

## **Research On Smartphone Usage and Travel Consumption (2023)**

- **Private communications are moving to messengers and chats.**
- **The use of social media as an information source is a remarkable trend.**
  - Messenger and chat applications rank 1st place as the most used apps on smartphones. Email apps come in 3rd place (71.7%) and the phone function comes in 4th at 64.5%. All of them have largely decreased usage when compared to data in 2019.
  - Users get the latest information from words that have surged in popularity, retweets and reactions from friends.
- **Popular social media apps include LINE, YouTube, and Instagram. Both Instagram and TikTok increased by more than 10 points since 2019 and the demographic of their users has also widened in scope.**
- **A total of 45.8% of people have changed their habits for a smartphone game.**
  - 72.7% of men in the 30's, 63.3% of men in their 20's (29 years old and younger)
  - 33% of men 29 years of age and younger have played or watched esports
- **There is an increase of buying travel-related reservations on smartphones (such as tickets for transportation and events). Accommodations and related facilities continue to rise in trends.**
- **Will AI services regarding travel change from “before traveling” to “while traveling?”**
  - This latest survey reveals an increase of “I can consult when I don't know something during my trip,” and “Solo traveling is easy because AI helps me in many ways.” when compared to the 2019 survey.

JTB Tourism Research & Consulting Co. (HQ: Shingawa-Ku, Tokyo, President and CEO Yoshihito Kazama, hereby referred to as “JTB”) conducted “Research On Smartphone Usage and Travel Consumption (2023).” This survey has been conducted annually from 2013 to 2019, with 2023 being the eighth reiteration – four years since the last one in 2019. Our firm continually conducts research and analysis on how people's lifestyles and values impact and influence consumer behavior and travel.

The survey conducted in 2019 revealed that social media has been moving away from a method of communication to a place to gather information, and that trend was further highlighted in 2023's results.

In addition, Chat GPT and other hot-topic AI services continually improve their technologies and further become more widely adopted – we are seeing how those services are changing in travel.

This survey aims to capture hints of future changes in lifestyles and travel behavior by continuously examining smartphone usage and people's attitudes and consciousness.

## Summary of Survey

Method: Online survey

Dates Surveyed: November 2<sup>nd</sup> to November 3<sup>rd</sup>, 2023

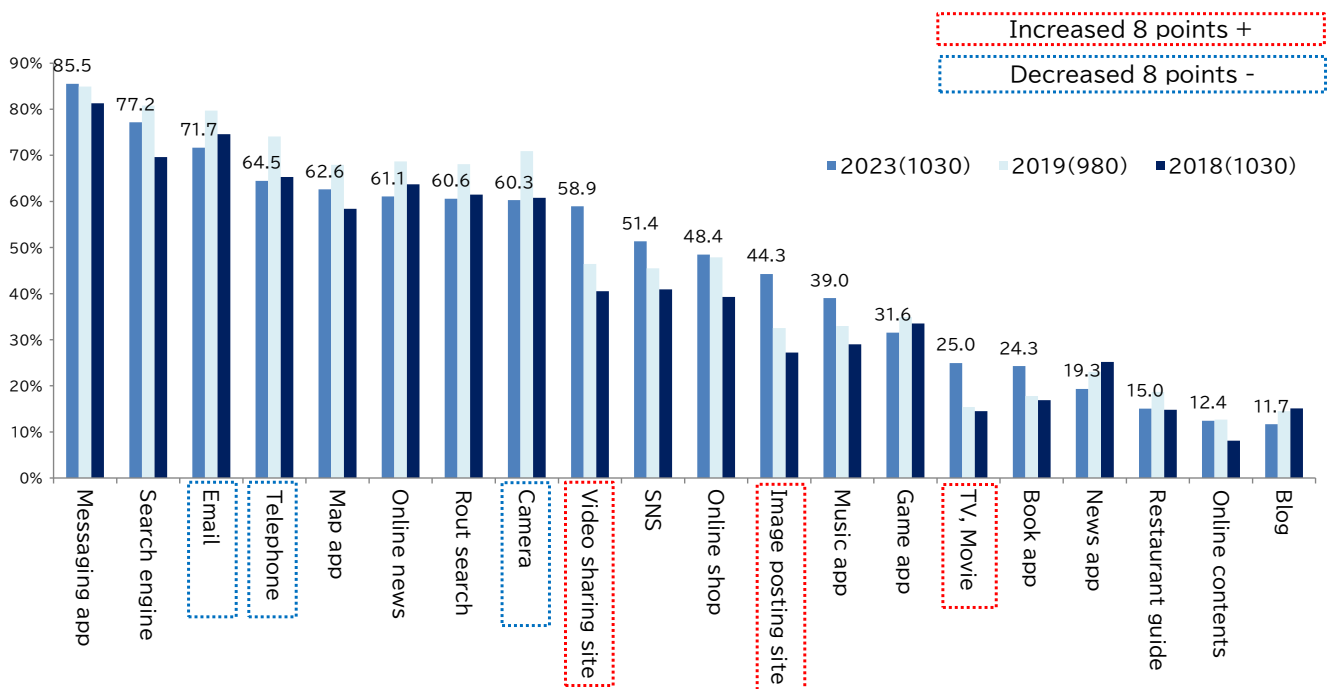
Targeted Audience: (Screening) Men and women ages 18 to 69 (for a total of 10,000 people) who live in the Tokyo and capital region, Nagoya and its surrounding areas, and Osaka and its surrounding areas. Upon screening the answers from participants of the main survey, we found out that 1,030 people have gone traveling at least once within the past year for domestic travel (including day trips), using their smartphones for private travel.

## Actual Usage Study Cases of the Internet and Smartphones

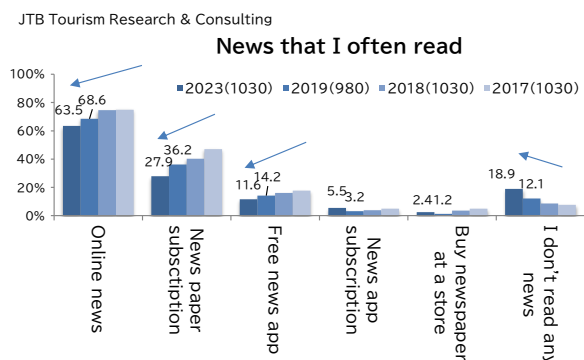
### 1. Private communications are moving to messengers and chats. The use of social media as an information source is a remarkable trend.

The usage of the phone and email function on smartphones has greatly decreased since the survey was last conducted in 2019. Private communications are now mainly on messenger and chat applications. Furthermore, summary sites lost 8 points since 2019 (figure 1). People are now using the internet for their news, while both physical and digital versions of newspapers are in decline (figure 2). On the other hand, users are getting news from the internet from words that have surged in popularity, reposts, and reactions from friends (figure 3). The survey conducted in 2019 also showed social media being used as a communication tool at first but gradually changed to a medium for collecting information and media. Current trends also show that social media is not just used for consumer affairs, but current affairs as well.

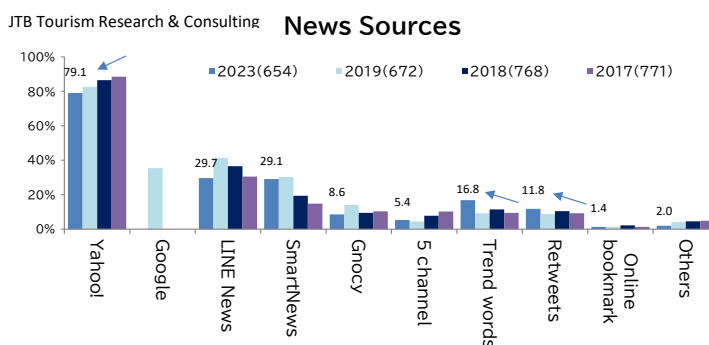
(Figure 1) Apps Most Frequently Used on Your Smartphone (Multiple Answers)



(Figure 2)



(Figure 3)



**2. Popular social media apps include LINE, YouTube, and Instagram. Both Instagram and TikTok increased by more than 10 points since 2019 and the demographic of their users has also widened in scope.**

The main social media apps and video uploading sites included LINE, YouTube, Instagram and X at the top. Both Instagram and TikTok increased by 10 points since the 2019 survey, and the demographics of its users has widen in scope. On the other hand, Facebook sees a decline 10 points since 2019 – although women in their 60’s are using the site more, both men and women in their 50’s and under are not using the site as much (table 1).

(Table 1) Main Social Media and Video Upload Apps Used on Smartphone (Separated by Age and Gender)

(Multiple Answers)

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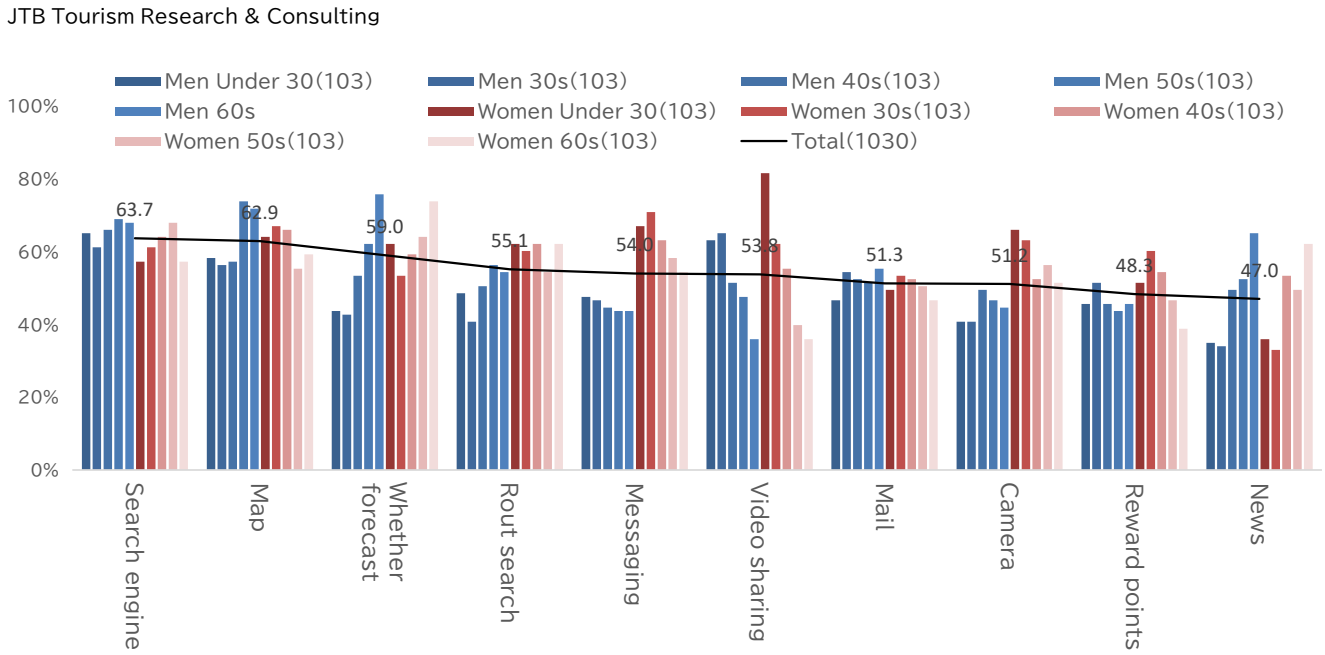
	LINE			YouTube			X (Twitter)			Facebook			Instagram			Tik Tok		
	2023	2019	2018	2023	2019	2018	2023	2019	2018	2023	2019	2018	2023	2019	2018	2023	2019	2018
Total (1030)	89.5	89.6	83.7	71.1	64.2	60.7	50.3	41.6	40.1	↓ 25.2	37.3	38.3	↑ 50.6	38.7	33.6	↑ 17.7	4.1	3.0
Men Under 30 (103)	85.4	93.9	93.2	80.6	87.8	81.6	↑ 80.6	70.4	72.8	↓ 17.5	40.8	48.5	↑ 63.1	52.0	49.5	↑ 33.0	6.1	15.5
Men 30s (103)	91.3	88.8	75.7	↑ 89.3	77.6	66.0	↑ 68.9	56.1	47.6	↓ 37.9	50.0	50.5	↑ 50.5	36.7	26.2	↑ 23.3	10.2	4.9
Men 40s (103)	85.4	85.7	77.7	72.8	68.4	64.1	↑ 50.5	38.8	40.8	↓ 26.2	40.8	42.7	35.9	29.6	21.4	10.7	6.1	0.0
Men 50s (103)	83.5	83.7	68.9	65.0	59.2	56.3	43.7	34.7	30.1	↓ 26.2	41.8	32.0	26.2	26.5	28.2	11.7	3.1	0.0
Men 60s	85.4	76.5	72.8	52.4	49.0	52.4	26.2	17.3	30.1	30.1	32.7	35.9	↑ 23.3	12.2	23.3	↑ 12.6	1.0	0.0
Women Under 30 (103)	95.1	99.0	97.1	↑ 89.3	78.6	75.7	77.7	77.6	75.7	↓ 10.7	46.9	55.3	↑ 88.3	77.6	79.6	↑ 36.9	7.1	6.8
Women 30s (103)	92.2	95.9	92.2	71.8	66.3	65.0	↑ 59.2	38.8	37.9	↓ 29.1	46.9	44.7	↑ 75.7	61.2	50.5	13.6	4.1	1.9
Women 40s (103)	93.2	94.9	88.3	↑ 71.8	57.1	55.3	35.0	32.7	29.1	30.1	24.5	32.0	↑ 60.2	40.8	21.4	↑ 16.5	1.0	1.0
Women 50s (103)	90.3	91.8	89.3	↑ 63.1	50.0	55.3	40.8	36.7	29.1	22.3	31.6	30.1	↑ 51.5	34.7	25.2	↑ 13.6	2.0	0.0
Women 60s (103)	93.2	85.7	81.6	54.4	48.0	35.0	20.4	13.3	7.8	22.3	17.3	11.7	↑ 31.1	15.3	10.7	4.9	0.0	0.0

Note: The red arrows pointing upwards indicate an increase of 10 points since 2019, while the blue arrows pointing downward indicate a decrease of 10 points since 2019.

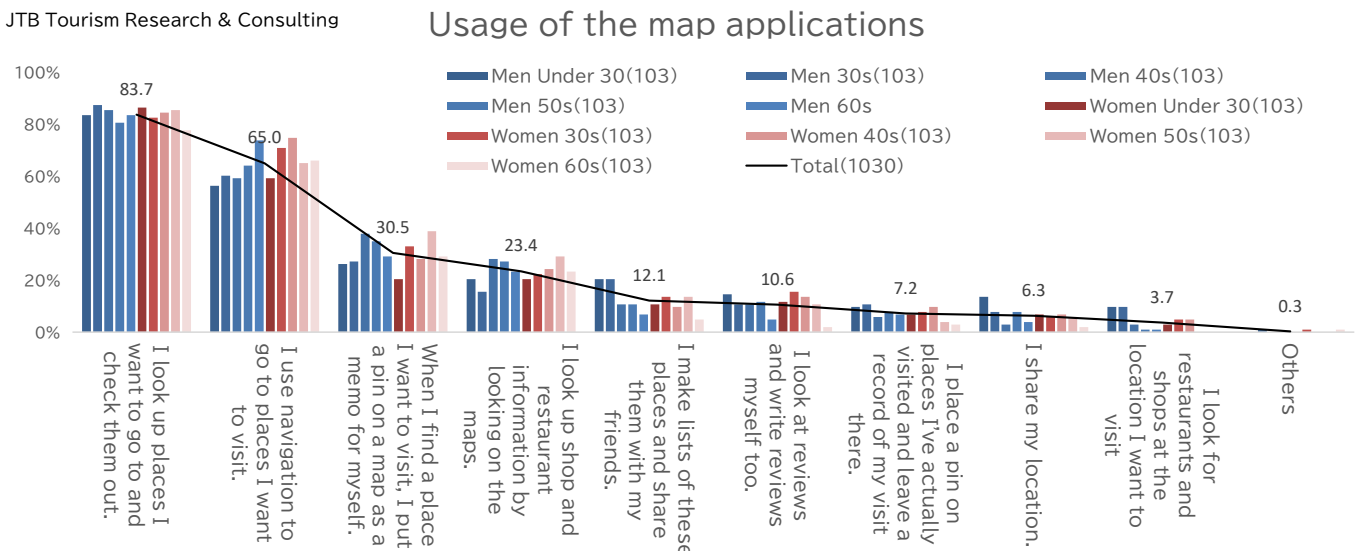
**3. Search engines in 1<sup>st</sup> place and map applications come in 2<sup>nd</sup> place for apps that people want to continually use. Map applications are not used just for searching locations and navigation but also for finding stores, restaurants and taking notes.**

Next, we asked participants which applications they would like to continue to use. While search engines came in 1<sup>st</sup> place, map applications came in 2<sup>nd</sup> place (figure 4). We asked them how they used the map applications and they responded with “Searching for places I want to go” (83.7%), “Navigation” (63.0%), “Finding out stores and restaurants on the map” (30.5%), “Finding restaurants around the destination” (23.4%), and “Bookmarking to make note that I want to visit that place” (12.1%). These results show that map applications are used in a variety of ways (figure 5).

(Figure 4) Applications You Want To Continue Using (Multiple Answers)



(Figure 5)



**Activities or Things That Have Increased or Decreased in Your Daily Life Compared to Three Years Ago**

4. Activities or things that have increased compared to three years ago include: “cashless payments,” “buying things online,” “on demand streaming video,” “online meetings,” “working from home,” and “spending more time on laundry and cleaning the house.”

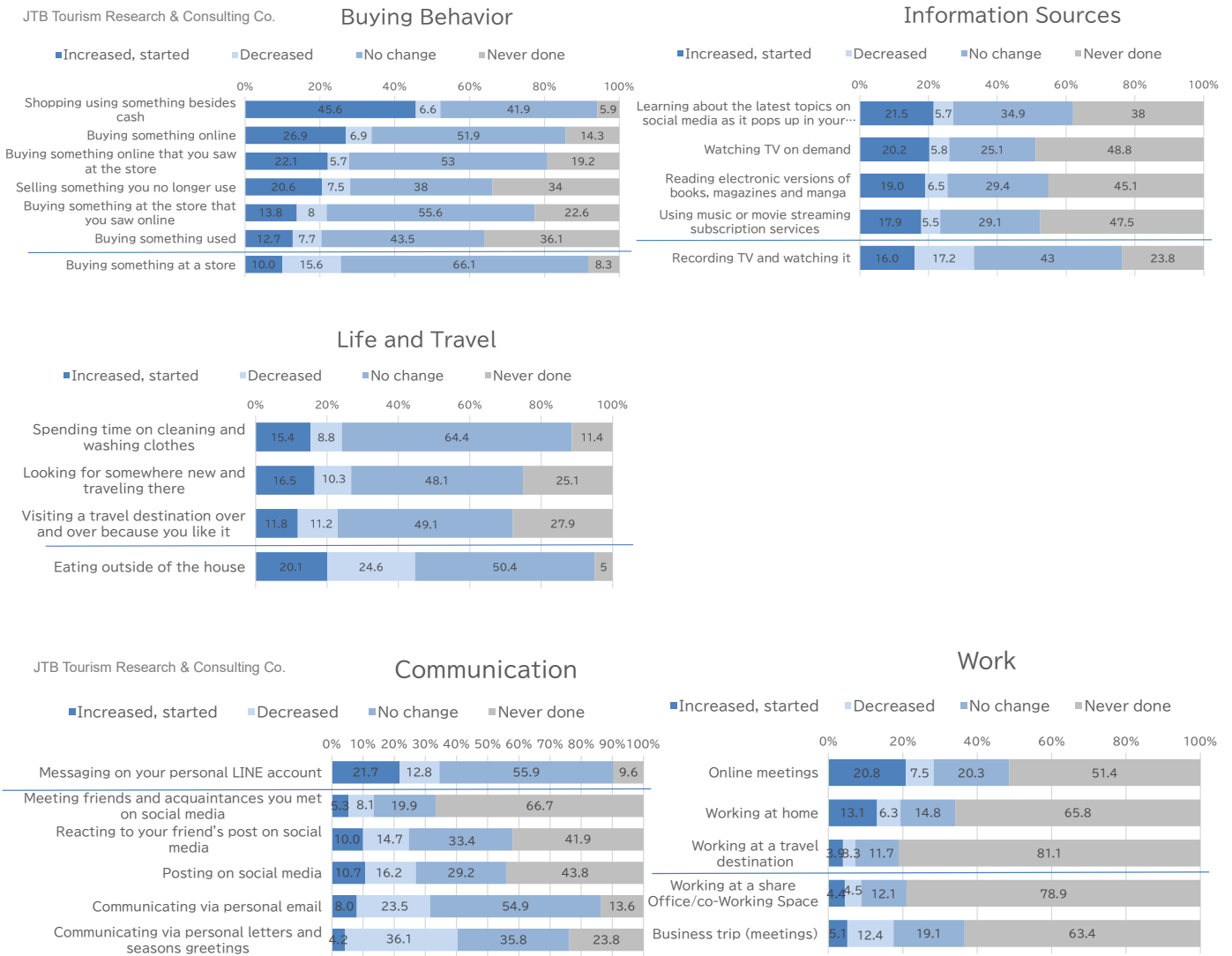
Our daily lives have changed tremendously since COVID-19 hit the world back in 2020, but there are many things that haven’t changed and things that have changed but went back to its former state. With this, we asked participants what activities or things increased for them and activities/things that decreased for them in the past three years.

At the top of the rankings, “cashless payments,” “buying things online,” and “on demand streaming video” increased for participants.

As the previous survey revealed, “learning about the latest topics on the internet” and “private communications on LINE or other messengers” has increased in numbers.

In addition, we can see that the digitalization of society continues as online meetings have become more commonplace. Work styles now include an increase of working from home, and since more people are staying at home – there’s been an increase of time spent doing laundry and cleaning the house.

(Figure 6)



Note: Items above the line indicate an increase or a start, which are higher in percentage ratio than decreases.

## Playing Games on Your Smartphone and esports

**5. 45.8 % of people in general have changed their daily habits or taken side trips somewhere to play their smartphone game. Men in their 30's reach 72.7%, while men 29 and under reached 63.3%. 33% of men aged 29 and under have played or watched esports.**

Esports is hot topic as of late, but we wonder how much interest people have in it. Singapore hosted its first Olympic Esports Week in June 2023, and there are tournaments around the country within Japan too.

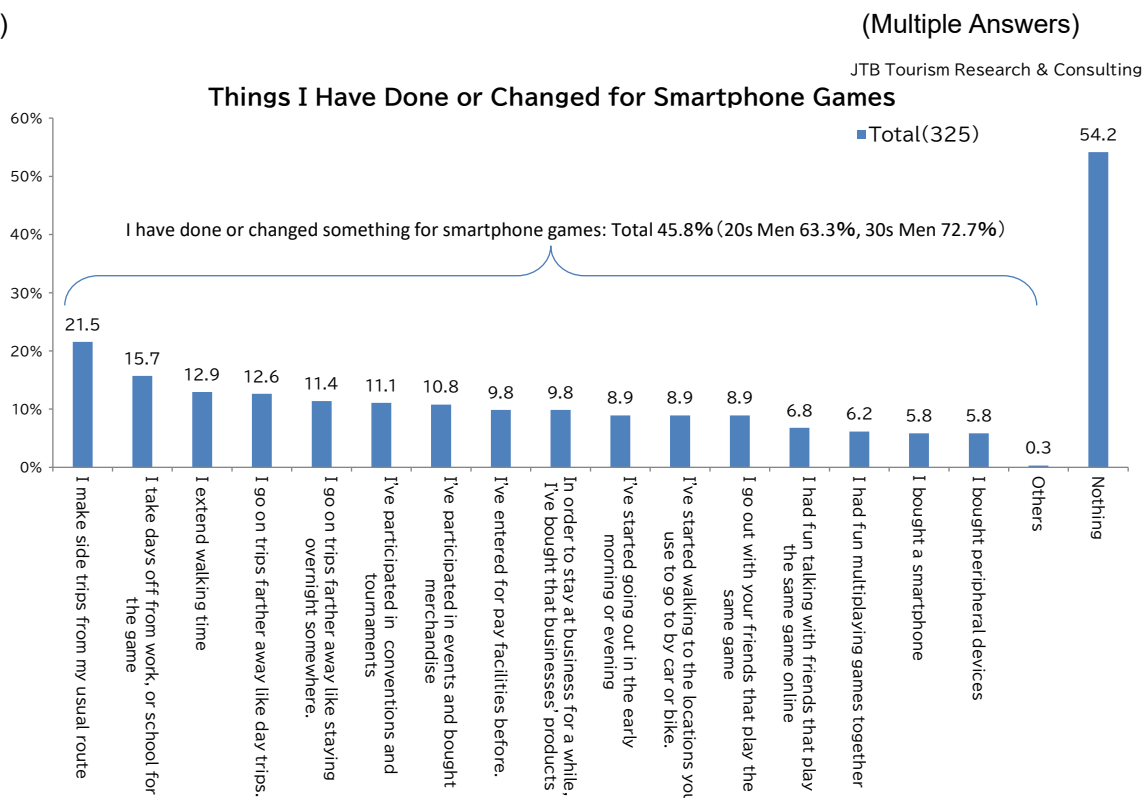
Out of the people who play smartphone games, 45.8% of people changed their behaviors in some ways such as, "I make side trips from your usual route on the way to/from work or to/from school," "In order to stay at business for a while, I've bought that businesses' products," etc. Looking at the data based on age and gender, 72.7% of men in their 30's and 63.3% of men aged 29 years and under have a large percentage of these actions (figure 7).

Men ages 29 and under and men in their 30's have a strong tendency to be interested in and/or have experience playing esports. In general, only 12.6% of people have played or watched esports but men 29 and under hit 33.0%, while men in their 30's hit 28.2% (figure 8). Over 50% of men in their 30's and 29 and under want to participate or watch esports at a venue (figure 9).

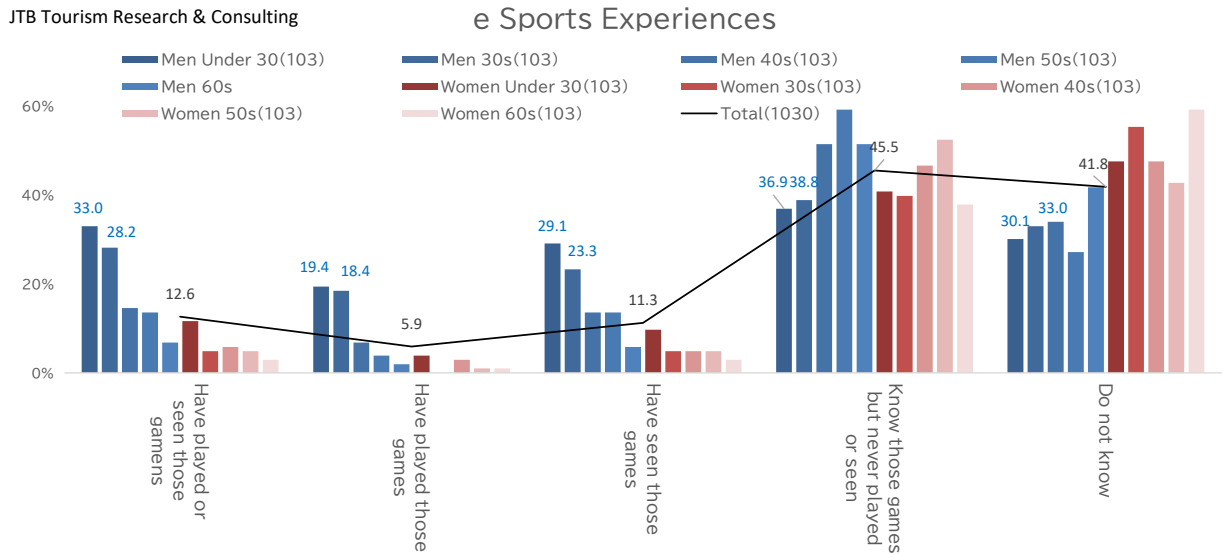
Around 30% to 40% of people responded with answers such as, "Game software (including purchasable items in the game)," "Goods about my favorite characters," "Goods about my favorite game or player," "Souvenirs and products local to the area of the event," "Tourism in the local area," "Collaboration goods of the event and the local area" for things they wanted to purchase when and after participating at the events. We can see that there is a potential consumption element to the events (figure 10).

For those interested in esports, these are the thing following things that people want in their local areas: "Esports Event (Tournament or Convention)" at 39.7%, "A facility where I can enjoy esports (for example, a gaming café, etc.)" at 38.5%, and "Esports Event (Experience Event)" at 34.6% (figure 11).

(Figure 7)

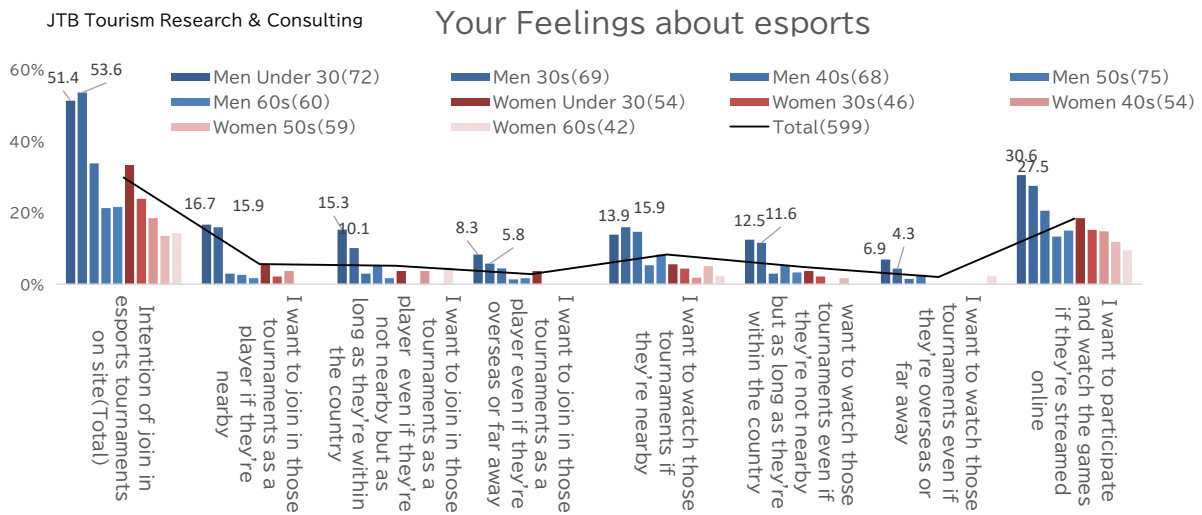


(Figure 8)



(Multiple Answers)

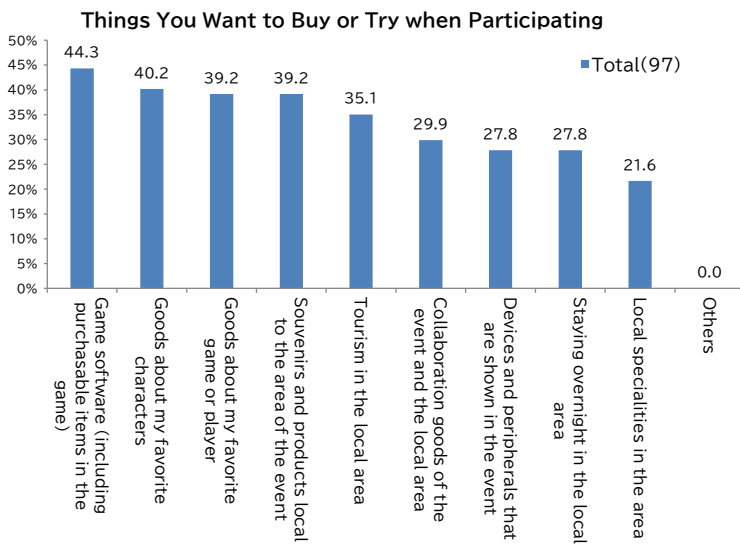
(Figure 9)



(Multiple Answers)

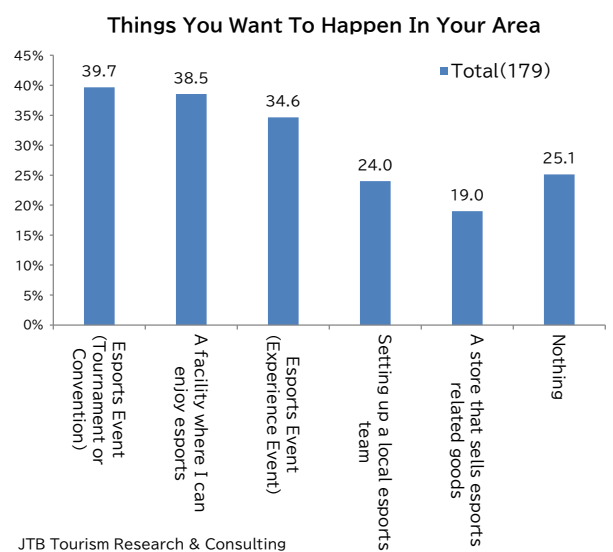
(Figure 10)

(Multiple Answers)



(Figure 11)

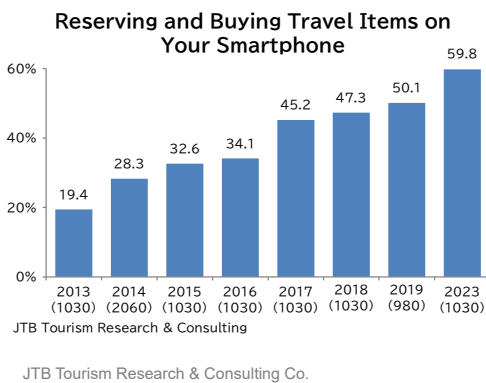
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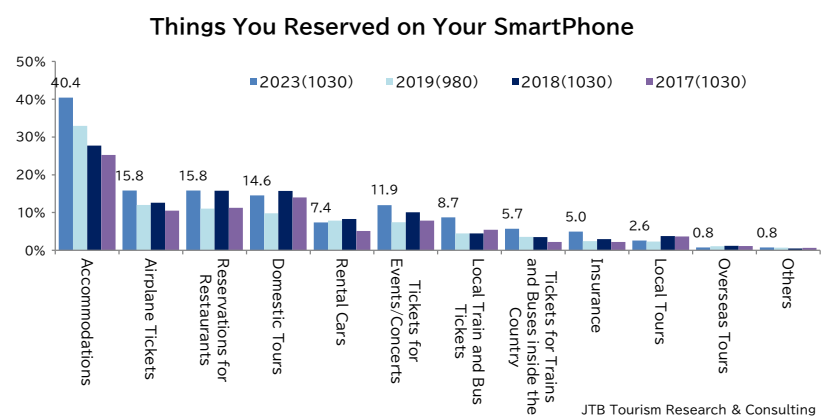
**6. There is an increase of buying reservations for travel (such as transportation tickets and events) on smartphones than before. Accommodations continues to grow in scope.**

There is an increase of buying reservations for travel on the smartphone and it has continued to grow since the start of this survey in 2013. The 2023 survey shows an increase of 10 points in comparison to 2019 (figure 12). Looking at the details of what was purchased, we can see “accommodations” continually growing and leading the rankings. Furthermore, there is an increase for “Airplane Tickets,” “Tickets for Events/Concerts,” “Local Train and Bus Tickets,” “Tickets for Trains and Buses to the Airport inside the Country,” which shows a trend for ticket purchases (figure 13). We believe that it was a result of COVID-19 and the subsequent policies of timed-entry slots, and non-contact services expanding their reach.

(Figure 12) (Multiple Answers)



(Figure 13) (Multiple Answers)



**7. Will AI services regarding travel change from “before traveling” to “while traveling?”**

**This latest survey reveals an increase of “I can consult when I don't know something during my trip,” and “Solo traveling is easy because AI helps me in many ways.” when compared to the 2019 survey.**

Next, we asked participants about their usage of AI services in different fields. While it is not possible to directly compare the results with the 2019 survey as the selection and answers are different, we can see that 2019 had a total of 30.7% of people using AI services, while 43.2% of people in 2023 were using such services – a clear increase. What's interesting and surprising is that more women aged 29 and under used such services more than men. There is a clear increase of “Translation and interpretation services” and “Search engine that can detect what I've taken with my smartphone camera” (figure 14).

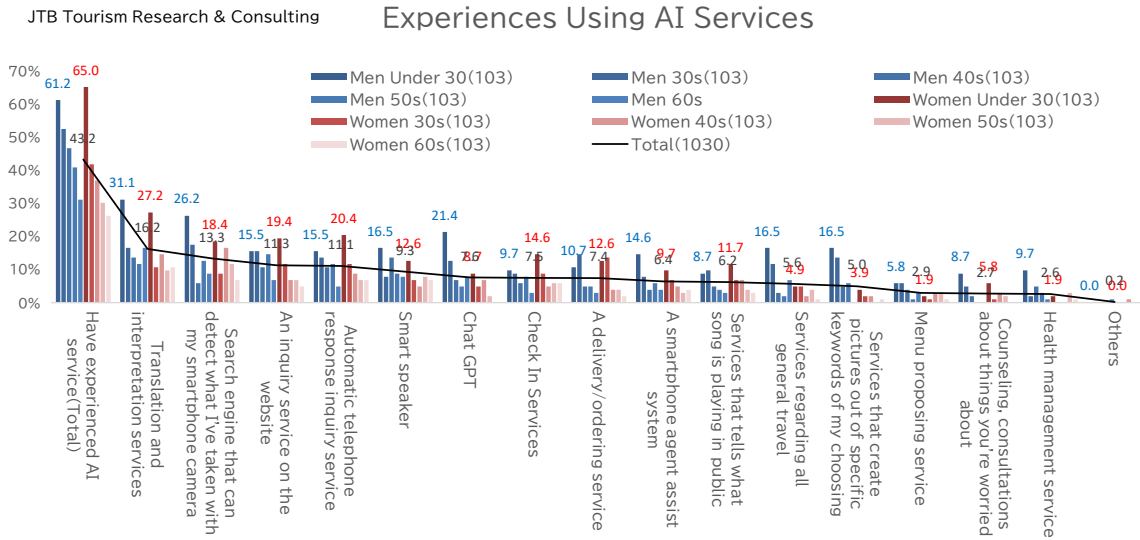
When we asked how people felt when using these services for travel, they responded with, “It's easier to ask these services than people” as the number one answer for both 2019 and 2023. Compared to 2019, 2023 saw an increase of “I can consult when I don't know something during my trip,” and “Solo traveling is easy because AI helps me in many ways.” On the other hand, “I have received answers that I thought I wouldn't,” and “It lessens the burden for me when it comes to making reservations and buying tickets and creating travel plans” decreased in points (figure 15). The usage of AI services for travel may change from “before traveling” to something that's done, “while traveling.”

Even though the technology behind these services continues to improve, “I'm not getting the answers I thought I would get” ranks highly. It seems AI is enhancing its functionality to the many and varied demands of people as AI usage continues to spread.

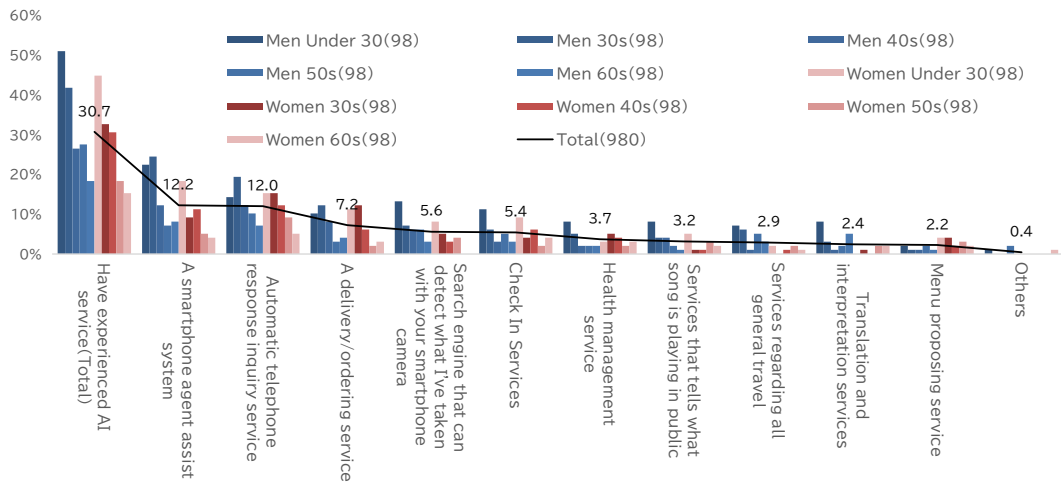


(Figure 14)

(Multiple Answers)



Reference: Experiences Using AI Services(2019)

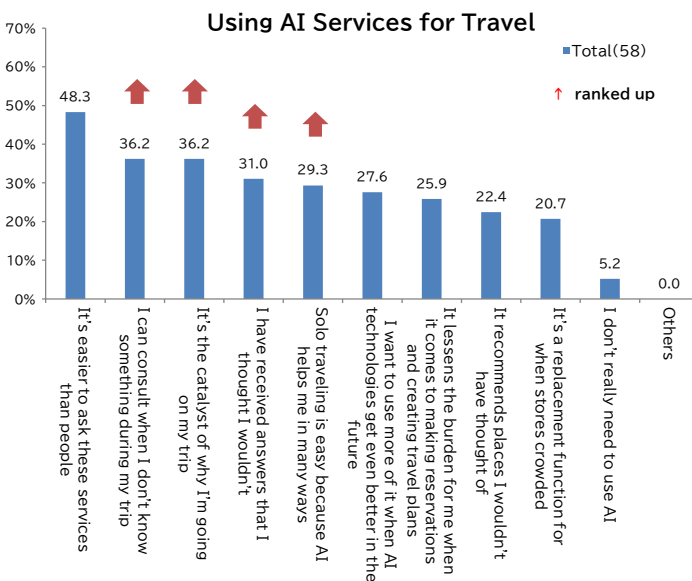


(Figure 15)

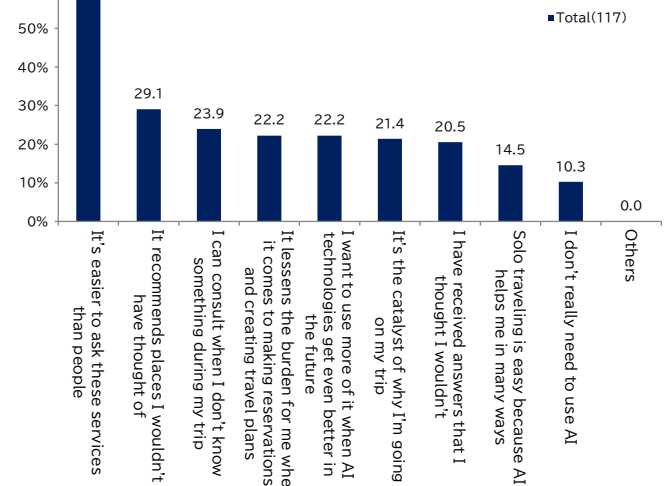
(Multiple Answers)

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Reference: Using AI Services for Travel (2019)



- **Social media is Becoming a Source of Information including News, Not Just Consumption Trends**

Smartphones have made their way into the fabric of everyone's lives since 2010 – and the Tohoku Tsunami and Earthquake in 2011 spurred its use furthermore. In comparison to e-mail, social media was used as a method to keep in touch and communicate with many others more easily. However, people are now suffering from social media fatigue as connections with others remain constant, no matter the time or place.

Later, as people were trying to find ways to use social media, they started to use it to collect information on buying things and to promote themselves – not just as a communication tool. We have learned with this survey that social media is now used as a point of contact for all information, including the news.

As more information gets promoted to more and more people on social media, only information that everyone is interested in gets selected for viewing – which means that information that an individual user is not interested in will not be seen. There is discussion that the advancement of AI will see a quicker personalization of such information for individual users. How will a society that only shows personalized information affect and change the behaviors of individual users in the future? When information is laid out on the rails, one of the greatest joys in travel is discovering something by accident, or encountering something you thought you wouldn't have. What should we do to create these experiences? It is something to think about.

- **Rapid Shifts to Online in Lifestyles Highlights Changes in Consumer Behavior and Work Styles**

COVID-19 changed everything to become online and that in turn has changed us and our society in major ways. The results of this survey reveal a large increase in “Cashless payments” and “Buying things online.” Subscription services are on the rise with television, music, and books too. Work styles see an increase of online meetings and working from home (either at home or while traveling).

Singapore hosted the first Olympic Esports Week in June 2023 which became a huge topic of discussion and shows one way of how sports are now online. The results of this survey reveals that the main demographic interested in esports are still men in their 20's and 30's, which shows over 45.8% of people changing their daily habits and taking side trips for their smartphone games. We also learned that people are interested in sightseeing in the local areas, local souvenirs, and products after the events. Depending on how these developments go, there may be ripple effects in consumption from travel.

- **More People are Using Travel-Related AI Services While Traveling**

More people are buying things on their smartphones compared to 2019, as accommodations leads the rankings. We can also see that more people are buying tickets (transportation and events) on their smartphones too – this is something to note. There is an increase of “I can consult when I don't know something during my trip,” and “I have no problems using AI while solo traveling” for usages of travel-related AI services. Meanwhile, we can see a decrease in “It recommends places I wouldn't have thought of,” “It lessens the burden for me when it comes to making reservations and buying tickets and creating travel plans” – these are things done before traveling. There might be a shift in using AI services while traveling instead of before traveling.

On the other hand, looking at the survey we took, “Global 13 Country Survey” (<https://www.tourism.jp/tourism-database/survey/2023/10/inbound-survey/>) and its results shows that most travelers will decide on their travel plans before traveling, and that there is little change of their actions while traveling. They collect information on their destination and accommodations before traveling, while looking up information on food, easy activities, souvenirs, and places to buy them while traveling. People may want such information at the right time and place as AI should determine what information they need according to the travel plans.

Contact : JTB Tourism Research & Consulting Co. PR <https://www.tourism.jp/en/contact/>