

Trends Amongst Japanese Travelers During the COVID-19 Epidemic (Part 13)

Produced from Results of JTBF Travelers Survey

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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 2021 [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 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)	24	65	78	98	85	81	74	505	20	60	72	94	83	86	88	503	1,008
Composition Ratio (%)	2.4	6.4	7.7	9.7	8.4	8.0	7.3	50.1	2.0	6.0	7.1	9.3	8.2	8.5	8.7	49.9	100.0
Trips (Number)	35	90	107	139	110	120	96	697	26	82	94	111	128	120	126	687	1,384
Composition Ratio (%)	2.5	6.5	7.7	10.0	7.9	8.7	6.9	50.4	1.9	5.9	6.8	8.0	9.2	8.7	9.1	49.6	100.0

■ Second Quarter Survey (July 2021) Period covered by survey: April to June 2021 Survey period: July 5 to July 9, 2020

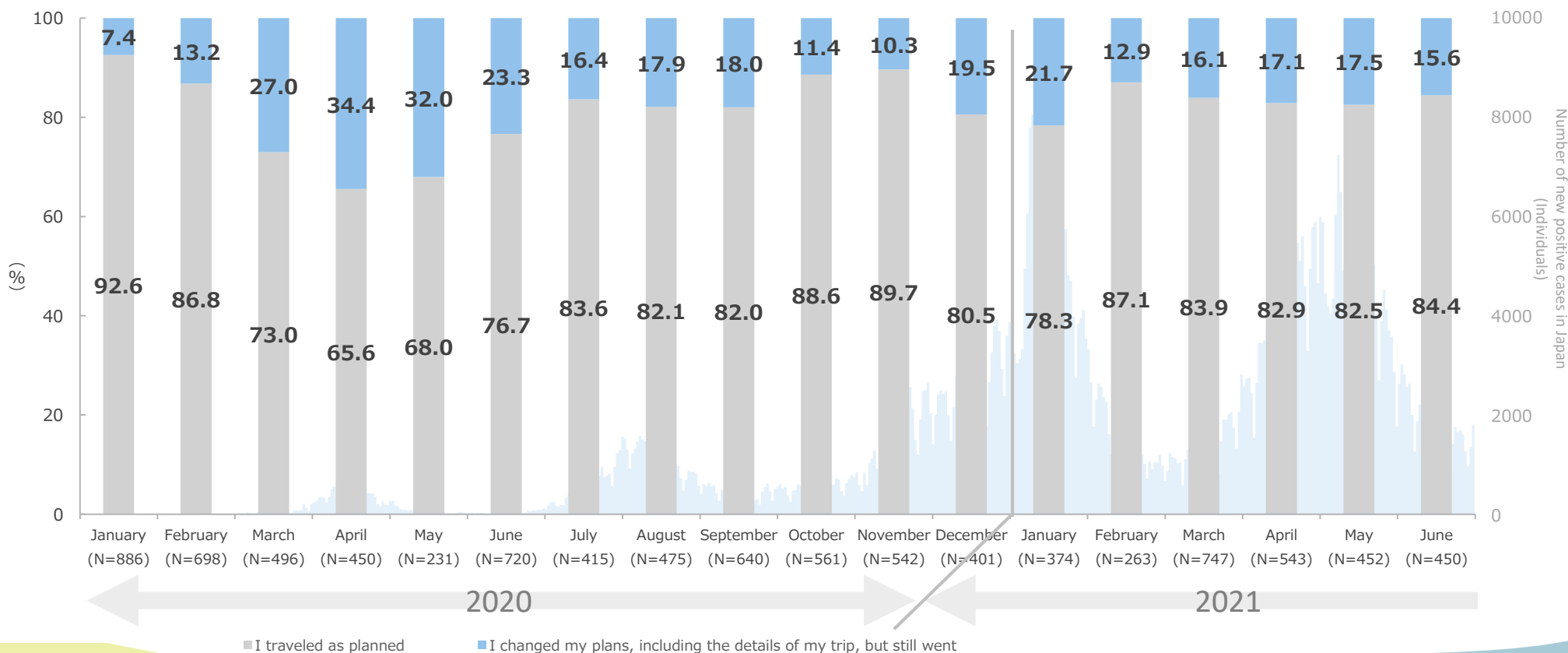
Age (years)	Male								Female								Total
	16-19	20-29	30-39	40-49	50-59	60-69	70-79	Subtotal	16-19	20-29	30-39	40-49	50-59	60-69	70-79	Subtotal	
Respondents (Individuals)	24	71	82	100	82	81	74	514	21	63	72	95	83	86	88	508	1,022
Composition Ratio (%)	2.3	6.9	8.0	9.8	8.0	7.9	7.2	50.3	2.1	6.2	7.0	9.3	8.1	8.4	8.6	49.7	100.0
Trips (Number)	35	103	108	140	127	121	117	751	26	87	95	126	112	127	121	694	1,445
Composition Ratio (%)	2.4	7.1	7.5	9.7	8.8	8.4	8.1	52.0	1.8	6.0	6.6	8.7	7.8	8.8	8.4	48.0	100.0

Note: For more information on the FY2020 JTBF Traveler Trends Survey, please refer to Part 11.

Changes to Travel Plans: 20% Changed During Peak in First Half of 2021

- The percentage of those changing their travel plans in Japan due to COVID-19 increased during the spread of infection throughout 2020. This trend continued in the first half of 2021.
- Month by month, those changing their plans increased to 20% in January 2021, the peak month during the third wave, but decreased to 10% in February 2021 as the number of infections also decreased. However, from April 2021, the number of infections rapidly increased again, and in May 2021, the peak of the fourth wave, those changing their plans increased to just under 20%.

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



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

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Changes due to COVID-19: Changes to Activities/Destinations Remains at Top

- Excepting August 2020 and January 2021, the most common changes to domestic travel due to COVID-19 were activities and destinations. Changes to accommodation gradually increased from April 2021, exceeding 25% in June 2021 to become the third-highest percentage.
- In the first half of 2021, changes in travel destination (domestic to domestic) particularly increased between January to February 2021 and May 2021 during the third and fourth waves.

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	Length of stay	Accommodation	Transportation	Travel destination (domestic to domestic)	Number of travel companions	Travel destination (overseas to domestic)	Travel companion	Other
2020	Jan (N=66)	36.4	28.8	15.2	19.7	25.8	6.1	16.7	10.6	3.0
	Feb (N=92)	42.4	28.3	15.2	18.5	19.6	8.7	15.2	8.7	1.1
	Mar (N=134)	39.6	23.1	17.9	14.2	23.9	4.5	18.7	4.5	1.5
	Apr (N=155)	34.8	29.0	14.8	20.0	21.9	5.8	11.6	4.5	3.2
	May (N=74)	37.8	36.5	18.9	20.3	21.6	8.1	18.9	4.1	1.4
	June (N=168)	41.1	21.4	14.3	20.2	23.8	4.2	5.4	3.0	6.5
	July (N=68)	32.4	30.9	17.6	26.5	23.5	2.9	7.4	0.0	2.9
	Aug (N=85)	29.4	20.0	20.0	24.7	36.5	1.2	9.4	5.9	5.9
	Sept (N=115)	33.9	32.2	16.5	22.6	28.7	2.6	8.7	2.6	6.1
	Oct (N=64)	48.4	20.3	14.1	21.9	17.2	3.1	14.1	1.6	1.6
	Nov (N=56)	42.9	35.7	17.9	17.9	21.4	5.4	1.8	1.8	8.9
	Dec (N=78)	41.0	23.1	23.1	16.7	25.6	2.6	7.7	2.6	5.1
2021	Jan (N=81)	34.6	35.8	21.0	8.6	29.6	6.2	1.2	1.2	2.5
	Feb (N=34)	29.4	26.5	17.6	8.8	29.4	2.9	8.8	0.0	2.9
	Mar (N=120)	40.0	28.3	16.7	13.3	22.5	4.2	6.7	2.5	4.2
	Apr (N=93)	44.1	30.1	20.4	15.1	25.8	2.2	3.2	1.1	2.2
	May (N=79)	38.0	24.1	22.8	5.1	29.1	8.9	2.5	5.1	3.8
	June (N=70)	37.1	27.1	25.7	18.6	17.1	5.7	1.4	1.4	8.6

June 2021: "I Don't Feel Anxious" Exceeded "No Point in Worrying"

- Regarding their feelings surrounding travel during COVID-19, from April 2020 "No point in worrying" accounted for the highest percentage of respondents, however from June 2021 this changed to "I don't feel anxious about COVID-19."
- Focusing on August to December 2020 during the Go To Travel campaign, "Prices are lower than usual" hovered between 15% and 20%. However, from January 2021 onward, the percentage dropped to almost below 10%. During the same period, the number of respondents who answered, "Everything's empty" was less than 10%, but after January 2021, when the campaign was suspended and a state of emergency was declared, this number increased to just under than 20%.

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

		I don't feel anxious about COVID-19	No point in worrying	Everything's empty	It's safe to travel because infections are low at the destination	I want to support tourist attractions at the destination	* I wasn't sure if it was ok to travel	* There's no problem as long as I take proper measures to prevent infection	I really want to take this trip	I'm tired of self-restraint/ can't keep holding back	* I'm tired of self-restraint/ can't keep holding back	Not an issue because the places I visit and public transportation are taking thorough measures to prevent infection	We need to prevent economic stagnation	The current situation hasn't changed things for me	There were fewer foreign tourists	I traveled according to the thoughts of my travel companions	Prices are lower than usual	It was a trip that could only be held now (commemorative trip, etc.)	Travel won't cause a nuisance at my destination	* Vaccinations have begun nationwide, so it's not a problem	Cancelling or changing a trip is a hassle	I won't be infected/even if I'm infected I won't get sick/it will be mild	I don't want to pay cancellation fees	It was for an important event so I had to travel	Other (%)
2020	Jan (N=886)	66.4	13.9	2.1	8.2	3.3	-	-	6.7	1.4	-	4.3	30.2	4.3	3.4	1.2	2.9	6.5	-	3.0	10.2	4.3	1.5	9.8	
	Feb (N=698)	37.0	19.8	4.3	14.6	7.9	-	-	12.9	1.6	-	5.7	26.8	9.9	7.3	2.4	6.7	6.7	-	3.6	11.9	8.0	1.6	5.9	
	Mar (N=496)	26.2	19.8	9.1	21.0	12.7	-	-	18.3	2.6	-	6.3	19.0	11.5	11.9	4.6	10.3	8.1	-	3.8	8.1	7.7	2.6	7.5	
	Apr (N=450)	20.4	26.2	9.8	17.3	12.9	-	-	13.8	5.8	-	10.2	17.3	10.2	10.7	5.1	8.7	7.6	-	4.0	15.6	9.6	2.0	4.0	
	May (N=231)	20.3	33.8	11.3	19.9	14.3	-	-	11.3	6.1	-	11.7	11.3	6.1	8.2	3.9	5.2	7.8	-	2.6	15.6	5.2	4.3	2.6	
	June (N=720)	21.7	27.9	10.0	24.9	24.0	-	-	10.1	5.0	-	13.8	11.5	11.8	9.0	12.8	3.2	7.8	-	1.4	6.4	2.2	0.8	5.3	
	July (N=415)	20.2	33.3	11.6	21.4	21.9	-	-	14.2	4.6	-	11.3	11.1	10.8	9.9	12.3	3.9	6.5	-	2.7	8.9	3.9	2.7	3.4	
	Aug (N=475)	22.5	37.5	8.8	21.3	18.7	-	-	13.3	6.1	-	11.8	10.5	10.3	11.8	14.7	6.9	9.7	-	0.4	6.1	2.5	2.3	2.3	
	Sept (N=640)	23.9	36.1	6.7	19.5	21.3	-	-	13.6	6.1	-	14.2	9.8	10.6	9.5	20.0	5.0	6.6	-	1.4	7.2	2.0	1.3	4.4	
	Oct (N=561)	25.5	27.3	6.1	25.0	23.5	-	-	12.7	2.5	-	12.8	12.7	13.0	10.0	19.6	7.5	5.5	-	2.3	6.8	3.9	2.0	3.0	
	Nov (N=542)	23.1	26.0	6.5	22.9	23.2	-	-	18.1	3.5	-	14.4	10.3	11.6	10.0	21.8	7.6	6.8	-	2.2	6.8	4.4	1.5	4.2	
	Dec (N=401)	24.2	28.9	4.7	17.7	21.2	-	-	20.2	2.2	-	14.7	7.5	9.5	13.0	20.4	9.5	6.0	-	3.7	4.2	5.7	1.5	3.5	
2021	Jan (N=374)	22.2	28.6	18.4	18.7	17.4	23.0	15.0	12.3	12.8	12.0	11.5	13.1	11.8	7.2	10.7	5.3	7.0	0.8	3.5	4.5	7.0	0.5	3.2	
	Feb (N=263)	24.3	27.4	19.8	18.6	16.7	16.0	15.6	13.7	11.0	12.2	12.5	11.8	9.9	4.9	9.5	5.3	7.6	0.4	2.3	6.1	2.7	1.9	2.7	
	Mar (N=747)	25.8	28.9	18.1	17.5	17.3	20.7	15.9	13.9	12.0	13.5	12.4	9.1	9.0	6.2	8.3	8.8	6.6	0.5	2.3	4.3	4.8	1.2	1.7	
	Apr (N=543)	26.2	33.3	18.4	19.7	17.7	20.3	14.0	15.3	13.4	13.6	10.7	12.0	13.1	6.3	7.7	5.3	7.6	1.3	2.9	5.2	3.7	1.3	1.7	
	May (N=452)	27.4	29.2	19.5	19.0	15.5	18.4	17.0	17.3	14.8	11.1	12.4	8.6	10.6	9.7	6.4	8.0	8.4	1.3	2.4	3.5	4.6	1.8	2.0	
	June (N=450)	32.2	26.4	19.3	18.4	18.4	17.3	15.1	14.4	13.8	11.8	10.7	10.4	8.2	8.0	7.8	7.6	6.4	3.6	3.1	2.9	2.7	0.4	1.3	

Note 1: Sorted using June 2021 as standard. Note 2: "*" Denotes that item was new to the FY 2021 survey.

Impressions of Travel in First Half of 2021: 30 - 35% Felt Infection Control was Thorough

- Regarding impressions of domestic travel, for all months during the first half of 2021 "No crowds so it was comfortable" had the highest percentage of respondents. The percentage of respondents who answered, "Not much different from before COVID-19" dropped sharply to 25% in April 2020, when the first emergency declaration was issued, increasing to 45% by October 2020. However, this dropped below 30% again in January 2021, when the second emergency declaration was issued.
- In the first half of 2021, the percentage of respondents who answered that infection control at their travel destinations was "thorough" greatly exceeded the percentage who answered that they were "Not thorough which was concerning." However, this percentage was only 30 to 35%.

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 before COVID-19	*Thorough infection control was implemented at the destination	I was welcomed at my destination	*It reaffirmed the importance of travel to me	Everything was closed and lonely	It was a shame some stores/facilities were closed	It was more crowded than I expected	I was worried about infection	I was worried I might be a source of infection	I couldn't talk about my trip afterwards because I went secretly	I'm tired of worrying about infection	I'm worried that I won't be treated well on my trip	*I'm worried about the lack of thorough infection control at the destination	I was criticized by others after my trip	Other
2020	Jan (N=886)	14.2	82.1	-	11.3	-	4.4	3.6	6.1	7.6	5.5	-	5.0	2.0	-	1.2	0.9
	Feb (N=698)	25.1	60.6	-	12.0	-	9.6	5.0	9.6	17.3	11.5	-	9.5	3.0	-	2.0	0.6
	Mar (N=496)	36.7	44.0	-	13.1	-	19.4	13.7	12.1	26.2	14.7	-	9.3	3.8	-	2.0	1.0
	Apr (N=450)	41.1	26.2	-	10.9	-	25.6	13.3	5.3	22.2	13.3	-	9.6	7.3	-	2.4	0.7
	May (N=231)	43.7	24.7	-	14.3	-	23.8	20.8	5.2	20.3	12.6	-	9.5	8.7	-	0.9	1.3
	June (N=720)	49.7	33.6	-	17.9	-	18.1	14.3	10.4	16.7	7.5	-	4.6	3.1	-	0.3	1.0
	July (N=415)	52.5	32.5	-	12.8	-	14.7	11.3	10.8	17.3	8.7	-	6.3	3.9	-	0.5	0.7
	Aug (N=475)	51.4	37.7	-	13.1	-	10.3	9.9	16.0	17.3	11.6	-	5.3	2.9	-	0.4	0.6
	Sept (N=640)	43.4	39.5	-	13.9	-	7.7	6.6	20.3	16.6	9.2	-	4.7	3.9	-	0.3	1.7
	Oct (N=561)	41.7	46.9	-	12.8	-	9.4	6.2	13.0	18.7	9.8	-	6.1	2.9	-	0.2	1.6
	Nov (N=542)	40.6	45.9	-	10.1	-	7.6	6.1	17.5	20.5	11.4	-	5.7	2.4	-	0.2	1.7
	Dec (N=401)	49.6	40.1	-	11.7	-	8.0	8.2	10.7	18.2	10.5	-	5.5	3.2	-	1.0	1.2
2021	Jan (N=374)	48.9	26.5	34.2	17.4	13.9	17.6	9.9	8.8	13.9	10.4	8.0	4.5	5.1	1.1	0.8	0.8
	Feb (N=263)	49.4	24.7	32.7	17.5	14.8	16.0	9.1	11.8	12.2	11.0	6.5	3.8	1.5	1.5	0.4	1.1
	Mar (N=747)	44.3	29.5	34.8	15.3	13.0	9.9	10.2	14.3	13.3	8.6	7.2	4.7	2.1	1.1	0.7	0.9
	Apr (N=543)	51.2	31.5	29.3	19.2	17.5	12.2	12.2	11.2	13.3	7.4	6.4	4.8	2.8	1.5	0.6	1.1
	May (N=452)	45.8	29.2	29.0	15.3	17.5	15.9	17.7	14.2	13.9	10.2	9.3	5.5	5.1	2.9	0.4	0.0
	June (N=450)	50.0	33.8	32.2	18.2	17.8	16.2	14.9	11.6	10.9	7.6	7.1	4.7	2.4	0.7	0.4	1.3

Note 1: Sorted using June 2021 as standard. Note 2: "*" Denotes that item was new to the FY 2021 survey.

COVID-19 Measures at Destination: **More Thorough** than in Day-to-Day Life

- In the first half of 2021, "wearing masks" remained the most common measure against COVID-19 during domestic travel, at over 90%. The percentages for "Encouraging use of and thoroughly use alcohol sanitizing sprays installed at places visited" and "Encouraging and thoroughly practicing hand washing and gargling" remained above 70%.
- The percentage of respondents who answered "Not doing anything in particular" has remained below 1% since October 2020 (excluding March 2021). In day-to-day life, this trended at around 1 to 2%¹. It can, therefore, be assumed that respondents are taking the same or even more thorough measures during travel compared to daily life.

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	Avoiding densely populated spaces	Maintaining social distance	Avoiding enclosed spaces with poor ventilation	Being careful when eating and drinking (avoiding buffets and eating while walking)	Try not to touch items that are touched by many people	Refrain from talking or talking on a cell phone when others are around	*Avoiding close conversations and other close situations	*Using cashless payments	*Check the information on COVID-19 measures at places I plan to visit	*Downloading contact tracing applications	*Checking information on COVID-19 measures in the region I'm traveling to	*Checking information on new travel etiquette and new travel rules	*Brought a thermometer to check my temperature every day.	*Took a PCR test before traveling	Other	Not doing anything in particular
2020	Jan (N=886)	36.1	18.6	30.8	22.9	10.9	8.2	11.5	7.4	11.2	-	7.4	-	-	-	-	-	-	-	1.0	47.4
	Feb (N=698)	59.7	37.2	53.4	40.7	23.4	17.9	24.1	15.3	24.1	-	16.0	-	-	-	-	-	-	-	0.4	19.5
	Mar (N=496)	75.0	54.6	64.7	51.8	41.9	32.7	39.5	29.0	34.7	-	30.0	-	-	-	-	-	-	-	0.6	9.1
	Apr (N=450)	81.3	52.7	61.3	52.2	43.6	34.4	38.9	27.8	36.4	-	27.3	-	-	-	-	-	-	-	0.4	4.2
	May (N=231)	80.1	57.1	61.5	49.8	35.1	35.5	36.4	24.2	30.7	-	22.5	-	-	-	-	-	-	-	0.0	3.9
	June (N=720)	92.9	73.9	74.0	61.1	47.9	46.9	43.5	35.3	42.2	-	31.7	-	-	-	-	-	-	-	0.6	1.8
	July (N=415)	94.7	71.8	70.4	61.0	53.3	49.6	45.1	33.7	41.0	-	34.0	-	-	-	-	-	-	-	0.2	1.0
	Aug (N=475)	94.1	76.6	74.7	64.6	53.3	50.5	48.4	36.0	40.4	-	33.9	-	-	-	-	-	-	-	0.6	1.9
	Sept (N=640)	95.2	78.1	72.2	61.4	50.5	49.7	45.6	33.8	39.5	-	33.3	-	-	-	-	-	-	-	0.0	1.6
	Oct (N=561)	96.3	80.6	76.8	66.7	56.7	56.3	51.5	43.7	47.6	-	42.2	-	-	-	-	-	-	-	0.2	0.7
	Nov (N=542)	98.0	83.8	77.7	67.7	54.4	59.0	49.6	48.3	48.5	-	43.4	-	-	-	-	-	-	-	0.2	0.4
	Dec (N=401)	97.5	81.5	74.3	62.8	55.6	59.6	50.1	43.6	40.4	-	41.6	-	-	-	-	-	-	-	0.0	0.5
2021	Jan (N=374)	94.1	74.6	71.9	64.4	55.9	52.9	48.7	42.5	36.9	33.4	37.4	34.5	15.8	12.0	13.4	9.1	9.4	1.1	0.0	0.5
	Feb (N=263)	93.2	77.2	76.0	65.8	58.2	55.1	51.7	49.0	46.4	38.0	46.0	36.9	19.0	14.8	16.0	12.2	11.0	1.1	0.0	0.8
	Mar (N=747)	94.8	77.9	73.5	66.4	54.4	53.0	47.5	47.1	41.2	37.2	38.0	36.4	16.2	13.7	12.6	9.2	9.1	0.7	0.1	1.1
	Apr (N=543)	95.6	73.5	72.2	61.0	54.9	49.0	44.0	42.5	42.2	33.1	37.0	30.4	15.1	11.2	12.5	9.6	8.1	2.0	0.0	0.6
	May (N=452)	94.7	77.4	71.2	63.3	56.4	50.0	47.8	45.4	42.9	37.4	37.4	34.1	14.2	12.2	10.4	9.3	8.2	2.7	0.4	0.4
	June (N=450)	96.7	78.0	71.8	59.6	50.0	46.2	43.6	43.6	40.7	35.6	33.8	33.6	13.6	12.7	12.2	8.7	8.4	2.7	0.4	0.9

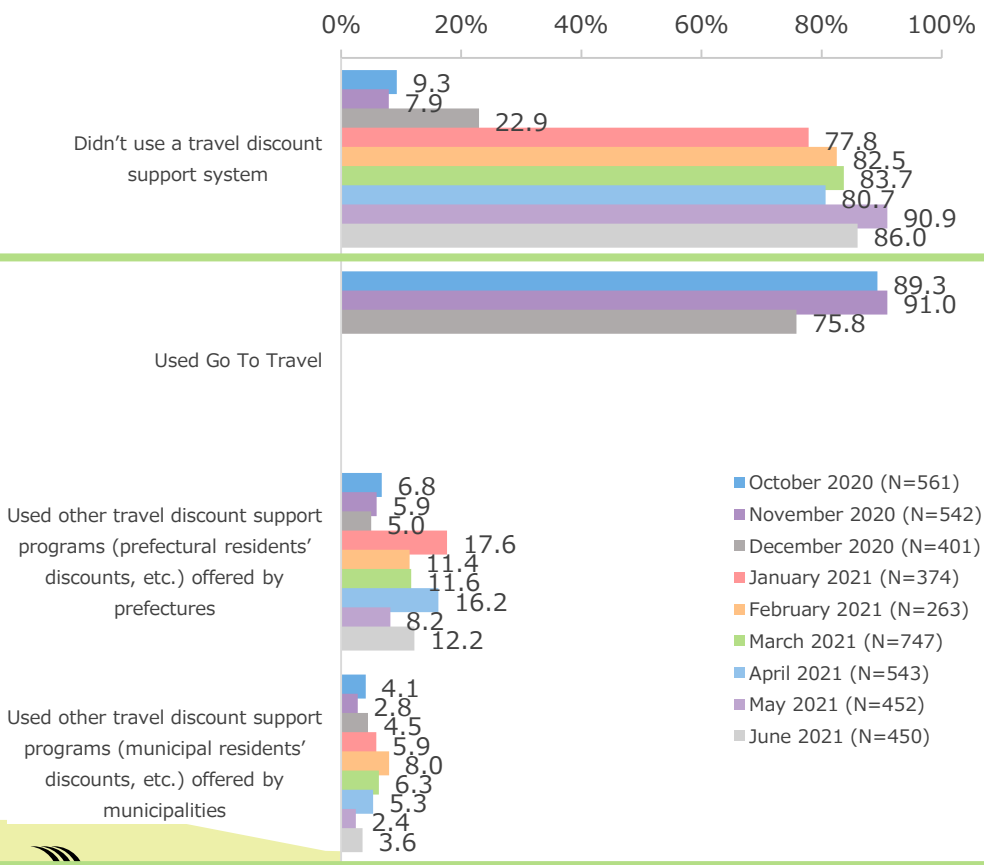
Note 1: For COVID-19 countermeasures in daily life see part 12, page 13 Note 2: Sorted using June 2021 as standard. Note 3: "*" Denotes that item was new to the FY 2021 survey.

10 to 20% Used Travel Discount Support Programs in First Half of 2021

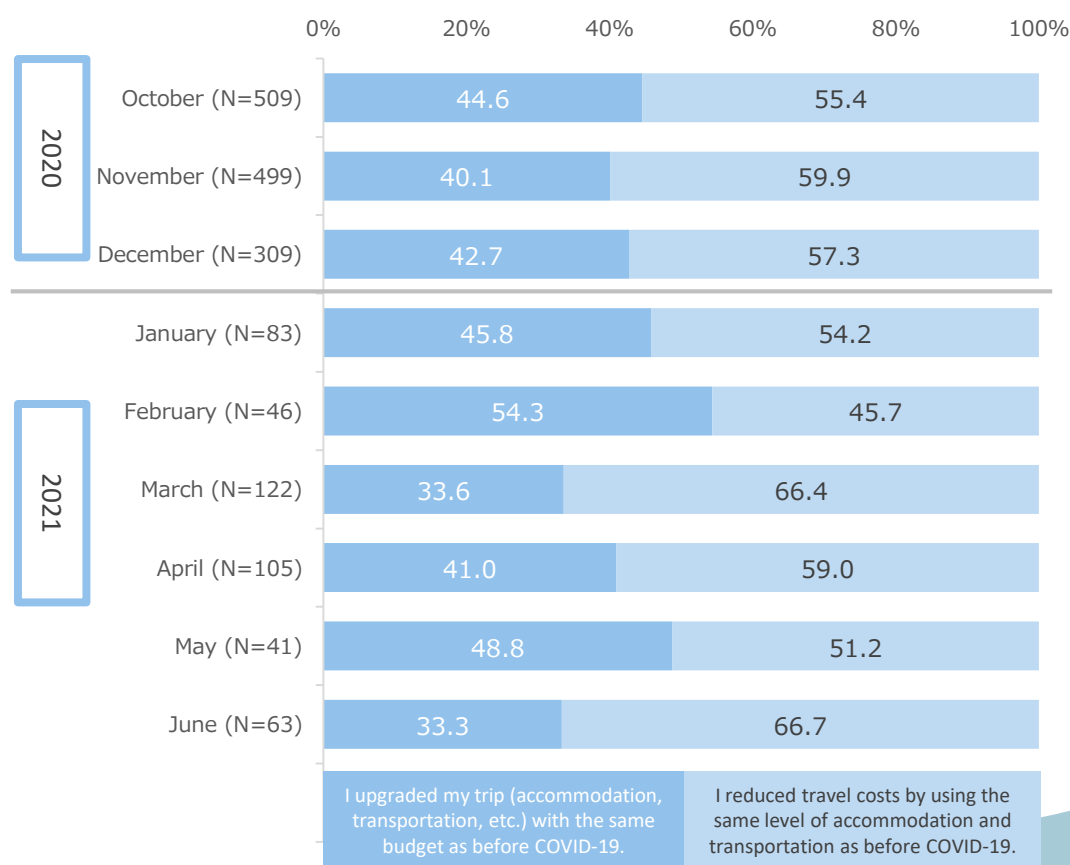
- The utilization rate of the travel discount support system was 75 to 90% in October to December 2020, when Go To Travel was first implemented. However, after January 2021, when it was suspended, only local travel discount support systems implemented by some prefectures and municipalities were available, leading to a utilization rate of 10 to 20%.
- In terms of how these systems were used, more than half of the respondents in all months except February 2021 answered, “I reduced travel costs by using the same level of accommodation and transportation 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]



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)



Trends Amongst Japanese Travelers During the COVID-19 Epidemic (Part 13)

Produced from Results of JTBF Travelers Survey

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GOKITA Reiko, NAKA Nanae, YASUHARA Arisa

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