

Trends Amongst Japanese Travelers During the COVID-19 Epidemic (Part 22)

Produced from Results of the JTBF Travelers Survey

September 30, 2022

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

Survey Results

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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 5 to June 5, 2020

Male									Female								
Age (years)	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	Total
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

Male									Female								
Age (years)	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	Total
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

Male									Female								
Age (years)	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	Total
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

■ December 2021 Survey Survey Period: November 24 to December 30, 2021

Male									Female								
Age (years)	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	Total
Respondents (Individuals)	19	75	102	135	114	152	97	694	20	84	112	150	123	145	132	766	1,460
Composition Ratio (%)	1.3	5.1	7.0	9.2	7.8	10.4	6.6	47.5	1.4	5.8	7.7	10.3	8.4	9.9	9.0	52.5	100.0

■ May 2022 Survey Survey Period: May 13 to June 8, 2021

Male									Female								
Age (years)	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	Total
Respondents (Individuals)	12	86	98	146	126	118	130	716	8	88	97	124	115	124	141	697	1,413
Composition Ratio (%)	0.8	6.1	6.9	10.3	8.9	8.4	9.2	50.7	0.6	6.2	6.9	8.8	8.1	8.8	10.0	49.3	100.0

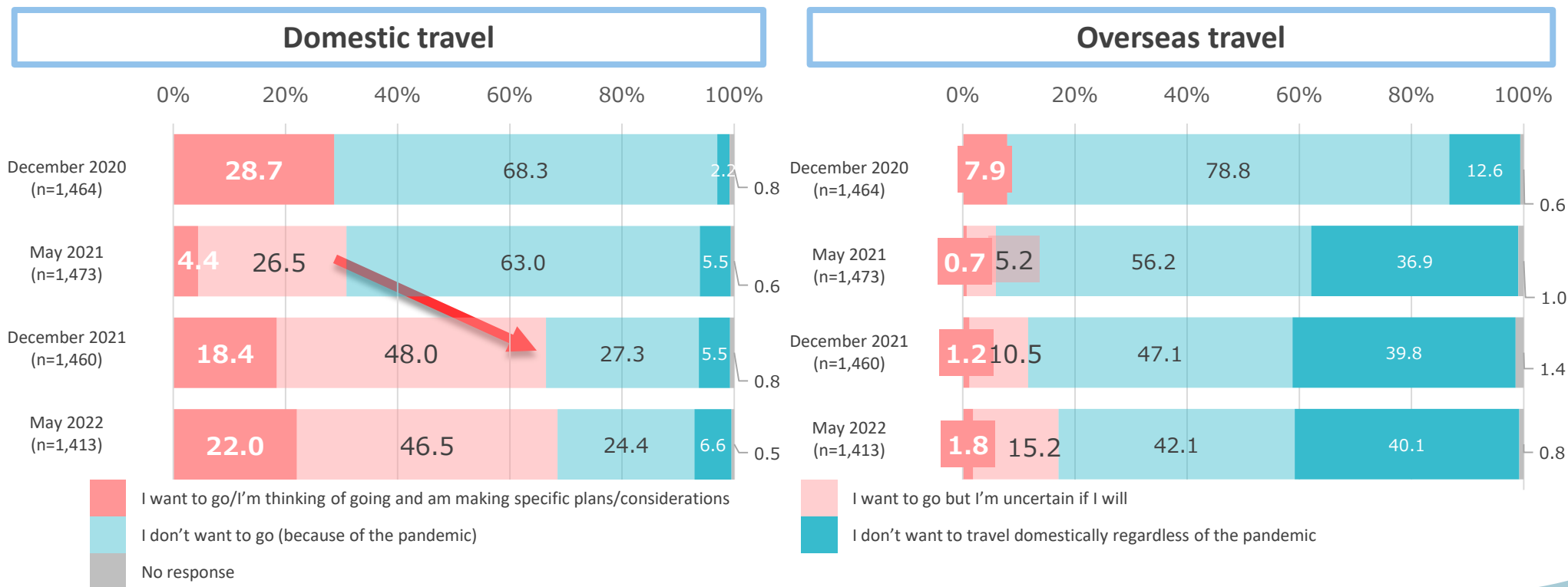
Note: Households were extracted from a residential map database with respondents based on the population at the time of the census. This method allowed us to select survey targets without regional or gender age bias.

The survey was then sent by mail, and respondents were asked to fill out the questionnaire by themselves. Copyright © 2022 JTBF All Rights reserved. <3>

The desire for domestic travel reached a turning point at the end of 2021 and is now recovering

- Regarding domestic travel, in December 2020 and May 2021 "I want to go" scored just under 30%, but in December 2021 it greatly increased to nearly 70%, and in May 2022 it continued to be nearly 70%. Moreover, the item "making specific plans/considerations" has increased each time it was surveyed. It can be assumed that the desire for domestic travel switched from refraining to implementation from December 2021 onwards.
- Regarding overseas travel as well, the percentage of respondents answering "I want to go (making specific plans/considerations + uncertain)" has gradually increased, but is at a low level compared to domestic travel. Furthermore, the percentage of respondents answering "I didn't want to travel overseas in the first place" is rising, so it is likely to be necessary to closely observe whether an impact on the awareness of overseas travel itself is occurring due to COVID-19 becoming prolonged.

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

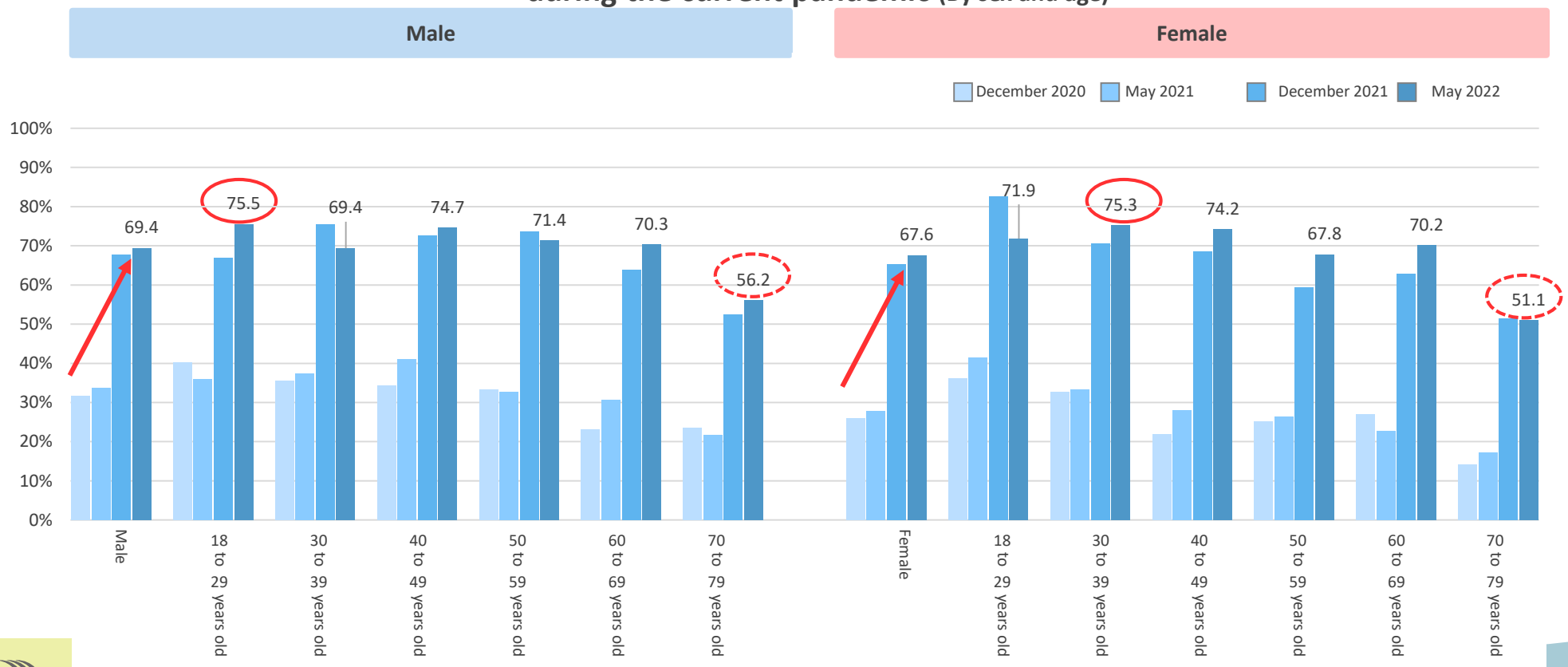


※ In December 2020, "I want to go" was the only option in the survey but from May 2021 onwards we established two options: "I want to go and am making specific plans/considerations" and "I want to go but I'm uncertain if I will".

Desire for domestic travel during COVID-19: recovering at the end of 2021 for both sexes in all age groups

- As in the overall trend, the percentage of respondents who answered "I want to go" on a domestic trip during the current COVID-19 greatly increased in December 2021 for both sexes in all age groups so the desire to travel has recovered. This is also true for respondents in their 70s, among whom travel intentions were lower throughout all of the surveys, and both males and females in their 70s had exceeded 50% as of December 2021.
- Subsequently, in May 2022 the respondents were divided into those whose desire to travel increased and those whose desire to travel decreased, and the desire to travel increased among males in their 20s, 40s, 60s and 70s and females in their 30s to 60s.
- In the most recent survey, travel intentions were particularly high among males in their 20s and females in their 30s, with both of these groups exceeding 75%.

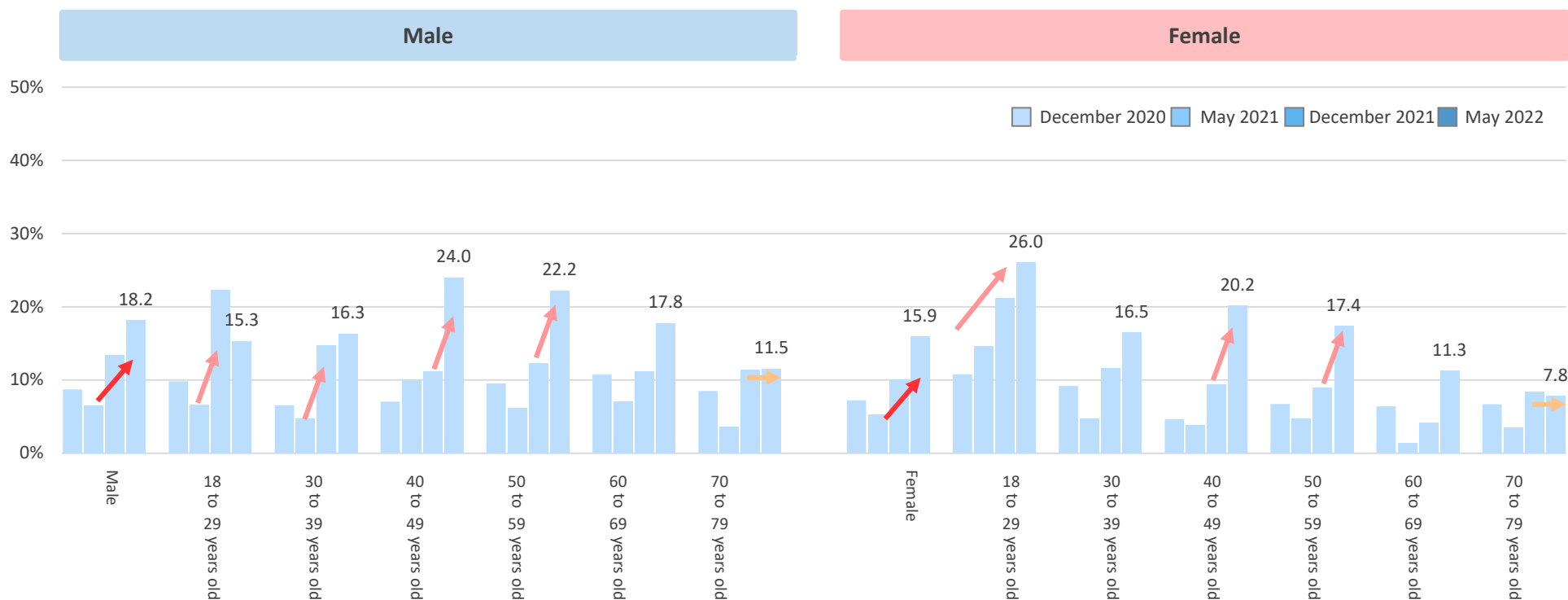
The percentage of respondents who answered "I want to go" on a domestic sightseeing/recreational trip during the current pandemic (By sex and age)



Overseas travel intentions during COVID-19: Consistently increasing among females in their 20s

- Looking by sex at the percentage of respondents who answered "I want to go" on an overseas trip during the current COVID-19, it has been increasing since the end of 2021 for both males and females.
- Looking at the change by sex and age, among females in their 20s overseas travel intentions have been consistently increasing since December 2020. Furthermore, the timing of the increase differs for each sex and age. Among males in their 20s and 30s travel intentions greatly increased at the time of the previous survey and among males and females in their 40s and 50s they greatly increased in the most recent survey. On the other hand, little change was seen the previous survey among both males and females in their 70s.

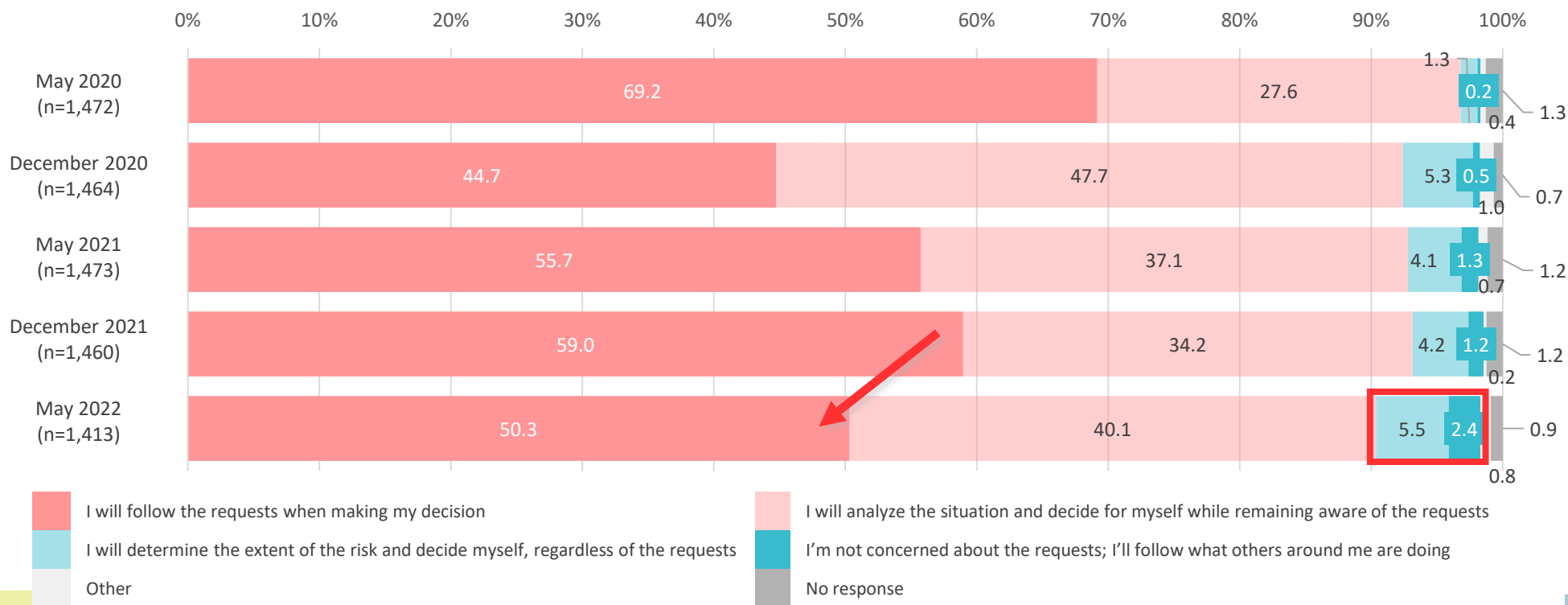
The percentage of respondents who answered "I want to go" on an overseas sightseeing/recreational trip during the current pandemic (By sex and age)



"I will analyze the situation and decide for myself" increased from the previous survey to 40%

- When asked if they were aware of national and local government requests when deciding whether to travel, 50.3% of the respondents answered that they "Follow the national and local government requests," 8.7pt down from the previous survey, while instead "I will analyze the situation and decide for myself while remaining aware of the requests" increased 5.9pt to 40.1%.
- "I am not concerned about/will disregard the national and local government requests (I will determine the extent of the risk and decide myself + I'll follow what others around me are doing)" was 7.9%, the highest it has been to date.

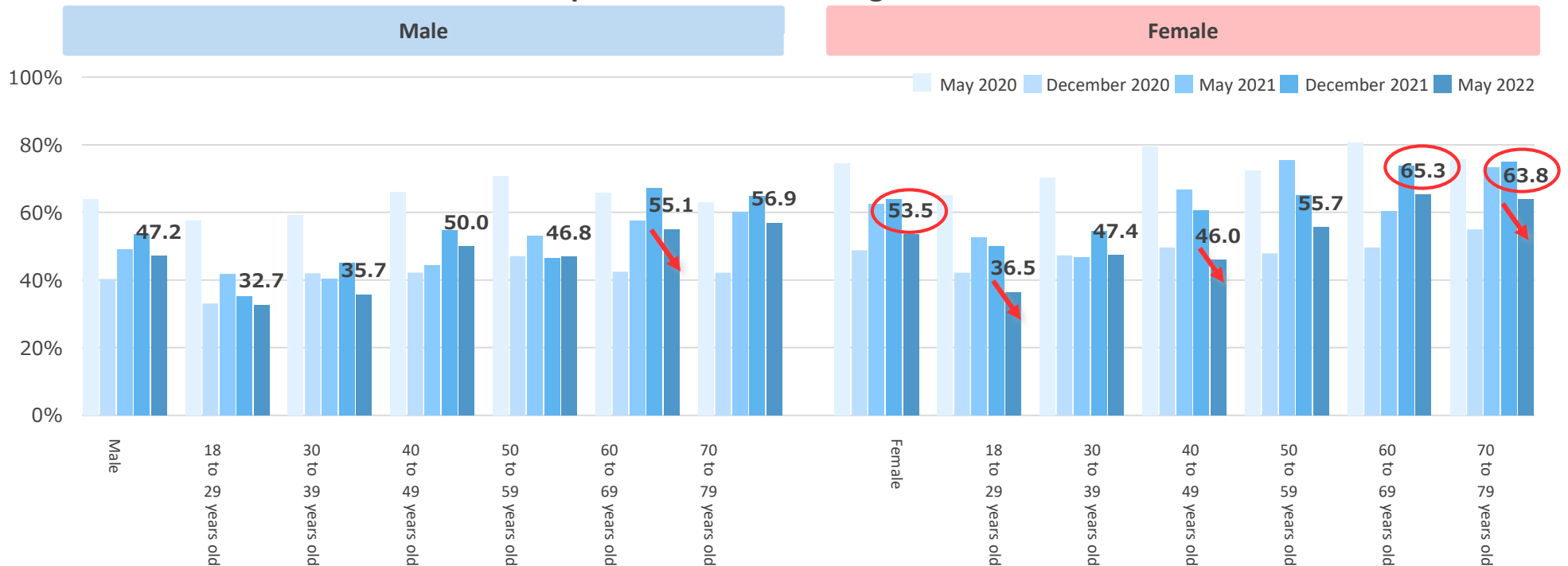
Q. To what extent does your awareness of requests from national or local governments (e.g., refraining from going out, refraining from travel) impact your decision to travel?



"Follow the national and local government requests" decreased for both sexes in most age groups

- The percentage of respondents who answered that they "follow the national and local government requests" when traveling was 47.2% for males and 53.5% for females, so the figure for females was somewhat higher, just as in the previous surveys.
- Looking at the change from December 2021, the percentage decreased for both sexes of all ages except for males in their 50s, and in particular it decreased by 10pt among males in their 60s and females in their 20s, 40s, and 70s.
- Note that more than 60% of elderly females in their 60s or older still selected "I will follow the requests when making my decision".

The percentage of respondents who answered that they "follow the national and local government requests" when traveling (By sex and age)

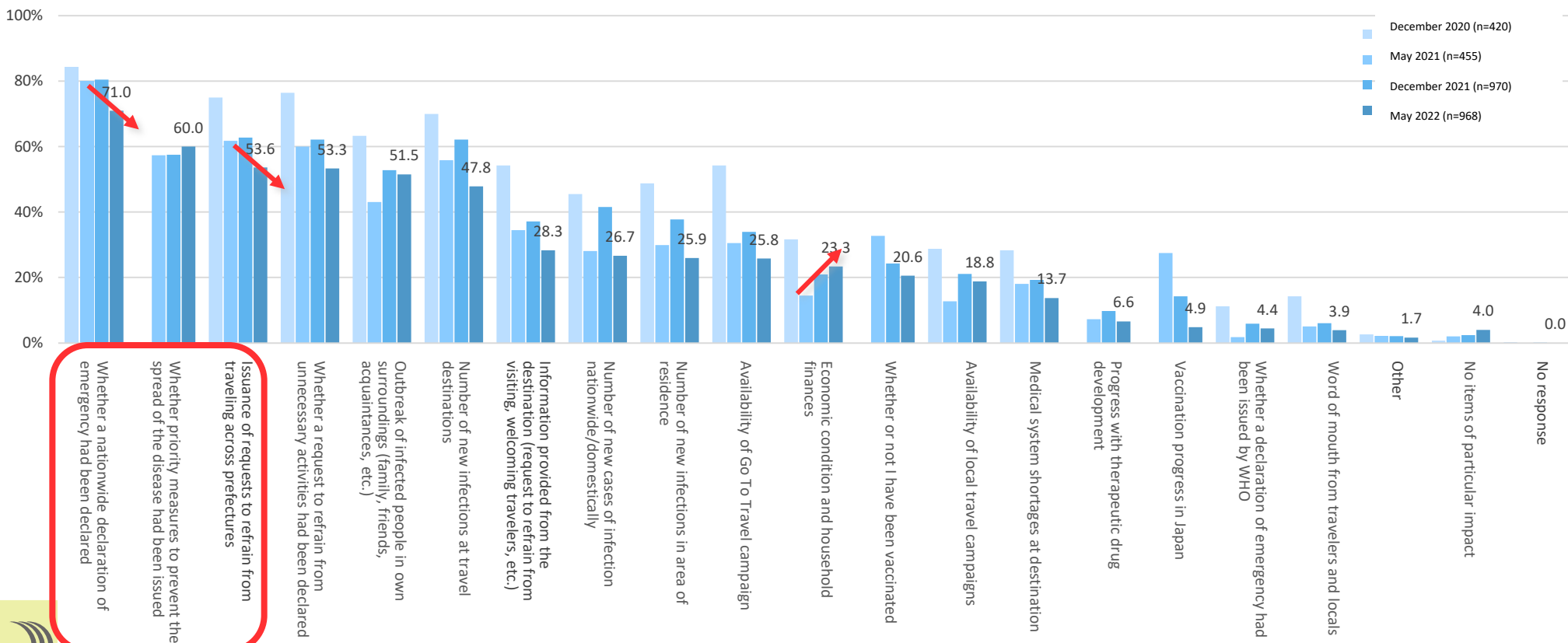


The impact on domestic travel decisions **decreased for most items**

- When asked about the items which have an impact when deciding whether to travel domestically during the current pandemic, the greatest number of respondents answered "Whether a nationwide declaration of emergency had been declared" at 71.0%, followed by "Whether priority measures to prevent the spread of the disease had been issued (60.0%" and "Issuance of requests to refrain from traveling across prefectures (53.6%," so requests issued by national and local government occupied the top positions.
- Most of the items decreased from the previous survey, and this suggests that the hurdles to domestic travel have become lower.
- On the other hand, "Economic condition and household finances" is increasing, hinting at an economic impact due to the prolonging of COVID-19.

Q. What matters influenced your decision to travel domestically during the current pandemic?

(Only answered by those who answered "I want to go" on domestic travel during COVID-19) [Multiple answers]



Elements impacting domestic travel: 20s to 30s: "Outbreak of infected people in own surroundings;" 40s to 60s: "Priority measures to prevent the spread of the disease"

- Looking at the matters impacting domestic travel by age in a ranking format, "Whether a nationwide declaration of emergency had been declared" ranked 1st in all of the age groups, and in particular it was nearly 80% among respondents in their 40s.
- Among respondents in their 20s to 30s, the comparatively young age groups, "Outbreak of infected people in own surroundings" and among respondents in their 40s to 60s "Whether priority measures to prevent the spread of the disease had been issued" ranked 2nd. Furthermore, the elements impacting domestic travel differed depending on the age group. For example, among respondents in their 60s to 70s, "Number of new infections at travel destinations" entered the top five.

Matters impacting domestic travel (By age) [Multiple answers]

20 to 29 years old(n=143)		(%)
1	Whether a nationwide declaration of emergency had been declared	69.9
2	Outbreak of infected people in own surroundings (family, friends, acquaintances, etc.)	56.6
3	Whether priority measures to prevent the spread of the disease had been issued	50.3
4	Whether a request to refrain from unnecessary activities had been declared	45.5
5	Issuance of requests to refrain from traveling across prefectures	43.4

30 to 39 years old(n=141)		(%)
1	Whether a nationwide declaration of emergency had been declared	67.4
2	Outbreak of infected people in own surroundings (family, friends, acquaintances, etc.)	58.9
3	Whether priority measures to prevent the spread of the disease had been issued	56.7
4	Whether a request to refrain from unnecessary activities had been declared	48.9
5	Issuance of requests to refrain from traveling across prefectures	48.2

40 to 49 years old(n=201)		(%)
1	Whether a nationwide declaration of emergency had been declared	77.6
2	Whether priority measures to prevent the spread of the disease had been issued	63.7
3	Whether a request to refrain from unnecessary activities had been declared	56.2
4	Outbreak of infected people in own surroundings (family, friends, acquaintances, etc.)	55.7
5	Issuance of requests to refrain from traveling across prefectures	53.2

50 to 59 years old(n=168)		(%)
1	Whether a nationwide declaration of emergency had been declared	72.0
2	Whether priority measures to prevent the spread of the disease had been issued	64.9
3	Issuance of requests to refrain from traveling across prefectures	56.0
4	Outbreak of infected people in own surroundings (family, friends, acquaintances, etc.)	56.0
5	Whether a request to refrain from unnecessary activities had been declared	51.8

60 to 69 years old(n=170)		(%)
1	Whether a nationwide declaration of emergency had been declared	70.0
2	Whether priority measures to prevent the spread of the disease had been issued	61.2
3	Number of new infections at travel destinations	55.9
4	Whether a request to refrain from unnecessary activities had been declared	54.7
5	Issuance of requests to refrain from traveling across prefectures	54.1

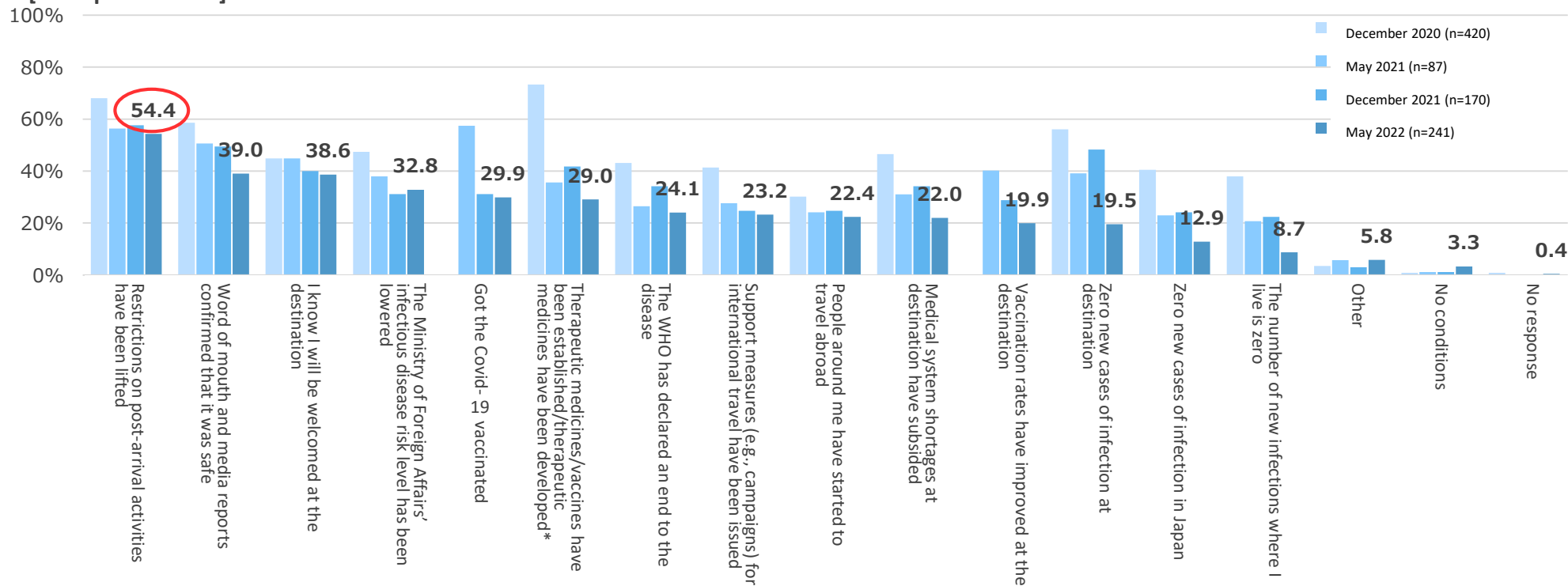
70 to 79 years old(n=145)		(%)
1	Whether a nationwide declaration of emergency had been declared	66.2
	Issuance of requests to refrain from traveling across prefectures	
3	Whether a request to refrain from unnecessary activities had been declared	61.4
4	Whether priority measures to prevent the spread of the disease had been issued	60.7
5	Number of new infections at travel destinations	55.9

Conditions for resuming overseas travel: "Restrictions on post-arrival activities have been lifted" scored by far the highest

- When asked about their conditions for resuming overseas travel, "Restrictions on post-arrival activities have been lifted" scored by far the highest at 54.4%, followed by "Word of mouth and media reports confirmed that it was safe (39.0%)," and "I know I will be welcomed at the destination (38.6%)".
- The figures for most of the items have decreased since the previous survey, so it can be inferred that, just as for domestic travel, the hurdles to overseas travel have also become lower.

Q. After travel restrictions and destination entry restrictions have been eased, what conditions would need to be met for you to travel internationally? (only answered by those who answered "I want to go" on overseas travel during COVID-19)

[Multiple answers]



Conditions for resuming overseas travel: 20 to 30s: "welcomed at the destination;" 40s and older: "development of therapeutic medicines"

- Looking at the conditions for resuming overseas travel by age in a ranking format, "Restrictions on post-arrival activities have been lifted" ranked 1st in all of the age groups, and it was particularly high among respondents in their 50s to 60s, at about 60%.
- Among respondents in their 20s to 30s, the comparatively young age groups, "I know I will be welcomed at the destination" and among respondents in their 40s to 70s "Therapeutic medicines have been developed" entered the top five, so the conditions for resuming overseas travel differed depending on the age group.

Conditions for resuming overseas travel (By age) [Multiple answers]

20 to 29 years old(n=92)		(%)
1	Word of mouth and media reports confirmed that it was safe	48.9
	Restrictions on post-arrival activities have been lifted	
3	The WHO has declared an end to the disease	37.0
4	I know I will be welcomed at the destination	34.8
5	Zero new cases of infection at destination	33.7

30 to 39 years old(n=88)		(%)
1	Restrictions on post-arrival activities have been lifted	45.5
2	The WHO has declared an end to the disease	39.8
3	Word of mouth and media reports confirmed that it was safe	35.2
4	I know I will be welcomed at the destination	34.1
5	Zero new cases of infection at destination	33.0

40 to 49 years old(n=150)		(%)
1	Restrictions on post-arrival activities have been lifted	45.3
2	Therapeutic medicines/vaccines	38.0
3	The WHO has declared an end to the disease	34.0
4	Word of mouth and media reports confirmed that it was safe	32.0
5	The Ministry of Foreign Affairs' infectious disease risk level has been lowered	30.0

50 to 59 years old(n=115)		(%)
1	Restrictions on post-arrival activities have been lifted	60.9
2	Therapeutic medicines/vaccines	47.0
3	The WHO has declared an end to the disease	40.0
4	Word of mouth and media reports confirmed that it was safe	36.5
5	The Ministry of Foreign Affairs' infectious disease risk level has been lowered	33.0

60 to 69 years old(n=114)		(%)
1	Restrictions on post-arrival activities have been lifted	57.9
2	Word of mouth and media reports confirmed that it was safe	51.8
3	Therapeutic medicines/vaccines	50.9
4	Zero new cases of infection at destination	37.7
5	The Ministry of Foreign Affairs' infectious disease risk level has been lowered	36.8

70 to 79 years old(n=85)		(%)
1	Word of mouth and media reports confirmed that it was safe	47.1
	Therapeutic medicines/vaccines	
	Restrictions on post-arrival activities have been lifted	
4	Zero new cases of infection at destination	44.7
5	The WHO has declared an end to the disease	40.0

Regions respondents want to visit: "Areas I have never traveled before" has increased

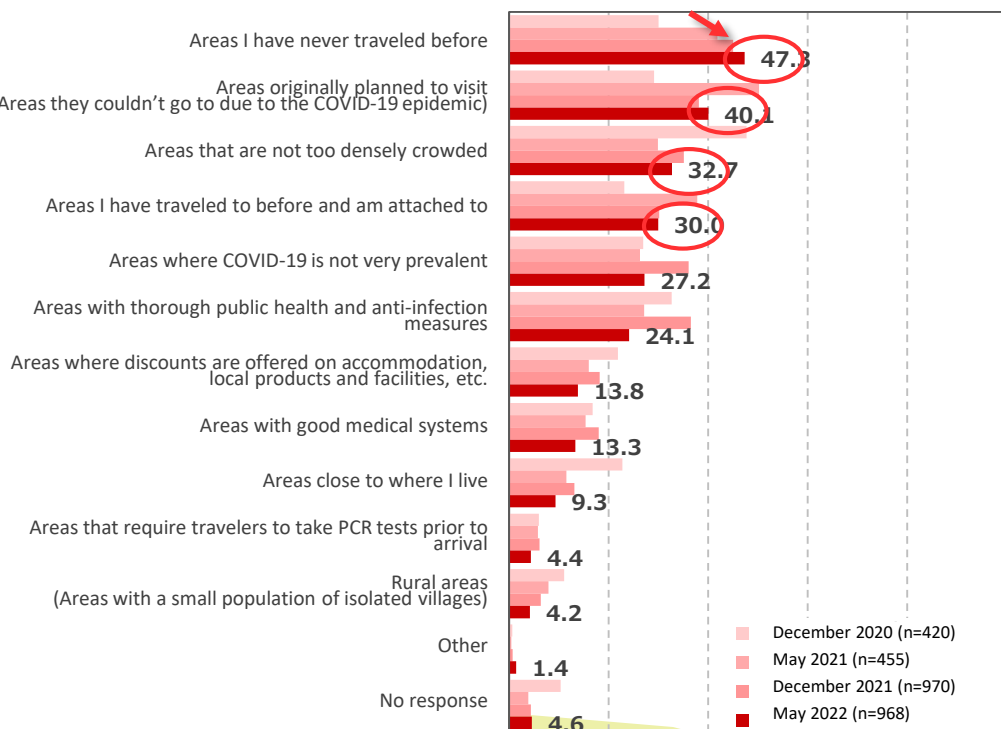
- Regarding the top destinations for future trips, "Areas I have never traveled before" scored highest at 47.3%; furthermore, this figure has increased each time the survey was conducted. Next were "Areas originally planned to visit (Areas they couldn't go to due to the COVID-19 epidemic)" (40.1%), "Areas that are not too densely crowded" (32.7%), "Areas I have traveled to before and am attached to" (30.0%), each of which exceeded 30%.
- Regarding regions the respondents don't want to visit, "Areas with high numbers of people infected by COVID-19" scored by far the highest at 65.0%, followed by "Areas without thorough public health and anti-infection measures" (49.1%) and "Areas prone to crowding" (47.3%), each of which was nearly 50%.

Q. Which areas would you like to/not like to visit in the future?

(Only answered by those who answered "I want to go" on domestic or overseas travel during COVID-19) [Multiple answers]

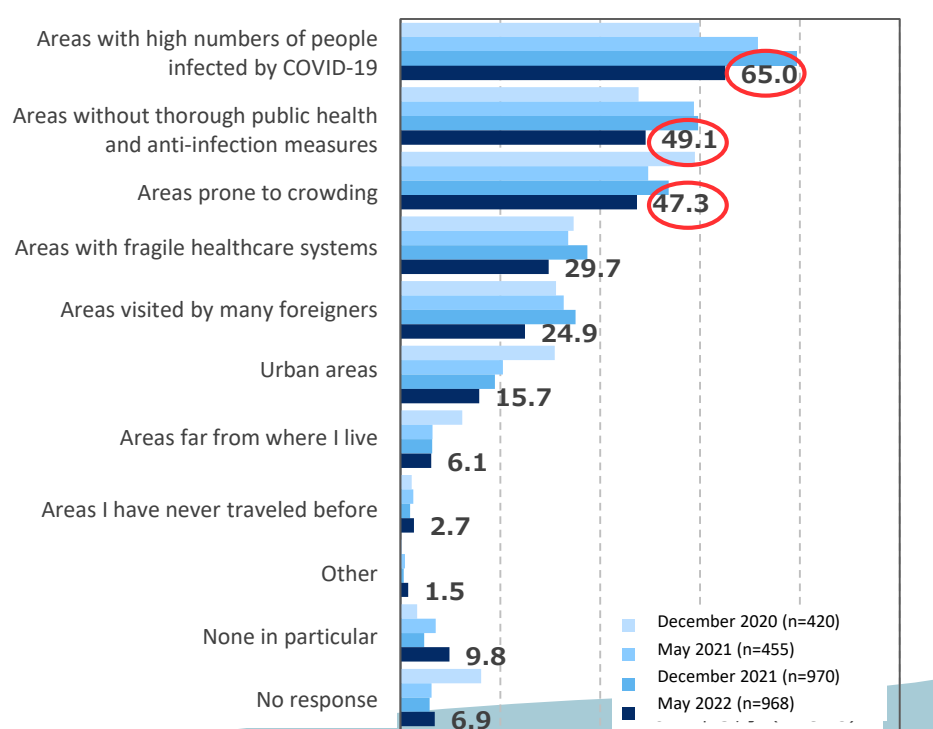
Areas respondents want to visit

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



Areas respondents don't want to visit

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



Regions respondents want to visit: respondents in their 20s placed importance on "Areas I have never traveled before"

- Looking at the regions respondents want to visit by age in a ranking format, "Areas I have never traveled before" ranked 1st in all of the age groups, and it was particularly high among the respondents in their 20s and 50s, exceeding 50%.
- Among respondents in their 20s to 50s, "Areas originally planned to visit" exceeded 40% and was ranked 1st or 2nd, and among respondents in their 60s to 70s, "Areas that are not too densely crowded" ranked 2nd, accounting for nearly 40% in both of these age groups.

Regions Where Respondents Want to Visit (By age) [Multiple answers]

20 to 29 years old(n=145)		(%)
1	Areas I have never traveled before	56.6
2	Areas originally planned to visit	44.1
3	Areas that are not too densely crowded	32.4
4	Areas I have traveled to before and am attached to	24.1
5	Areas where COVID-19 is not very prevalent	20.0

30 to 39 years old(n=141)		(%)
1	Areas originally planned to visit	41.8
	Areas I have never traveled before	
3	Areas that are not too densely crowded	34.0
4	Areas I have traveled to before and am attached to	33.3
5	Areas where COVID-19 is not very prevalent	21.3

40 to 49 years old(n=204)		(%)
1	Areas I have never traveled before	46.1
2	Areas originally planned to visit	42.6
3	Areas that are not too densely crowded	30.9
4	Areas where COVID-19 is not very prevalent	29.9
5	Areas I have traveled to before and am attached to	29.4

50 to 59 years old(n=170)		(%)
1	Areas I have never traveled before	50.0
2	Areas originally planned to visit	41.2
3	Areas I have traveled to before and am attached to	34.1
4	Areas where COVID-19 is not very prevalent	25.9
5	Areas that are not too densely crowded	25.3

60 to 69 years old(n=171)		(%)
1	Areas I have never traveled before	46.8
2	Areas that are not too densely crowded	37.4
3	Areas originally planned to visit	35.1
4	Areas with thorough public health and anti-infection measures	31.6
5	Areas where COVID-19 is not very prevalent	29.2

70 to 79 years old(n=147)		(%)
1	Areas I have never traveled before	42.9
2	Areas that are not too densely crowded	37.4
3	Areas I have traveled to before and am attached to	36.1
4	Areas originally planned to visit	35.4
	Areas where COVID-19 is not very prevalent	

Regions the respondents don't want to visit: 60s and older place importance on "number of infections" and "healthcare systems"

- Looking at the regions the respondents don't want to visit by age in a ranking format, "Areas with high numbers of people infected by COVID-19" ranked 1st in all of the age groups, and it was particularly high among the respondents in their 60s to 70s, exceeding 70%.
- "Areas with fragile healthcare systems" and "Areas visited by many foreigners" scored under 20% among respondents in their 20s and accounted for just under 30% to 40% among respondents in their 60s to 70s, so differences in awareness depending on the age group were seen.

Regions Where Respondents Don't Want to Visit (By age) [Multiple answers]

20 to 29 years old(n=145)		(%)
1	Areas with high numbers of people infected by COVID-19	54.5
2	Areas without thorough public health and anti-infection measures	43.4
3	Areas prone to crowding	40.7
4	Areas with fragile healthcare systems	20.0
5	Areas visited by many foreigners	17.2

30 to 39 years old(n=141)		(%)
1	Areas with high numbers of people infected by COVID-19	58.2
2	Areas prone to crowding	48.2
3	Areas without thorough public health and anti-infection measures	41.8
4	Areas with fragile healthcare systems	28.4
5	Areas visited by many foreigners	24.1

40 to 49 years old(n=204)		(%)
1	Areas with high numbers of people infected by COVID-19	58.8
2	Areas without thorough public health and anti-infection measures	48.5
3	Areas prone to crowding	39.7
4	Areas with fragile healthcare systems	26.0
5	Areas visited by many foreigners	24.0

50 to 59 years old(n=170)		(%)
1	Areas with high numbers of people infected by COVID-19	68.8
2	Areas without thorough public health and anti-infection measures	47.1
3	Areas prone to crowding	44.1
4	Areas with fragile healthcare systems	28.2
5	Areas visited by many foreigners	22.4

60 to 69 years old(n=171)		(%)
1	Areas with high numbers of people infected by COVID-19	76.0
2	Areas without thorough public health and anti-infection measures	57.9
3	Areas prone to crowding	53.8
4	Areas with fragile healthcare systems	40.4
5	Areas visited by many foreigners	28.1

70 to 79 years old(n=147)		(%)
1	Areas with high numbers of people infected by COVID-19	73.5
2	Areas prone to crowding	59.9
3	Areas without thorough public health and anti-infection measures	54.4
4	Areas with fragile healthcare systems	34.7
5	Areas visited by many foreigners	34.0

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GOKITA Reiko, YASUHARA Arisa, NAKA Nanae

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