

For Immediate Release

October 17, 2008

(Translation of Japanese Release No.178)

JTB Survey of Wedding & Honeymoon Intentions

Of Those Intending to Marry, 26.2% Would Like a Resort Wedding.

—For their wedding, most would prefer Hawaii, followed by Europe, then Okinawa—

—Reasons: “Always wanted to,” “Want to create the best memories,”

“Want to share the pleasure with relatives and friends.” —

Fully 92% of Those Intending to Marry Want a Honeymoon (77.7% want a ceremony).

—For their honeymoon, most would prefer Europe, followed by Hawaii, then Okinawa—

For Both Weddings & Honeymoons, “Autumn Brides” Enter the Mainstream.

—Reasons: “The weather is good,” “It’s easy for parents and close family to attend,”

“It’s easier to take holidays then.”—

JTB Corp. has just performed a questionnaire-based survey of the wedding plans of 1,000 single women aged from 20 to their early 30s living in the greater Tokyo, Nagoya or Kansai regions, supplemented by interview-based surveys of bridal-service providers. As the wedding scene continues to diversify, the surveys reveal the following characteristics of wedding ceremonies to be performed at resorts overseas or within Japan (“resort weddings”) and of honeymoons.

The style of big-city weddings has undergone considerable change. The tendency is to put less stress on the relationship between the two families and to disregard merely social obligations, while each year reportedly sees a stronger insistence by couples on finding the best match for their own preferences. It looks as if the bridal market is still healthy, absorbing the changes caused by the continuing trend towards later marriages and smaller families. While there are those who mention the influence of soaring fuel surcharges and a declining economy, the bridal market for travel remains strong.

1. “Resort Wedding” Style Comes Top—Preferred by 26.2%.

With the proportion of younger segments of the population declining, the number of marriages performed in 2007 dropped to 714,000, continuing the downward trend of recent years. The average age at which men married reached 30.0 for the first time in 2006, and this trend towards later marriages*¹ also showed itself in the average age of marriage for women (at 28.2 years). However, unlike the wedding market of the past, many couples are first registering their marriages and only

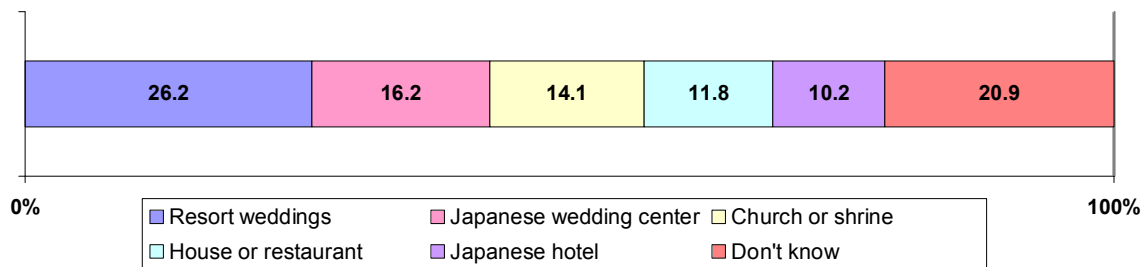
later performing a ceremony or going on their honeymoon, a mark of the diversifying scene.

When questionnaire respondents were asked their preferred style of wedding ceremony, **fully 26.2% of those intending to get married wanted a resort wedding**, higher than for either hotel or wedding-center ceremonies.

In fiscal 2006, the number of orders received by JTB in the greater Tokyo area (including weddings performed both overseas and within Japan) was 5.6% higher than the previous year, and this increased by a further 1.7% in fiscal 2007. Even this year, 2008, with the numbers of those departing for overseas destinations lower than for the same month of last year, month after month, the bookings for resort weddings in October and November are still managing to stay about the same as in 2007, suggesting a firm market floor.

**1: Source, “Annual estimates of demographic trends in 2007” issued by the Ministry of Health, Labour and Welfare.*

Graph 1: Preferred Style of Wedding for Those Intending to Marry

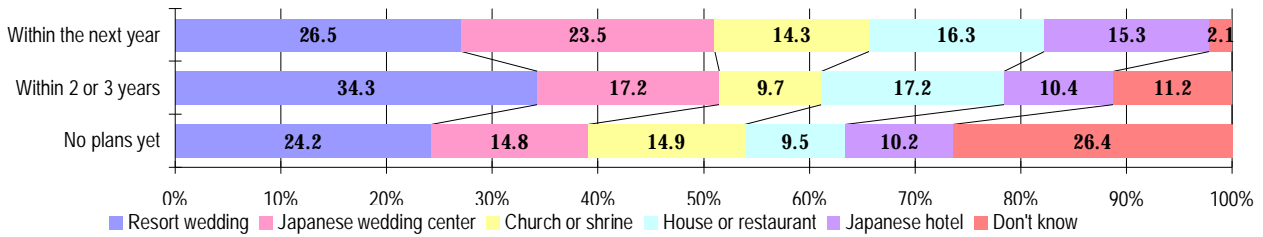


I Resort Weddings are Increasingly Popular with Older Couples

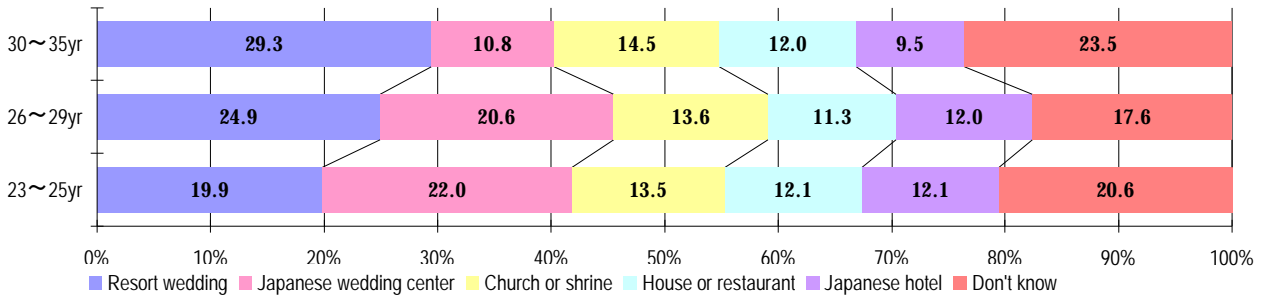
Among those intending to marry, the preference for resort weddings differs according to their situation. Whereas 24.2% of those without definite plans prefer them, the figure is 26.5% for those who intend to marry within a year and rises to 34.3% for those planning to marry within the next two or three years. This shows that it is not just an appealing idea but is under practical consideration.

Looking at preferences by age, the figure is 19.9% for those aged from 23 to 25, 24.9% for those from 26 to 29, and 29.3% for those from 30 to 35, showing a clear progression. As the years pass, women have many opportunities to see weddings and receptions, and this suggests that when they are wondering what would be best for their own wedding they increasingly prefer a ceremony just for themselves or celebrating with—and expressing gratitude to—a few close family members.

Graph 2-1: Preferred Style of Wedding by Intention to Wed



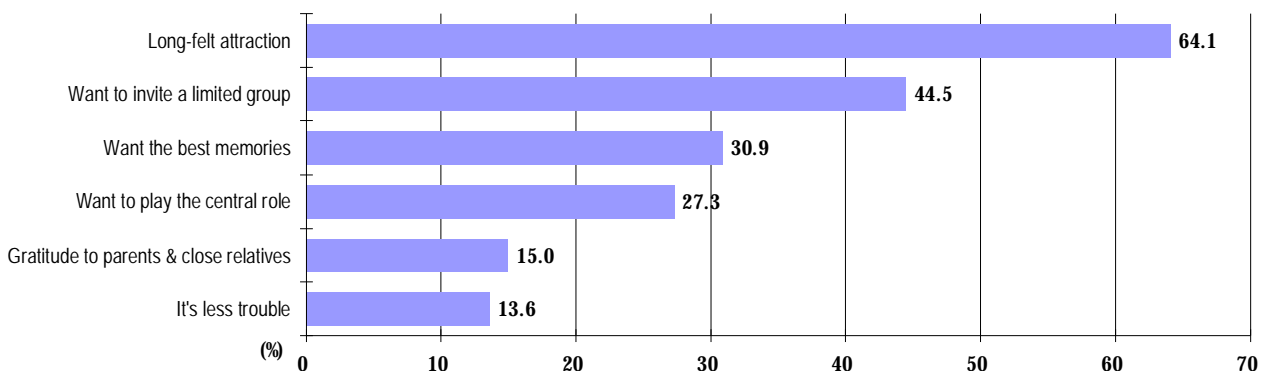
Graph 2-2: Preferred Style of Wedding by Age



I Long-Felt Attraction, Gratitude, Congratulations and Best Memories Motivate the Couple's Choices

First among the reasons for choosing a resort wedding is a long-felt desire to hold the ceremony at an overseas resort. Second is the desire to thank and be congratulated by a very limited group of people, and third is the desire to have a ceremony in which they are central and that will leave them with the best possible memories. This is a very strong demonstration of the feeling that what should be the most memorable ceremony in their lives should also be free of a sense of duty and social obligation, a ceremony in which the couple play the central role, and through which they can express their gratitude to parents and close family members who will give them heartfelt congratulations.

Graph 3: Reasons for Choosing a Resort Wedding



I The Top Three Preferred Locations are Hawaii, Europe and Okinawa. Beach Resort Weddings are Popular with Experienced Travelers

The three most popular locations for a resort wedding are Hawaii, Europe and Okinawa (in that order). Hawaii, of course, is where Japanese first started to hold overseas wedding ceremonies. It offers a

characteristically wide range of choice, from churches built facing the deep blue sea to hilltop churches overlooking the boundless ocean. A similarly wide range of service “menus” have been devised and established, so there is a considerable depth of pricing that eases participation by all, including those who accompany the couple. This seems to be why Hawaii continues to lead in popularity.

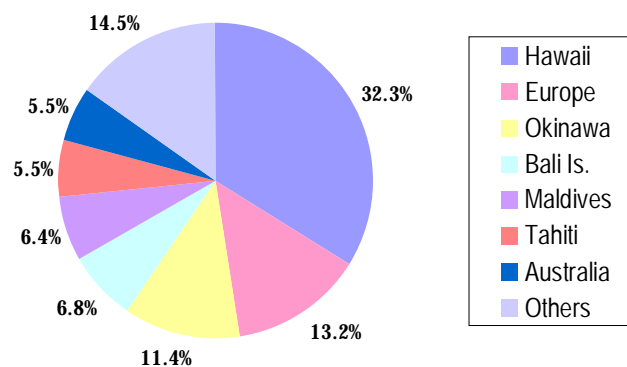
The long-felt attractions of Europe show themselves in both weddings and honeymoons. To hold their ceremony in a solemn church, where their main desire is to express gratitude to parents and seek blessings on the start of their new journey through life together, is a motivation that tends to be stronger among older couples.

Okinawa, with its chalk-white churches facing the sea, has recently been growing in popularity. In 2007, 7,285 couples were married there, 20.4% more than the previous year, and estimates put the number of people visiting Okinawa for the weddings, including those coming with the couples, at 153,000(*2). The reasons for the increase are (1) it is served by flights from many Japanese airports and is readily accessible from most parts of Japan, which is particularly convenient for families and friends who may be scattered in different region. (2) If the ceremony is held at the weekend there is no need to take time off work, with participation possible through short visits (including day-return trips). (3) Many people, including friends, can participate. (4) There are no troublesome procedures and safety/security are high.

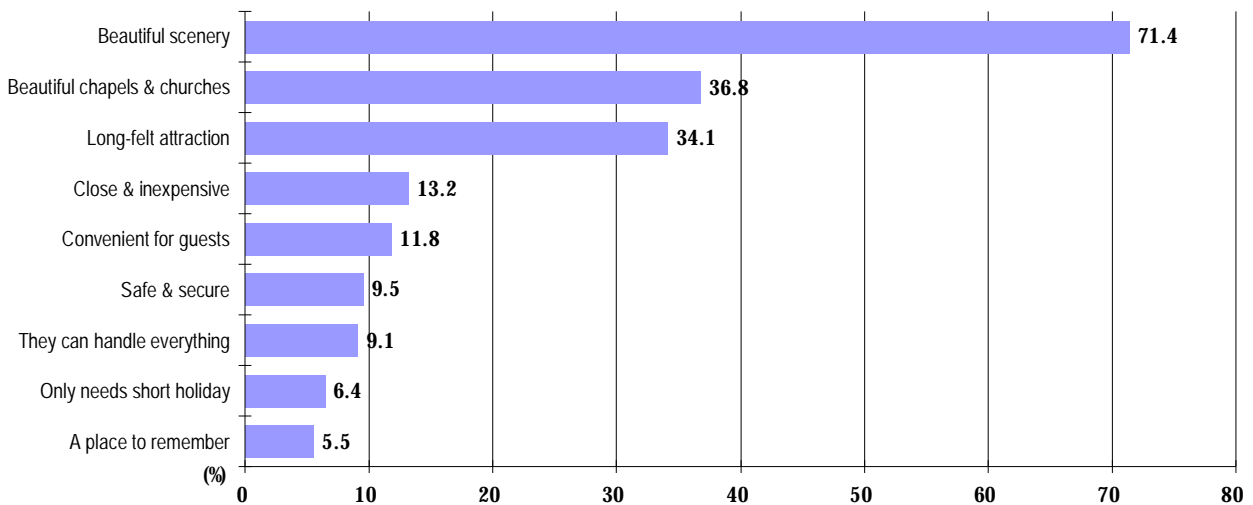
There are also many who select beach resorts in Bali Island, the Maldives and Tahiti, etc., for their wedding ceremony.

*2: Source, “Survey of the number of resort weddings performed in Okinawa in 2007” by the Tourism Promotion Section of the Okinawa Prefectural Government Department of Tourism, Commerce and Industry.

Graph 4: Preferred Locations for Resort Weddings



Graph 5: Reasons for Selecting Resort Wedding Locations



I The Key Concepts: Insistence on What Suits Them Both, Creating the Best Memories, and Gratitude to Parents and Close Family.

It looks as if the attraction of a resort wedding is the opportunity for the couple to show themselves at their most beautiful, with the bride attired in her wedding dress, facing an azure sea from a white- or glass-walled church.

The background to this kind of preference for resort weddings include (1) the changes that have taken place in general attitudes to marriage, (2) the fact that resorts can provide about the same standard of service as hotels and wedding centers, and (3) the growing selection of available locations and facilities, which means that they can readily select whatever best responds to their expectations.

Actual bookings reveal that (1) the wedding dress tends to be selected beforehand in Japan, (2) the souvenir album, unlike former conventional wedding albums, tends to be edited and processed more dramatically, and (3) the bride insists on make-up that will show her at her best. This means that a make-up rehearsal is essential, and many brides-to-be regularly attend beauty salons for the two or three months leading up to the ceremony. There seems to be no limit to woman's desire to show herself at her glowingly beautiful best. A resort wedding appears to meet the couple's insistence on creating the very best of memories.

2. Fully 92% of Those Intending to Marry Want a Honeymoon, Whereas Only 77.7% Want a Ceremony.

While many couples will naturally have experienced overseas travel before their marriage, a honeymoon is still seen as a unique, once-in-lifetime experience. Of those intending to marry, as many as 92% want a honeymoon, far more than those who want a wedding ceremony.

Bookings for honeymoons with JTB in the greater Tokyo area showed an increase in sales of 1.9% over the previous year in fiscal 2006, and a further 3.7% increase in fiscal 2007, a very healthy trend.

I The Top Three Honeymoon Destinations are Europe, Hawaii and Okinawa.

Europe is by far the most preferred destination for honeymoons. Italy appears to be particularly popular. This applies not only to package tours but also to those showing strong individual preferences concerning the wedding ceremony, like those who choose house weddings, among whom “made-to-order” honeymoons are popular.

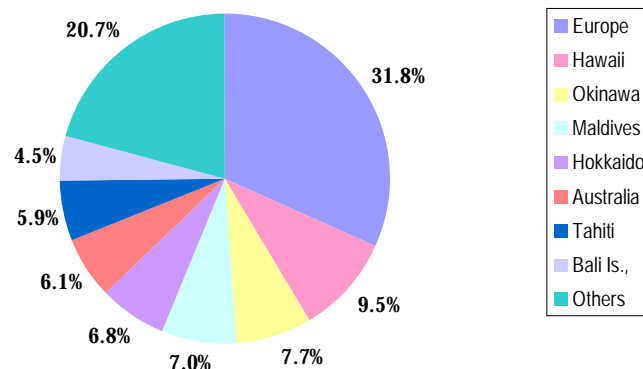
Some way behind in second place was Hawaii. Here, the attraction seems to be that the couple need not overly concern themselves with travel itself but can simply enjoy their time together.

There was a time when honeymoons were seldom taken within Japan, but now this is being reversed. The preferred destinations are Okinawa and Hokkaido. The questionnaire revealed that those wanting to honeymoon in Japan are now 18% of the total, and most of these would prefer to spend it in one or the other of these destinations.

The Maldives and Tahiti are popular with those who are experienced overseas travelers. They are also popular with couples who would just like to spend time by themselves lazing beside a blue lagoon, as are Bali Island, Fiji and New Caledonia, among others.

The number one reason given for selecting a location was “beautiful scenery,” followed by the opportunity for “leisurely relaxation,” with “wanted to visit it at least once” in third place.

Graph 6: Preferred Honeymoon Destinations

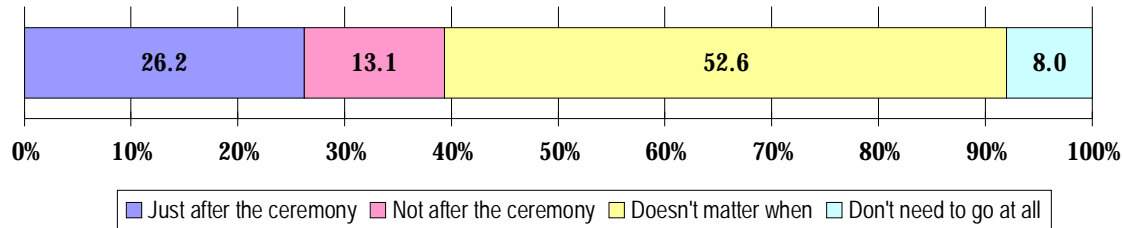


I Honeymoon Timing Has to Suit Both Bride and Groom.

In the traditional order of events, the couple’s decision came first, followed by the approval of the parents, the exchange of betrothal gifts, the wedding ceremony and reception, the honeymoon, and then the official registration of the marriage. In this case the ceremony, wedding reception and honeymoon all took place at almost the same time. Recently, however, the official registration comes first, with the wedding and/or honeymoon following when the financial situation permits and both bride and groom can take time off from work, so now they often tend to take place separately.

According to questionnaire response, 65% of couples separate the honeymoon from the wedding ceremony and go at a different time, and they are not particular about when that should be. The ceremony may be held at the weekend or on one or two days off, while many couples delay their long-to-be-remembered honeymoon until when they can both take their holidays at the same time and can arrange to pay for it.

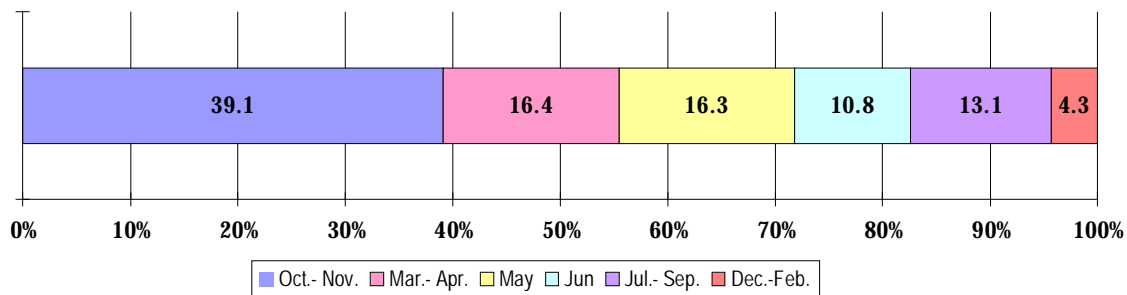
Graph 7: Honeymoon Timing



3. For Both Weddings & Honeymoons, “Autumn Brides” Enter the Mainstream.

Traditionally, June was the season for weddings, hence the phrase “June bride.” But recently, more couples are taking their honeymoons in the autumn, particularly in October and November. When the questionnaire asked preferences for the timing of the wedding, the largest number (39.1% of respondents) also chose October and November. JTB sales, too, show the annual peak departures for resort honeymoons taking place in these two months.

Graph 8: Preferred Timing for Weddings



JTB Percentage Sales per Month in 2007 for the Greater Tokyo Area

	April	May	June	Sep.	Oct.	Nov.
Resort Weddings	9.0%	8.2%	9.7%	9.7%	12.5%	11.8%
Honeymoons	7.8%	8.3%	8.9%	9.7%	11.6%	11.8%

The reasons given for selecting October and November were (1) Good weather (93.3%), (2) Easy for parents and close family to participate (19.8%), and (3) Easy to take time off (13.7%). The main reason seems to be to avoid June, in the hot and humid rainy season, to join in celebrating with guests under the clear blue skies of autumn.

There is also the fact that April through June are the first quarter of the financial year, making it difficult to take time off and draw up plans, in contrast with autumn, when both partners can more easily coordinate their plans, and their parents and close relatives find it easier to participate. December and January are very hectic months, while February and March are busy with the closing of the financial year. All these factors combine to make the autumn—October and November—the best choice. There is also the attraction that travel costs are much lower than in the summer.

Survey Methodology

Survey Period	September 19 (Fri.) through 23 (Tue.), 2008.
Respondents	Unmarried women aged 23 to 35, resident in greater Tokyo (Tokyo plus Kanagawa, Saitama and Chiba Prefectures), the Nagoya area (Aichi, Gifu and Mie Prefectures), and the Kansai area (Kyoto and Osaka plus Hyogo and Nara Prefectures).
Sample Size	1,000
Method	Online web-based questionnaire

Reference Data

Intention to Marry		Intention to Hold Ceremony (among those intending to marry)	
Plan to marry within a year	9.8%	Want to hold a wedding ceremony	77.7%
Plan to marry within 2-3 years	13.4%	Do not want to hold a wedding ceremony	22.3%
Want to marry, have no plans.	61.0%		
Don't want to marry, no plans.	15.8%		

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