

Trends Amongst Japanese Travelers During the COVID-19 Epidemic (Part 20)

Produced from Results of the JTBF Travelers Survey

May 13, 2022

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

Results of the survey

JTBF Travelers Survey: Additional Analysis	... p.4
Method of the Analysis	... p.4
(1) Is domestic travel during COVID-19 more dangerous than daily life?	... p.5
(2) What do you think if you hear others are going to travel?	... p.6
(3) What do you think if travelers come to the area in which you reside?	... p.7
(4) Will your behaviors at destinations change after COVID-19 is contained?	... p.8
(Reference) Travel Intentions after COVID-19 is Contained, by Generation	... p.9

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

	Male								Female								
Age (years)	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	Total
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, 2021

	Male								Female								
Age (years)	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	Total
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

■ Third Quarter Survey (October 2021) Period covered by survey: July to September 2021 Survey period: October 1 to October 6, 2021

	Male								Female								
Age (years)	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	Total
Respondents (Individuals)	464	2,472	3,744	6,107	4,255	3,750	3,224	24,016	764	2,558	3,930	6,083	4,653	4,776	3,220	25,984	50,000
Composition Ratio (%)	0.9	4.9	7.5	12.2	8.5	7.5	6.4	48.0	1.5	5.1	7.9	12.2	9.3	9.6	6.4	52.0	100.0

■ Fourth Quarter Survey (January 2022) Period covered by survey: October to December 2021 Survey period: January 7 to January 14, 2022

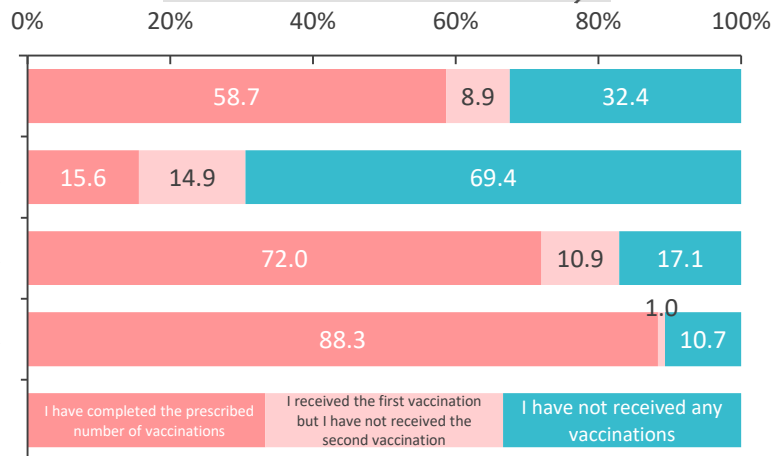
	Male								Female								
Age (years)	16-19	20-29	30-39	40-49	50-59	60-69	70-79	Subtotal	16-19	20-29	30-39	40-49	50-59	60-69	70-79	Subtotal	Total
Respondents (Individuals)	335	2,798	4,087	5,548	4,249	4,178	3,305	24,500	588	2,866	4,218	5,665	4,273	4,474	3,416	25,500	50,000
Composition Ratio (%)	0.7	5.6	8.2	11.1	8.5	8.4	6.6	49.0	1.2	5.7	8.4	11.3	8.5	8.9	6.8	51.0	100.0

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

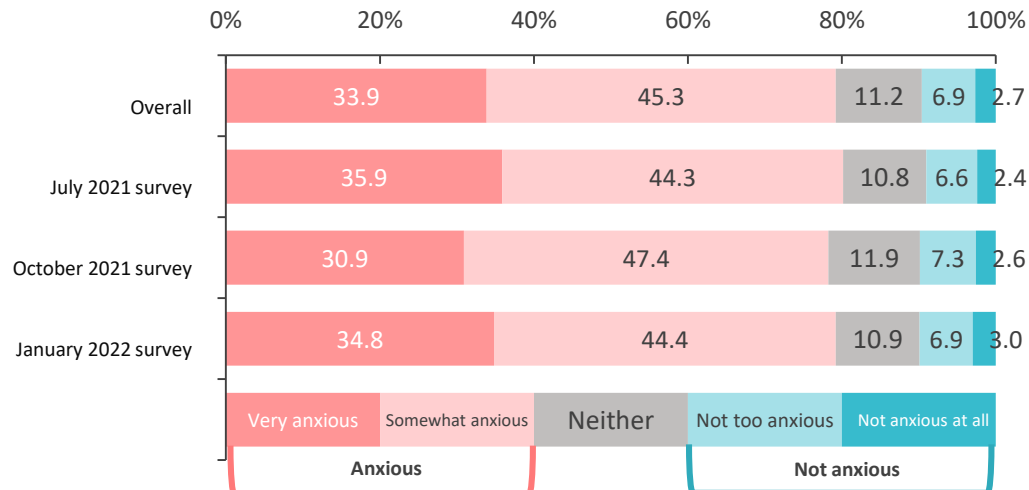
This report presents the results of the survey about the questions (1) Do you think domestic travel during COVID-19 is more dangerous than daily life? (2) What do you think about others traveling? (3) What do you think about travelers coming to the area in which you reside, and (4) Do you think your behaviors at destinations will change after COVID-19 is contained?

Regarding the method of the analysis, we tabulated data by sex and age, COVID-19 vaccination status, anxiety about COVID-19, travel intentions after containment, impact on household finances (for the aforementioned four items, refer below), and the degree of danger of domestic travel during COVID-19 when compared to daily life (refer to the next page).

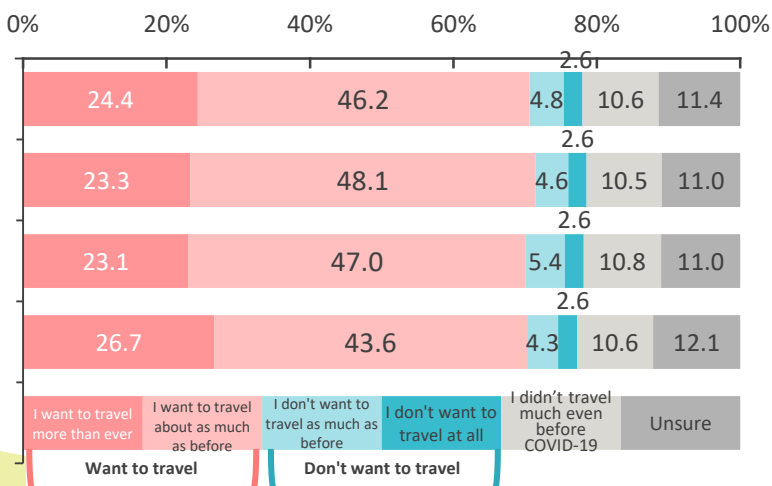
COVID-19 vaccination status



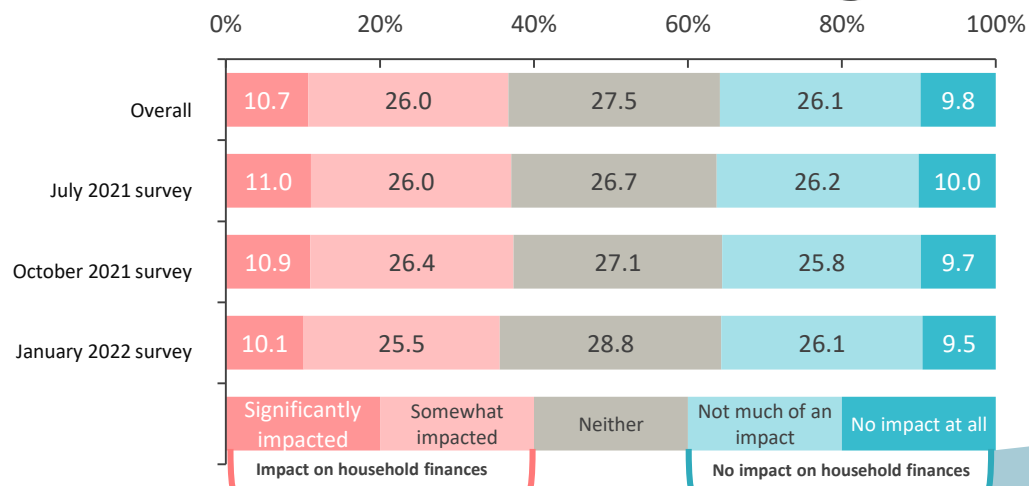
Anxiety about COVID-19



Travel intentions after COVID-19 is contained



Impact on household finances

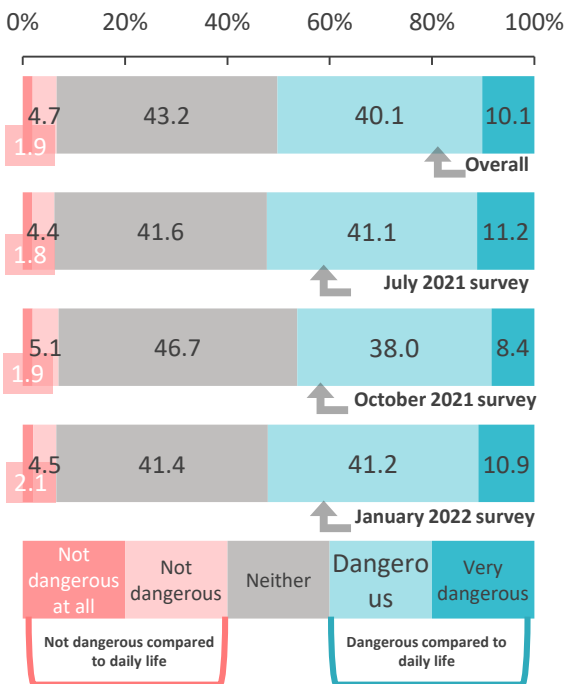


* Overall N=150,000, each survey's N=50,000

In the elderly and anxious groups there are many respondents who feel that domestic travel is dangerous compared to daily life

- When asked if they thought domestic travel during COVID-19 is more dangerous than daily life, approximately half of the respondents in all of the surveys answered "Dangerous compared to daily life (dangerous + very dangerous)". In the October 2021 survey which was conducted at a time when there were comparatively fewer infections, the percentage of respondents who thought it was dangerous was somewhat lower, as was anxiety (refer to the previous page).
- "Dangerous compared to daily life" scored low among "males in their 20s". Conversely, the percentage of respondents who answered "Dangerous compared to daily life" was high among the "elderly," "respondents anxious about COVID-19," "respondents for whom there is an impact on household finances," and "respondents who do not want to travel after containment," so about 60% answered "Dangerous". Among the elderly and respondents who had suffered a negative impact from COVID-19, there were many respondents who felt that domestic travel was dangerous.

Q. Do you think domestic travel is dangerous compared to daily life from the perspective of being infected with COVID-19?



		Not dangerous at all	Not dangerous	Neither	Dangerous	Very dangerous
Male	16-19	4.5	8.2	41.5	35.8	9.9
	20-29	4.7	9.7	46.0	31.7	7.9
	30-39	4.1	7.7	44.6	34.1	9.5
	40-49	3.5	6.7	45.9	33.5	10.3
	50-59	2.3	6.0	44.4	36.5	10.8
	60-69	1.6	4.9	39.6	43.4	10.5
	70-	0.8	3.3	36.9	48.9	10.1
Female	16-19	1.4	3.5	36.4	44.3	14.4
	20-29	1.6	4.5	43.2	41.5	9.2
	30-39	1.4	3.5	43.3	41.4	10.4
	40-49	1.3	3.3	44.2	40.7	10.6
	50-59	0.8	3.0	45.6	40.2	10.4
	60-69	0.7	2.3	42.3	44.9	9.7
	70-	0.5	2.1	41.1	46.1	10.1

		Not dangerous at all	Not dangerous	Neither	Dangerous	Very dangerous
COVID-19 vaccination status	I have completed the prescribed number of vaccinations	1.4	4.4	43.5	41.3	9.4
	I received the first vaccination but I have not received the second vaccination	5.2	41.9	41.7	41.7	9.9
	I have not received any vaccinations	3.0	4.9	43.1	37.5	11.5
		4.9	43.1	37.5	11.5	
Anxiety about COVID-19	Anxious	0.5	2.5	38.0	47.1	11.8
	Not anxious	14.6	20.4	48.9	10.7	5.4
Impact on household finances	Impact on household finances	1.6	4.2	37.0	44.0	13.1
	No impact on household finances	3.1	6.3	44.0	37.9	8.7
Travel intentions after COVID-19 is contained	Want to travel	2.0	5.5	44.5	40.0	8.1
	Don't want to travel	1.4	2.8	31.1	46.1	18.6

* Cross-tabulated based on the answers overall (N=150,000)

"Approve" travel by others: **over 40% among respondents in their 10s to 20s and 10% of respondents in their 70s**

- As of January 2022, regarding others traveling, "Oppose (somewhat oppose + oppose)" at 40% was much higher than "Approve (approve + somewhat approve)" at 20%.
- Looking at the results by age group, there is a big difference depending on age group. A permissive attitude toward travel can be seen more among "young people". In addition, respondents who "Approve" of others traveling accounted for 60% to 70% of "respondents not anxious about COVID-19" and "respondents who do not feel that domestic travel is dangerous compared to daily life".

Q. What do you think if you hear others around you are going to travel now? (January 2022 survey)

January 2022 survey overall (N=50,000)

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



- Approve (I think it is ok to travel)
- Somewhat approve (I somewhat think it is ok to travel)
- Neither
- Somewhat oppose (I somewhat think it is better not to travel)
- Oppose (I think it is better not to travel)

		Approve	Somewhat approve	Neither	Somewhat oppose	Oppose
Male	16-19	15.8	33.7	29.0	15.5	6.0
	20-29	13.9	31.4	33.1	14.8	6.8
	30-39	10.9	23.7	36.8	19.2	9.4
	40-49	7.9	18.6	39.2	22.4	12.0
	50-59	5.7	14.9	40.0	25.0	14.4
	60-69	3.2	13.7	37.9	30.2	15.1
	70-	1.9	12.5	34.5	35.3	15.9
Female	16-19	11.2	32.1	30.8	17.5	8.3
	20-29	8.5	31.6	31.5	20.6	7.8
	30-39	5.7	21.8	34.8	26.1	11.6
	40-49	4.2	16.1	37.2	29.2	13.4
	50-59	2.9	13.6	39.1	29.3	15.1
	60-69	2.2	11.6	37.8	33.7	14.8
	70-	1.4	10.4	35.6	35.7	16.9

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

		Approve	Somewhat approve	Neither	Somewhat oppose	Oppose
COVID-19 vaccination status	I have completed the prescribed number of vaccinations	5.0	18.1	36.7	27.8	12.4
	I received the first vaccination but I have not received the second vaccination	9.5	22.7	35.0	22.3	13.6
	I have not received any vaccinations	10.7	16.5	37.3	19.2	16.3
Anxiety about COVID-19	Anxious	2.8	15.9	35.1	31.4	14.8
	Not anxious	28.2	30.6	27.3	7.3	6.6
Impact on household finances	Impact on household finances	5.1	17.5	33.6	28.3	15.6
	No impact on household finances	8.3	21.4	32.4	26.1	11.8
Danger recognition about domestic travel	Not dangerous compared to daily life	39.6	33.7	19.1	4.9	2.7
	Dangerous compared to daily life	1.4	9.0	29.4	38.0	22.3
Travel intentions after COVID-19 is contained	Want to travel	6.8	21.9	35.2	25.9	10.2
	Don't want to travel	2.4	8.4	33.1	31.8	24.3

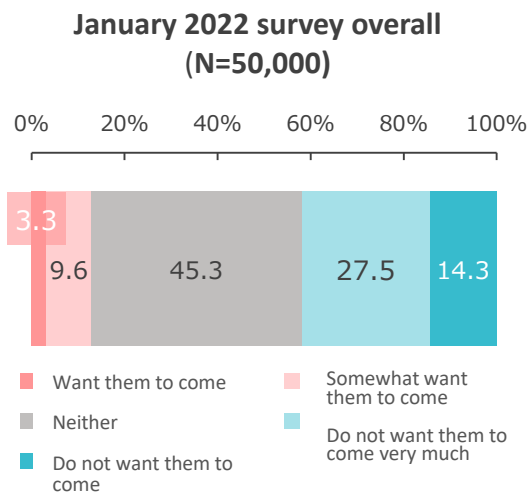
0% 20% 40% 60% 80% 100%

* Cross-tabulated based on the answers at the time of the January 2022 survey

Regarding travelers coming to the area in which they reside, only 10% of respondents "want them to come"

- At the time of the January 2022 survey, when asked about travelers visiting the area in which they reside, only 10% of the respondents answered that they "Want them to come (want them to come + somewhat want them to come)" and respondents who answered that they "Do not want them to come (do not want them to come very much + do not want them to come)" accounted for 40% of the total.
- The percentage of respondents answering "Want them to come" decreased and the percentage answering "Do not want them to come" increased in higher age groups. Furthermore, "Do not want them to come" accounted for 60% of "respondents who feel that domestic travel is dangerous compared to daily life" and "respondents who do not want to travel after containment".

Q. What do you think about travelers visiting the area where you live? (January 2022 survey)



		Age Group	Want them to come	Somewhat want them to come	Neither	Do not want them to come very much	Do not want them to come very much
Male	16-19	9.0	19.1	43.9	18.2	9.9	
	20-29	7.2	17.2	45.2	18.6	11.7	
	30-39	6.9	13.3	45.9	20.6	13.4	
	40-49	5.3	10.8	47.8	21.2	14.9	
	50-59	3.4	9.7	48.6	22.6	15.7	
	60-69	2.3	8.0	42.8	31.0	15.8	
	70-	1.2	7.0	38.9	37.3	15.5	
Female	16-19	4.3	13.3	43.2	25.5	13.8	
	20-29	3.2	12.8	45.0	25.5	13.5	
	30-39	2.7	9.6	45.0	27.6	15.2	
	40-49	2.2	8.8	46.5	27.9	14.6	
	50-59	1.9	7.0	47.8	29.2	14.1	
	60-69	1.5	6.5	44.5	34.2	13.3	
	70-	1.1	5.4	42.9	37.1	13.6	

		Response	Want them to come	Somewhat want them to come	Neither	Do not want them to come very much	Do not want them to come very much
COVID-19 vaccination status	I have completed the prescribed number of vaccinations	3.1	9.8	45.3	28.3	13.5	
	I received the first vaccination but I have not received the second vaccination	14.6	45.3	21.3	16.8		
	I have not received any vaccinations	4.7	7.3	45.5	21.6	20.9	
Anxiety about COVID-19	Anxious	2.1	18.5	42.3	31.4	15.7	
	Not anxious	13.1	17.3	47.0	11.6	11.0	
Impact on household finances	Impact on household finances	3.7	10.2	40.7	28.5	16.9	
	No impact on household finances	4.1	10.5	43.5	28.1	13.8	
Danger recognition about domestic travel	Not dangerous compared to daily life	20.2	26.1	38.1	8.9	6.6	
	Dangerous compared to daily life	1.5	5.7	34.6	35.9	22.3	
Travel intentions after COVID-19 is contained	Want to travel	4.0	11.5	45.5	27.5	11.6	
	Don't want to travel	1.5	5.6	35.8	30.6	26.8	

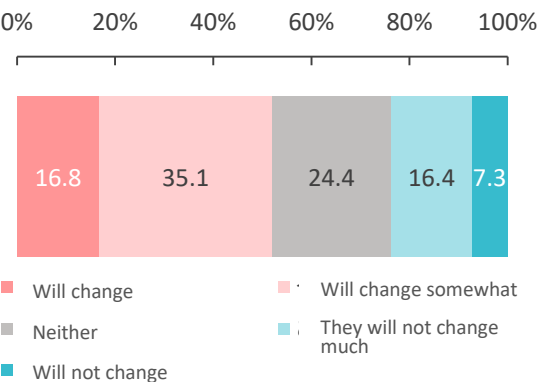
* Cross-tabulated based on the answers at the time of the January 2022 survey

Behaviors at destinations after containment: "Will change" depending on anxiety about COVID-19 and impact on household finances

- At the time of the October 2021 survey, the percentage of respondents who answered that the things they want to do at their destinations after COVID-19 is contained "Will change (I think they will change + I think they will change somewhat)" exceeded 50%. On the other hand, 25% answered that they "Will not change (I think they will not change much + I think they will not change)".
- Respondents answering that they "Will not change" accounted for approximately half of "respondents not anxious about COVID-19". Focusing on anxiety about COVID-19, the percentage of "respondents for whom there is an impact on household finances" who answered they "Will change" was 10 percentage points higher compared to "respondents for whom there is no impact".

Q. Do you think the things you want to do at your destination will change after the containment of COVID-19 compared to before COVID-19 (the COVID-19 epidemic began)? (October 2021 survey)

October 2021 survey overall (N=50,000)



		Will change	Will change somewhat	Neither	They will not change much	Will not change
Male	16-19	21.6	34.9	19.2	13.4	11.0
	20-29	20.5	32.5	22.2	15.0	9.8
	30-39	17.8	33.3	24.0	14.6	10.4
	40-49	16.9	31.8	27.1	14.9	9.4
	50-59	16.0	33.7	27.2	14.8	8.3
	60-69	16.6	35.3	23.8	15.8	8.5
	70-	14.7	35.6	22.6	20.1	6.9
Female	16-19	28.3	34.9	16.2	12.8	7.7
	20-29	22.2	36.7	17.6	16.7	6.8
	30-39	18.0	35.0	23.1	17.6	6.3
	40-49	14.8	35.7	26.5	16.8	6.2
	50-59	15.7	35.3	26.4	16.7	5.9
	60-69	15.5	39.7	24.0	16.5	4.3
	70-	14.9	37.1	23.6	19.4	4.9

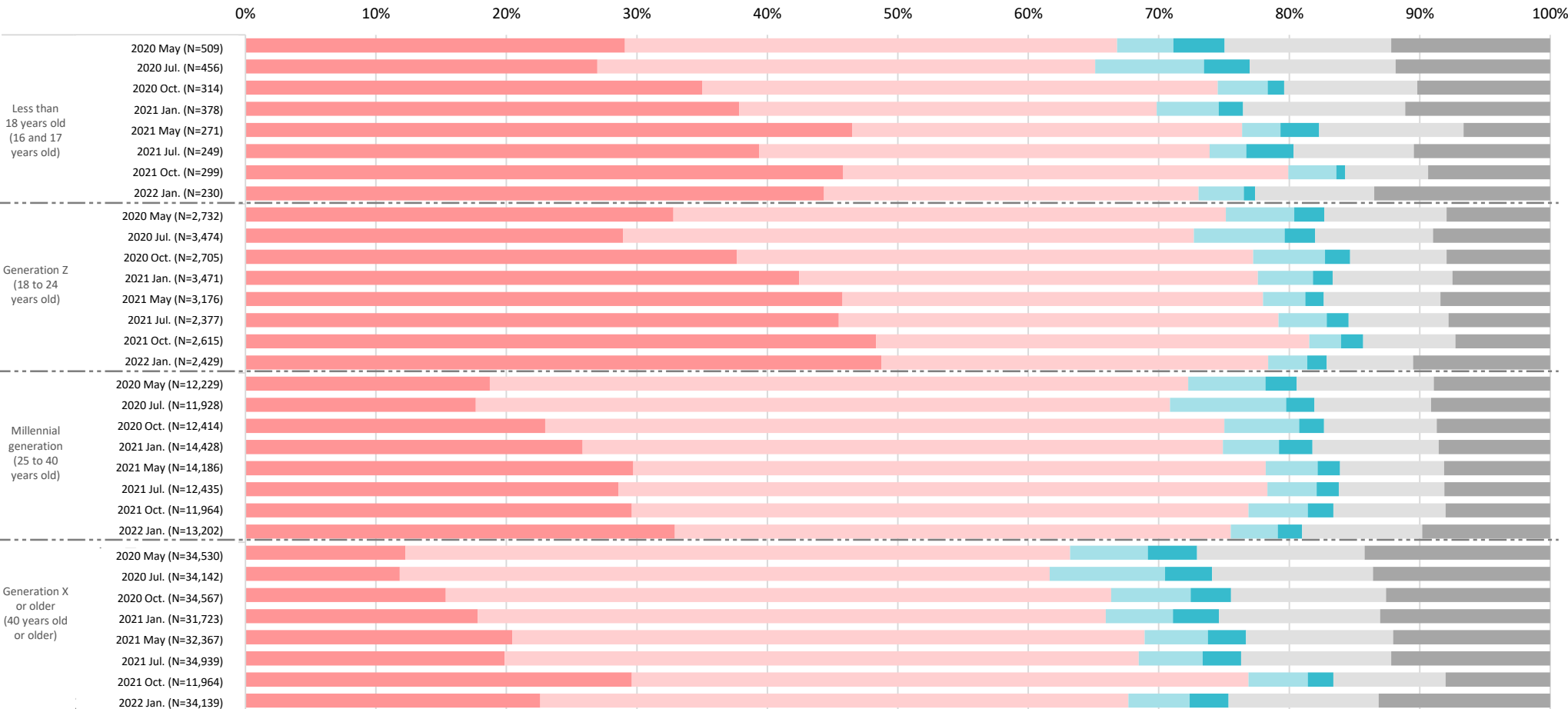
		Will change	Will change somewhat	Neither	They will not change much	Will not change
COVID-19 vaccination status	I have completed the prescribed number of vaccinations	17.5	37.0	23.3	16.2	6.0
	I received the first vaccination but I have not received the second vaccination	16.6	35.6	25.7	16.2	6.0
	I have not received any vaccinations	14.1	26.8	28.2	17.3	13.6
Anxiety about COVID-19	Anxious	18.8	38.1	22.2	15.3	5.6
	Not anxious	11.3	22.8	18.4	25.6	21.9
Impact on household finances	Impact on household finances	22.5	39.4	20.0	12.6	5.6
	No impact on household finances	14.3	31.7	19.2	23.4	11.4
Danger recognition about domestic travel	Not dangerous compared to daily life	17.4	29.7	15.3	20.2	17.4
	Dangerous compared to daily life	21.7	34.2	21.8	14.6	7.6
Travel intentions after COVID-19 is contained	Want to travel	18.3	38.1	20.4	17.4	5.8
	Don't want to travel	19.2	35.7	24.4	10.4	10.2

*Cross-tabulated based on the answers at the time of the October 2021 survey

Travel intentions after containment are tending toward recovery in all generations: **this is especially marked in generation Z**

Looking at the trends in travel intentions after COVID-19 is contained by generation, there is a tendency toward recovery in all generations. In particular, a higher percentage than other generations of "generation Z (18 to 24 years old at the time of the 2021 survey)," a generation which is expected to drive the travel market going forward, answered from the beginning of COVID-19 that "I want to travel more than ever," and this figure approached 50% in the most recent January 2022 survey.

Travel intentions after COVID-19 is contained 

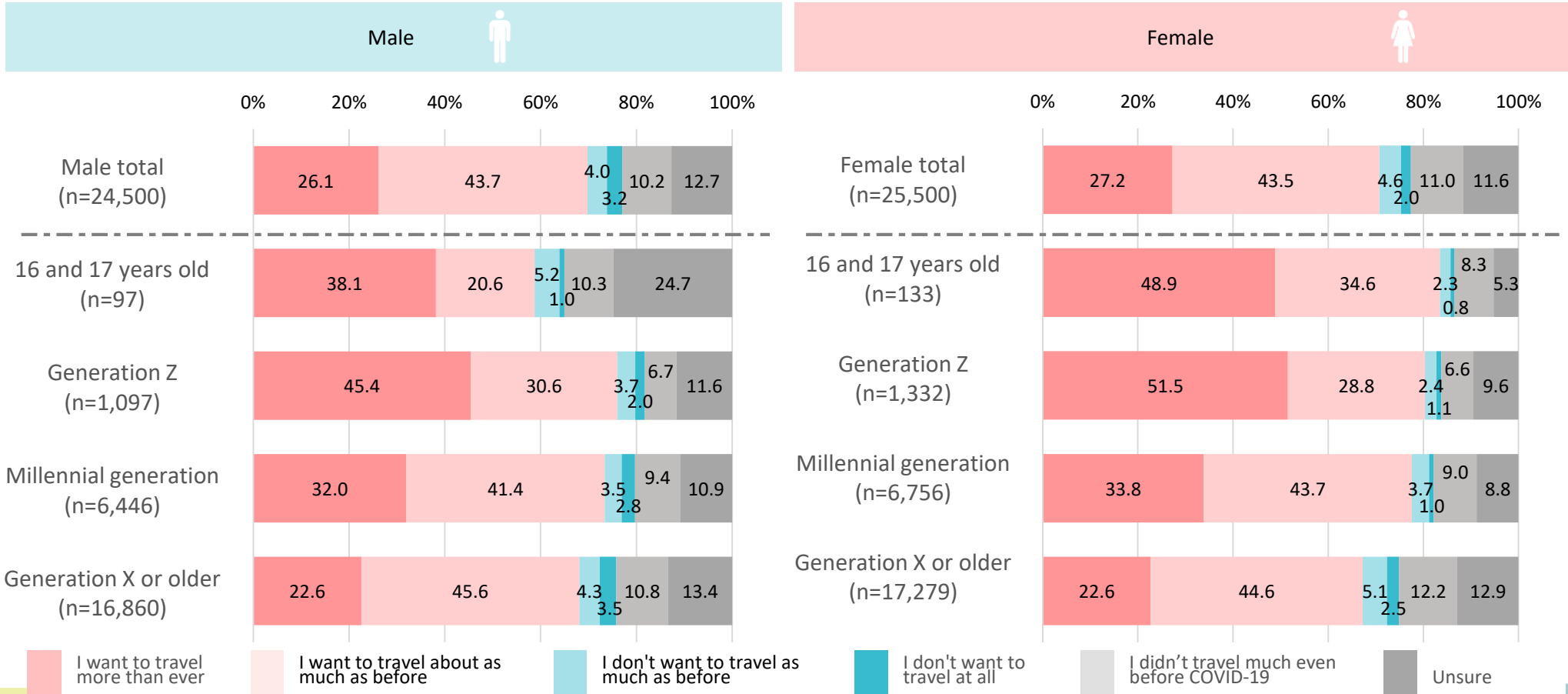


■ I want to travel more than ever
 ■ I want to travel about as much as before
 ■ I don't want to travel as much as before
 ■ I don't want to travel at all
 ■ I didn't travel much even before COVID-19
 ■ Unsure

After containment: More than half of females in generation Z answered "I want to travel more than ever"

- Looking at the results in the most recent January 2022 survey by sex and generation, travel intentions were particularly high among "females in generation Z" with over 50% answering that "I want to travel more than ever".

Travel intentions after COVID-19 is contained (January 2022 survey) 



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