

Trends Amongst Japanese Travelers During the COVID-19 Epidemic (Part 15)

Produced from Results of the JTBF Travelers Survey

October 11, 2021

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

Survey Results

1. Changes in Selection of Future Travel Destinations and Travel Behaviors

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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.

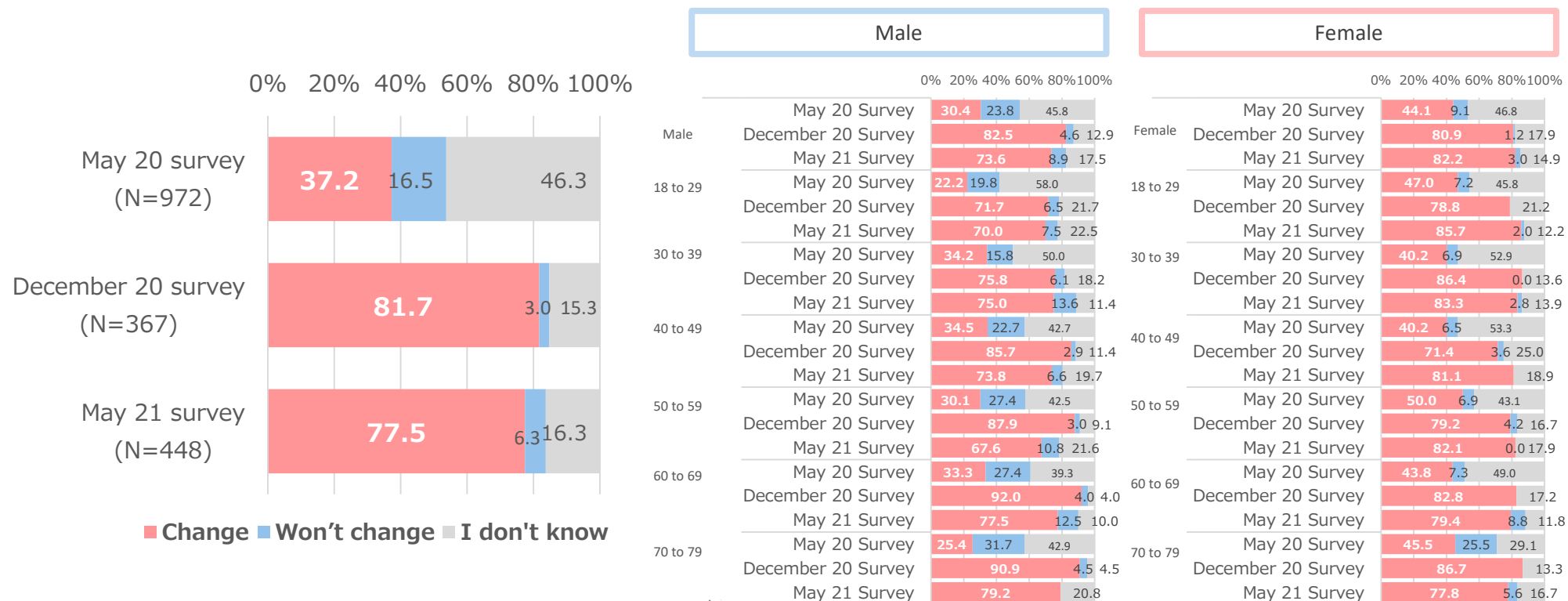
The survey was then sent by mail, and respondents were asked to fill out the questionnaire by themselves.

Selection of Future Travel Destinations and Travel Behaviors: 80% "Will Change"

- When asked about future changes to travel destinations and behavior, slightly less than half of the respondents in the May 2020 answered "Unsure," while 80% of the respondents in the December 2020 and May 2021 surveys answered "Will change." Many respondents believed that travel will change after COVID-19.
- Examining the most recent May 2021 survey by sex and age group, women were more likely to say "change" than men, except those in their 70s.

Q. Do you think that COVID-19 will change your future travel choices and your behavior at your destination?

(After COVID-19 is contained/only those who indicated they would like to travel during the pandemic, excludes non-responses)



Attempt to Avoid Crowds and Group Activities During Future Travel

- When planning future travel, there were high levels of awareness related to avoiding crowds, such as "avoiding crowded places," "avoiding crowded dates, periods, and seasons," "avoiding crowded times," and "checking the level of crowding in advance."
- COVID-19 has emphasized the need for more private tours, with respondents expressing they want to "refrain from participating in group tours with many other participants" or "refrain from participating in bus tours" altogether, as well as preferring to "travel alone or with a small group of close friends."

Q. What will you stay aware of when planning your trip and during activities at your destination? [Multiple answers]

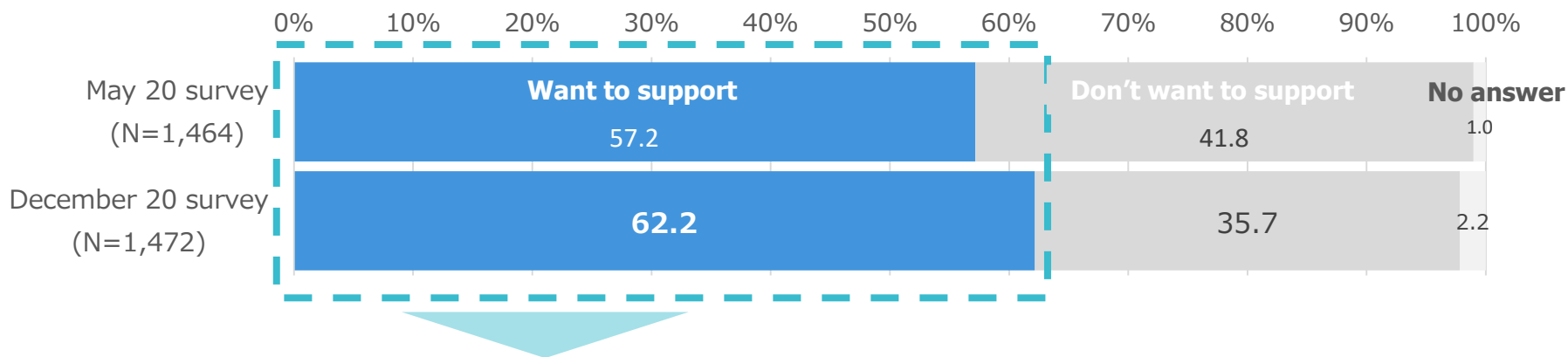
(After COVID-19 is contained/only those who indicated they would like to travel during the pandemic, excludes non-responses)

		December 2020 Survey (n=379)	May 2021 Survey (n=441)	increase and decrease
Avoid congestion	Avoid crowded places.	83.9	71.0	-12.9
	Avoid holidays and crowded times and seasons.	62.3	60.8	-1.5
	Avoid crowded times.	57.0	58.3	1.3
	Check crowding in advance.	52.0	55.6	3.6
Participation in tours, etc.	Refrain from participating in group tours with many other participants.	63.9	49.4	-14.4
	Refrain from participating in bus tours.	54.1	42.4	-11.7
	Refrain from participating in group trips related to work, communities, clubs, etc.	46.2	35.8	-10.3
	Refrain from participating in tours where guides provide specialized commentary on local nature and culture.	16.1	11.1	-5.0
Creating travel plans	Travel alone or with a small group of close acquaintances.	49.1	54.9	5.8
	Refrain from using public transportation (trains, buses, boats, etc.)	49.9	30.8	-19.0
	Refrain from stopping at more than one location.	25.9	18.8	-7.0
	Shorten the time and days spent at the destination.	25.1	17.7	-7.4
	Allow more leeway and longer stays at the destination.	7.1	12.0	4.9
Accommodation	At onsen ryokan hotels, select rooms with a private bath, such as an open-air bath.	27.2	30.8	3.7
	Refrain from using bed and breakfast-type accommodation.	29.6	26.8	-2.8
	Select a tourist facility (amusement park, museum, garden, etc.) that can be reserved.	14.2	19.7	5.5
Other	Use contactless payments whenever possible.	35.4	36.1	0.7
	Refrain from using large Japanese-style baths with many other.	32.2	27.9	-4.3

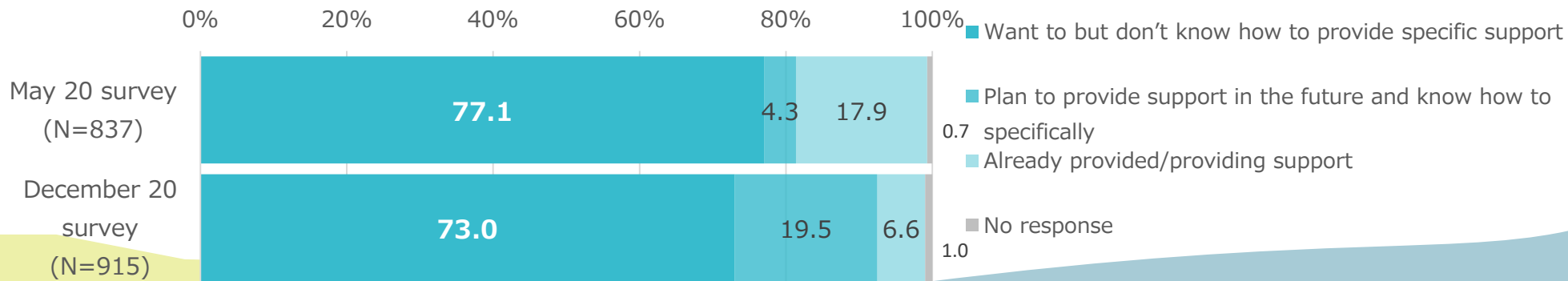
Support for Tourism Areas: 70% “Want to But Don't Know How”

- When asked about intent to support tourism areas affected by COVID-19, sixty percent said they “Want to provide support” in both the May and December 2020 surveys.
- However, when those who said that they would like to provide support were asked about their experience doing this, more than 70% responded that they “Didn’t know how to provide specific support.” Providing these individuals with information about what tourism areas would like them to do may lead to further support.

Q. Would you like to support tourism areas that have experienced a significant decrease in tourist numbers and have been impacted economically by COVID-19?



Q. Have you provided support to tourism areas affected by COVID-19?



Support for Tourism Areas **Increased Willingness to "Travel There"**

- When those who knew of specific ways to support tourism areas and those who had already provided or were already providing support were asked about specific details, the top responses in both the May 2020 and December 2020 surveys were "Purchasing of products from the area via the Internet," "Traveling there," and "Donating through the hometown tax system."
- In the December 2020 survey, "Purchasing tickets in advance for use after COVID-19 has been contained" and "Traveling there" increased by more than 10 points, suggesting that the intention to visit these areas is increasing.

Q. What kind of specific support have you provided/do you plan to provide to tourism areas affected by COVID-19?

(Only those who know of specific ways to provide support to tourism areas and those who have already provided or are providing support)

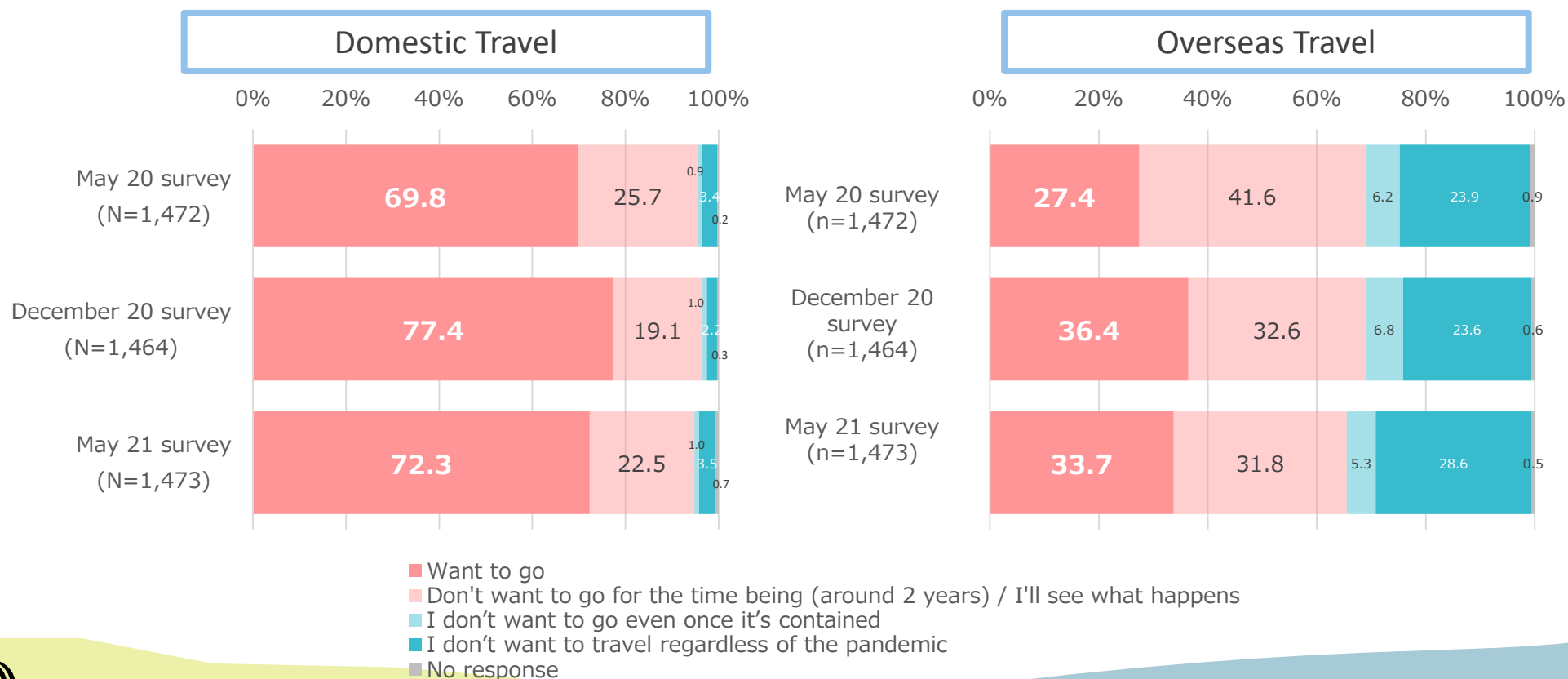
[Multiple answers]

	May 2020 Survey (n=186)	December 2020 Survey (n=238)
Purchase regional products through the Internet	33.9	50.0
Travel locally	38.7	49.2
Use hometown tax donations	27.4	30.7
Purchasing tickets in advance for use after COVID-19 has been contained	9.7	20.6
Purchase of local products at regional product specialty stores and other stores	21.0	19.7
Crowdfunding donations	7.5	11.8
Disseminate knowledge of regions in need	0.5	0.8
Other	4.3	1.7

Intent to Travel after COVID-19: 70% Domestic, 30% International

- When asked if they would like to go on sightseeing and recreational trips after COVID-19 is contained, approximately 70% of respondents said they would like to go on a domestic trip at any time during the survey period, with a particularly high willingness to travel in the December 2020 survey conducted during the GoTo Travel campaign period.
- However, only about 30% of respondents wanted to go on an overseas trip, while 30% to 40% said they "Don't want to go for the time being / will see what happens". COVID-19 has led to a cautious attitude toward international travel.

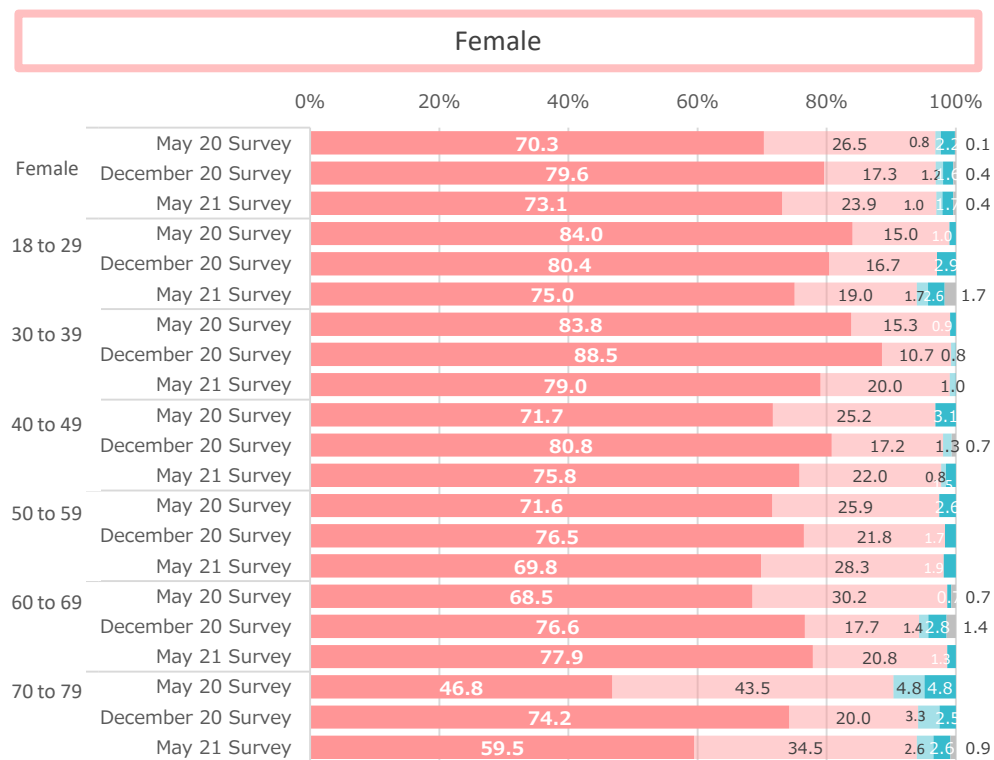
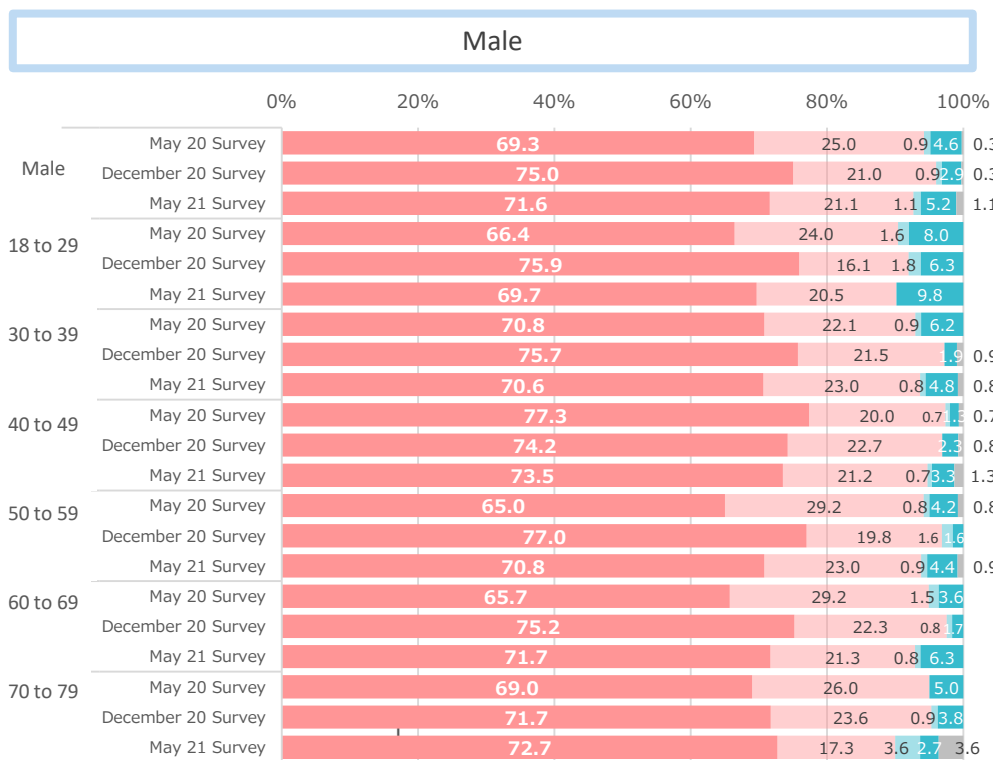
Q. Do you want to go on a sightseeing/recreational trip after COVID-19 is contained?



Domestic Travel After Containment: More than 75% of Women in their 20s and 30s Want to Travel

- For willingness to travel domestically after COVID-19 is contained, more than 75% of women in their 20s and 30s expressed they "want to travel" in both survey periods, indicating a high level of willingness to travel.
- Examining the changes in "want to travel" among women in their 70s, the percentage dropped below 60% in May 2020 and May 2021, when a state of emergency was declared, but reached close to 75% in December 2020, showing a greater fluctuation than in the other gender groups.

Q. Do you want to go on a domestic sightseeing/recreational trip after COVID-19 is contained?



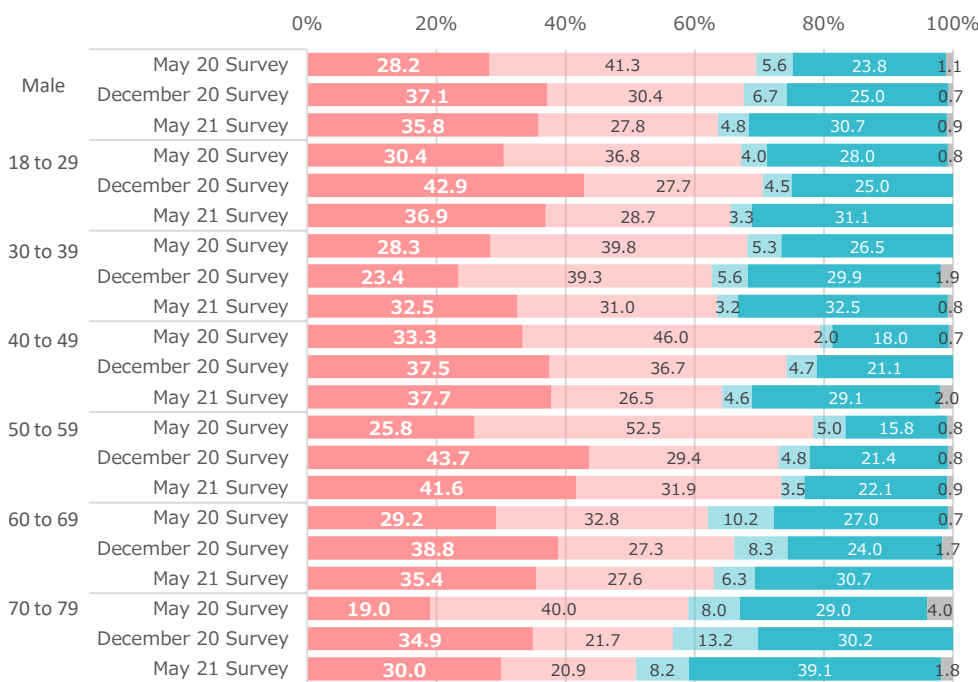
■ Want to go
 ■ Don't want to go for the time being (around 2 years) / I'll see what happens
 ■ I don't want to go even once it's contained
 ■ I don't want to travel regardless of the pandemic
 ■ No response

International Travel After Containment: More than 40% of Women in their 20s Want to Travel

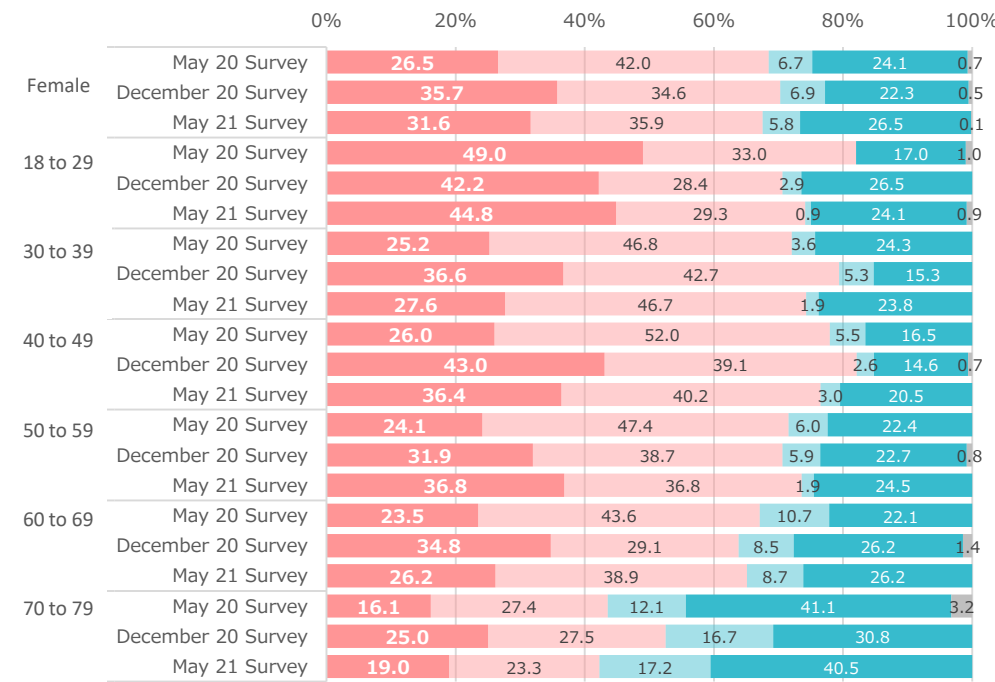
- There was no marked difference in willingness to travel abroad after the pandemic between men and women.
- The percentage of women in their 20s who "want to travel" exceeded 40% in all survey periods, while the percentage of women in their 70s was only 25% at most, indicating age-based differences.

Q. Do you want to go on an international sightseeing/recreational trip after COVID-19 is contained?

Male



Female

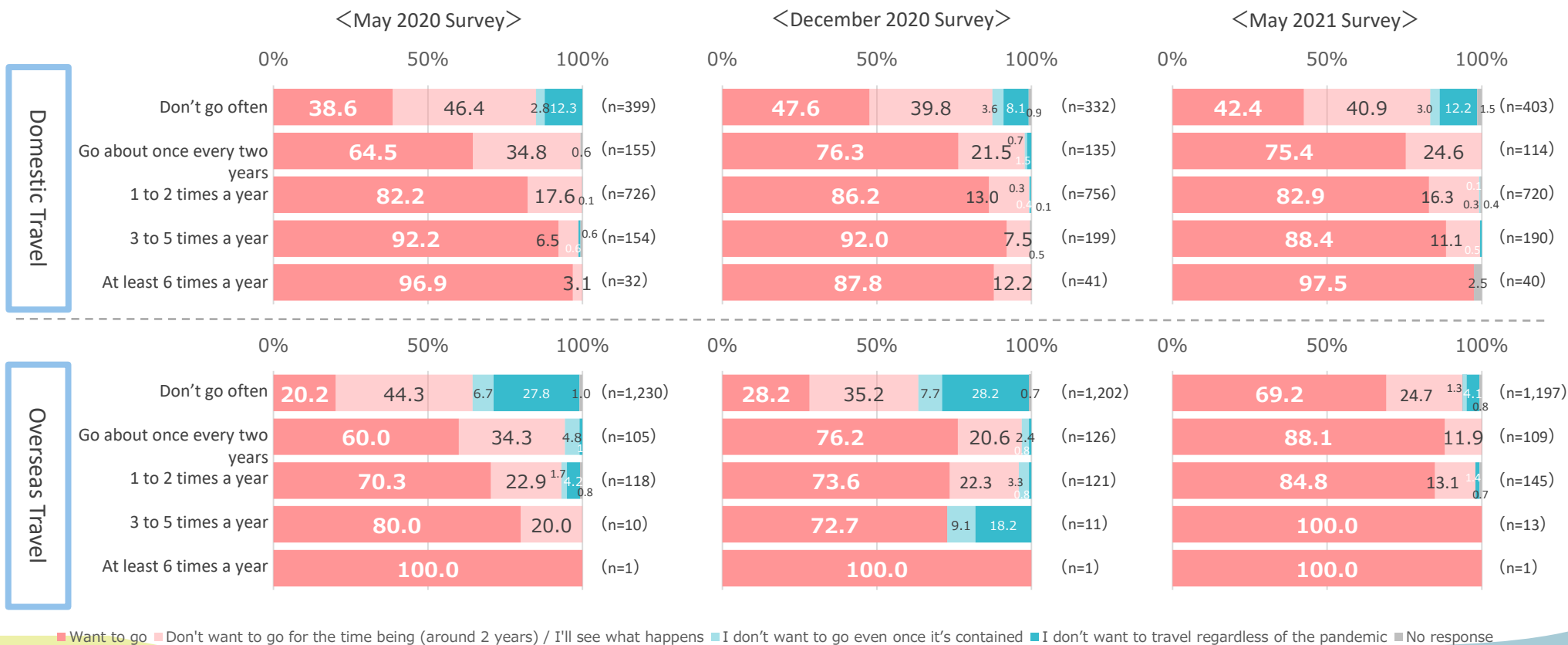


■ Want to go ■ Don't want to go for the time being (around 2 years) / I'll see what happens ■ I don't want to go even once it's contained ■ I don't want to travel regardless of the pandemic ■ No response

Travel After COVID-19: Those Who Travel More Frequently More Willing

- Examining intent to travel after COVID-19 by frequency of travel reveals that the higher the respondent's typical frequency of domestic or international travel, the higher their intent to travel is.
- When examining domestic travel in the most recent May 2021 survey, 3.0% of respondents who do not travel often say they "don't want to go even once it's contained," while the percentage of those who go more than once every two years is almost zero. Among those who traveled regularly, few seem to have lost their willingness to travel. However, even among those who had traveled once or twice a year, 15% said they "Don't want to go for the time being / will see what happens", suggesting that there are individual differences in the time it takes to recover desire to travel.

Q. Do you want to go on a sightseeing/recreational trip after COVID-19 is contained?



Want to go | Don't want to go for the time being (around 2 years) / I'll see what happens | I don't want to go even once it's contained | I don't want to travel regardless of the pandemic | No response

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