Inbound COVID-19 Sentiment Tracker

Market Snapshot – Japan

Read the full report for Wave 4 here (PDF, 8MB)

If you need the data in a different format, please contact research@visitbritain.org

Bristol Balloon Fiesta: Destination Bristol ©Gary Newman
**Japan Market Summary**

**Travel intentions**

- **Intending to travel abroad for leisure**:
  - Wave 2: 42%
  - Wave 4: 38%

- **Planning stage**:
  - Trip booked: 4% (Wave 2), 4% (Wave 4)
  - Destination chosen: 39% (Wave 2), 39% (Wave 4)
  - Trip planned: 38% (Wave 2), 33% (Wave 4)
  - Intend to travel: 19% (Wave 2), 25% (Wave 4)

**Journey purpose**

- Holiday: 58%
- Other leisure purposes: 58%
- Visit friends or relatives: 16%

**Among leisure trip intenders:**

- Europe: 40%
- Britain: 13%

**Among Britain intenders:**

- England: 53%
- Scotland: 37%
- London: 23%
- Wales: 20%

**Top activities**

- Dining out: 51%
- History and heritage: 48%
- Visiting cultural attractions: 47%
- Iconic tourist attractions: 44%
- Shopping: 43%

**Top Travel Companions**

- With your spouse/partner: 65%
- With friends: 30%
- Alone: 25%
- With adult family members: 21%
- With children (under 18): 20%
- As part of a tour group: 7%

**Destination types**

- Coastline: 32%
- Large city: 63%
- Mountains or hills: 18%
- Will roam around: 46%
- Country/village: 21%
- Small/mid-sized city/town: 45%

**Top modes of transport within Britain**

- Public transport - Train: 71%
- Public transport - Tube/subway: 58%
- Public transport - Bus: 49%
- Taxi: 33%
- Rented car/vehicle: 25%
- Private coach/minibus: 25%
- Uber/other sharing app: 11%
- Own car vehicle: 7%
- Domestic flight: 7%

**Top Accommodation**

- Hotel chain: 86%
- Boutique hotel: 32%
- Cruise: 21%
- Historic house/castle: 19%
- Self catered property: 16%

*(% definitely & probably) in the next 12 months*
**Japan Market Summary**

### Top travel drivers

**...for any international trip**
- Decrease in coronavirus cases at destination: 53%
- Removal of quarantine policies in home country: 38%
- Removal of quarantine policies in destination country: 36%
- Stable political environment in destination country: 27%
- Money-back guarantee should I wish to cancel my trip: 25%

**...for a trip to Britain**
- Decrease in coronavirus cases at destination: 42%
- Removal of quarantine policies in home country: 31%
- Removal of quarantine policies in destination country: 30%
- Money-back guarantee should I wish to cancel my trip: 23%
- An attractive offer e.g. discounts on flights or accommodation: 21%

### Travel concerns – for travel to Britain*

- Contracting COVID-19 during my journey/trip: 90%
- Access to healthcare if I contract COVID-19 abroad: 89%
- Change in quarantine requirements on my return home: 85%
- Other people not following COVID-19 policies/procedures: 84%
- Limited / restricted experiences at destination: 83%
- Locals’ attitude towards international tourists: 82%
- Costs of mandatory COVID-19 tests: 78%
- Extra admin involved with new policy/rules during the trip: 76%
- Affordability of robust travel insurance: 72%
- Accessibility of affordable air fares: 64%

*% very & somewhat concerned
**% completely & somewhat agree

### Travel attitudes**

<table>
<thead>
<tr>
<th>Statement</th>
<th>Agree</th>
<th>No opinion</th>
<th>Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I will delay my next international trip until Omicron is under control</td>
<td>84%</td>
<td>4%</td>
<td>12%</td>
</tr>
<tr>
<td>I would be comfortable using public transport within the destination</td>
<td>82%</td>
<td>4%</td>
<td>14%</td>
</tr>
<tr>
<td>I will be intending to take fewer but longer holidays</td>
<td>80%</td>
<td>7%</td>
<td>3%</td>
</tr>
<tr>
<td>I would be happy to take a pre-trip covid-19 test should that be required</td>
<td>80%</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>I will leave booking until later/last minute</td>
<td>65%</td>
<td>10%</td>
<td>25%</td>
</tr>
<tr>
<td>Booking through a travel agent is a safer option at the moment</td>
<td>65%</td>
<td>11%</td>
<td>25%</td>
</tr>
<tr>
<td>I will think more about sustainability when planning future holidays</td>
<td>64%</td>
<td>13%</td>
<td>23%</td>
</tr>
<tr>
<td>I will look for less crowded places, even if I miss attractions</td>
<td>58%</td>
<td>9%</td>
<td>33%</td>
</tr>
<tr>
<td>I will favour international destinations closer to my home country</td>
<td>50%</td>
<td>14%</td>
<td>36%</td>
</tr>
<tr>
<td>I will favour local destinations instead of traveling internationally</td>
<td>47%</td>
<td>17%</td>
<td>36%</td>
</tr>
<tr>
<td>I will favour destinations I have been before rather than new places</td>
<td>43%</td>
<td>11%</td>
<td>46%</td>
</tr>
</tbody>
</table>