

Survey of Future Overseas Travel Sentiment Among Japanese Amid the Coronavirus Pandemic (Conducted February 2021)

■ People who travel overseas are more enthusiastic domestic travelers. Rate of domestic travel in 2020 is 71.7%

People who traveled overseas in 2019 tended to travel domestically more frequently than people who only traveled domestically

People who traveled domestically three or more times in 2020 included 25.3% of the people who traveled overseas in the prior year, and 13.0% of the people who only traveled domestically

■ As overseas travel resumes, people who say they “want to go immediately, regardless of destination” are 13.8% of the total

Those who “will not go until COVID-19 subsides globally” are 60.4%

26.1% of males 15-29 years old responded that they “want to go immediately, regardless of destination”

■ Topping the list of countries/regions that people want to visit on tourism first are Hawaii, Taiwan, the U.S. mainland, Australia/New Zealand, and South Korea

People “just like” Hawaii, while Taiwan and South Korea are “close to Japan.” Taiwan and Australia/New Zealand are also chosen because “the number of COVID-19 infections is small” and “their handling of new infections can be trusted”

■ People who say they “want to travel overseas even if a period of isolation is required upon entering the country” are 16.9% of the total

Those who “want to go immediately on a package tour (managed travel) that monitors activity for safety” are 12.7%

Among people who “want to go immediately, regardless of destination,” 51.2% “want to go even if a period of isolation is required,” while just 32.6% “want to travel overseas immediately on a package tour that monitors activity”

■ The majority of people, 51.6%, are “not doing anything in particular right now to be ready for overseas travel when it resumes”

Even people who traveled prior to the coronavirus pandemic and intend to in the future may lose interest in overseas travel if COVID-19 persists

JTB Tourism Research & Consulting Co. (Shinagawa, Tokyo; Hajime Nozawa, President & CEO) has compiled the results of a survey titled “Survey of Future Overseas Travel Sentiment Among Japanese Amid the Coronavirus Pandemic.”

In 2020, the market for overseas travel among Japanese saw demand all but vanish with the global spread of novel coronavirus infections (“COVID-19”), despite the fact that travelers in 2019 numbered as high as 20 million for the first time ever. Even now, there is still no clear indication when people might again be able to travel freely

overseas on tourism. This survey aims not only to understand what interest people who have traveled overseas in the past have in traveling overseas right now amid the coronavirus pandemic and how they might respond when travel resumes, but also to reveal what kind of travel they hope to take right now at a time when they cannot travel overseas.

Our *JTB Report: All About Japanese Overseas Travelers*, which JTB has edited and published since 1988, analyzes and documents the structure and trends of the market based on our own fixed-point questionnaire surveys, as well as on statistical data from the various relevant agencies and organizations. This survey is a part of those activities.

The survey data and English-language translation will be posted on our website sometime in April.

The situation of Japanese Outbound Market

The number of Japanese traveling outside Japan in the past decade rebounded from its low point in 2015 to top 20 million for the first time ever in 2019. Unfortunately, the global spread of COVID-19 led to restrictions on overseas travel that resulted in an 84.2% decline in the number of overseas travelers in 2020, who numbered a mere 3.17 million people (see Diagram 1). Of these, the number of overseas travelers in January through March prior to the global outbreak of COVID-19 was 93.6% of the total, or 2.97 million people. It is fair to say that overseas tourist travel essentially vanished after March (see Diagram 2). More than a year has passed since people have no longer been able to travel freely overseas. In that time, how have their sentiments toward overseas travel changed?

Figure 1. Number of Japanese Traveling Outside Japan (Data: "Immigration Control Statistics," Immigration Services Agency, Ministry of Justice)

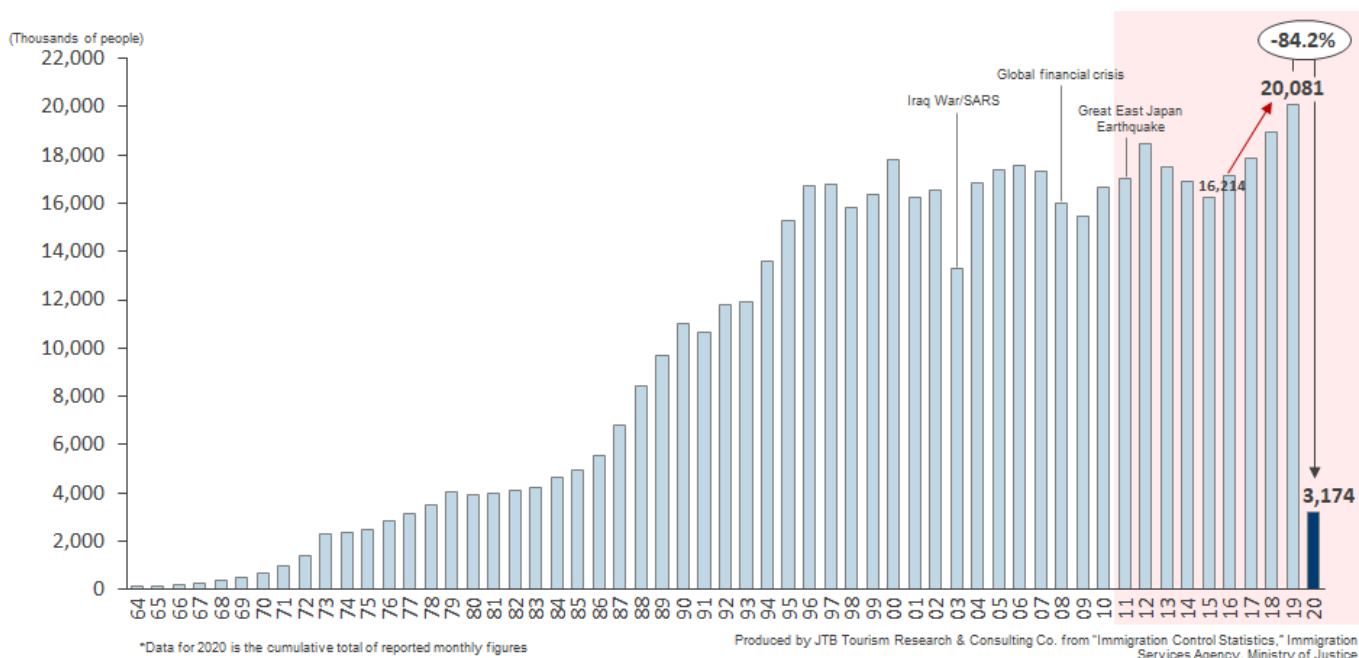
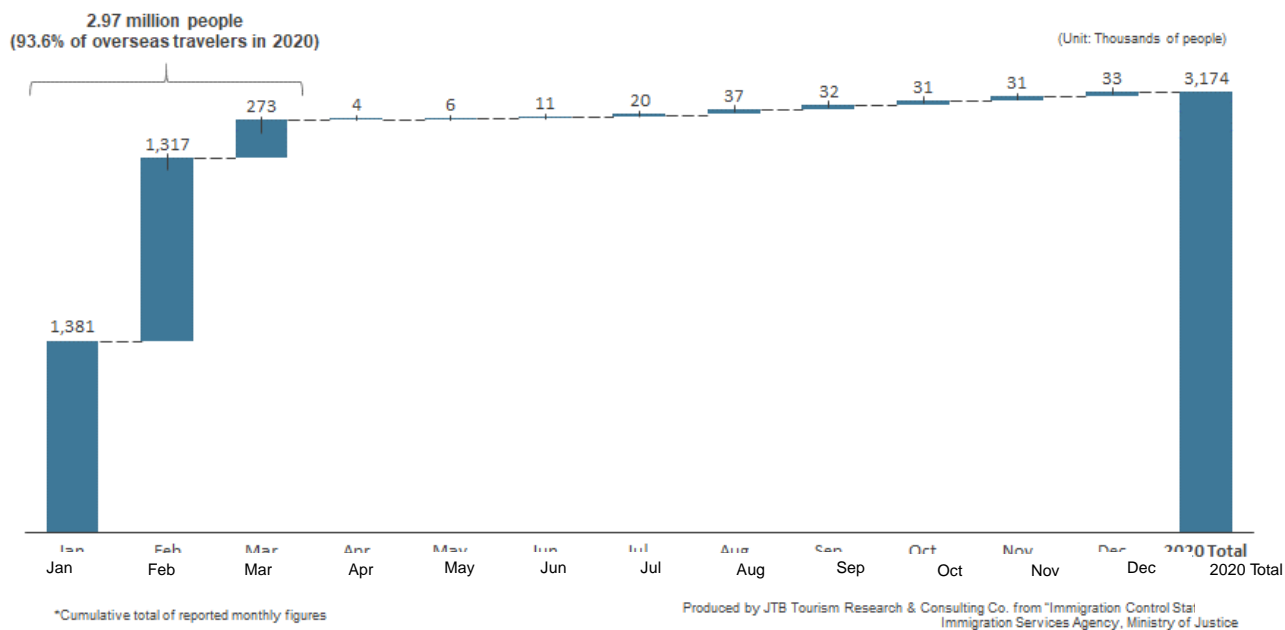


Figure 2. Number of Japanese Traveling Outside Japan in 2020 by Month (Data: “Immigration Control Statistics,” Immigration Services Agency, Ministry of Justice)



Survey Overview

Survey Method: Web-based questionnaire survey

Survey Period: Thursday, Feb. 4 to Sunday, Feb. 7, 2021

Survey Respondent: (Preliminary Survey) Men and women aged 15 or older nationwide: **12,142 people**
 (Main Survey) Of the people who responded to the screening survey, those who traveled overseas between 2017 and 2020 (including those traveling on business): **2,187 people**
 *However, people who said they “would not go in the future” when asked about their plans to travel overseas, including several years from now, were excluded

Travel Experiences in 2019 and 2020, and Overseas Travel Sentiment for the Next Few Years

The preliminary survey asked 12,142 men and women aged 15 or older nationwide about their overseas and domestic travel between 2018 and 2020 and their intentions regarding overseas travel for the next few years.

1. People who traveled overseas in 2019 traveled more times domestically than people who only traveled domestically in 2019, and 53.0% of them traveled three or more times

People who traveled overseas in 2019 traveled domestically in 2020 at a rate of 71.7%, while people who only traveled domestically in 2019 traveled in 2020 at a rate of 53.6%

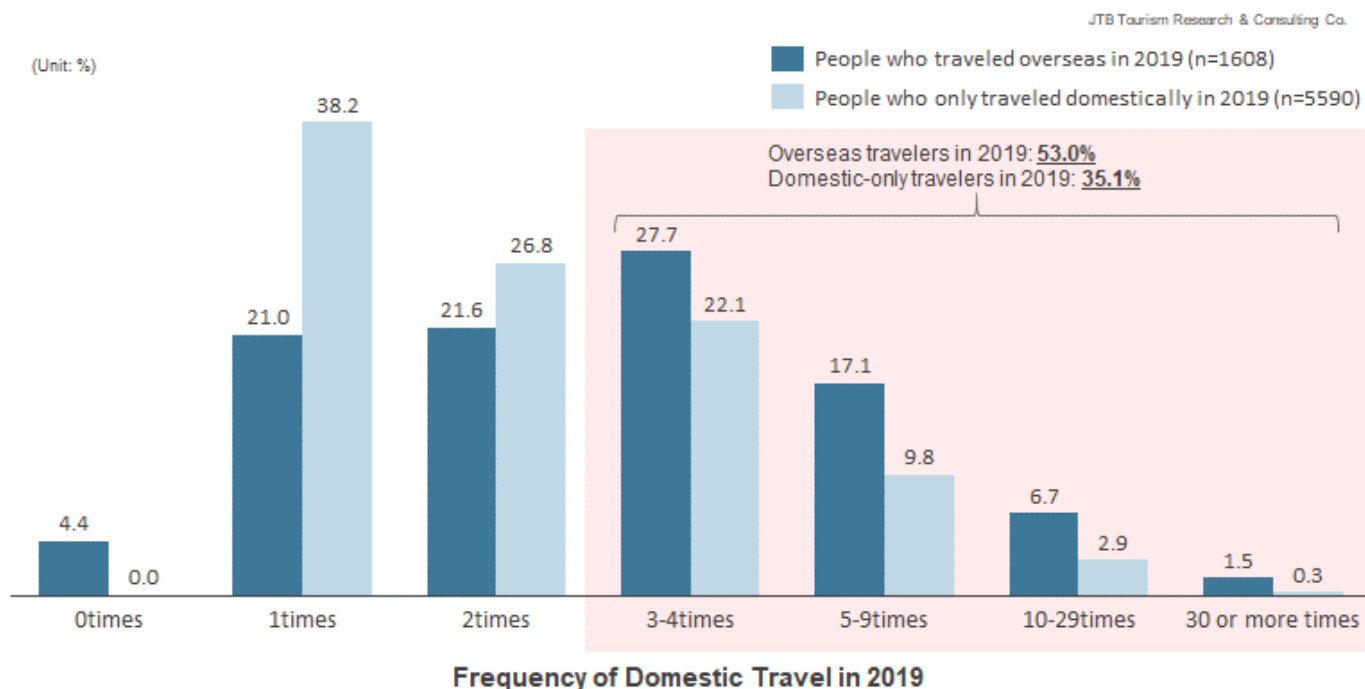
People who travel overseas are also more enthusiastic domestic travelers

First, to learn how much potential for domestic travel there is among people who have traveled overseas, in the preliminary survey we compared the frequency of domestic travel between people who traveled overseas in 2019 and those who only traveled domestically in 2019. We found that 95.6% of people who traveled overseas in 2019 also traveled at least once domestically in 2019. While the highest percentage of people, 27.7%, traveled “3 or 4 times,” the majority of people, 53.0%, were repeat travelers who traveled at least three times. On the other hand, among people who only traveled domestically in 2019, the highest percentage of people, 38.2%, traveled “once” domestically, while 35.1% were repeat travelers who traveled at least three times (Figure 3). As this shows,

even when people could travel freely overseas and domestically in 2019, people who traveled overseas were also more enthusiastic domestic travelers.

That being the case, how much domestic travel was undertaken in 2020, after COVID-19 had spread domestically, by people who traveled overseas in 2019? Whereas 71.7% of people who traveled overseas in 2019 traveled at least once domestically in 2020, just 53.6% of people who only traveled domestically in 2019 did so in 2020. This finding shows that the rate of domestic travel was higher among people who traveled overseas the year before. In terms of travel frequency, while the highest percentage of people in both groups traveled only once, and the percentage was roughly the same, our findings also reveal differences between people who traveled at least twice; and among repeat travelers who traveled at least three times, 25.3% were people who traveled overseas the year before, whereas just 13.0% were people who traveled only domestically the year before (Figure 4). Based on the above, we conclude that people who travel overseas are avid travelers in general and more enthusiastic domestic travelers as well, and that such travelers from the now-vanished overseas travel market have taken the lead as consumers of domestic travel.

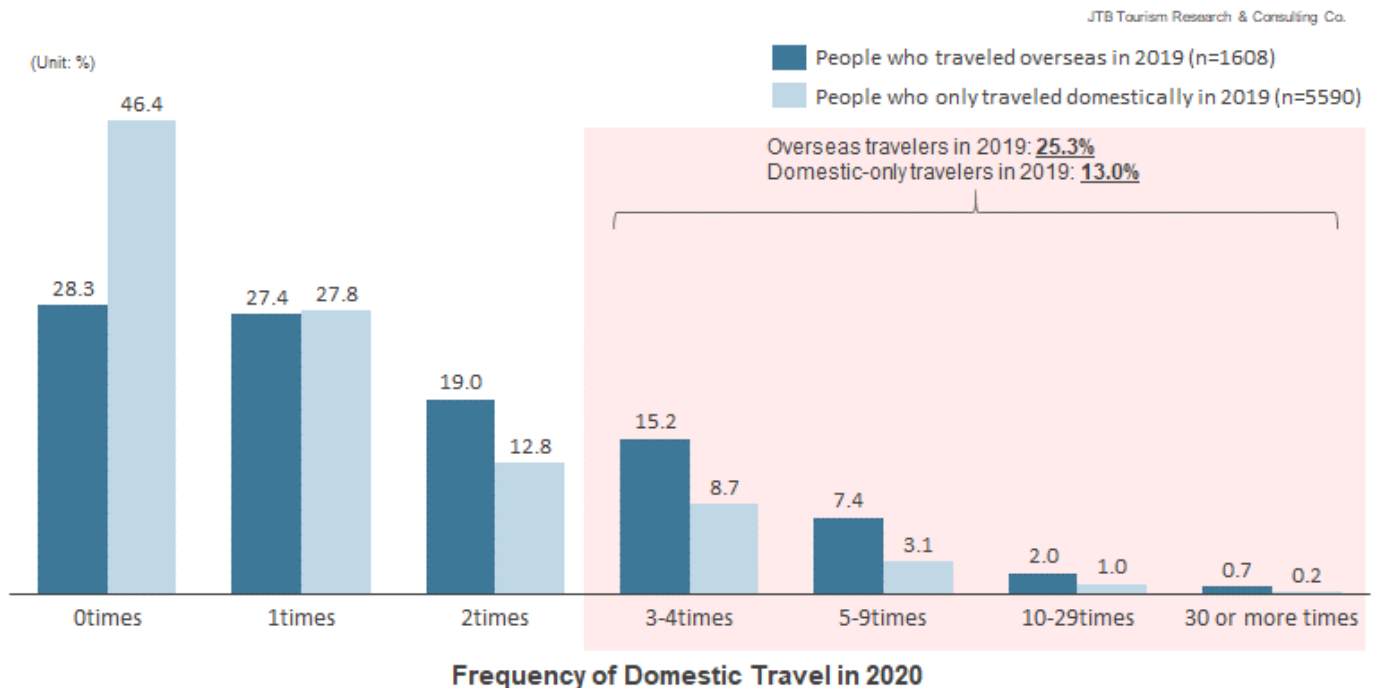
Figure 3. Domestic Travel* in 2019 Among People Who Traveled Overseas/Domestically in 2019
 *Overnight travel for leisure and/or tourism



*Totals for preliminary survey respondents, excluding those who never traveled domestically even once between 2018-2020.

Figure 4. Domestic Travel* in 2020 Among People Who Traveled Overseas/Domestically in 2019

*Overnight travel for leisure and/or tourism



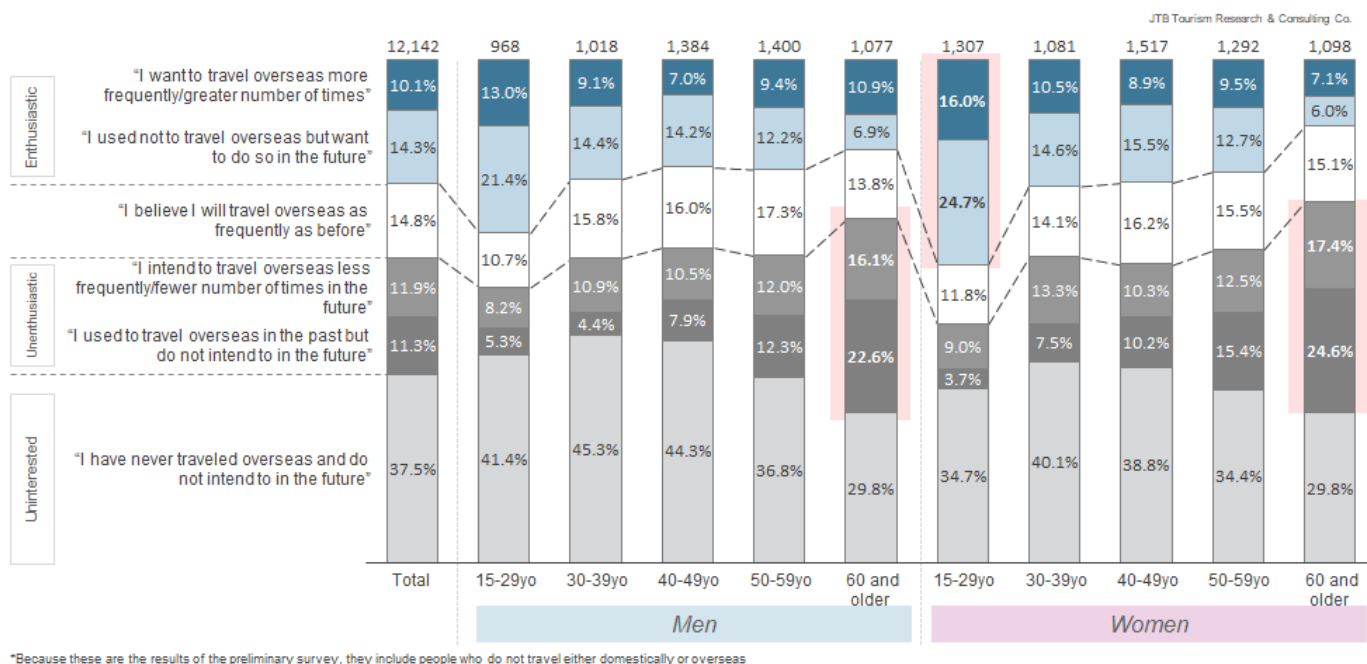
*Totals for preliminary survey respondents, excluding those who never traveled domestically even once between 2018-2020.

2. Future intentions regarding overseas travel for the next few years are roughly the same between “enthusiastic” travelers (24.4%) and “unenthusiastic” travelers (23.3%)

Among women aged 15-29, roughly 40 percent are enthusiastic travelers; among men and women aged 60 and older, fewer than 20 percent are enthusiastic travelers, while roughly 40 percent are unenthusiastic travelers

Next, we asked about respondents’ intentions regarding overseas travel for the next few years. Overall, the total percentage of “enthusiastic” travelers—those who “want to travel overseas more frequently/greater number of times” and those who “used not to travel overseas but want to do so in the future”—is 24.4%. This percentage of enthusiastic travelers is just slightly higher than that of “unenthusiastic” travelers—those who “intend to travel overseas less frequently/fewer number of times in the future” and those who “used to travel overseas in the past but do not intend to in the future.” By gender and age, 40.7% of women aged 15-29 are enthusiastic travelers, showing that they are more eager than other age groups. Meanwhile, among men and women aged 60 and older, there is a significant difference between unenthusiastic travelers (38.7% of men, 42.0% of women) and enthusiastic travelers (17.8% of men, 13.1% of women) (Figure 5). Like other surveys, we believe the longer the period that people cannot travel overseas, the more likely it is that a generational change will occur.

Figure 5. Future Overseas Travel Sentiment for the Next Few Years



Feelings and Thoughts on Resuming Overseas Travel

In the main survey that follows, we asked the 2,187 respondents who had traveled overseas between 2017 and 2020 and intended to travel overseas in the next few years about their feelings and thoughts regarding overseas travel right now while COVID-19 is still prevalent.

3. Regarding their intention to resume overseas travel, 60.4% say they “will not go until COVID-19 has subsided globally,” 25.8% say they would “once the country or region [they] want to visit starts accepting travelers,” and 13.8% say they “want to go immediately to any country or region, regardless of destination”

When asked about their intention once overseas travel is resumed, 60.4% said they “will not go overseas for now, until COVID-19 has subsided globally,” revealing that roughly 60 percent of respondents are waiting to travel overseas until COVID-19 is no longer prevalent. Meanwhile, 25.8% said they “want to go once the country or region [they] currently want to visit starts accepting tourist travelers,” while 13.8% said they “want to go immediately to any country or region, regardless of destination, so long as that country or region is accepting tourist travelers,” showing that there is about 10 percent of people who just want to go somewhere immediately, regardless of the destination. By gender and age, 26.1% of men aged 15-29 said they “want to go immediately to any country or region, regardless of destination, so long as that country or region is accepting tourist travelers,” showing them to be more enthusiastic than other age groups (Figure 6). In the preliminary survey, women aged 15-29 appeared eager when asked about their “future intentions regarding overseas travel for the next few years,” but their intentions once overseas travel is resumed show them to be more cautious than men.

Next, we asked what they thought would give them the opportunity to resume overseas travel. As revealed in their top response—“if an effective treatment for COVID-19 is found” (40.4%)—the ability to be treated for COVID-19 in the event of infection is considered a major pre-condition to resuming overseas travel. By gender and age, we found that men and women aged 15-29 were more likely than other age groups to answer “if the atmosphere of self-restraint in [their] country dissipates” and “if the people around [them] (e.g., friends and acquaintances) start traveling overseas” (Figure 7). This reveals that younger age groups pay greater attention to their

relationships with those around them, showing concern for things like an atmosphere of self-restraint and how they appear to those around them.

Figure 6. Desire to Resume Overseas Travel by Gender and Age

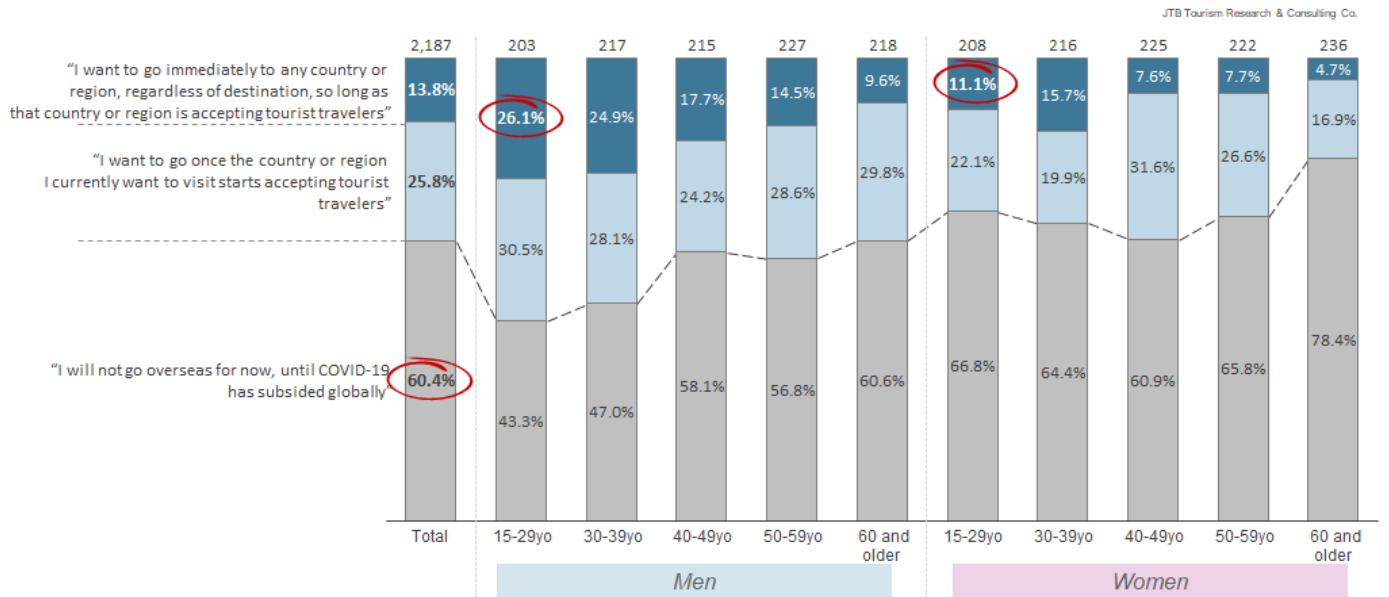
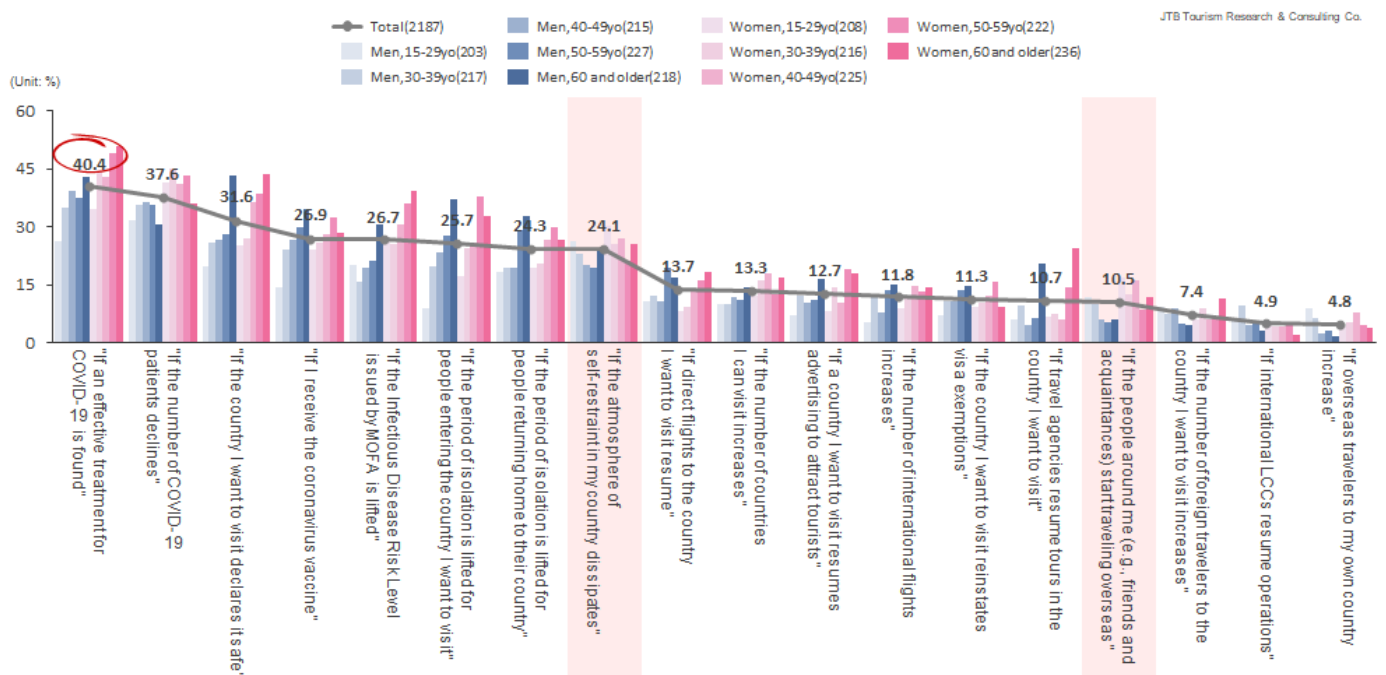


Figure 7. Opportunity to Resume Overseas Travel by Gender and Age



4. When overseas tourist travel is possible again, the countries/regions people want to visit are Hawaii, Taiwan, the U.S. mainland, Australia/New Zealand, and South Korea. Hawaii is chosen because people “like the country/region,” while Taiwan and Australia/New Zealand are chosen because “the number of COVID-19 infections is small” and “their handling of new infections can be trusted”

We asked people where they would first like to go once overseas tourist travel is possible again. In order of preference, they said Hawaii (20.1%), Taiwan (11.8%), the U.S. mainland (7.5%), Australia/New Zealand (7.0%), and South Korea (7.0%) (Figure 8). A popular destination prior to the coronavirus pandemic, it seems Hawaii will continue to be a popular travel destination once overseas tourist travel resumes.

Why, then, did people choose these countries/regions? Looking at the reasons why people chose each of these countries/regions, we find that people “like the country/region” in the case of Hawaii more than other countries/regions, underscoring Hawaii’s overall strength as a destination that people “just like.” We also find that Taiwan and South Korea score high because “the country/region is relatively close to Japan” and “travel costs seem low,” while the U.S. mainland and Australia/New Zealand score high for “great environment to enjoy nature and outdoor activities.” Additionally, Taiwan and Australia/New Zealand score higher than others as “a country/region where the number of COVID-19 infections is small” and “the country/region’s handling of new infections can be trusted,” revealing that how a country/region handles COVID-19 has become a criterion in choosing future destinations (Figure 9).

Next, by gender and age, Hawaii is everyone’s top choice of country/region to visit. On the other hand, we see differences in second choices and below. Taiwan scores high among men in all age groups, while South Korea tends to be high among women (Figure 10).

Figure 8. Countries/Regions People Would Like to Visit First Once Overseas Travel Resumes

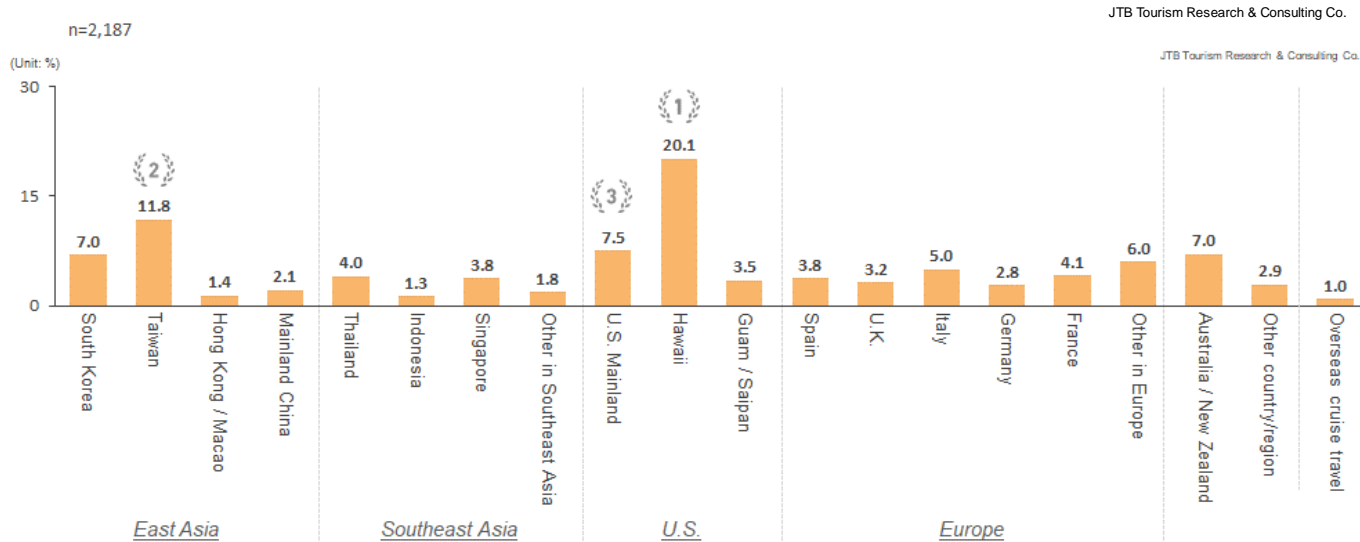


Figure 9. Reasons Why the Country/Region that People Want to Visit Was Chosen (For the Top 5 Countries/Regions that People Want to Visit)

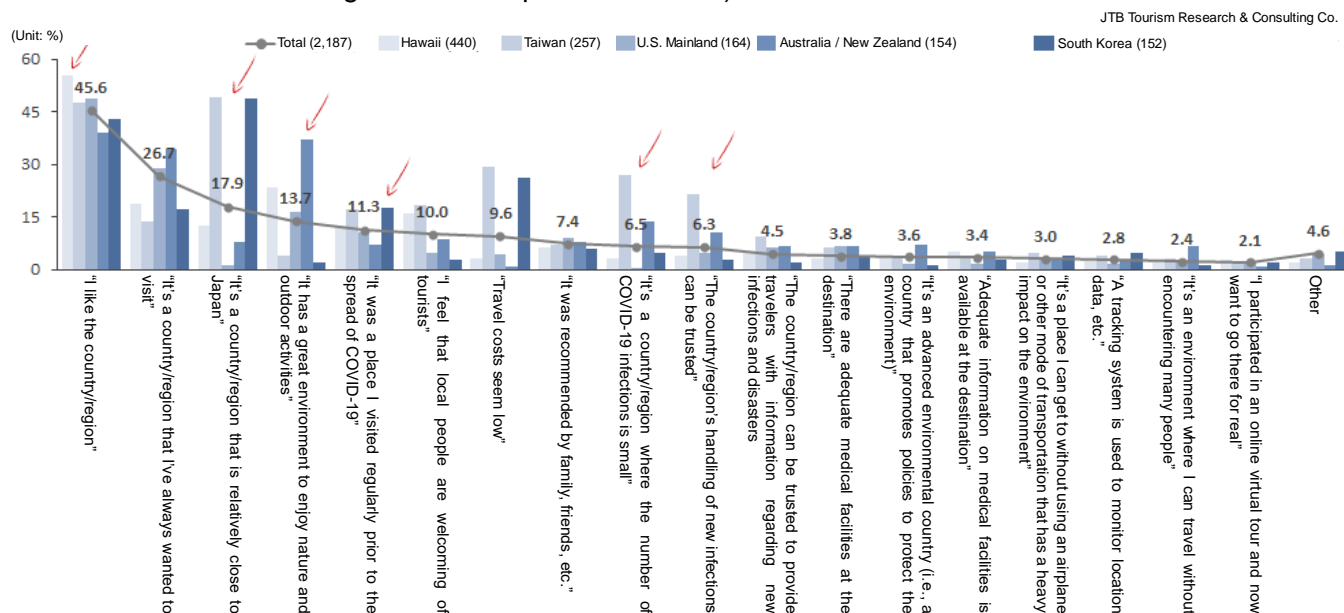


Figure 10. Countries/Regions that People Want to Visit by Gender and Age

JTB Tourism Research & Consulting Co.

		15-29歲		30-39歲		40-49歲		50-59歲		60歲以上	
		(n=208)		(n=217)		(n=215)		(n=227)		(n=218)	
Men	1	Hawaii	15.8	Hawaii	24.4	Hawaii	21.4	Hawaii	22.5	Hawaii	16.5
	2	U.S. Mainland	12.8	Taiwan	13.8	Taiwan	13.5	Taiwan	11.9	Taiwan, Other in Europe	11.5
	3	Taiwan	10.8	U.S. Mainland	12.4	Australia / New Zealand	10.2	Thailand	9.3	Thailand	8.3
		(n=208)		(n=216)		(n=225)		(n=222)		(n=236)	
Women	1	Hawaii	19.7	Hawaii	24.5	Hawaii	17.3	Hawaii	22.1	Hawaii	16.9
	2	South Korea	16.8	Taiwan	12.0	Taiwan	12.9	South Korea	12.2	Other in Europe	12.7
	3	Taiwan	10.6	South Korea	11.1	Other in Europe	9.3	Taiwan	10.8	Taiwan	9.7

Travel Style When Overseas Travel Resumes

As a preventative measure when someone enters or leaves a country, Japan and many other countries have established a fixed period of isolation following a person’s travel into or out of the country. Meanwhile, to resume travel, the Japan Association of Travel Agents and All Nippon Travel Agents Association have proposed to the government that overseas travel be resumed first with “managed travel” (group-type package tours), in which the planned travel organizer can monitor the activity history of participating tourists during and after the trip. As part of its “Strategy for preventing the spread of COVID-19 and recovering tourism,” the government is considering managed small-scale distributed package tours on a trial basis.⁽¹⁾

With that in mind, the main survey asked people how they felt about “travel with isolation” and “managed travel.”

5. A majority of people who “want to travel overseas immediately, regardless of destination” would agree to “travel with isolation”

Meanwhile, even among people who “want to travel immediately,” 32.6% would want to participate in “managed travel,” while roughly half “want to do as [they] please individually”

When asked if they would want to travel overseas even if it meant there would be a fixed period of isolation after entering their destination country (“travel with isolation”), 16.9% of all respondents were “agreeable,” combining those who “want to go even if a period of isolation is required, so long as there are ways to have fun inside the facility” and those who “want to go even if a period of isolation is required since [they] can work during the isolation period.” Among all respondents, 51.2% of those who “want to go immediately, regardless of destination” were agreeable, indicating that just over half of people who want to travel immediately would agree to “travel with isolation” (Figure 11). There are already countries/regions in the world that offer plans that make it possible to have fun even during the period of isolation. For instance, in Thailand, five government-designated golf courses have been announced where people can quarantine in isolation for 16 days while playing rounds of golf at the course instead of quarantining in isolation at a hotel.⁽²⁾ Such efforts to make enjoyable the period of

isolation upon entry in the country may become the standard for overseas travel during the coronavirus pandemic because they address both the needs of travelers who want to travel immediately and the issues facing businesses that want to break free of the current situation.

Next, we asked whether people would want to travel overseas on “managed travel,” an approach that only allows overseas travel using group-type package tours through travel agencies in order to monitor local activity to ensure traveler safety and provide a smooth on-site travel experience. Findings show that people who “want to wait to travel overseas until [they] can travel as [they] please individually” are the most numerous overall at 41.7%, while those who would “want to travel overseas immediately on a package tour with managed travel” are a mere 12.7%. Overall, just 32.6% of even those people who “want to go immediately, regardless of destination” say they would “want to travel overseas immediately on a package tour through a travel agency,” while 48.8% say they would “wait to travel overseas until [they] can travel as [they] please individually” (Figure 12). Based on the above, it was found that people who “want to go immediately, regardless of destination” are not enthusiastic when it comes to traveling overseas on a group-type package tour with “managed travel,” even when they were agreeable to “travel with isolation.” People who “want to go immediately, regardless of destination” include a relatively large number of experienced overseas travelers, and such people have a strong desire to move about freely at their destination. For that reason, it is important to think about ways to make group-type package tours more appealing to such travelers.

(1) Source: MLIT website, “Regarding establishment of ‘Strategy for preventing the spread of COVID-19 and recovering tourism’” [Japanese]

https://www.mlit.go.jp/kankocho/news02_000433.html

(2) Source: Tourism Authority of Thailand website, “[Golf] Thai government-designated golf courses can substitute for coronavirus isolation” [Japanese]

<https://www.thailandtravel.or.jp/news/84069/>

Figure 11. Thoughts Regarding “Travel with Isolation” by Intention After Overseas Travel Resumes

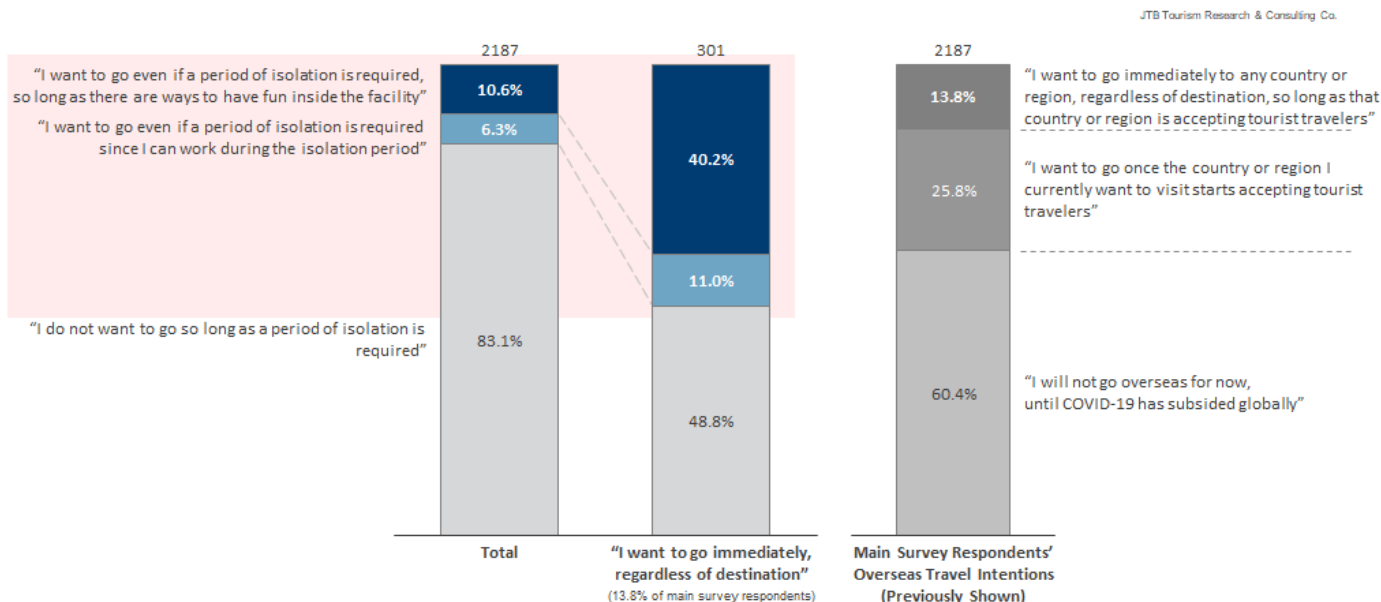
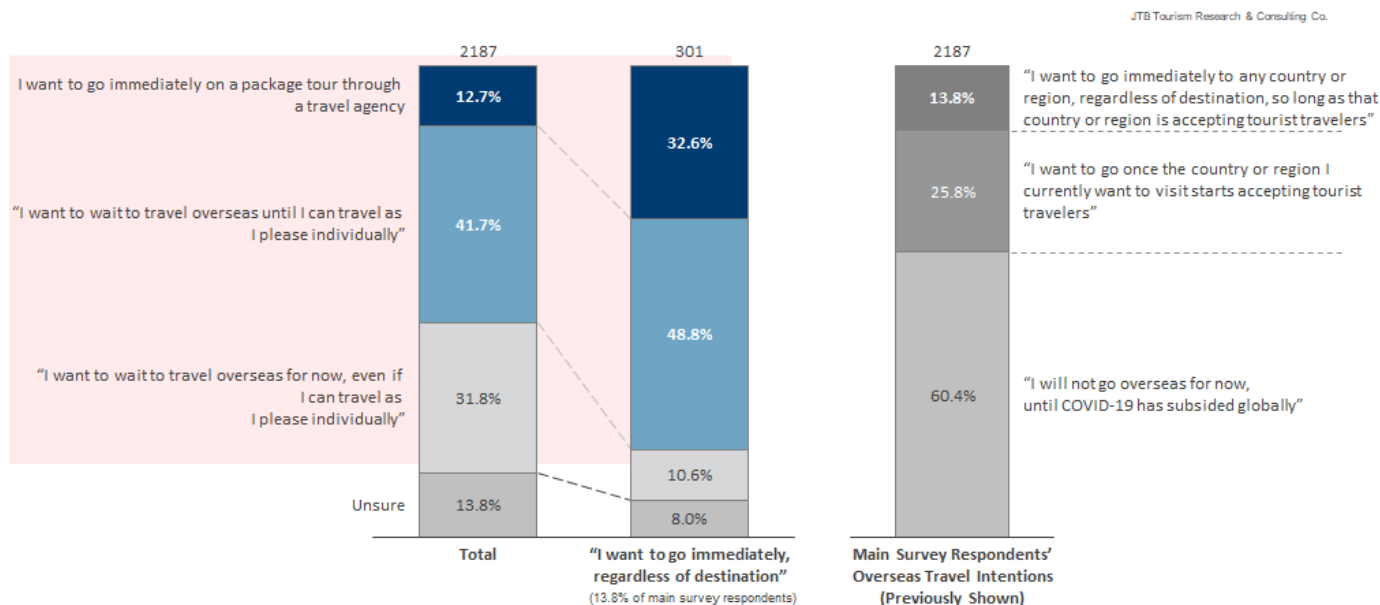


Figure 12. Thoughts Regarding “Managed Travel” by Intention After Overseas Travel Resumes



6. Things people are doing right now to prepare for overseas travel when it resumes are...

Overall, “saving money” (38.7%) and “monitoring information on countries/regions [they] want to visit” (24.6%)

Younger groups are “saving money” and “making vacation plans,” while older groups are “keeping an eye on information”

We asked people if they were doing anything right now to prepare for overseas travel when it resumes, even though there is still no clear indication when that might be. The majority of people, 51.6%, are “not doing anything in particular to be ready for overseas travel when it resumes.” There is concern that even people who traveled overseas between 2017 and 2020 and even main-survey respondents who intend to travel overseas in the future may lose interest in traveling overseas if COVID-19 persists and overseas travel remains restricted. What, then, are the people who are doing something to prepare for overseas travel when it resumes actually doing? When asked for specifics, the highest percentage of people say they are “saving for travel costs” (38.7%), followed by those who are “monitoring information on the actual overseas destinations [they] want to visit” (24.6%) (Figure 13). A closer look by gender and age shows that women aged 15-29 are “saving for travel costs” and men aged 15-29 are “making vacation plans” more than other age groups. Meanwhile, we find that men and women aged 60 and older, who more often mention “travel programs” and “travel agency trip availability,” are collecting the information actually needed to travel overseas. As for younger people, they more often get their information from “blogs and YouTube videos by people who have visited the travel destinations” and by “hearing about travel experiences from family members, etc.,” revealing that media sources tend to differ by age group, even when both groups are seeking the same information (Figure 14). At a time like now, when COVID-19 makes it impossible to predict when overseas travel may resume, it is best to use media sources that are better suited to the needs of particular age groups and individuals when providing information to people who intend to travel overseas in the future.

Figure 13. Preparing Now for Overseas Travel

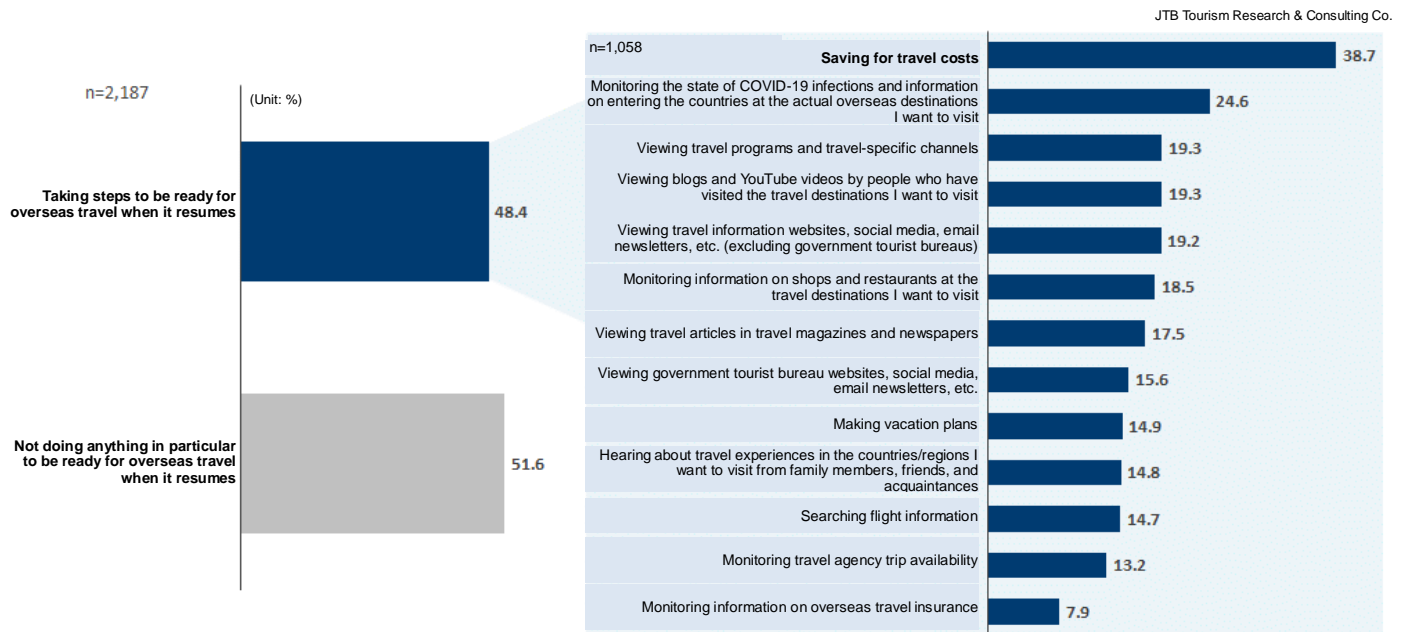
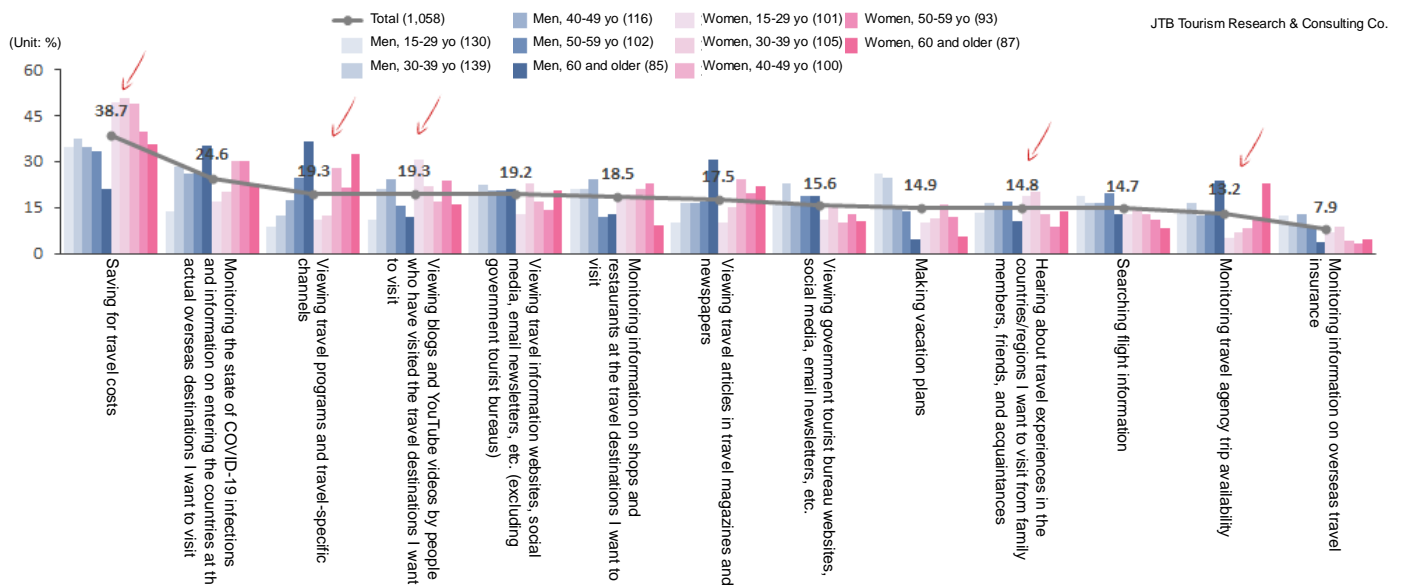


Figure 14. Preparing Now for Overseas Travel by Gender and Age



*Totals excluding respondents "not doing anything in particular to be ready for overseas travel when it resumes"; "Other" not shown

Conclusion

■ The key to reviving overseas travel is safety and security demonstrated through “information sharing” and “package tour design”

Among people preparing for overseas travel when it resumes, many of them are monitoring “information.” One of the important findings of this survey is that the types and sources of information that people rely on differ by age group, even when both groups are seeking the same “information.” Whereas younger people tend to monitor personal experiences and other local information shared on blogs and social media to help them develop their sense of the destination, older people tend to monitor websites for restrictions on entering the country, the state of COVID-19, and tour trip availability for the actual destinations they intend to visit. Among the top destinations that people want to visit, Taiwan and Australia/New Zealand tended to be chosen because their handling of COVID-19 is highly regarded. That these countries/regions are highly regarded in this way is also because they were very effective at disseminating information to the world. It is precisely because no one can foresee when overseas travel will resume that it is important to select media sources and disseminate information in a way that is tailored to individual needs and predicated on sharing information that foregrounds safety and security.

At the same time, despite their intention to travel overseas in the future, a majority of people (51.6%) currently say they are “not doing anything in particular to be ready for overseas travel when it resumes.” As COVID-19 drags on, this raises concerns that people may let their passports expire and even lose interest in overseas travel altogether. When things do resume, it will be important to work on restoring an environment that has undergone a full reset while lowering the hurdles to overseas travel.

Even among people who “want to go immediately, regardless of destination,” those who were enthusiastic about using a “package tour with managed travel that monitors activity” were few in number compared to those who would accept a fixed period of isolation upon entering a country. Conventional group-type package tours typically involve moving from place to place, but visiting numerous cities and people at a time when COVID-19 is still prevalent may be cause for concern among travelers. In the future, rather than a managed style of travel that hastily takes people from one place to the next, perhaps the experience of the coronavirus pandemic can provide the opportunity to reimagine “resort life” that is both secure and comfortable and lets people spend time relaxing in a rich natural setting.

The global spread of coronavirus infections in 2020 did not only upend international exchange. As a result, Japanese domestic transit was also restricted, and domestic tourism was severely disrupted. We must not forget that additional disruptions and challenges will be waiting for us once overseas travel has resumed. As we continue our efforts through trial and error, it will be all the more important to focus our thinking on consumer-aligned insights by asking ourselves how we can ensure safety and security as we revive the overseas travel market.

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