

DBJ and JTBF: Survey on Tourist Travel to Japan from Asia, Europe, the United States, and Australia (Second Special Survey on the Level of the Effects of COVID-19)

~Convergence of Covid-19 will see a further increase in Japan's popularity as an overseas travel destination~

~Culinary experiences and on-line interactions offer effective avenues to explore today~

1. Development Bank of Japan Inc. has regularly published the Survey on Foreign Travelers to Japan from Eight Asian Regions since 2012, with the cooperation of the Japan Travel Bureau Foundation since 2015. In June of 2020, we carried out the First Special Survey on the Level of the Effects of COVID-19 (the "First Survey") to learn how coronavirus disease (Covid-19) had affected the feelings of foreign travelers towards overseas travel and to assess latent demand for the inbound market once the pandemic eased.

The survey covered here is the Second Special Survey of the Impact of Covid-19 (the "Second Survey"), **carried out December 1–12, 2020** to discover how the views of foreign travelers have changed in the six months since the First Survey.
2. The First Survey produced the following findings:
 - ① Concern about Covid-19 ran high, and was felt more strongly among people in Asia than those in Europe, the United States and Australia.
 - ② Regardless of region, respondents showed keen interest in enjoying foreign travel once the Covid-19 pandemic started easing. Increases were seen in budgets and length of stay.
 - ③ Japan ranked high on the list of popular tourist destinations.
 - ④ Compared with other countries and regions, Japan was held in high regard for its shopping options, cuisine, public safety and cleanliness, but more negatively in the areas of multilingual support, hands-on tours and other activities.
3. The Second Survey found that although unease over Covid-19 remained strong, interest in leisure travel was rising in each region surveyed. Whether in Asia or Europe, the Americas or Australia, respondents everywhere showed an increasing desire to travel overseas. Budgets for foreign travel are increasing along with length of stay.
4. Japan is growing increasingly popular as a tourist destination. It continues to hold the top position among Asian travelers, and its share is on the increase. Among Western travelers, it rose from second place in the First Survey to first place in the second. Respondents from the various regions were asked about the characteristics that made Japan a competitive international travel destination. Delicious food, cleanliness, and public safety ranked high among all respondents, regardless of their place of residence. Nightlife, on the other hand, received poor evaluations. Negative assessments varied according to respondents' home region: those from Southeast Asia rated Japan fairly poorly as a "long-term stay" destination; those from Europe and the Americas were dissatisfied with its facilities for "relaxation," and those from Australia had issues with "hands-on tours and activities" and "long-term stay." These findings point to a need for market-specific strategies.
5. The Covid-19 pandemic has put a long-term brake on inbound tourism. This has not prevented people from holding Japan-related events in their own countries, and Japanese culinary experiences, content experiences, and food sales take place often. Japanese food events are held in restaurants as well as supermarkets. Despite their frequency, however, these events have been relatively ineffective in stimulating interest in travel to Japan. In contrast, the survey found that online tours, though held less frequently, were highly effective in this respect.
6. In light of these results, it will be important to continue to dispel concerns about Covid-19 infections while improving Japan's competitiveness as a tourist destination in preparation for the resumption of overseas travel in the near future. There are things we can do today to keep interest in Japanese travel high and encourage it further. Of the Japan-related activities held overseas, those that are held frequently will benefit from efforts to make them more effective in encouraging travel to Japan. Those which are already proving effective will benefit from efforts to increase the frequency with which they are held. As one example, Japanese local governments and destination marketing organizations (DMOs) could tie up with restaurants and other venues overseas to hold online tours in which participants could actually experience Japanese regional cuisine—a new kind of online culinary experience involving a diverse range of participants. Even in today's difficult circumstances, we can look forward to new and exciting initiatives if we work together with other stakeholders.

- This document was created solely for the purpose of information provision, and is not intended to attract business.
- This document was created based on information that DBJ and the JTBF deem to be reliable, but DBJ and the JTBF cannot guarantee its accuracy and certainty. Please use this document at your own discretion.
- This document is a written work and protected under the Copyright Act. When quoting this document in accordance with the provisions of the Copyright Act, please be sure to specify
Source: Development Bank of Japan and Japan Travel Bureau Foundation
- It is necessary to receive the consent of the copyright holders to reprint or reproduce all or any part of the text from this document; therefore, please note the following contacts for inquiries.

(Inquiries)

Regional Planning Department, Development
Bank of Japan

Tel: 03-3244-1633

Website: <https://www.dbj.jp/>

Tourism Culture Vitalization Department, Japan
Travel Bureau Foundation

Tel: 03-5770-8360

Website: <http://www.jtb.or.jp/>