

Internet Survey of Spring Travel Trends for 2006

- New Airport Popular for Travel to and from Kobe (ACE JTB stopover plans up 145%)--
 - Difficulty of Taking Time Off Encourages Travel with Friends Who Share Holiday Dates--
 - Families Travel to Mark Turning Points like Children's School Graduation or Admission--
 - Overseas Travel is Powered by Young Working Women and Students--
- * (Popular destinations include America/Europe/Hawaii/Micronesia/Asia) *

JTB Corp. has just published a summary of the trends revealed by a survey of travel trends for the spring travel season (March 1 through April 10, 2006 on a departure basis). The survey used an Internet questionnaire (with 2,985 valid responses) and bookings with JTB and others, and established the following trends.

Spring Travel Trends in 2006

Responses to the Internet questionnaire reveal that as of early February, well over half of respondents were planning some kind of spring travel, indicating strong travel motivation. Those planning to travel overseas amounted to 6.4%, those planning to travel within Japan and stay overnight amounted to 38.6%, while a further 22.4% intended to take day trips from home.

For domestic travel, the difficulty of taking long holidays in spring means that a higher proportion of journeys are usually made to nearby destinations than in the summer travel season. However, this year, tours to more distant locations such as Hokkaido, Okinawa and Kyushu are evidently popular. According to the various companies marketing domestic package tours, in line with the continuing polarization of expenditures on travel, sales are strong for the comparatively expensive packages that use air travel to reach more remote destinations. It seems clear that the influence of improvements in the Japanese economy which became apparent last year are providing a strong impetus this year.

The relative ease with which young working women and students can take time off makes them a driving force in spring travel demand for overseas travel. This is reflected in the relative popularity of destinations that attract young women by the ease with which they can be visited, such as Hawaii, Guam and Saipan, and also Asian destinations with the exception of Korea and China. The U.S. Mainland, particularly the West Coast, has also maintained the popularity it achieved last year.

The departure peak is in March, but spring is also the season for graduation trips. This year, the fact that a larger proportion of students have found employment, and the influence of the active provision by the major travel companies of attractively priced packages aimed at students, have combined to create strong sales of graduation travel, and more distant destinations such as Europe and the United States are particularly popular.

Characteristics of Spring Travel

1. New Airport Boosts Popularity of Travel to and from Kobe

The new Kobe Airport opened on February 16. Three airlines, JAL, ANA and Skymark, have started to operate a total of 27 return flights a day linking Kobe to seven domestic destinations including Haneda (Tokyo), Sapporo (Hokkaido) and Okinawa. Our questionnaire reveals that 10.1% of respondents in the Kinki region (adjoining Kobe and the Kansai region) think the newly opened airport will be convenient and stated that they expect to fly more frequently as a result. Similarly, 15.8% of respondents in Okinawa, 11.7% in Kyushu, and 7.2% in the Kanto region including Tokyo all give the same reason for saying that they expect to take more opportunities to visit the Kansai region.

JTB reports healthy sales of travel utilizing Kobe Airport; ACE JTB tours departing Tokyo in March for overnight stays in Kobe are attracting participants at 145% of the numbers for last year. While some of this represents a shift from Kansai International Airport and JR (rail) links, the numbers of participants departing Haneda for the three Kansai-region airports (Kansai International, Itami and Kobe) are also showing strong growth and running at 122% of last year. New patterns of travel are also appearing, going from Kanto to the islands of Awaji and Shikoku and the Chugoku region via Kobe, and further increases in sales are expected.

Strong sales are also reported for travel products departing Kobe Airport. They are particularly strong for packages using flights to Haneda and Okinawa. Previously, travelers were forced to use the Shinkansen bullet train or fly from Itami, but the much greater convenience for those coming from the Kobe direction and the synergistic effect of the publicity campaign for the new airport appear to have led to the strong sales.

In March, the Kita Kyushu and New Tanegashima Airports will open. Travel companies have already commenced sales of travel packages using the new airports, and it looks as if we can expect further encouraging developments.

2. Difficulty of Taking Time Off Encourages Travel with Friends Sharing Holiday Dates.

Among reasons for not planning to travel in the spring, the most frequent were "Could not take time off" at 38.3% and "Holiday dates for family and friends clashed" at 14.3%. This shows us that, in comparison with our survey for last summer, it is much more difficult for working adults to take time off in the spring. However, there are considerable differences in the proportions citing "Could not take time off" among the different age groups, for while over 50% of men in their 30s through 50s did so, less than 40% of men and women in their 20s and women in their 30s cited this reason.

On the other hand, a comparison of fellow travelers with those in the summer holidays reveals that while the proportions of those traveling with children or three generations of the same family traveling together are low, the proportions are higher for married couples traveling together (30.6%), and similarly for friends who travel together (25.2%).

For many companies, the financial year ends in March, making it difficult for working adults to take time off in the spring, but young working women, with their strong desire to travel, tend to use any holidays remaining from their previous year's entitlement to travel with friends, while young married couples with no children tend to travel together, as do friends, all contributing to the healthy demand situation.

3. Families Travel to Mark Turning Points like Children's Graduation from --or Admission to--School or University.

While family travel is less common in spring than it is in summer, the fact that it is a time when children move to a new stage in their education and/or a different school means there is little homework and no club activities, so the spring is a season when it is easier for children to travel. Our Internet survey revealed that the top reasons for traveling in spring included "The schools are on holiday" at 23.7%, "To celebrate graduation" at 7.6%, and "Because it's the only time we can travel with the children," at 6%, so many people cite school-related reasons.

Thirty percent of families with children over school age are making some kind of journey to celebrate school admission or graduation. Of these, 7.3% of families are going overseas, while the numbers traveling within Japan and staying overnight reached 21.9%. These journeys to mark school graduation or admission are by no means confined to young children: those graduating from junior highschool were most numerous, at 36.1%, while 25.2% of such journeys were made for graduating from highschool or university.

Of families with children from junior-school pupils to university students, almost half (49.3%) hoped to celebrate their graduation by traveling. While it is a season in which parents find it difficult to take time off, it appears that the desire to mark such a turning point for their children by travel, even if it is only a short journey within Japan, is very strong.

Survey Methodology

- Survey timing : February 3 through 7, 2006
- Respondents : Individuals between the ages of 15 and 79
- Methodology : Online Internet questionnaire
- Responses : 2,985
- Survey content : Travel involving at least one night away from home with departures between March 1, 2006, and April 10, 2006 (including overseas travel but excluding commercial or other business travel).

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Table 1: Spring Travel Plans (multiple answers)

	Nature of Travel Plan	%
1	Plan to travel overseas	6.4
2	Plan to travel in Japan with overnight stays.	38.6
3	Plan to make a day trip from home.	22.4
4	No plans to travel this spring.	44.2
5	Will have fun with my friends.	24.8

Table 2: Departure Timing* (multiple answers)

	Dates	%
1	Early March (1st through 10th)	25.1
2	Mid March (11th through 20th)	26.4
3	Late March (21st through 31st)	40.1
4	Early April (1st through 10th)	35.6

*(for those with plans to travel this spring)

Table 3: Fellow Travelers* (multiple answers)

	Traveling Companion(s)	%
	Traveling with other members of the family	62.2
	Taking children (up to junior highschool)	22.0
	With spouse only	27.2
	With parent(s)	8.5
	Three generations	4.5
	With a friend	16.2
	With two or more friends	19.1
	School, club, company or local group.	5.6
	Traveling alone	5.7
	Other	1.4

*(for those with plans to travel this spring)

Table 4: Purpose of Travel* (multiple answers)

	Stated Purpose	%
1	To enjoy hot springs	46.5
2	To enjoy scenery and nature.	43.1
3	To enjoy good food.	41.7
4	For recreation, a change of mood, or to relieve stress.	26.2
5	To have fun with my friends.	24.8
6	To have fun with the family.	22.7
7	To visit famous cherry blossom sites, and enjoy flower viewing.	16.6
8	To go shopping.	13.6
9	To have fun at a theme park, etc.	12.3
10	To enjoy sports or the outdoor life.	10.2

*(for those with plans to travel this spring)

Table 5: Reason for Traveling in Spring* (multiple answers)

	Stated Reason	%
1	Because the weather is good.	51.0
2	Because spring flowers are so beautiful..	27.0
3	Because the schools are on holiday.	23.7
4	Because travel is cheaper.	13.6
5	Because it's easy for me to take time off from work.	10.7
6	To celebrate graduation.	7.6
7	Because it's the only time we can travel with the children.	6.0
8	Because I'd like to go somewhere free of my pollen allergy.	3.7

*(for those with plans to travel this spring)

Table 6: Reason for Not Traveling* (multiple answers)

	Stated Reason	%	Summer '05	Difference (%age pts)
1	Because I could not take time off from work.	38.3	27.3	+11.0
2	Lack of discretionary income.	26.5	15.7	+10.8
3	Would prefer to relax at home.	19.2	5.8	+13.4
4	Holiday dates for family and friends clashed.	14.3	9.4	+4.9
5	Because travel is expensive.	11.4	4.5	+6.9
6	Travel just doesn't appeal to me.	11.1	26.0	-14.9
7	I have other things to do than travel.	8.9	8.9	0.0
8	Family situation.	7.4	13.5	-6.1
9	Because it's crowded with so many people.	7.2	18.5	-11.3

*(for those with no plans to travel this spring)

Table 7: Things I Want More than Travel (single answers)

	Preference	%
1	No, I really think travel is best.	22.2
2	Personal computer, notebook computer..	11.1
3	Slim, large-screen color TV, projection TV.	8.9
4	Hand baggage and clothing (casual) etc.	5.7
5	DVD recorder with hard disk.	5.1
6	Mobile music player.	4.8
7	Microwave oven, washing machine, drier.	4.7
8	Briefcase and clothing (prestigious brands), etc.	4.1
9	Digital camera.	4.0
10	House purchase or reform.	4.0

Table 8: Have You Ever Traveled to Mark Graduation or Admission? (multiple answers)

	Nature of Travel	%
1	I've been overseas with the family.	4.5
2	I've been overseas with one or more friends.	9.2
3	I've been overseas on my own.	2.0
4	I've traveled in Japan with the family and stayed overnight.	11.1
5	I've traveled in Japan with one or more friends and stayed overnight.	27.4
6	I've traveled alone in Japan and stayed overnight.	3.6
7	I've taken a day trip with the family in Japan.	3.5
8	I've taken a day trip with one or more friends in Japan.	8.1
9	I've taken a day trip on my own in Japan.	1.7
10	I've never made that kind of travel.	53.0

Table 9: The Occasion of the Travel Experience* (multiple answers)

	Admission or Graduation	%
1	Admission to junior (primary) school	2.8
2	Graduation from junior (primary) school	10.1
3	Graduation from junior highschool	21.0
4	Graduation from senior highschool	45.6
5	Graduation from university (including junior college or vocational college)	55.3

*(for those with experience of travel to celebrate graduation or admission)

Table 10: Have You Traveled when a Child Graduated or was Admitted? (multiple answers)

	Nature of Travel	%
1	We have been overseas as a family.	7.3
2	We have traveled within Japan as a family and stayed overnight.	21.9
3	We have taken a day trip away from home as a family.	7.1
4	We have never made this kind of travel.	60.2
5	No answer	9.3

*(for those with children of primary school age or above)

Table 11: The Occasion for Family Travel* (multiple answers)

	Admission or Graduation	%
1	Admission to junior (primary) school	19.9
2	Graduation from junior (primary) school	33.4
3	Graduation from junior highschool	36.1
4	Graduation from senior highschool	25.2
5	Graduation from university (including junior college or vocational college)	1.2

*(for those who have traveled to celebrate a child's graduation or admission)

Table 12: Do You Intend Family Travel to Mark Graduation or Admission?* (multiple answers)

	Nature of Travel Contemplated	%
1	Would like to travel overseas as a family.	7.3
2	Would like to travel as a family to a remote destination.	21.9
3	Would like to travel as a family to a nearby destination.	7.1
4	Would like to make a family day trip away from home.	60.2
5	We will celebrate, but not by means of travel.	24.8
6	No answer	4.1

*(for those who have children in full-time education, from primary school to university)