

Travel Trends for the Autumn Honeymoon Season 2001

Supplementing our usual questionnaire-based survey with interviews of JTB sales staff.

- **Honeymooners still going overseas despite the US terrorist attacks!**
 - (1) Going overseas as planned... 38.6%
 - (2) Going overseas at a later date... 59.3%
 - (3) Taking a domestic honeymoon now and planning to go overseas later, or changing to a domestic honeymoon... 2.1%

- **Most popular overseas honeymoon destinations this autumn**

According to the survey carried out in the second week of September, immediately after the multiple US terrorist attacks, the rankings were unchanged from last year:
(1st) Hawaii, (2nd) US Mainland and (3rd) Australia.
The second survey, in the second week of October, after the attacks on Afghanistan, puts:
(1st) Hawaii, (2nd) Australia and (3rd) Europe.

- **Domestic honeymoons up 486% on year, with Tokyo Disney Resorts Popular.**

(1) Hokkaido, (2) Kanto and (3) Kyushu were the most popular destinations.

Each year, JTB Corp. carries out surveys of travel trends for the spring (March through May) and autumn (October through December) honeymoon seasons. The autumn surveys are usually performed in the second week of September with the results published in the third week of October. However, this year, multiple terrorist attacks on the US were followed by military bombardment of Afghanistan, and under these exceptional circumstances another survey of overseas honeymoon trends was performed in the second week of October. The latter consisted of interviews with the staff of JTB Offices. The results are now available.

These surveys are now entering their 32nd year since the first was carried out 1970. This one covers couples booking honeymoons with JTB's main offices in Tokyo, Nagoya and Osaka (4,338 couples in September and 1,832 couples in October). A summary of the main results of the survey follows.

Autumn Honeymoon Trends by Destination, Duration and Cost

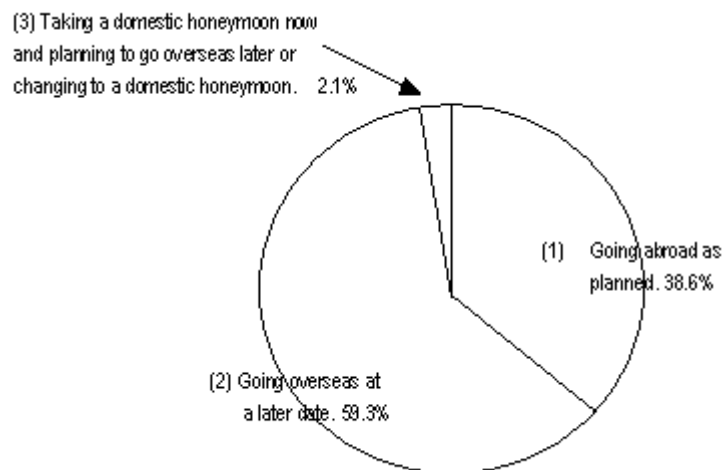
Table 1: Honeymoon Destinations and Average Durations and Costs

	Overseas		Domestic		Overall
Proportion (%)	97.3	(97.3)	2.7	(2.7)	100
	89.0		11.0		
Average no. of days	7.5	(7.5)	4.6	(4.6)	7.1
Average cost/couple	¥466,000	(¥472,000)	¥216,000	(¥213,000)	¥438,000
	\$3,883	(\$3,933)	\$1,800	(\$1,775)	\$3,650

Notes: Amounts in US dollars are calculated, for information purposes only, at a nominal rate of ¥120/US\$. The upper percentages are for the 2nd week in Sep., the lower for the 2nd week in Oct., with last year's figures in brackets.

The Effect of the US Terrorist Attacks on Honeymoons

- Before the attacks: running at 135.3% of the previous year. After: only 38.5%**
 In the fall, there were 4,223 bookings for overseas honeymoons, running at a good 135.3% of the previous year, but the multiple US terrorist attacks and the military bombardments of Afghanistan brought this figure down to 38.5%.
- After the attacks, what action did those who had booked take?**
 Increases and decreases in bookings for domestic and overseas honeymoons, and interviews with JTB office staff, reveal that as of the end of October, the proportions were as shown below:



Autumn Honeymoon Trends by Destination

Popular Destinations

- **Hawaii keeps its secure hold on the No.1 spot, Australia boosts its share to 23.6%**

In the second week of September, before the effects of the terrorist attacks could be felt, the order of popularity was: 1st., Hawaii with 29.9%, 2nd., the US Mainland with 16.9%, and 3rd., Australia with 15.7%.

However, in the second week of October, the survey revealed the following changes: 1st., Hawaii with 25.5%, 2nd., Australia with 23.6%, and 3rd., Europe with 14.7%.

Hawaii held on to its top position in the second survey although it dropped 3.1 percentage points below the previous year's figure. Since 1995, the three most popular destinations had remained the same, although with some differences in their relative placings. However, the US Mainland, with very popular destinations such as Las Vegas, was severely impacted by the terrorist attacks, losing its place in the top three. The gainers were Australia (up 5.8 percentage points) and Europe (up 3.0 points), which significantly increased their shares. Destinations other than Australia registering gains in the southern hemisphere included New Zealand (up 2.0 points) and the islands of the South Pacific (up 3.6 points).

Chart 1 Popular Overseas Honeymoon Destinations

(Figures in brackets are percentage point changes from last year as of October)

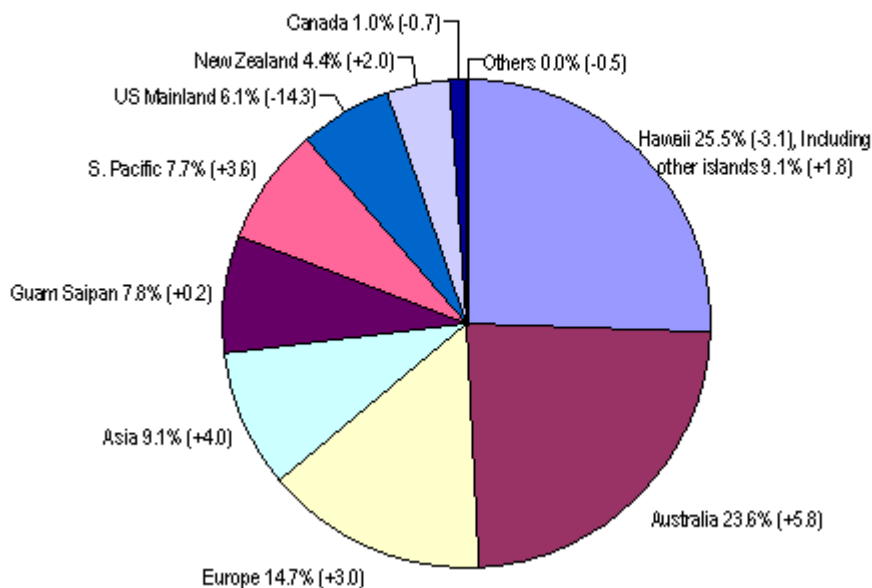


Table 2 Three Most Popular Destinations by Point of Departure

Departing from	Survey	First	Second	Third
Tokyo	Sep.	Hawaii (40.6%)	Australia (11.6%)	Guam, Saipan (11.3%)
	Oct.	Hawaii (30.4%)	Australia (20.2%)	S. Pacific (11.1%)
Nagoya	Sep.	Hawaii (25.7%)	US Mainland (20.7%)	Europe (15.8%)
	Oct.	Australia (26.6%)	Hawaii (24.1%)	Europe (18.7%)
Osaka	Sep.	Hawaii (23.3%)	US Mainland (20.9%)	Australia (19.6%)
	Oct.	Australia (25.1%)	Hawaii (22.1%)	Europe (16.3%)
Nationwide	Sep.	Hawaii (29.9%)	US Mainland (16.9%)	Australia (15.7%)
	Oct.	Hawaii (25.5%)	Australia (23.6%)	Europe (14.7%)

For those departing from Tokyo, Hawaii retained first place after the terrorist attacks, but for both Nagoya and Osaka, Australia overtook Hawaii to claim top position.

Table 3 The Top Twenty Overseas Honeymoon Destinations (cumulative total of visits)

Oct.	Sep.	2000	City	Oct.	Sep.	2000	City
1	1	1	Honolulu	11	-	20	Christchurch
2	2	2	Sydney	12	-	19	Auckland
3	4	4	Gold Coast	13	-	-	Queenstown
4	6	7	Rome	14	14	-	Bali Island
5	7	8	Cairns	15	-	9	Maui Island
6	8	11	Paris	16	3	3	Las Vegas
7	5	6	Guam	17	17	-	Tahiti (Papeete)
8	9	12	Venice	18	-	-	New Caledonia (Noumea)
9	10	13	Florence	19	19	18	Ayres Rock
10	14	16	Milan	20	15	15	Hamilton Island

This autumn Honolulu remains in top position. Five European cities rank within the top ten, and of these, four are in Italy, which continues to be a very popular destination. Tahiti and New Caledonia are among several South Pacific destinations in the top 20.

Overseas Weddings

- **Overseas weddings were 94.6% of last year, declining less than overseas honeymoons, although there were fewer guests traveling with the couple.**

Before the terrorist attacks, the number of overseas weddings was trending favorably at 112.3% of the previous year, but cancellations followed, particularly for the US Mainland and Hawaii. However, the decline was not as sharp as for honeymoons, dropping to 94.6% of the previous year (85% of the level immediately before the attacks).

Bookings for overseas weddings are usually made six months or a year in advance. Couples are unwilling to cancel ceremonies over which they have spent so much time and which they are eagerly anticipating. Most of those who canceled did so very reluctantly at the urging of family, relatives and employers. There were those who postponed the wedding ceremony itself, saying "we definitely want photographs of an overseas wedding."

While the number of couples did not decline sharply, there was an undeniable reduction in the number of guests traveling with them, in sharp contrast with the recent growth trend. Some couples will celebrate the wedding by themselves.

Table 4 The Number of Overseas Weddings (by destination)

	Hawaii	Guam, Saipan	Oceania inc. S. Pacific	America, Canada	Europe	Asia & Others	Total
Tokyo	211	65	63	23	15	5	382
Nagoya	43	18	10	4	6	1	82
Osaka	60	45	44	7	6	3	165
Nationwide	314	128	117	34	27	9	629
Last year	419	102	76	39	15	14	665
Percentage of last year	74.9	125.5	153.9	87.2	180.0	64.3	94.6
Proportion of total (%)	49.9	20.3	18.6	5.4	4.3	1.4	100.0

The most popular destinations for overseas wedding ceremonies are where there is a full selection of facilities at reasonable prices. For several years this has meant Hawaii (with 50% of the total) and Guam, Saipan (with 20%) together accounting for 70% of demand. Australia (with 10%), the US Mainland and Europe follow behind. Fears about US resorts led to an increase in the share for Oceania, which is now approaching 20%. However, there are no significant changes in the most popular destinations nor in their relative popularity.

Average Length of Honeymoons

The average length of honeymoon is 7.5 days, unchanged from last year.

Chart 2. Average Length of Overseas Honeymoons (Days)

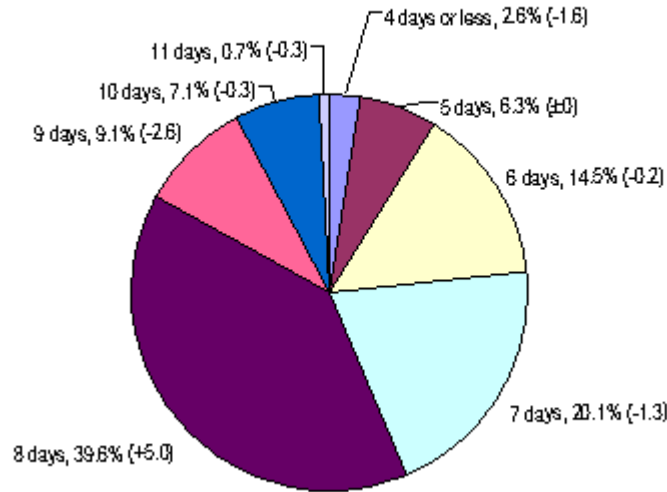


Table 5 Lengths of Honeymoons by Departure Point

Departure Point	Average Length (Days)
Tokyo	7.4 days
Nagoya	7.5 days
Osaka	7.5 days
Nationwide	7.5 days

Average Expenditure on Honeymoons per Couple (tour cost, excluding overseas costs)

The average amount spent per couple was ¥466,000 (\$3,883), representing a decline to 98.7% of last year's figure of ¥472,000 (\$3,933).

Chart 3 Average Expenditures per Couple on Overseas Honeymoons

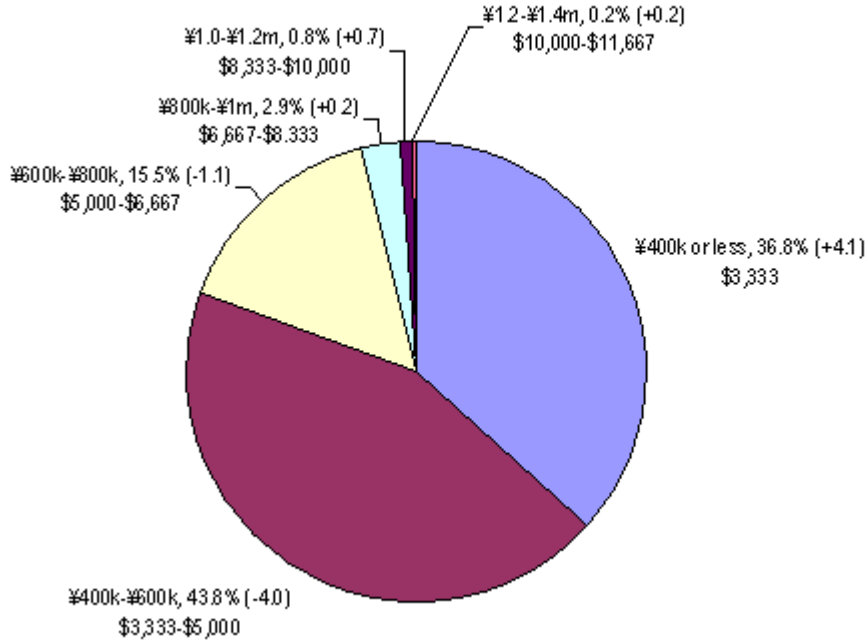


Table 6 Average Expenditure per Couple by Departure Point

Tokyo	Nagoya	Osaka	Nationwide
¥446,000 (\$3,717)	¥518,000 (\$4,317)	¥464,000 (\$3,867)	¥466,000 (\$3,883)

Table 7 Average Expenditure per Couple by Destination

	Hawaii	Guam, Saipan	N. America	Asia	Europe	Oceania
Nationwide	¥410,000 (\$3,417)	¥264,000 (\$2,200)	¥476,000 (\$3,967)	¥374,000 (\$3,117)	¥582,000 (\$4,850)	¥454,000 (\$3,783)

Departure Dates

The most popular dates, in descending order of popularity, are Monday, November 26; Monday November 5; and Monday, October 29.

Average Age

The average age of the groom is 30.6 years and that of the bride is 28.6. (Note: the average ages of marriage throughout Japan are 30.4 years for the groom and 28.2 for the bride, according to the census figures for 2000.)

Survey Methodology for Autumn 2001 Honeymoon Trends

Locations:	Twelve main JT B offices in the following areas: Tokyo; Ikebukuro, Ginza, Shinjuku, Shimbashi, Chiba, Yurakucho. Nagoya; Sakae, Fushimi, Nagoya Ekimae Bldg. Osaka; Umeda, Kobe Sannomiya, Tennoji
Sample size:	2nd week of September, 4,338 couples; 2nd week of October, 1,832.
Period of survey:	Sep. 12 ~21 and Oct. 10 ~19, 2001.
Survey procedure:	Surveyed and acquired statistics for those booking at the above JT B offices with departures in the period October through December, by destination, length and cost.