stages of travel planning, due to entry restrictions in Japan and other countries.

Q. What changes have you made due to COVID-19? (Domestic Travel)

(Only for those who made changes due to COVID-19) [Multiple answers]

	Activities and destinations visited	Travel destination (domestic)	Accommodation	Length of stay	Transportation	Travel destination (overseas to domestic)	Travel companion	Number of travel companions	Other
Jan (N=66)	36.4	25.8	15.2	28.8	19.7	16.7	10.6	6.1	3.0
Feb (N=92)	42.4	19.6	15.2	28.3	18.5	15.2	8.7	8.7	1.1
Mar (N=134)	39.6	23.9	17.9	23.1	14.2	18.7	4.5	4.5	1.5
Apr (N=155)	34.8	21.9	14.8	29.0	20.0	11.6	4.5	5.8	3.2
May (N=74)	37.8	21.6	18.9	36.5	20.3	18.9	4.1	8.1	1.4
June (N=168)	41.1	23.8	14.3	21.4	20.2	5.4	3.0	4.2	6.5
July (N=68)	32.4	23.5	17.6	30.9	26.5	7.4	0.0	2.9	2.9
Aug (N=85)	29.4	36.5	20.0	20.0	24.7	9.4	5.9	1.2	5.9
Sept (N=115)	33.9	28.7	16.5	32.2	22.6	8.7	2.6	2.6	6.1
Oct (N=64)	48.4	17.2	14.1	20.3	21.9	14.1	1.6	3.1	1.6
Nov (N=56)	42.9	21.4	17.9	35.7	17.9	1.8	1.8	5.4	8.9
Dec (N=78)	41.0	25.6	23.1	23.1	16.7	7.7	2.6	2.6	5.1

For Domestic Travel “No Point in Worrying” Most Common Response Since April

- In January and February, "I don't feel anxious COVID-19" and "The current situation doesn't affect me much" were the most common responses. These responses decreased in March, but they were still high on the list. From April onward, "No point in worrying" became the most common response.
- The percentage of respondents who answered “Want to support tourist attractions at destination” remained at around 20% from June onwards.

Q. What were your feelings when traveling? (Domestic Travel) [Multiple answers]

(%)

	No point in worrying	I don't feel anxious about COVID-19	I want to support tourist attractions at the destination	Prices are lower than usual	I really want to take this trip	It's safe to travel because infections are low at the destination	We need to prevent economic stagnation	I traveled according to the thoughts of my travel companion/s	There were fewer foreign tourists	It was a trip that could only be held now (commemorative trip, etc.)	I couldn't change my annual leave	The current situation hasn't changed things for me	Travel won't cause a nuisance at my destination	I don't want to pay cancellation fees	Everything's empty	Canceling or changing a trip is a hassle	I don't think I'll get infected	I don't like self-restraint	It was an important event so I had to travel	Even if I'm infected I won't get sick/It will be mild	Other
Jan (N=886)	13.9	66.4	3.3	1.2	6.7	8.2	4.3	3.4	4.3	2.9	3.6	30.2	6.5	4.3	2.1	3.0	6.5	1.4	1.5	5.9	9.8
Feb (N=698)	19.8	37.0	7.9	2.4	12.9	14.6	5.7	7.3	9.9	6.7	7.9	26.8	6.7	8.0	4.3	3.6	8.7	1.6	1.6	5.2	5.9
Mar (N=496)	19.8	26.2	12.7	4.6	18.3	21.0	6.3	11.9	11.5	10.3	8.1	19.0	8.1	7.7	9.1	3.8	6.3	2.6	2.6	4.0	7.5
Apr (N=450)	26.2	20.4	12.9	5.1	13.8	17.3	10.2	10.7	10.2	8.7	10.7	17.3	7.6	9.6	9.8	4.0	10.9	5.8	2.0	6.4	4.0
May (N=231)	33.8	20.3	14.3	3.9	11.3	19.9	11.7	8.2	6.1	5.2	12.6	11.3	7.8	5.2	11.3	2.6	10.4	6.1	4.3	8.7	2.6
June (N=720)	27.9	21.7	24.0	12.8	10.1	24.9	13.8	9.0	11.8	3.2	6.0	11.5	7.8	2.2	10.0	1.4	4.9	5.0	0.8	2.8	5.3
July (N=415)	33.3	20.2	21.9	12.3	14.2	21.4	11.3	9.9	10.8	3.9	5.1	11.1	6.5	3.9	11.6	2.7	5.5	4.6	2.7	5.1	3.4
Aug (N=475)	37.5	22.5	18.7	14.7	13.3	21.3	11.8	11.8	10.3	6.9	5.3	10.5	9.7	2.5	8.8	0.4	4.2	6.1	2.3	2.9	2.3
Sept (N=640)	36.1	23.9	21.3	20.0	13.6	19.5	14.2	9.5	10.6	5.0	4.2	9.8	6.6	2.0	6.7	1.4	4.5	6.1	1.3	3.8	4.4
Oct (N=561)	27.3	25.5	23.5	19.6	12.7	25.0	12.8	10.0	13.0	7.5	5.3	12.7	5.5	3.9	6.1	2.3	5.2	2.5	2.0	4.1	3.0
Nov (N=542)	26.0	23.1	23.2	21.8	18.1	22.9	14.4	10.0	11.6	7.6	5.7	10.3	6.8	4.4	6.5	2.2	5.4	3.5	1.5	3.0	4.2
Dec (N=401)	28.9	24.2	21.2	20.4	20.2	17.7	14.7	13.0	9.5	9.5	7.7	7.5	6.0	5.7	4.7	3.7	3.2	2.2	1.5	1.2	3.5

Impressions of Travel: “Not Much Different from Normal” Increased from June to 45% in October

- For impressions during the trip “Not much different from normal” increased gradually from June to 45% in October, before dropping to 40% in December. From March to July, the ratio of "It was deserted and lonely" was higher than "It was more crowded than I expected" but from August onward, this ratio reversed. This change suggests that the situation was gradually reverting to pre-COVID-19 times.
- The percentage of respondents who were "Worried about infection" peaked at 25% in March and remained at around 15% to 20% from April. In all months, there were a certain number of travelers who traveled despite fear of infection.

Q. What were your impressions of your trip when you traveled? (Domestic Travel) [Multiple answers] (%)

	No crowds so it was comfortable	Not much different from normal	I was worried about infection	I was welcomed at my destination	It was more crowded than I expected	It was deserted and lonely	I'm tired of worrying about infection	I'm worried that I won't be treated well on my trip	I was criticized by others after my trip	Being requested to stay home after returning	Other		
Jan (N=886)	14.2	82.1	7.6	11.3	6.1	5.5	3.6	4.4	5.0	2.0	1.2	1.1	0.9
Feb (N=698)	25.1	60.6	17.3	12.0	9.6	11.5	5.0	9.6	9.5	3.0	2.0	0.7	0.6
Mar (N=496)	36.7	44.0	26.2	13.1	12.1	14.7	13.7	19.4	9.3	3.8	2.0	0.6	1.0
Apr (N=450)	41.1	26.2	22.2	10.9	5.3	13.3	13.3	25.6	9.6	7.3	2.4	1.8	0.7
May (N=231)	43.7	24.7	20.3	14.3	5.2	12.6	20.8	23.8	9.5	8.7	0.9	0.9	1.3
June (N=720)	49.7	33.6	16.7	17.9	10.4	7.5	14.3	18.1	4.6	3.1	0.3	0.1	1.0
July (N=415)	52.5	32.5	17.3	12.8	10.8	8.7	11.3	14.7	6.3	3.9	0.5	1.0	0.7
Aug (N=475)	51.4	37.7	17.3	13.1	16.0	11.6	9.9	10.3	5.3	2.9	0.4	0.2	0.6
Sept (N=640)	43.4	39.5	16.6	13.9	20.3	9.2	6.6	7.7	4.7	3.9	0.3	0.3	1.7
Oct (N=561)	41.7	46.9	18.7	12.8	13.0	9.8	6.2	9.4	6.1	2.9	0.2	0.2	1.6
Nov (N=542)	40.6	45.9	20.5	10.1	17.5	11.4	6.1	7.6	5.7	2.4	0.2	0.2	1.7
Dec (N=401)	49.6	40.1	18.2	11.7	10.7	10.5	8.2	8.0	5.5	3.2	1.0	0.5	1.2

COVID-19 Measures at Destination **Thorough Throughout the Year**

- For measures against COVID-19 at the destination, "Wearing masks" exceeded 90% in June, and has remained above 95% since September, the highest percentage throughout the year. Since October, more than 80% of the respondents said that they "Encourage use of and thoroughly use alcohol sanitizing sprays installed at places visited" indicating that these measures were becoming more thorough.
- Less than 1% of respondents did not do anything in particular during trips between October and December. Many more travelers seem to be taking measures to prevent infection compared to before September.

Q. What COVID-19 measures did you take at your destination? (Domestic Travel) [Multiple answers]

(%)

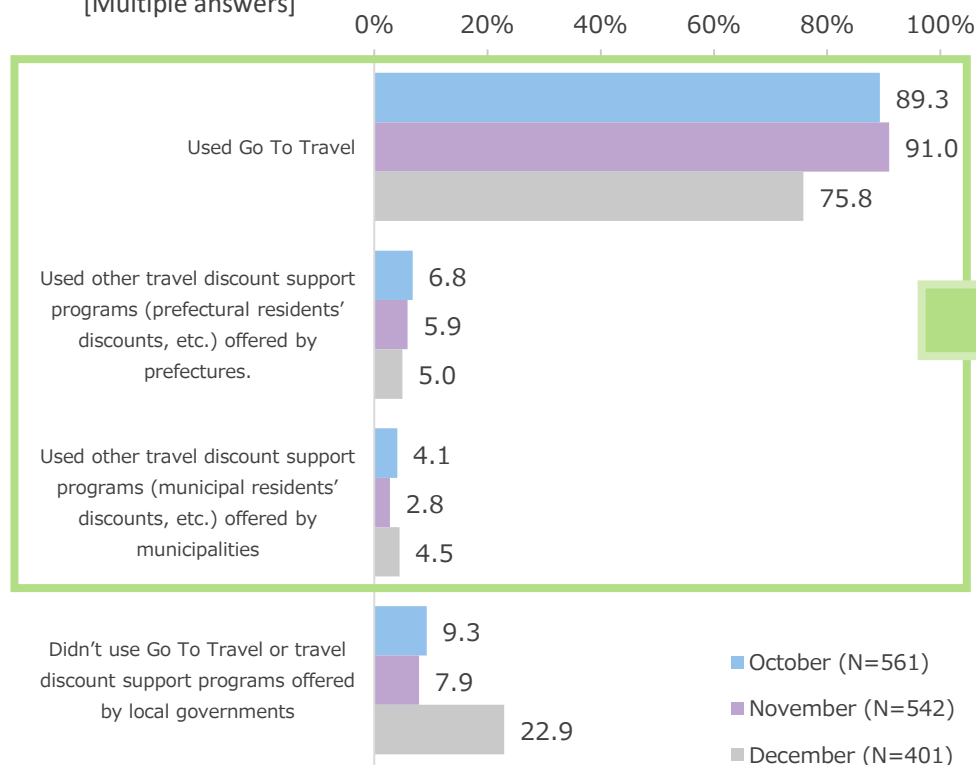
	Wearing masks	Encouraging use of and thoroughly use alcohol sanitizing sprays installed at places visited	Encouraging and thoroughly practicing hand washing and gargling.	Carrying alcohol sanitizer	Maintaining social distance	Avoiding densely populated spaces	Avoiding enclosed spaces with poor ventilation	Being careful when eating and drinking (avoiding buffets and eating while walking)	Avoiding close conversations and other close situations	Try not to touch items that are touched by many people	Other	Not doing anything in particular
Jan (N=886)	36.1	18.6	30.8	22.9	8.2	10.9	11.5	7.4	7.4	11.2	1.0	47.4
Feb (N=698)	59.7	37.2	53.4	40.7	17.9	23.4	24.1	15.3	16.0	24.1	0.4	19.5
Mar (N=496)	75.0	54.6	64.7	51.8	32.7	41.9	39.5	29.0	30.0	34.7	0.6	9.1
Apr (N=450)	81.3	52.7	61.3	52.2	34.4	43.6	38.9	27.8	27.3	36.4	0.4	4.2
May (N=231)	80.1	57.1	61.5	49.8	35.5	35.1	36.4	24.2	22.5	30.7	0.0	3.9
June (N=720)	92.9	73.9	74.0	61.1	46.9	47.9	43.5	35.3	31.7	42.2	0.6	1.8
July (N=415)	94.7	71.8	70.4	61.0	49.6	53.3	45.1	33.7	34.0	41.0	0.2	1.0
Aug (N=475)	94.1	76.6	74.7	64.6	50.5	53.3	48.4	36.0	33.9	40.4	0.6	1.9
Sept (N=640)	95.2	78.1	72.2	61.4	49.7	50.5	45.6	33.8	33.3	39.5	0.0	1.6
Oct (N=561)	96.3	80.6	76.8	66.7	56.3	56.7	51.5	43.7	42.2	47.6	0.2	0.7
Nov (N=542)	98.0	83.8	77.7	67.7	59.0	54.4	49.6	48.3	43.4	48.5	0.2	0.4
Dec (N=401)	97.5	81.5	74.3	62.8	59.6	55.6	50.1	43.6	41.6	40.4	0.0	0.5

Discount Support Systems Like Go To Travel Used for 75 to 90% of Trips

- The utilization of travel discount support programs such as Go To Travel was 90% in October and November. The usage rate decreased between October and November due to the temporary suspension of the system in December
- For how discounts were used, over 40% upgraded their trip with the same budget as before COVID-19.

Q. Have you used any travel discount support programs offered by the government, prefectures, or municipalities, such as Go To Travel?

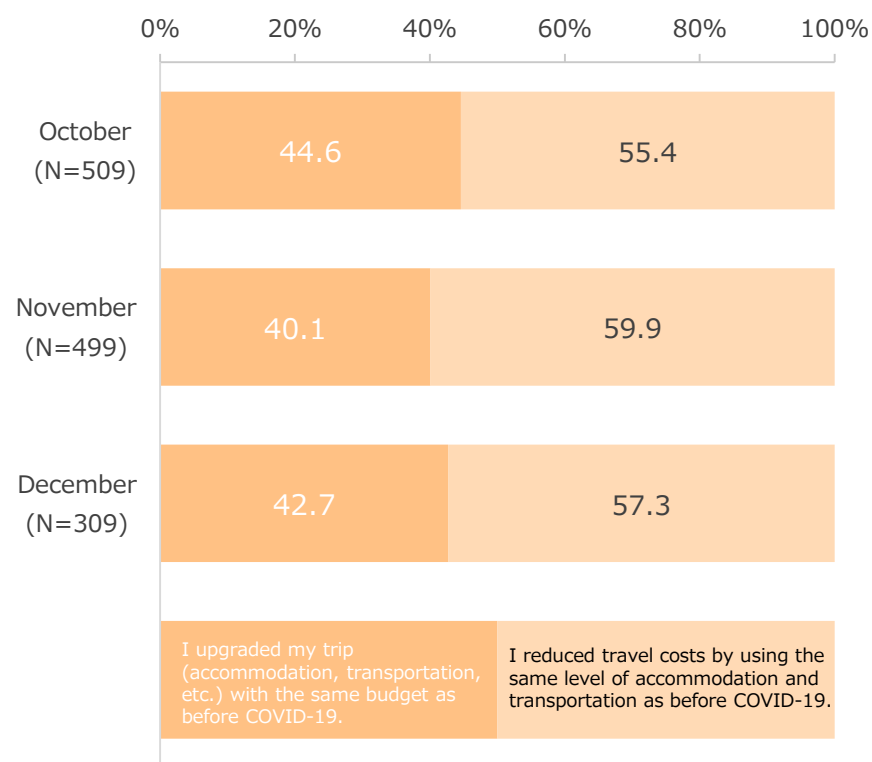
[Multiple answers]



Note: The question about the travel discount support system was added in the January 2021 survey.

Q. Compared to your usual trips, which of the following most closely resembles your current trip?

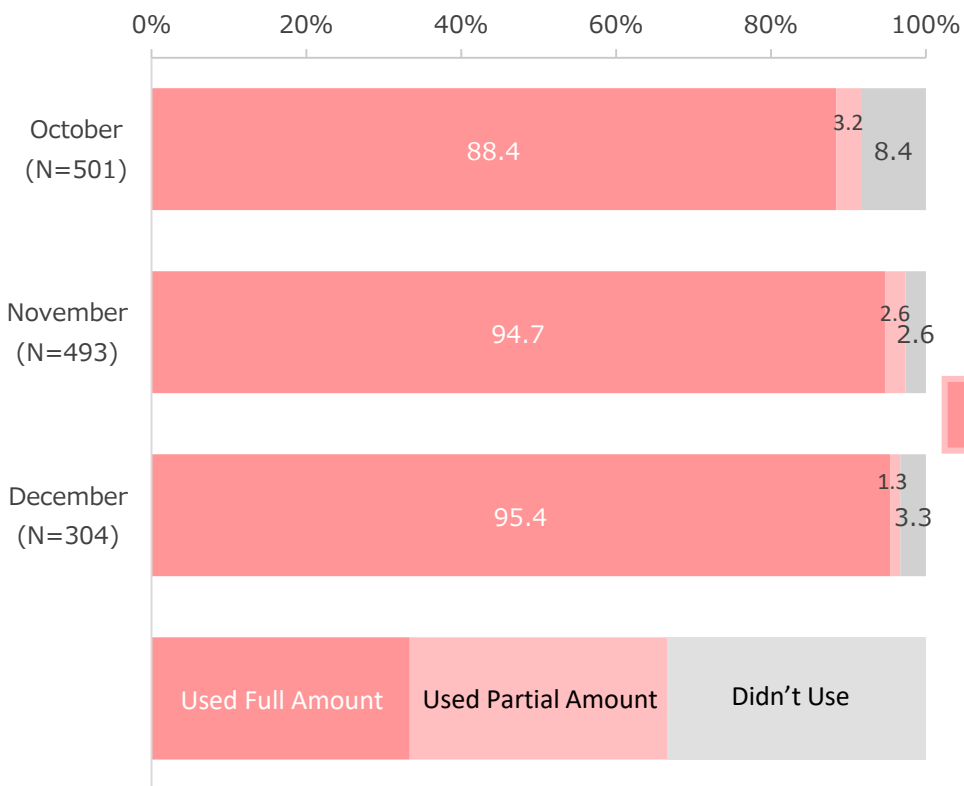
(Only respondents who used Go To Travel or other travel discount programs)



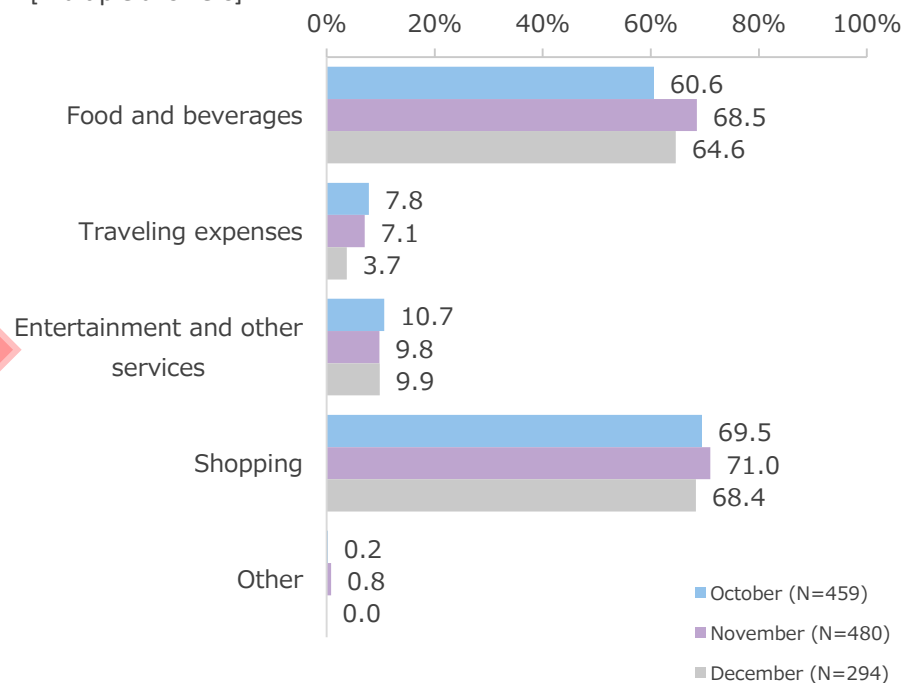
Go To Travel: 90% Used Full Amount of Regional Coupons

- 90% of Go To Travel users used the full amount of the regional coupons for the trips they took in any given month.
- 60 to 70% of respondents said they used the regional coupons for "Food and beverages" or "Shopping".

Q. Did you use the Go To Travel regional coupons during your trip?
(Only those who answered that they used Go To Travel)



Q. Please indicate all the expenses you used the Go To Travel regional coupons for.
(Only for those who answered that they used the regional coupons)
[Multiple answers]



Note: Local tours and activities, sports events, museums and other facilities, etc.

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GOKITA Reiko, NAKA Nanae, YASUHARA Arisa, NAKAJIMA Yutaka, TERASAKI Tatsuo

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