

# Trends Amongst Japanese Travelers During the COVID-19 Epidemic (Part 12)

Produced from Results of JTBF Travelers Survey

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Japan Travel Bureau Foundation  
Tourism Culture Vitalization Dept.,  
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# Survey Results

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# Survey Summary

Survey title: JTBF Travel Status Survey 2021 [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 2021) Period covered by survey: January to March 2021 Survey period: May 18 to May 25, 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)	552	3,171	4,331	5,303	3,909	3,415	3,235	23,916	728	3,429	4,549	5,567	4,621	4,325	2,865	26,084	50,000
Composition Ratio (%)	1.1	6.3	8.7	10.6	7.8	6.8	6.5	47.8	1.5	6.9	9.1	11.1	9.2	8.7	5.7	52.2	100.0

■ Second Quarter Survey (July 2021) Period covered by survey: April to June 2021 Survey period: July 5 to July 9, 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)	550	2,314	4,117	5,565	4,560	4,147	3,199	24,452	590	2,302	4,225	5,713	4,714	4,492	3,512	25,548	50,000
Composition Ratio (%)	1.1	4.6	8.2	11.1	9.1	8.3	6.4	48.9	1.2	4.6	8.5	11.4	9.4	9.0	7.0	51.1	100.0

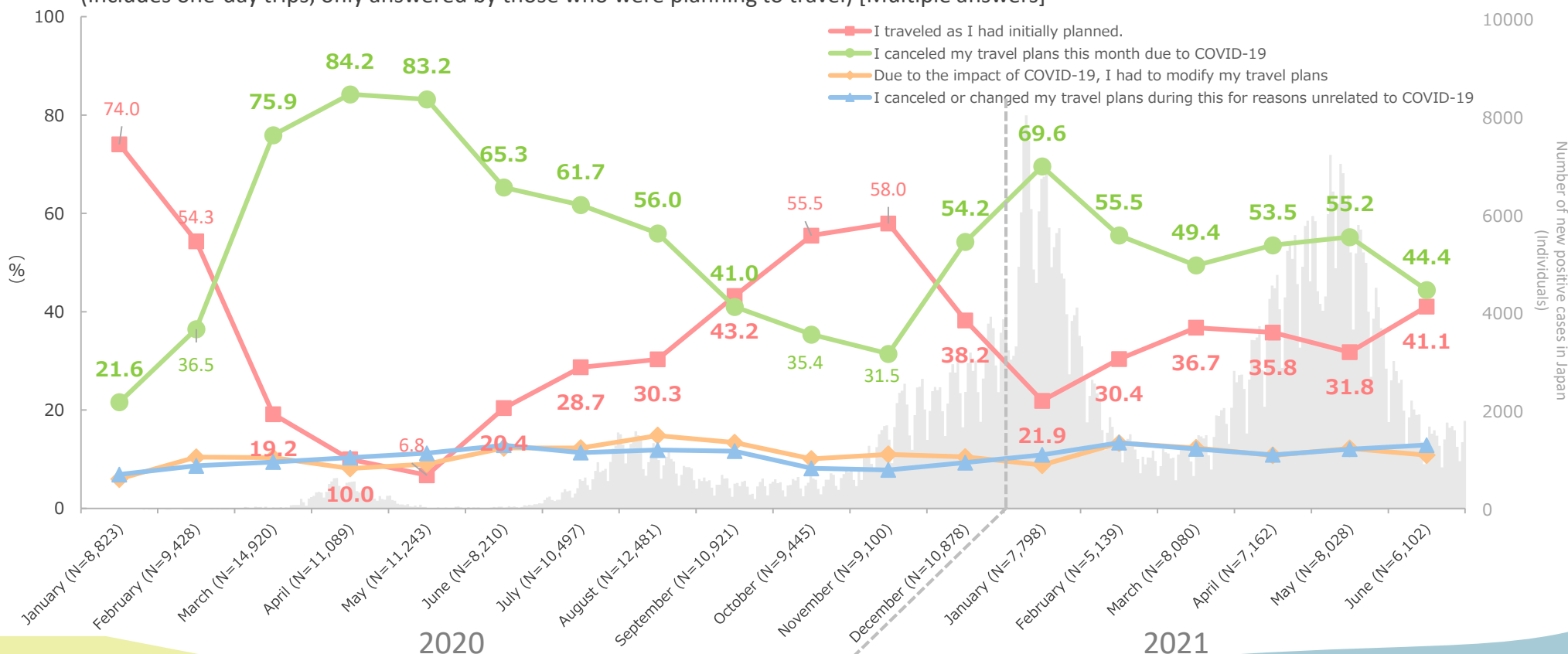
Note: For more information on the FY2020 sample, please refer to Part 10.

# Domestic Travel in the Midst of COVID-19: Some Getting Used to Pandemic in 4th Wave

- The percentage of respondents who said that they had canceled domestic travel due to COVID-19 jumped from 30% to 70% during the third wave (November 2020 to February 2021). Although cancellations began to decrease with the subsequent decrease in the number of infections, there was a slight increase from March to May as the fourth wave began (March to June 2021). However, this percentage was not as high as during the first wave (March to May 2020) or the third wave.
- During the fourth wave, the percentage of respondents who said that some trips were carried out as originally planned increased by about 10 points compared to the third wave. It can be assumed that people had grown used to COVID-19 compared to the first wave when there were still few infections.

## Q. Did you cancel 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]



Source: Created by JTBF based on data from the Ministry of Health, Labour and Welfare

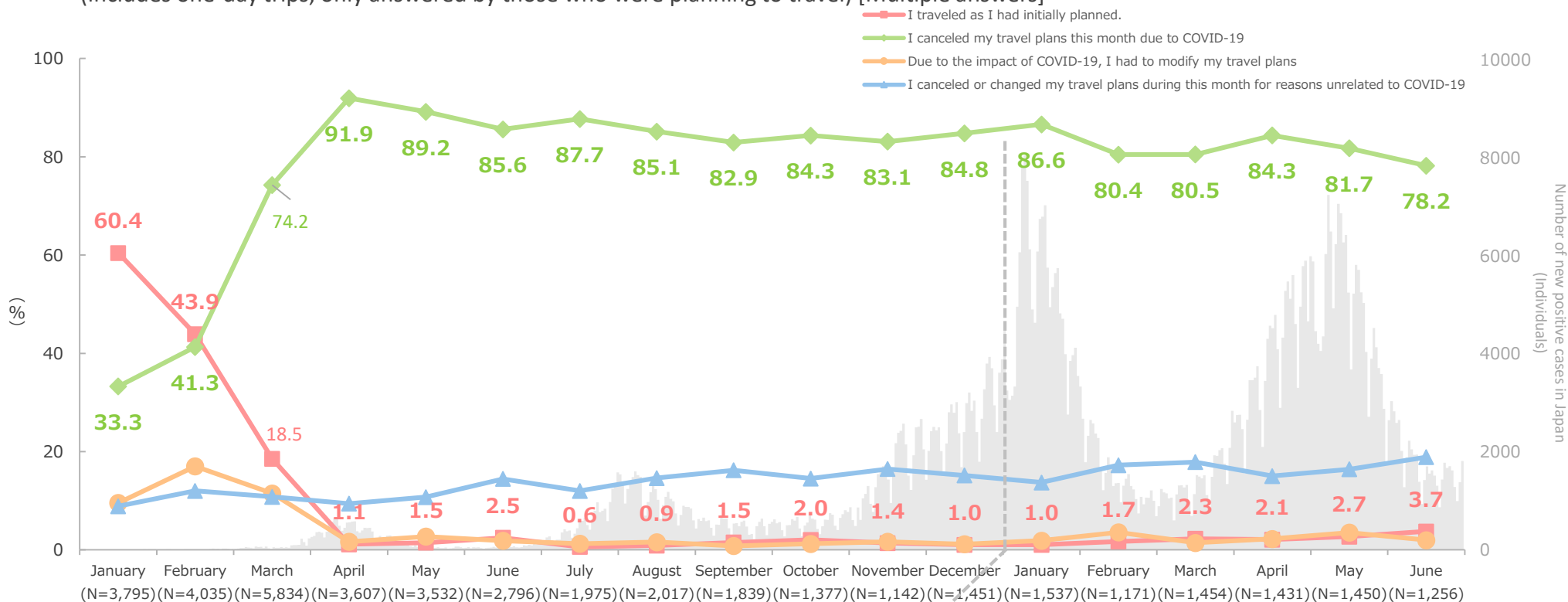
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# Cancellation of Overseas Travel: Gradual Decline to Around 80%

- The number of cancellations of overseas trips due to COVID-19 has gradually decreased since April 2020, reaching around 80% at the beginning of 2021.

## Q. Did you cancel 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]



2020

2021

Source: Created by JTBF based on data from the Ministry of Health, Labour and Welfare

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# Reasons for Cancellation: Avoiding Risk of Infection Continues at Top

- Avoiding risk of infection was still the most common reason for canceling domestic travel during the first half of 2021.
- The number of cancellations due to "Government's request to refrain from unnecessary activities" peaked in May 2020 and decreased through October, but increased again during the third wave after the second emergency declaration was issued (from Jan. 7 2021) increasing to just under 40%. After this, the long-term emergency declarations issued primarily in Tokyo and Osaka Prefectures led to a rate of 35% or more between January and June 2021.

## Q. Please select the reasons that influenced your decision to cancel your domestic travel.

(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 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 acceptance at travel destination	The Go To Travel Campaign was suspended	Cancellation of a tour, etc.	Destination travel restrictions	Economic factors due to COVID-19	Grew busy due to COVID-19	Other
2020	Jan (N=1,960)	80.5	49.4	40.6	18.0	17.6	16.7	12.1	10.2	7.2	-	6.7	6.9	6.1	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	4.5	3.5	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	6.1	3.4	3.7	0.8
	Apr (N=9,340)	79.7	53.6	46.3	44.4	23.6	16.8	11.2	17.0	14.2	-	6.7	10.1	3.5	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	10.6	3.7	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	11.8	4.4	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	7.5	5.3	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	5.6	5.4	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	6.3	5.2	3.0	1.1
	Oct (N=3,341)	81.8	54.8	41.7	20.1	18.8	12.0	10.0	8.2	4.9	-	4.0	4.6	4.0	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	3.6	3.9	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	2.9	3.2	2.4	3.0
2021	Jan (N=5,424)	77.0	53.3	45.7	37.7	21.2	13.2	10.1	6.5	5.4	16.8	4.3	3.1	3.4	2.3	0.6
	Feb (N=2,853)	79.0	50.2	40.3	35.3	21.3	12.0	9.1	8.9	6.3	11.7	4.0	3.6	4.1	2.7	0.6
	Mar (N=3,995)	80.4	52.8	43.7	36.3	21.2	12.5	10.8	7.6	6.1	9.9	3.7	3.2	3.8	2.7	0.6
	Apr (N=3,834)	77.6	51.1	42.4	39.5	20.1	13.3	10.1	9.5	7.5	7.9	4.2	4.2	4.3	2.8	1.0
	May (N=4,431)	76.0	53.3	44.1	43.4	20.7	11.8	10.1	9.7	7.1	6.8	3.4	3.5	3.1	2.1	0.9
	June (N=2,709)	75.0	46.0	39.1	35.9	17.5	11.4	10.0	9.4	7.9	6.6	4.6	4.4	4.0	2.8	1.1

Note 1: Sorted using June 2021 as standard.

Note 2: "The Go To Travel Campaign was suspended" was added from the FY 2021 survey.

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## Reasons for Cancellation: Avoiding Risk of Infection Top Reason for Overseas Travel Too

- As with domestic travel, "Avoiding risk of infection to self" continued to be the most common reason for canceling overseas travel in all months since the survey began. In the first half of 2021, this increased to at least 75% of responses.
- For overseas travel, "Restrictions on acceptance at travel destination" and "Destination travel restrictions" were higher than for domestic travel.

### Q. Please select the reasons that influenced your decision to cancel your overseas travel.

(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 during trip	Government's request to refrain from unnecessary activities	To avoid being criticized by others	Restrictions on acceptance at travel destination	Advice from family, friends, etc.	Destination travel restrictions	Travel companion's intent	Cancellation of an event, etc. that was the purpose of the trip	Cancellation of a tour, etc.	Economic factors due to COVID-19	Grew busy due to COVID-19	Other
2020	Jan (N=1,263)	75.9	45.5	39.7	15.7	14.9	7.4	18.2	8.9	11.8	13.3	8.9	8.6	7.3	0.7
	Feb (N=1,666)	80.9	52.7	43.5	18.1	15.2	8.8	17.9	7.0	11.6	11.5	6.8	5.0	4.8	1.1
	Mar (N=4,331)	82.1	58.0	47.8	27.8	18.0	14.9	20.0	11.5	13.2	14.5	8.2	4.3	4.6	0.9
	Apr (N=3,316)	78.7	49.4	40.2	30.9	19.1	16.8	15.6	13.8	10.3	13.4	9.3	3.1	2.9	0.5
	May (N=3,149)	78.3	51.1	41.4	34.0	18.3	18.9	14.4	16.3	9.7	12.5	8.7	3.1	2.9	0.5
	June (N=2,393)	77.0	44.6	36.6	26.9	16.3	19.6	13.5	18.3	8.7	13.4	10.5	3.5	2.7	0.7
	July (N=1,732)	74.1	42.9	34.2	22.4	17.5	24.2	12.9	19.7	7.6	7.6	9.5	2.9	2.2	0.5
	Aug (N=1,717)	74.1	44.8	34.9	22.1	17.6	23.7	11.8	19.7	6.9	7.2	6.9	3.0	2.1	0.8
	Sept (N=1,525)	73.8	42.0	31.1	20.1	16.1	23.3	10.7	19.9	6.6	6.8	8.8	2.6	1.8	1.2
	Oct (N=1,161)	77.6	43.2	32.5	15.8	12.5	16.3	10.6	10.3	7.8	5.9	7.5	2.8	3.0	0.9
	Nov (N=949)	76.7	39.3	29.8	14.0	11.4	14.4	9.8	10.9	5.8	4.8	6.4	3.0	2.3	1.2
	Dec (N=1,230)	76.8	44.8	33.9	17.2	13.2	15.7	11.2	11.5	6.7	4.9	5.1	3.3	2.8	1.8
2021	Jan (N=1,331)	79.8	47.4	35.2	22.9	15.7	10.5	11.7	8.5	8.9	6.2	6.1	4.3	3.8	1.0
	Feb (N=942)	78.8	41.8	31.4	19.6	14.1	11.6	10.0	8.6	7.0	8.0	5.1	4.5	3.6	0.6
	Mar (N=1,170)	79.6	46.6	34.4	22.6	15.5	11.6	11.7	9.1	8.5	7.7	5.6	3.8	3.3	0.4
	Apr (N=1,207)	77.1	43.8	33.4	25.7	16.5	12.7	12.7	10.4	8.2	6.8	5.7	4.6	4.1	0.4
	May (N=1,185)	75.9	45.2	34.2	26.8	16.0	12.9	11.0	10.5	7.4	6.6	5.2	4.1	3.3	0.7
	June (N=982)	75.9	40.9	31.8	23.7	14.5	13.5	10.1	9.8	7.8	6.5	6.2	4.4	3.7	0.9

Note: Sorted using June 2021 as standard

# Travel Plans for July to September 2021: Fewer than Previous Year

- For travel plans for the next three months, less than half of the respondents to the July 2021 survey answered that they intended to travel, lower than the same period in the previous year. The results may have been impacted by the survey being held when a state of emergency had been declared in Okinawa Prefecture, and when 10 prefectures, including Tokyo and Osaka, had issued priority measures to prevent the spread of the disease.
- The number of respondents who "Currently plan to take an overnight trip in Japan" was about 15% in the October 2020 survey, but dropped sharply in the January 2021 survey during the second emergency declaration. The May 2021 survey performed during the third declaration of emergency showed similar levels. However, these results exceeded 10% in the July 2021 survey, which was held during the declaration of emergency in Okinawa Prefecture and while priority measures to prevent the spread of the disease had been issued in 10 prefectures including Tokyo.

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

	Had no plans to travel anyway	Intend to travel (including reconsideration/cancellation)															
		I want to travel, but I haven't made plans yet.	Regardless of the impacts of COVID-19, planned to delay or cancel some travel	Domestic Day Trips				Domestic Accommodation Travel				Overseas Travel					
				Already decided to cancel or delay	Considering cancellation or delay	Hesitant to make plans	Plan to go at present	Already decided to cancel or delay	Considering cancellation or delay	Hesitant to make plans	Plan to go at present	Already decided to cancel or delay	Considering cancellation or delay	Hesitant to make plans	Plan to go at present		
May 2020 Survey (N=50,000)	55.6	44.4	17.5	0.5	6.5	2.0	6.1	0.8	14.9	3.0	8.3	1.6	3.3	1.0	2.0	1.4	
July 2020 survey (N=50,000)	45.7	54.3	30.1	0.6	2.7	1.6	5.8	3.0	6.5	2.8	10.0	9.3	2.1	0.9	2.4	1.7	
October 2020 survey (N=50,000)	45.6	54.4	29.3	0.5	2.0	1.2	4.1	4.5	4.6	1.9	6.6	14.8	1.6	0.8	1.9	1.5	
January 2021 Survey (N=50,000)	63.5	36.5	19.4	0.3	2.1	0.9	4.2	1.2	7.4	2.1	6.9	3.1	0.9	0.4	1.5	1.5	
May 2021 Survey (N=50,000)	59.4	40.6	22.7	0.4	2.5	1.2	5.5	1.9	5.9	1.8	8.3	4.7	0.8	0.5	1.8	1.6	
July 2021 Survey (N=50,000)	50.2	49.8	29.2	0.5	1.7	1.1	4.8	3.5	3.6	1.9	8.5	10.5	0.9	0.6	1.9	1.6	

Increased by 5 points or more compared to the same period during previous year

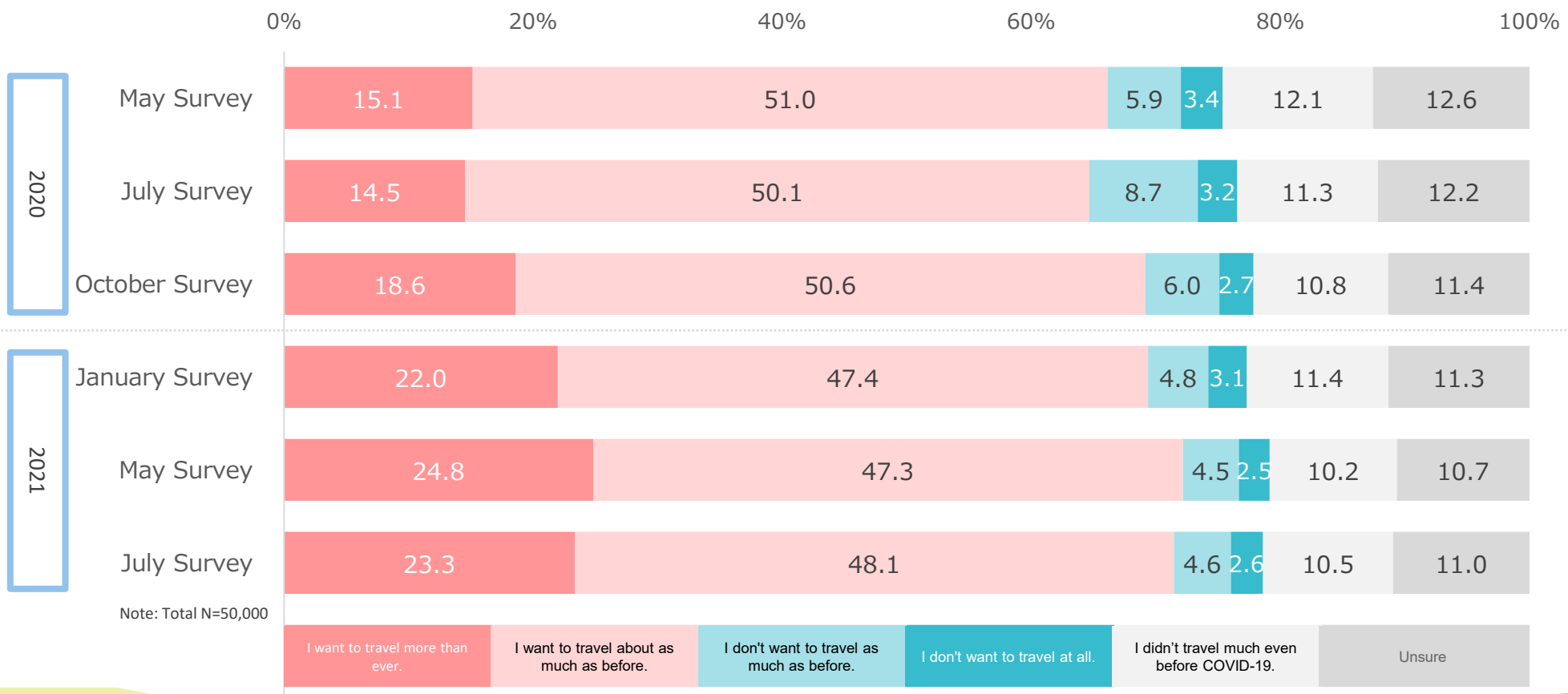
Decreased by 5 points or more compared to the same period during previous year



# “Want to Travel More than Ever” Increases Compared to Previous Year

- When asked about their travel intentions after COVID-19 is contained, more than 20% of respondents in all surveys conducted in January, May, and July 2021 said they wanted to travel more than ever. Additionally, the “don’t want to travel group” (don’t want to travel as much as before + don’t want to travel at all)” stayed at around 7 to 8%
- Although these recent figures were lower than the same period last year, from a long-term perspective, we believe that the desire to travel has increased more than ever before due to ongoing self-restraint from COVID-19’s prolonged spread.

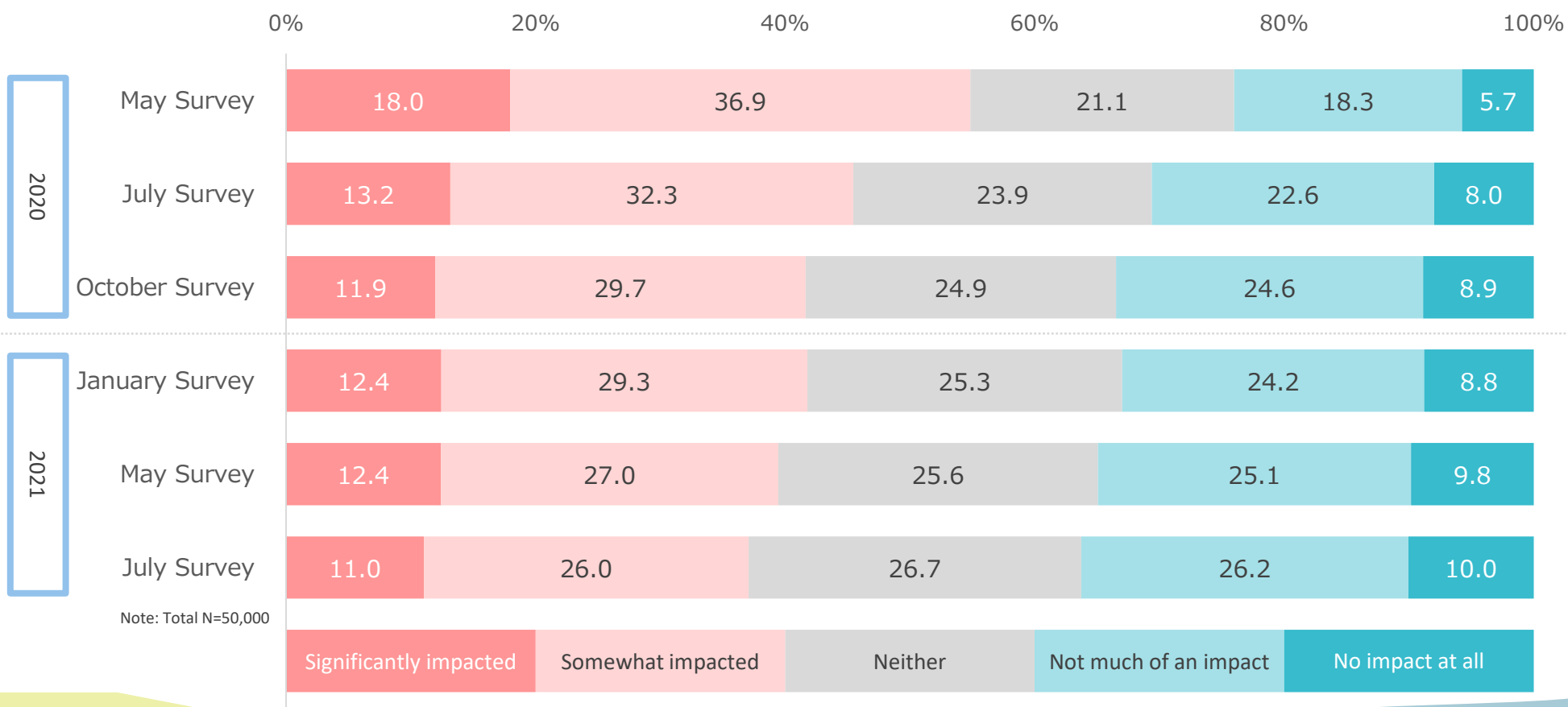
Q. Do you want to travel after COVID-19 is contained?



## 40% Say Household Finances Impacted by COVID-19

- Although more than 50% of respondents answered that COVID-19 had “impacted their household finances” (significantly impacted + somewhat impacted) in May 2020, this decreased to around 35% in the July 2021 survey.
- Although the number of respondents in the "impacted" group has decreased, it still accounts for just under 40%, indicating that the effects of COVID-19 are still being felt.

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

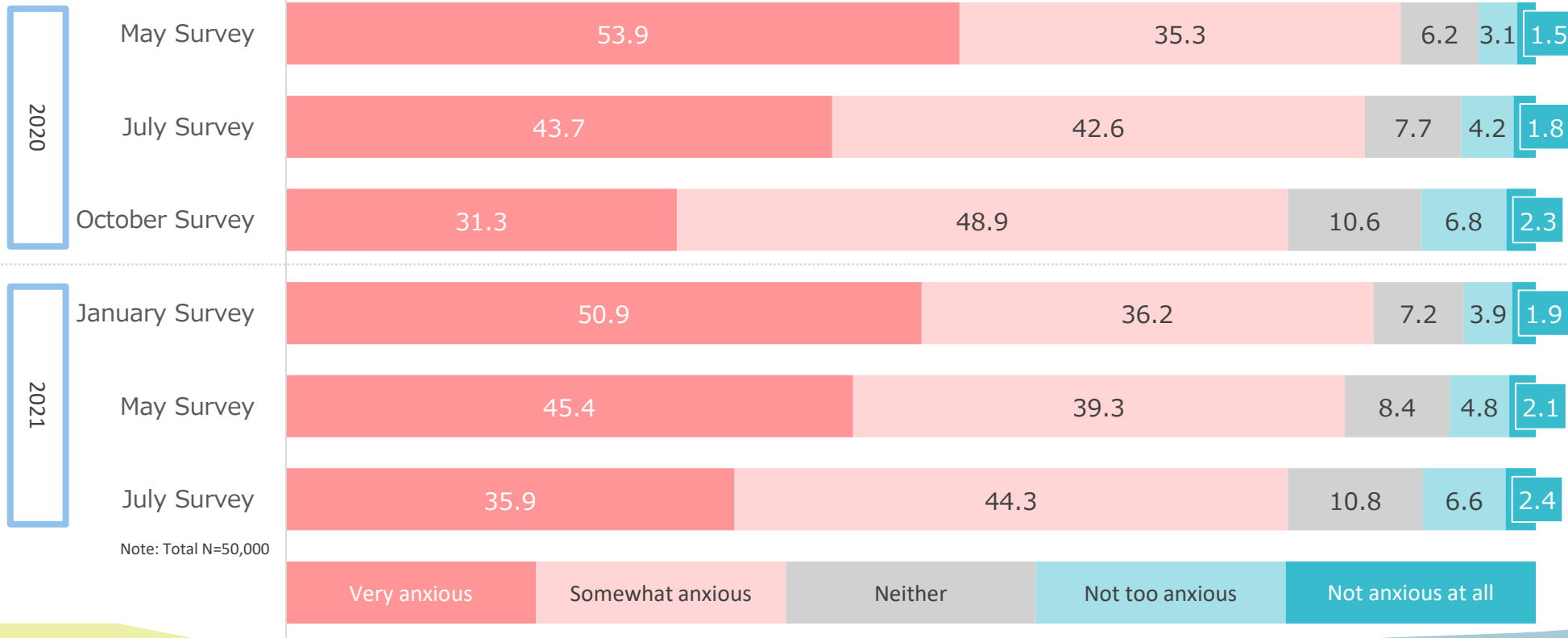


## Large Changes Caused by Infection Levels Create Anxiety

- The number of respondents who were "Very anxious" about the spread of COVID-19 decreased to 30% during the October 2020 survey, but increased again to 50% in the January 2021 survey. This percentage then decreased again to 35% in the July 2021 survey.
- The January 2021 survey was conducted during the third wave, when a second emergency declaration was issued due to the rapid increase in infections. The May 2021 survey was conducted during the fourth wave, when the number of infections was falling, and the July 2021 survey was conducted when infections were at low levels. The degree of anxiety amongst respondents fluctuated as the numbers of infections increase and decrease.

Q. Are you anxious about COVID-19?

0% 20% 40% 60% 80% 100%



# Anxiety Continues Regarding Infection of Self or Family and Prolongation

- “Self or family member becoming infected” has continued to be the highest area of concern since the survey commenced, exceeding 90%. This is followed by “Becoming prolonged and unsure when it will end.”
- While "Decline in tourism areas" remained at more than 20%, concerns about "Global economic downturn" and "Difficulty in obtaining daily necessities" are gradually decreasing.

## 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	Future changes in lifestyle, such as refraining from going out	Vaccine concerns: efficacy, safety, timing, etc.*	Infecting others*	Decline in tourism areas	Family financial difficulties due to reduced income or respondent or family members losing employment	Concerns about family members who live elsewhere*	Economic downturn in surrounding society	Discrimination, prejudice, and slander against people with COVID-19*	Response from authorities	The state of politics	Global economic downturn	Impacts on own mental/physical condition	Uncertainty about when work and school will return to normal	Societal values transforming	Self and family isolated from society	Difficulty in obtaining necessary daily necessities	Loss of hope towards life	Other
2020 May Survey (N=44,597)	92.6	71.2	55.0	56.0	47.0	-	-	26.7	37.8	-	37.2	-	30.0	26.5	40.5	-	28.9	14.2	8.0	32.7	7.7	1.1
2020 July Survey (N=43,169)	91.9	67.0	39.7	48.9	38.3	-	-	27.0	30.0	-	32.3	-	25.9	21.9	34.6	-	11.5	13.6	8.2	19.9	6.8	0.9
2020 October Survey (N=40,091)	93.1	61.5	33.0	43.6	31.7	-	-	21.7	27.5	-	27.9	-	19.9	16.0	29.7	-	7.7	13.8	10.2	13.6	7.4	0.8
2020 January Survey (N=43,503)	93.9	65.3	59.6	45.8	37.0	-	-	22.4	31.5	-	30.0	-	28.0	25.0	30.3	-	8.0	12.4	9.1	13.0	8.8	0.9
2020 May Survey (N=42,358)	92.7	62.5	50.3	40.7	37.1	33.3	32.3	24.2	27.4	26.3	24.7	25.6	25.1	25.1	22.3	18.6	19.6	11.4	11.7	8.7	7.9	0.6
2020 July Survey (N=40,086)	90.8	60.0	38.3	37.8	34.6	31.9	30.0	24.6	23.7	23.5	23.3	22.5	22.4	22.2	21.0	18.8	17.8	11.7	11.2	7.2	6.9	0.5

Note 1: Sorted using July 2021 as standard.

Note 2: “\*” Denotes that item was new to the FY 2021 survey.

# 95% Wear Masks Thoroughly, 60% Avoid Going Out

- Since the start of the survey, “Wearing a mask” has continued to be the most common countermeasure in daily life. In the first half of 2021 this exceeded 95%.
- In the October 2020 survey “Refrain from travel/recreation” was less than 50%, but this changed to around 60% from 2021, showing people are tending to stay at home.

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

(%)

	Wear a mask when going out	Encouraging and thoroughly practicing hand washing and gargling.	Encourage use of and thoroughly use alcohol sanitizing sprays installed at places visited	Avoiding densely populated spaces	Refrain from travel/recreation	Carry alcohol sanitizer (spray, wipes, etc.)	Social distance	Refrain from going out needlessly	Avoiding enclosed spaces with poor ventilation	Refrain from eating out	Try not to touch items that are touched by many people (door knobs, railings, etc.)	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.)*	Using cashless payments (credit cards, electronic money, barcode payments, etc.)	Refrain from talking or talking on a cell phone when others are around (e.g., in a train or elevator)	Refraining from seeing loved ones, family, or friends who do not live with me	Refrain from using public transportation	Check body temperature daily	Check information provided by the government and experts on measures to combat COVID-19	Try to get enough sleep, nutrition, and exercise.	Reduce the frequency of outings, even for daily needs such as grocery shopping	Refrain from going shopping for anything other than groceries and daily necessities	Use take-out or delivery instead of eating out	Download contact tracing applications such as COCCA*	Refrain from going to parks	Wash body as soon as I get home*	Sanitize clothes, bags, cell phones, and other belongings as soon as I get home	Other	Not doing anything in particular
2020 May Survey (N=50,000)	93.9	82.0	65.9	71.6	65.4	54.2	55.9	72.1	62.3	64.3	47.7	46.7	-	-	22.1	38.6	37.0	-	43.3	40.3	43.2	41.2	22.0	-	26.5	-	-	0.4	1.5
2020 July Survey (N=50,000)	94.9	77.3	68.4	63.0	55.7	57.7	51.4	53.7	52.7	45.7	42.2	37.1	-	-	19.5	25.3	26.9	-	31.5	30.0	25.9	22.9	15.0	-	11.3	-	-	0.2	1.8
2020 October Survey (N=50,000)	96.0	76.0	71.3	62.3	48.9	60.1	50.7	45.8	51.2	40.3	40.0	37.3	-	-	20.0	23.4	24.0	-	24.9	28.1	19.9	17.5	12.6	-	7.7	-	-	0.2	1.7
2020 January Survey (N=50,000)	97.4	79.1	74.4	67.5	60.1	63.4	55.7	58.6	52.4	51.4	44.0	42.9	-	-	24.8	32.2	27.4	-	32.8	34.1	26.6	24.8	16.8	-	10.7	-	-	0.3	1.3
2020 May Survey (N=50,000)	96.5	75.8	75.6	67.4	60.8	57.1	55.6	56.8	52.8	52.1	43.9	43.6	41.6	35.7	32.3	33.9	34.1	25.8	27.5	31.2	25.4	24.7	19.1	14.2	11.6	9.6	9.8	0.2	1.7
2020 July Survey (N=50,000)	95.9	74.4	74.3	65.3	56.9	54.7	53.5	51.1	50.9	48.5	42.2	41.3	40.0	33.2	31.0	30.7	30.6	23.8	24.8	30.1	22.0	20.9	16.5	12.6	9.7	9.4	8.7	0.2	2.0

Note 1: Sorted using July 2021 as standard.

Note 2: “\*” Denotes that item was new to the FY 2021 survey.

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Produced from Results of JTBF Travelers Survey

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