

# Trends Amongst Japanese Travelers During the COVID-19 Epidemic (Part 14)

Produced from Results of the JTBF Travelers Survey

October 4, 2021

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



# Survey Summary

Survey title: JTBF Travel Attitude Survey

Survey target: Men and women aged 18 to 79 nationwide (selected from survey company panels \*)

Survey method: Self-administered mail surveys

■ May 2020 Survey Survey Period: May 20 to June 5, 2020

Age (years)	Male								Female								Total
	18-19	20-29	30-39	40-49	50-59	60-69	70-79	Subtotal	18-19	20-29	30-39	40-49	50-59	60-69	70-79	Subtotal	
Respondents (Individuals)	34	91	113	150	120	137	100	745	22	78	111	127	116	149	124	727	1,472
Composition Ratio (%)	2.3	6.2	7.7	10.2	8.2	9.3	6.8	50.6	1.5	5.3	7.5	8.6	7.9	10.1	8.4	49.4	100.0

■ December 2020 Survey Survey Period: November 26 to December 10, 2020

Age (years)	Male								Female								Total
	18-19	20-29	30-39	40-49	50-59	60-69	70-79	Subtotal	18-19	20-29	30-39	40-49	50-59	60-69	70-79	Subtotal	
Respondents (Individuals)	15	97	107	128	126	121	106	700	17	85	131	151	119	141	120	764	1,464
Composition Ratio (%)	1.0	6.6	7.3	8.7	8.6	8.3	7.2	47.8	1.2	5.8	8.9	10.3	8.1	9.6	8.2	52.2	100.0

■ May 2021 Survey Survey Period: May 26 to June 16, 2021

Age (years)	Male								Female								Total
	18-19	20-29	30-39	40-49	50-59	60-69	70-79	Subtotal	18-19	20-29	30-39	40-49	50-59	60-69	70-79	Subtotal	
Respondents (Individuals)	14	108	126	151	113	127	110	749	13	103	105	132	106	149	116	724	1,473
Composition Ratio (%)	1.0	7.3	8.6	10.3	7.7	8.6	7.5	50.8	0.9	7.0	7.1	9.0	7.2	10.1	7.9	49.2	100.0

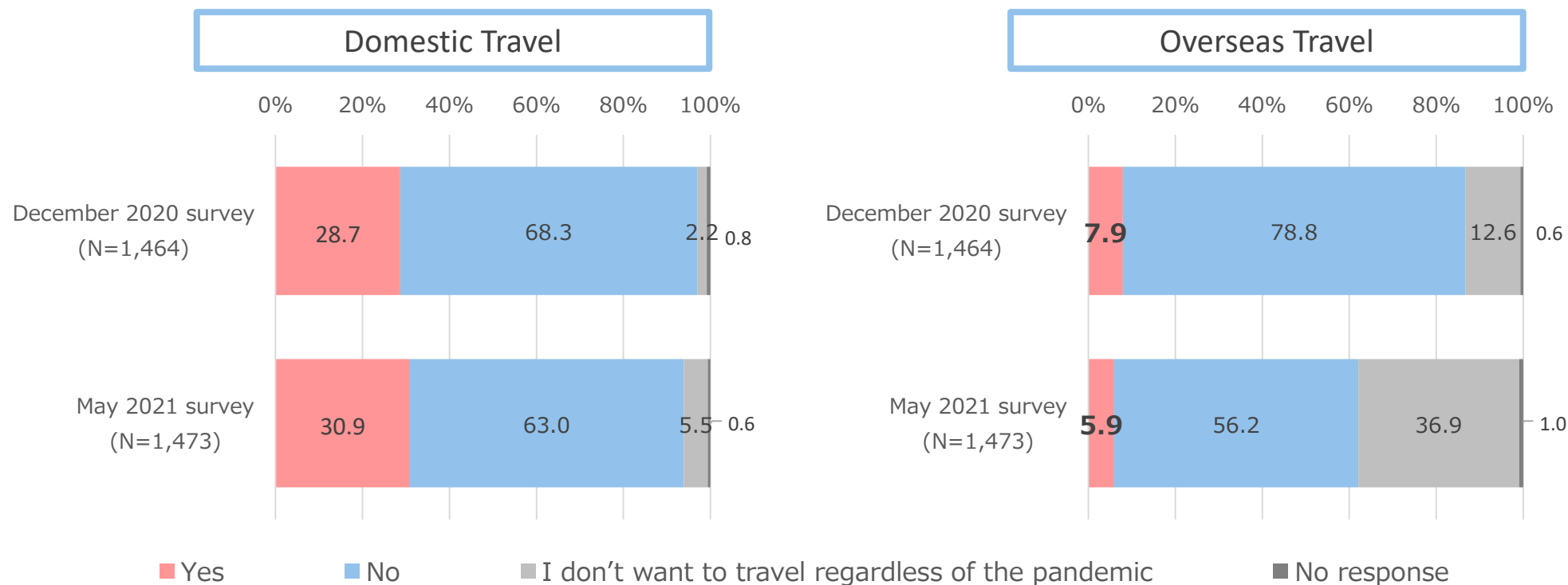
Note: Households were extracted from a residential map database with respondents based on the population at the time of the census. This method allowed us to select survey targets without regional or gender age bias.

The survey was then sent by mail, and respondents were asked to fill out the questionnaire by themselves.

## Desire to travel During COVID-19: Domestic 30%, Overseas <10%

- When asked if they want to go sightseeing/recreational trips during the pandemic, 30% of respondents in both the December 2020 and May 2021 surveys answered "Yes".
- However, less than 10% of respondents wanted to go on an overseas trip in both the December 2020 and May 2021 surveys.

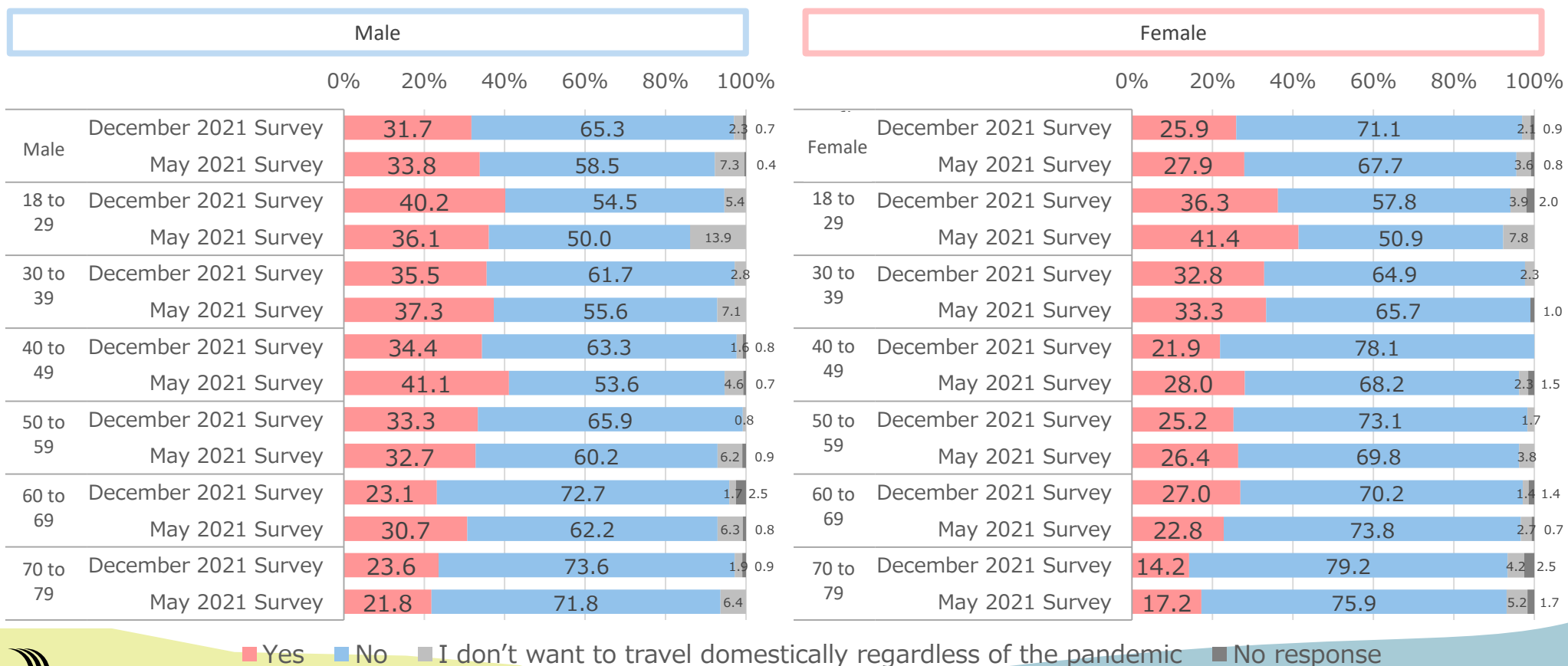
Q. Do you want to go on a sightseeing/recreational trip during the current pandemic?



## Domestic Travel During COVID-19: Those in 70s Cautious

- Willingness to travel domestically during the pandemic tended to be slightly higher among men than among women. The number of respondents who answered “Yes” to travel did not change markedly from the December 2020 survey to the May 2021 survey (although there was a slight increase for both sexes).
- By age group, both men and women in their 70s were relatively less likely to say they would like to go, indicating a cautious attitude toward travel. From the December 2020 survey to the May 2021 survey, an almost 10-point recovery in willingness to travel was seen among men in their 40s and 60s, and among women in their 20s and 40s.

### Q. Do you want to go on a domestic sightseeing/recreational trip during the current pandemic?

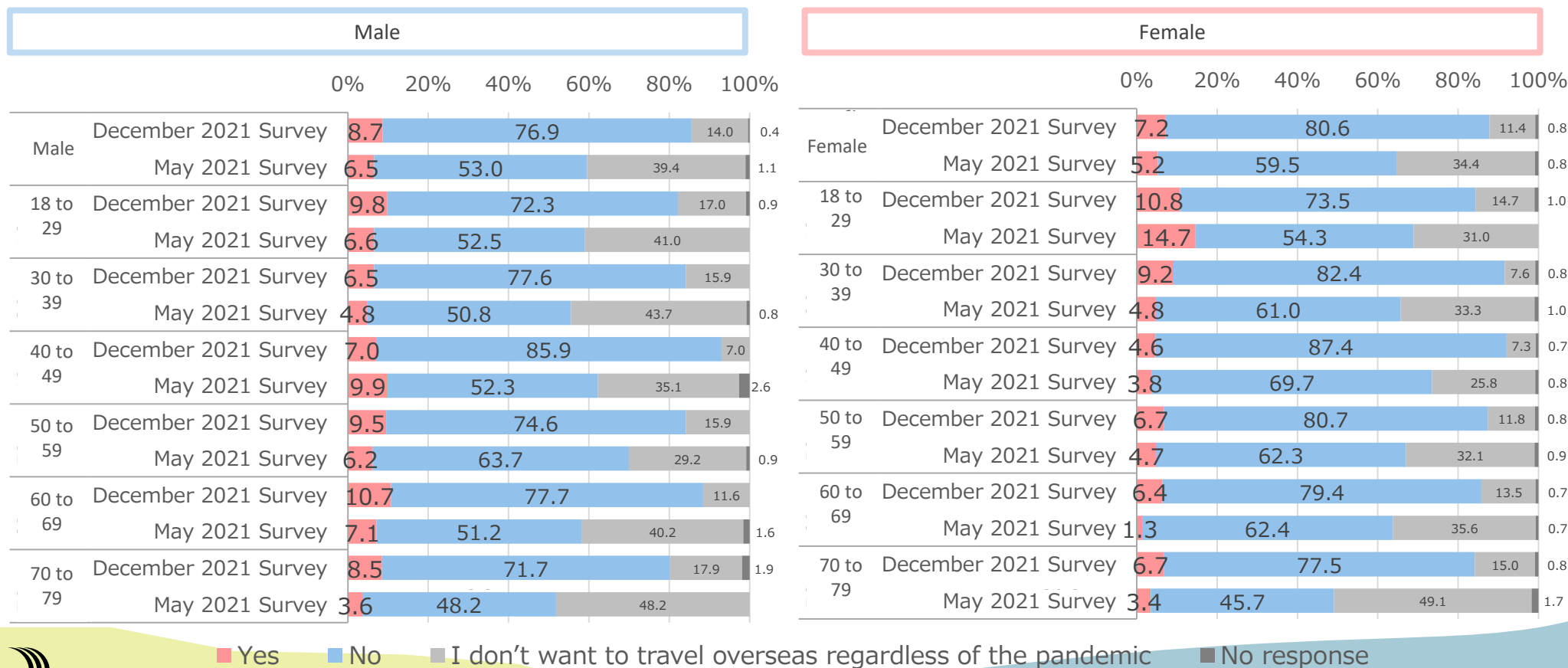


■ Yes ■ No ■ I don't want to travel domestically regardless of the pandemic ■ No response

# Overseas Travel During COVID-19: <10% of Men and Women Want to Go

- There was no marked difference in willingness to travel abroad during the pandemic between men and women.
- There was also no major difference by age group, with only 10% of all age groups saying they would like to travel abroad during COVID-19, revealing a cautious attitude.

Q. Do you want to go on an overseas sightseeing/recreational trip during the current pandemic?

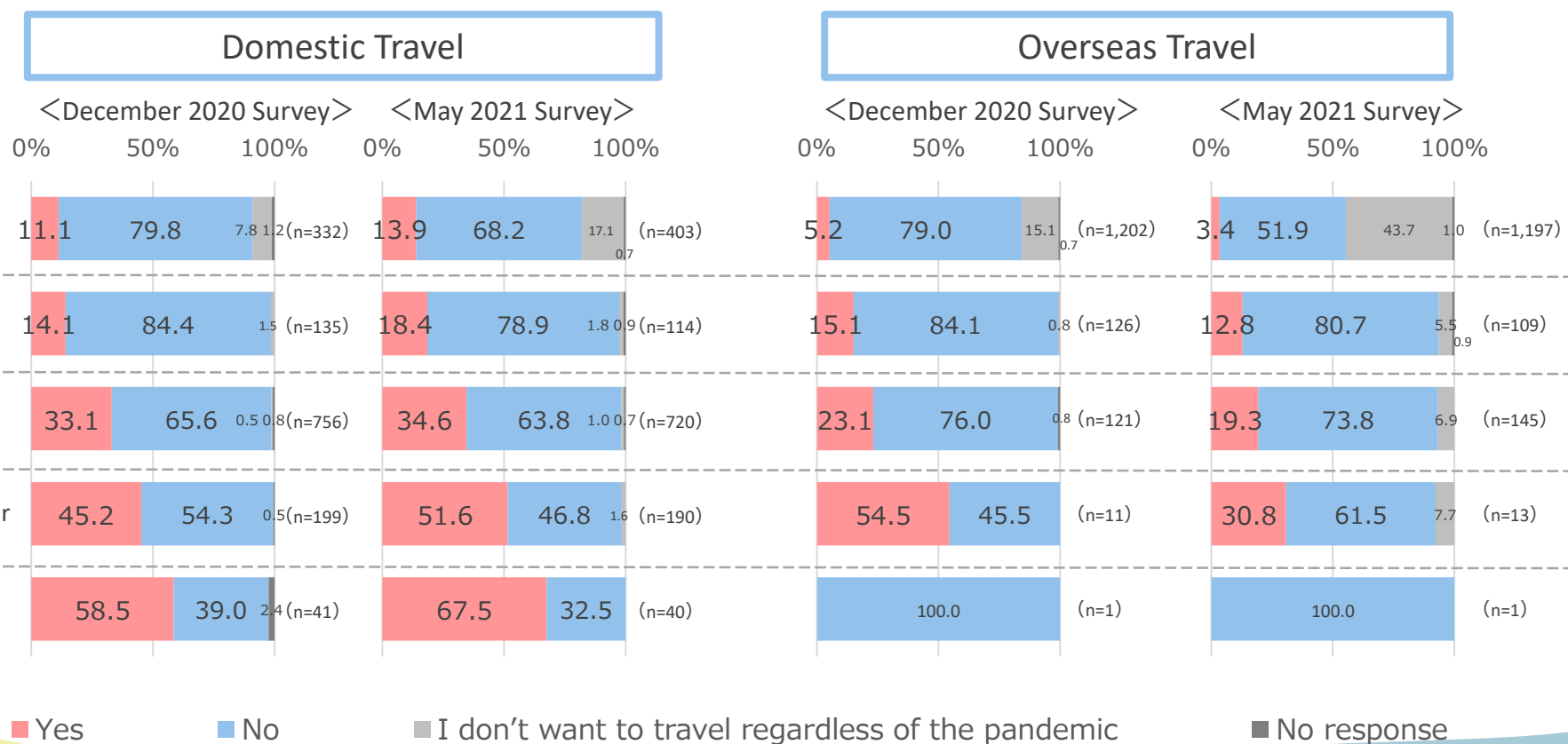


■ Yes   
 ■ No   
 ■ I don't want to travel overseas regardless of the pandemic   
 ■ No response

# Travel During COVID-19: Those Who Travel More Frequently More Willing

- Examining intent to travel during COVID-19 by frequency of travel reveals that the higher the respondent's typical frequency of travel, the higher their intent to travel during the pandemic is.
- Examining domestic travel, more than half of those who travel three or more times a year (3 to 5 times a year and 6 or more times a year) said they would like to travel, and their willingness to travel increased in May 2021 compared to December 2020.

Q. Do you want to go on a sightseeing/recreational trip during the current pandemic?

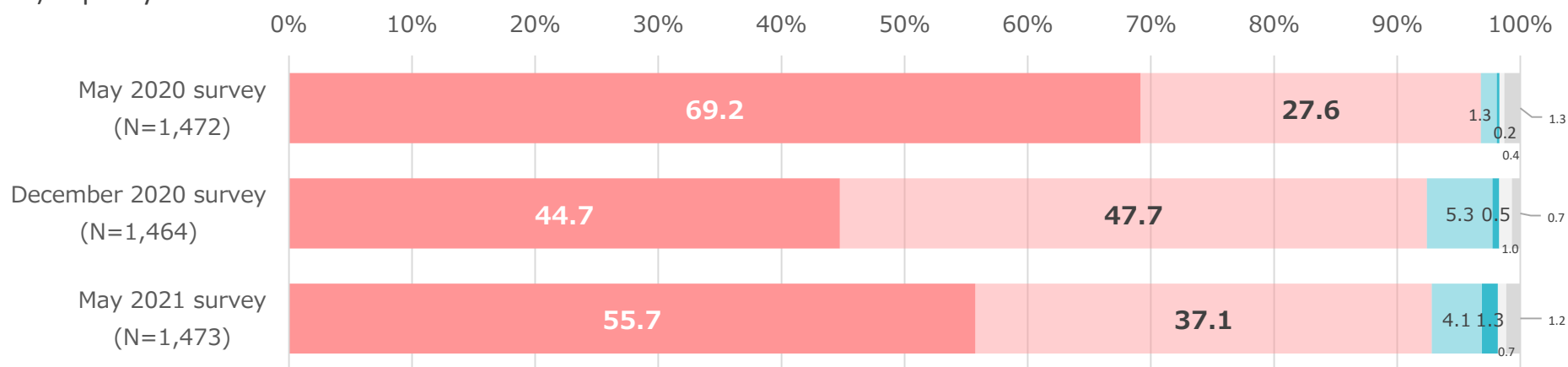


■ Yes ■ No ■ I don't want to travel regardless of the pandemic ■ No response

## National and Local Government Requests: Weaker Impact as Pandemic is Prolonged

- Regarding awareness of national and local government requests when deciding whether to travel, 70% of respondents in the May 2020 survey said they would follow the requests, but this number decreased to 40 to 60% in the December 2020 and May 2021 surveys. In December 2020, when the emergency declaration was lifted, those responding "I will analyze the situation and decide for myself while remaining aware of the requests" exceeded "I will follow the requests." However, these responses were reversed in May 2021 when the emergency declaration was reissued.
- The number of respondents who disregarded requests from national or local governments (the sum of those responding "I will determine the extent of the risk and decide myself" and "I'll follow what others around me are doing") also increased slightly, and their awareness of government requests changed as the pandemic became prolonged.

Q. To what extent does your awareness of requests from national or local governments (e.g., refraining from going out, refraining from travel) impact your decision to travel?



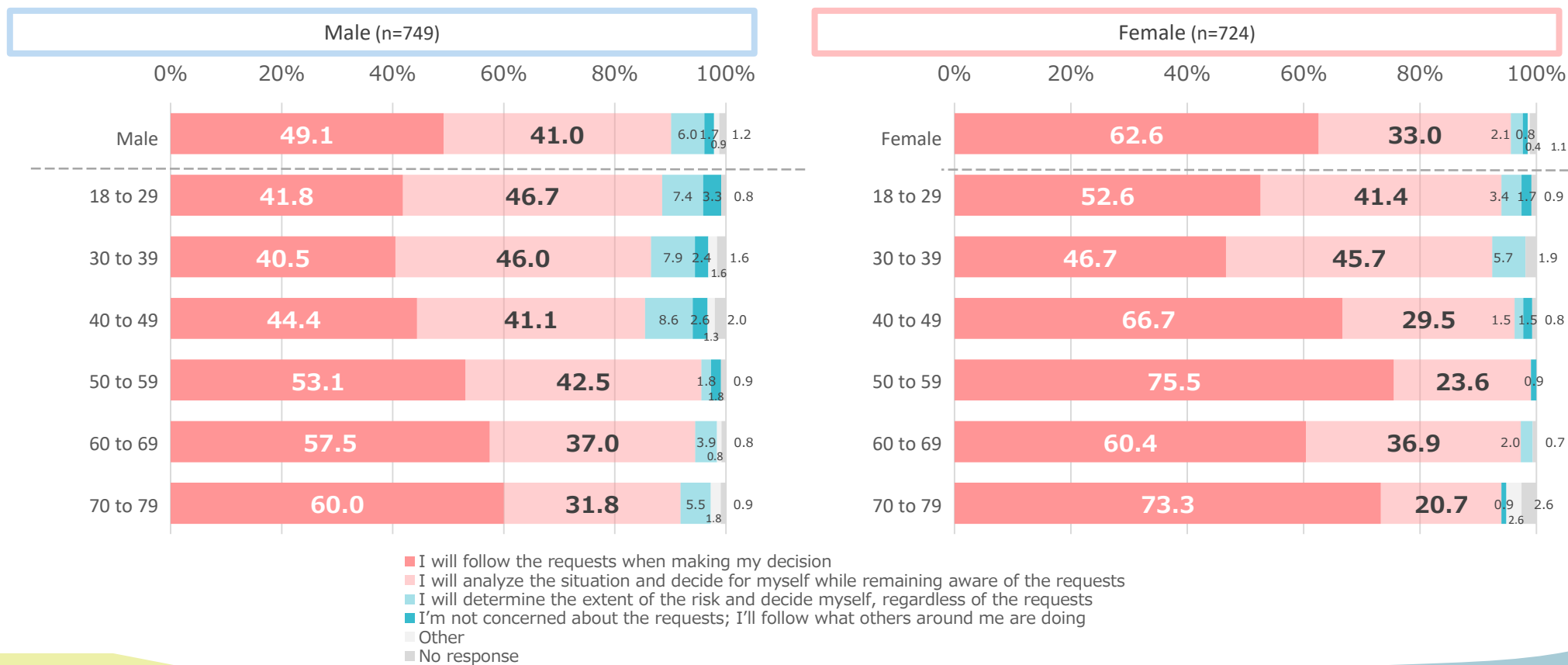
- I will follow the requests when making my decision
- I will analyze the situation and decide for myself while remaining aware of the requests
- I will determine the extent of the risk and decide myself, regardless of the requests
- I'm not concerned about the requests; I'll follow what others around me are doing
- Other
- No response



## Requests from National and Local Governments: Women Tend to Pay More Attention

- When examining attitudes toward these requests by gender, 49.1% of men and 62.6% of women said they would “Follow the requests” when making a decision, while 41.0% of men and 33.0% of women said they would “Analyze the situation” and decide for themselves while remaining aware of the requests. The results reveal a trend of men tending to decide for themselves.
- Among men in their 20s to 40s, 10% of the respondents were not concerned about requests from national or local governments.

Q. To what extent does your awareness of requests from national or local governments (e.g., refraining from going out, refraining from travel) impact your decision to travel? <May 2021 Survey>



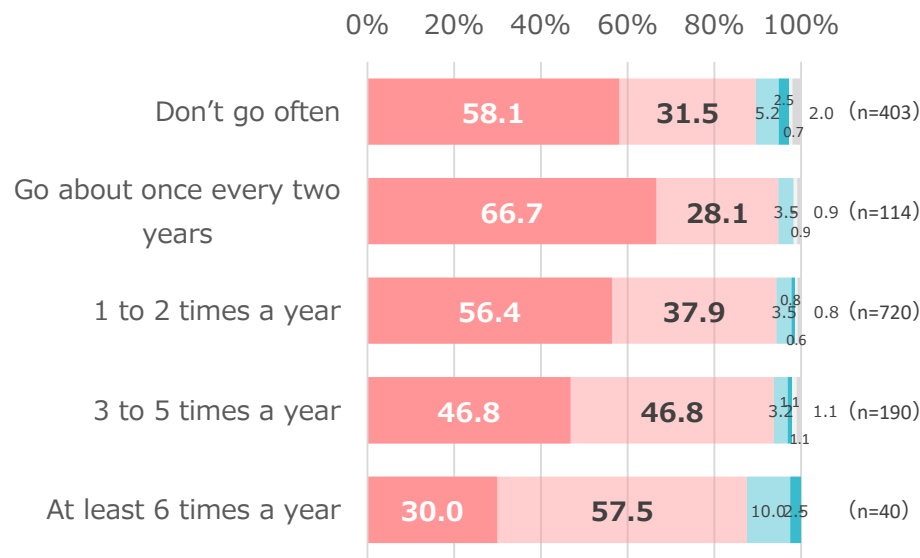
- I will follow the requests when making my decision
- I will analyze the situation and decide for myself while remaining aware of the requests
- I will determine the extent of the risk and decide myself, regardless of the requests
- I'm not concerned about the requests; I'll follow what others around me are doing
- Other
- No response

## National and Local Government Requests: Seasoned Travelers Value their Own Judgment

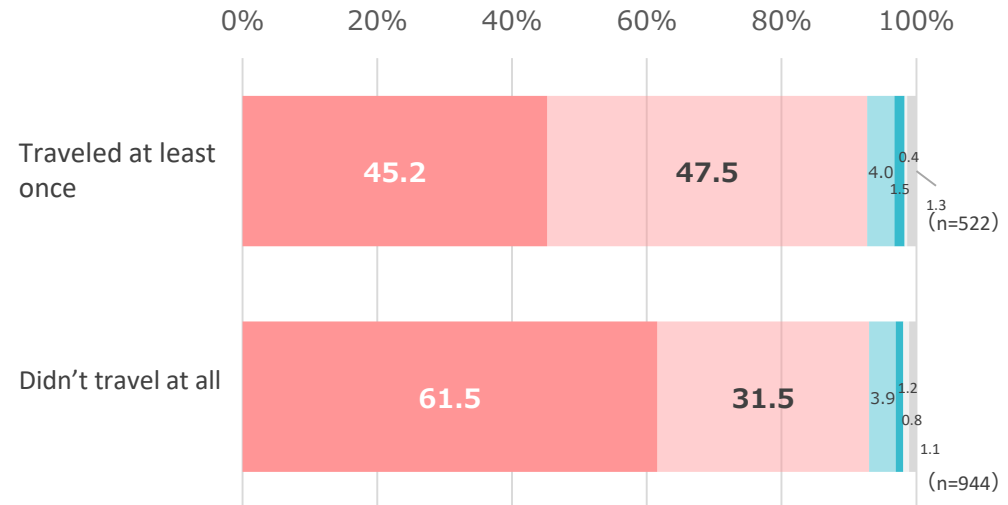
- Examining awareness of requests by usual frequency of domestic travel, for respondents who travel at least once every two years, the higher the typical frequency of travel, the higher the likelihood they answered, "I will analyze the situation and decide for myself while remaining aware of the requests".
- By comparison, those who had not recreationally traveled during 2020 either domestically or internationally were more likely to follow the requests, at 60%.

Q. To what extent does your awareness of requests from national or local governments (e.g., refraining from going out, refraining from travel) impact your decision to travel? <May 2021 Survey>

Per usual frequency of travel



Domestic and international from January to December 2020. By whether tourism and recreation trips are offered



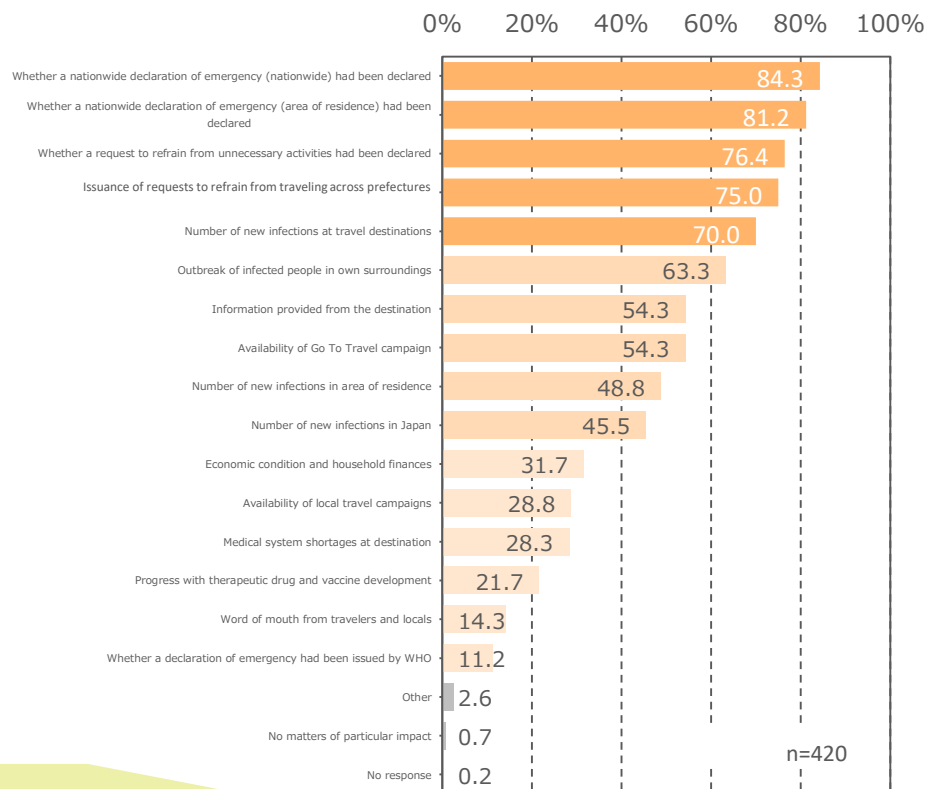
■ I will follow the requests when making my decision  
■ I will analyze the situation and decide for myself while remaining aware of the requests  
■ I will determine the extent of the risk and decide myself, regardless of the requests  
■ I'm not concerned about the requests; I'll follow what others around me are doing  
■ Other  
■ No response

## Declaration of Emergency, Requests to Refrain from Travel/Going Out, Number of Infected All Impact Domestic Travel

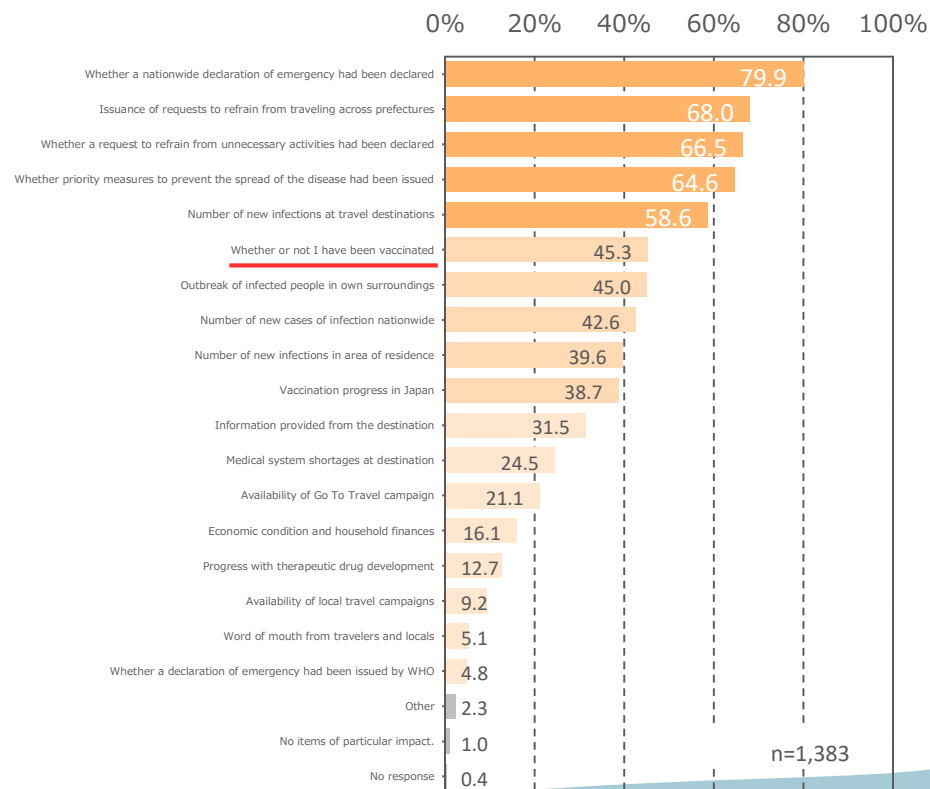
- Major factors affecting the decision to travel domestically during COVID-19 included whether a state of emergency had been declared, whether requests had been made to refrain from traveling or going out, and the number of newly infected people at the destination. There were no significant changes in the composition of the top ranked respondents from the December 2020 survey to the May 2021 survey.
- In the May 2021 survey, a new question, "Whether or not I have been vaccinated," ranked sixth (45.3%), indicating that vaccination status also impacts the decision to travel domestically. In Japan, vaccination of elderly people aged 65 years or older has been in full swing since May 2021. It will be interesting to see how this will impact the decision to travel as vaccine rates increase.

Q. What matters influenced your decision to travel domestically during the current pandemic? [Multiple answers]

<December 2020 Survey>



<May 2021 Survey>



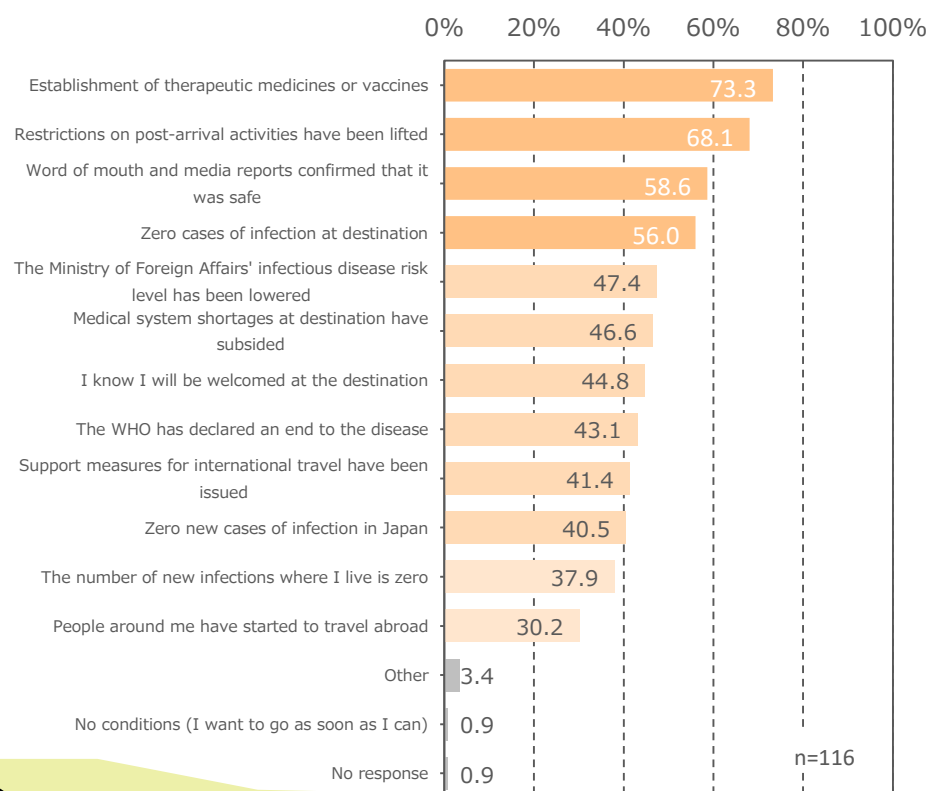
## Traveling Overseas: Therapeutic Medicines or Vaccines are Preconditions

- For conditions for traveling overseas, in the December 2020 survey the highest response was “Establishment of therapeutic medicines or vaccines” at 73.3%. For the May 2021 Survey “I’ve been able to be vaccinated” had the highest response rate (60.0%) revealing the high expectations regarding vaccinations when traveling overseas.

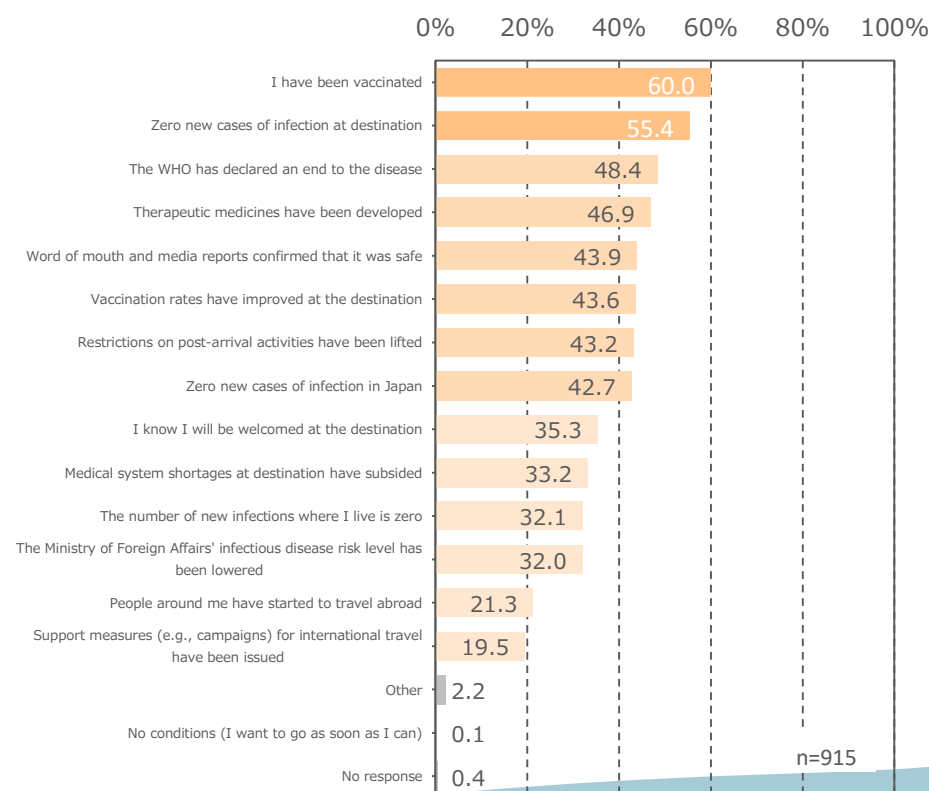
Q. After travel restrictions and destination entry restrictions have been eased, what conditions would need to be met for you to travel internationally?

[Multiple answers]

<December 2020 Survey>



<May 2021 Survey>



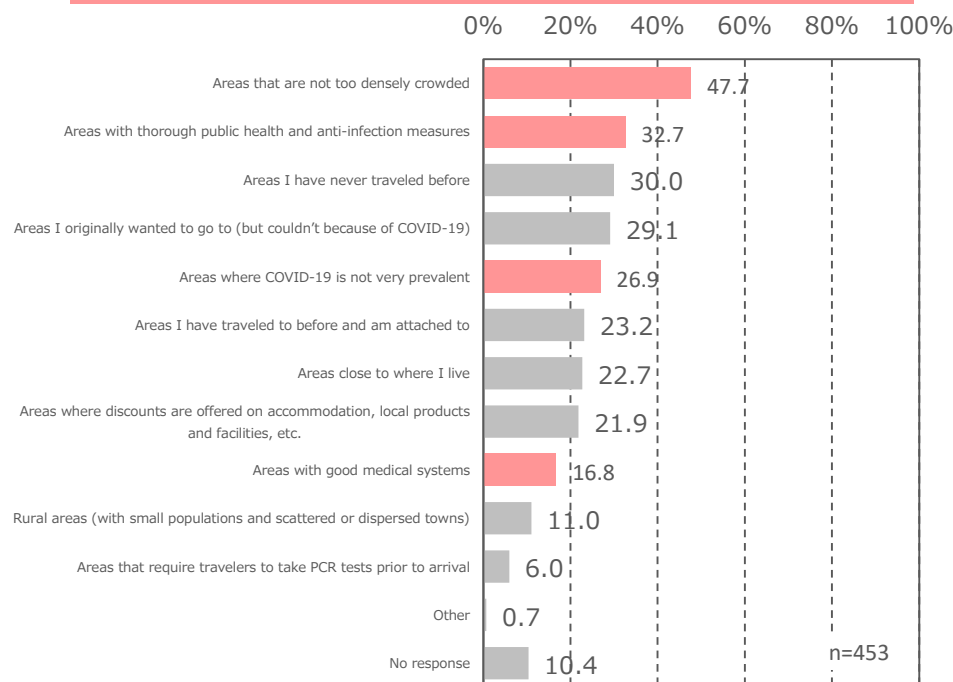
## Choosing a Destination During COVID-19: **Avoiding Closed Spaces/Infection** Are Preconditions

- Nearly half of the respondents cited "areas that are not too densely crowded" as places they would like to visit during the pandemic. On the other hand, 60% of the respondents cited "areas where there were many infected people" and "areas that are likely to be crowded" as areas they want to avoid.
- This suggests that measures to prevent the spread of infection, such as measures to avoid crowds and to maintain public health, are seen as a necessary preconditions for an area to be selected for travel.

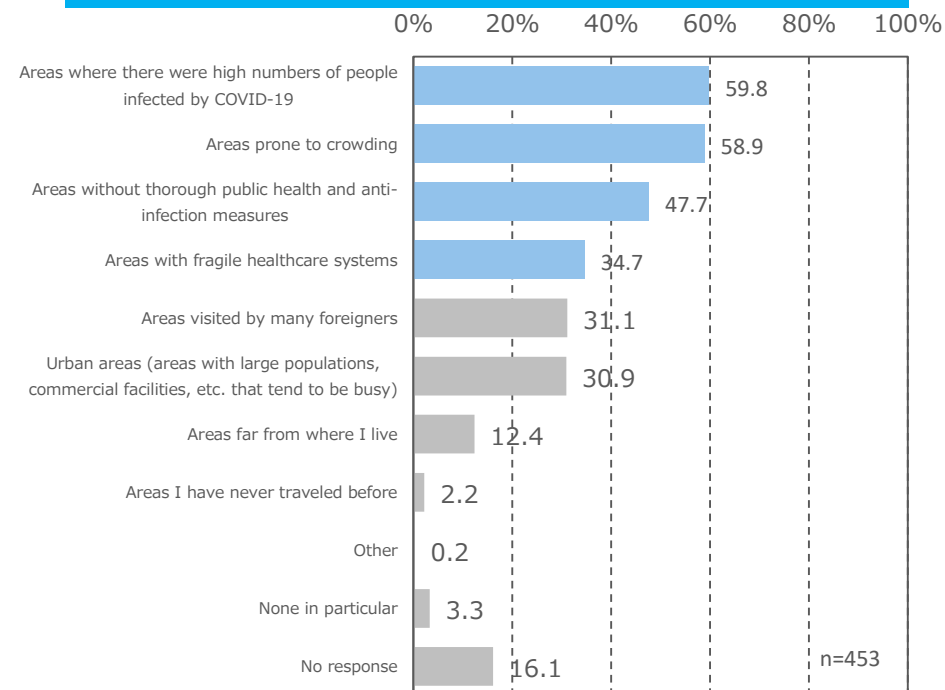
Q. If you travel during the current pandemic, which areas would you like to/not like to visit? [Multiple answers]

<December 2020 Survey>

### Areas respondents want to visit



### Areas respondents don't want to visit

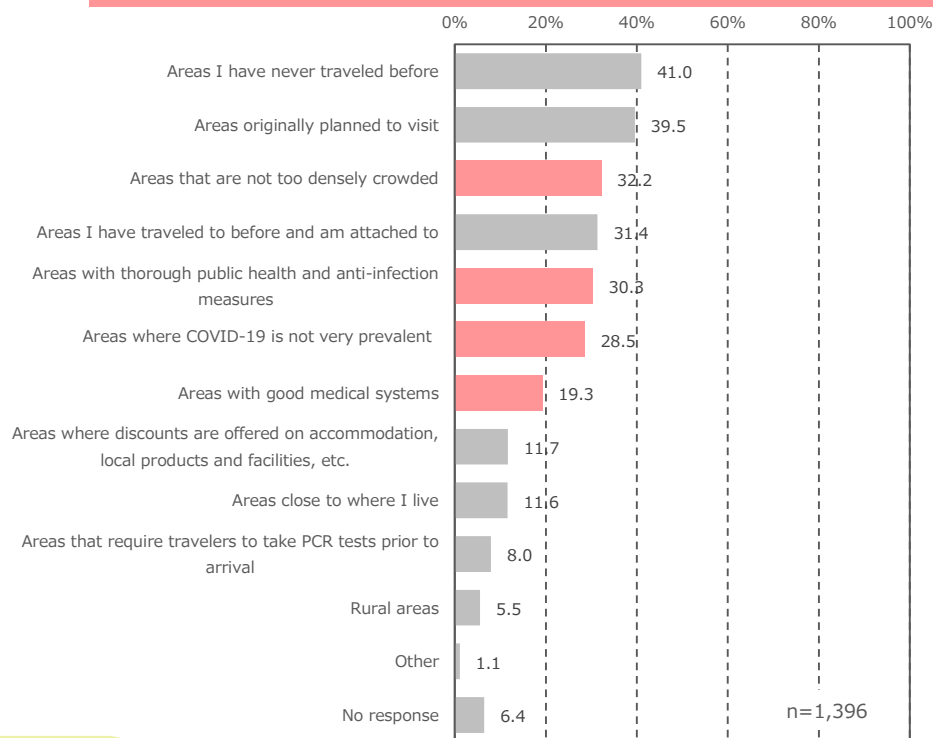


## Choosing Future Travel Destinations: **Inherent Attractiveness of Sightseeing Areas** Important

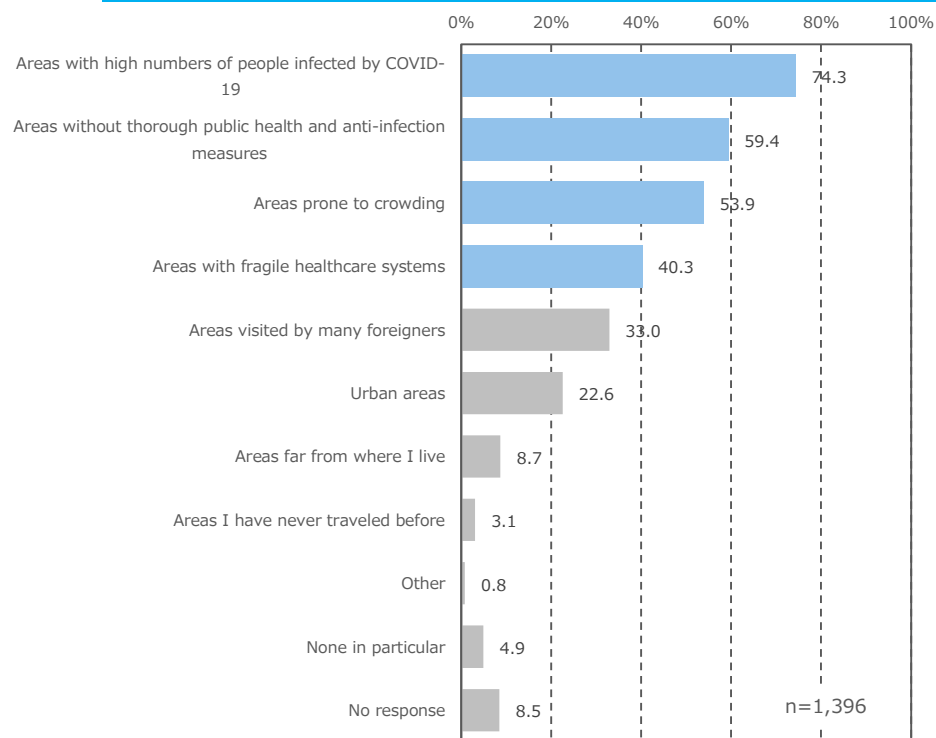
- For areas they would like to visit on future trips, 40% of the respondents cited "Areas they have never traveled to before" and "Areas they had originally planned to visit," indicating that not only measures against COVID-19, but also the inherent attractiveness of the tourist destinations were important reasons for their choice.
- However, areas where respondents were less inclined to go were "Areas with many infections people" (74.3%), "Areas without thorough public health and anti-infection measures" (59.4%), and "Areas that tend to be crowded" (53.9%).

Q. Which areas would you like to/not like to visit in the future? [Multiple answers] <May 2021 Survey>

### Areas respondents want to visit



### Areas respondents don't want to visit



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