

For Immediate Release

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(Translation of Japanese Release No.40)

A Survey of Travel Trends for Golden Week 2010 (Apr. 24 ~ May 4)

-- Taking Apr. 30 Off Creates a 7-Day Break, Encouraging Longer Trips! --

Special ETC Expressway discounts will ensure that more trips are made by car.

-- Overseas Travelers to Top 500,000 for First Time in Three Years (up 4.3% to 508,000). --

The most popular remote destinations are Europe & Hawaii; closer ones are Guam & China.

-- In Japan, Popular TV Series Make Kochi, Matsuyama and Nagasaki Popular --

The 1,300th anniversary celebrations of the Nara Heijo-kyo Capital to boost Kansai tourism.

← Survey Period →

April							May								
24th	25th	26th	27th	28th	29th	30th	1st	2nd	3rd	4th	5th	6th	7th	8th	9th
Sat	Sun	Mon	Tue	Thu	NH	Fri	Sat	Sun	NH	NH	NH	Thu	Fri	Sat	Sun

JTB has published estimates of travel trends during the eleven days of Golden Week (from April 24 through May 4 on a departure basis) for those intending to spend at least one night away from home.

The survey was based on a questionnaire with 1,200 respondents, the situation for sales by JTB group companies and airline bookings, and estimates of travel industry trends. It is the 42nd such survey since the first, in 1969. The findings are as follows:

Notes:

- In the *above* table, NH indicates a national holiday, pink and blue indicate days off (including Saturday for those who work a five-day week).
- In the *following* table, numbers of travelers are cumulative totals and numbers in parentheses indicate changes from the previous year and/or percentage point changes.
Average expenditures are per person per journey and for domestic travel include all spending on travel, accommodation, souvenirs and meals.
Average expenditures on overseas travel do not include expenses for souvenirs, etc., incurred at the destinations (but do include fuel surcharges).
Yen amounts are translated, for information purposes only, at a nominal rate of 93 JPY per USD.

Table 1: Numbers of Travelers, Average & Total Expenditures in Golden Week 2010.

	2010			2009	
	Projected	Change	Increase or Decrease	Estimated	Announced
No. of travelers	22,008,000	+1.0%	+222,000	21,786,000	21,900,000
Domestic	21,500,000	+0.9%	+201,000	21,299,000	21,400,000
Overseas	508,000	+4.3%	+21,000	487,000	500,000
Average Domestic Expenditures	¥38,000 (\$409)	+3.0%	+¥1,100 (\$12)	¥36,900 (\$397)	¥36,900 (\$397)
Average Overseas Expenditures	¥223,100 (\$2,399)	+4.7%	+¥10,000 (\$108)	¥213,100 (\$2,291)	¥216,800 (\$2,331)
Total Expenditures	¥930.3 billion (\$10.003 billion)	+4.6%	+¥40.6 billion (\$437 million)	¥889.7 billion (\$9.567 billion)	¥898.1 billion (\$9.657 billion)
Domestic	¥817.0 billion (\$8.785 billion)	+4.0%	+¥31.1 billion (\$334 million)	¥785.9 billion (\$8.451 billion)	¥789.7 billion (\$8.491 billion)
Overseas	¥113.3 billion (\$1.218 billion)	+9.2%	¥9.5 billion (\$102 million)	¥103.8 billion (\$1.116 billion)	¥108.4 billion (\$1.166 billion)

Main Characteristics of Travel in Golden Week 2010

1. The Holiday Sequence Makes it Easier to Take Longer Breaks: ETC Expressway Discounts Will Apply for Seven Straight Days.

The Golden Week holiday sequence runs from Saturday May 1 through the national holiday on May 5, but by taking Friday April 30 off a seven-day continuous break is possible, making it easier to take longer breaks, and there are many who will want to use this opportunity to visit more remote destinations. Electronic toll collection (ETC) on Japan's expressways will also be discounted over the full seven days, including April 30, and this is expected to encourage many more to travel by car. The questionnaire revealed that many are planning to visit more remote destinations, including Hokkaido, Shikoku and Okinawa.

2. More Respondents Feel Positive About Travel; Higher Travel Expenditures Expected this Year.

The Bank of Japan's quarterly short-term economic survey published on April 1 reports an improvement in business confidence. This should feed through to more relaxed household budgets and higher personal consumption. When respondents were asked their attitude to future travel expenditures, those wanting to increase them were 3.0 percentage points more numerous than last year, while those wanting to decrease expenditures were 6.4 points fewer. The prospects are for not only more travelers but also higher expenditures.

Table 2 (reference): Changes in Desire to Spend on Travel (excerpted from Table 10).

	March 2010		March 2009		March 2008	
Want to spend more	16.9	(+3.0)	13.3	(-3.0)	16.3	(+1.0)
Want to spend about the same	52.9	(+2.4)	50.5	(-5.7)	56.2	(-1.0)
Want to spend less	28.0	(-6.4)	34.4	(+10.6)	23.8	(-1.0)

Note: Numbers are percentages or (in parentheses) percentage point changes from previous year.

3. **Peak Overseas Departures are on the 29th, 1st and 2nd: Domestic on the 1st thro' 3rd.**

Bookings for LOOK JTB overseas package tours reveal a double peak of departures; those for more remote destinations in Europe, North America and Hawaii cluster on April 29, a national holiday, while those to closer destinations in Asia and Guam/Saipan are on the weekend of May 1 and 2. There are also many departing for Europe and Hawaii on May 5, a national holiday, and Thursday May 6. It seems that many cost-conscious consumers are delaying their departures to take advantage of off-peak rates.

Domestic departures, on the other hand, show stays concentrating on May 1, 2 and 3. The expressway toll discounts run from the first national holiday on April 29 through the last on May 5. This suggests that departures will be dispersed over a wider peak than usual.

4. **The Favorable Holiday Sequence and Consistently High Yen Exchange Rates Should Take Overseas Travelers Past the 500,000 Level for the First Time in Three Years.**

The favorable sequence of holidays promises to take the total number of overseas travelers to 508,000 (4.3% more than the previous year), the first time in three years to exceed the 500,000 level last reached in 2007. The yen is also maintaining consistently high exchange rates, so the increase in fuel surcharges from April should not have too serious an effect. The favorable sequence is also encouraging domestic travel, with numbers expected to reach 21.5 million (up 0.9%).

Table 3 (reference): Changes in Exchange Rates

(Tokyo foreign currency exchange/TTS, source: Bank of Tokyo Mitsubishi UFJ)

Against the JPY (Japanese Yen)	USD	EUR	GBP (Pound Sterling)	AUD (Australian Dollar)	KRW (Korean Won)
Mar. 30, 2010	93.17	125.69	142.06	86.50	8.36
Mar. 31, 2009	99.23	131.34	144.45	69.01	7.23
Mar 31, 2008	101.19	159.69	204.11	93.74	10.31

Table 4 (reference): JAL Fuel Surcharges dep. Japan (round trips) in JPY

	2010		2009			Increase from previous GW
	Apr.	Jan.	Oct.	July	Apr.	
Korea	1,000	600	600	0	400	600
Guam	6,000	4,000	4,000	0	2,000	4,000
Thailand, Malaysia Singapore	9,000	6,000	6,000	0	3,000	6,000
Hawaii	12,000	8,000	8,000	0	4,000	8,000
Oceania, N. America Europe	21,000	14,000	14,000	0	7,000	14,000

Overseas Travel

The Favorable Holiday Sequence Makes Europe and Hawaii Popular: Nearer Home, it is Guam and Destinations in Asia.

This year, the Golden Week holiday sequence makes it easier to take longer breaks and this, with consistently high yen exchange rates, has made Europe and Hawaii popular. Poland is bubbling over with the celebrations of the 200th anniversary of Chopin's birth, while Germany celebrates the 20th anniversary of the unification of East and West Germany and the 60th anniversary of the "Romantic Road." More travelers than last year also appear to be heading for Australia. Closer at hand, Guam, China and Asia in general should also see more travelers (see Table 5).

The Shanghai International Exposition (from May 1) Promises a Major Increase in Travel to China.

Airline bookings are strong for Shanghai, Beijing and Dairen and the opening of the Shanghai Expo on May 1, in particular, is expected to encourage many Japanese visitors.

Three Airlines, Including Emirates, Start Services via Narita, and the Middle East Attracts Attention as a New Destination.

On March 28, Emirates initiated a service of five flights a week from Narita to Dubai while Etihad Airways initiated a similar service to Abu Dhabi. As of April 26 they are joined by Qatar Airways, which will provide seven flights a week to Doha. Their fleets of aircraft and reputations for service are generating interest in new travel destinations. Travel companies have arranged not only package tours with stays in the area but also trips to Europe via the Middle East and tours to Africa, so the Middle East is attracting considerable interest this Golden Week.

Domestic Travel

ETC Expressway Discounts for Seven Straight Days Boost Stays and Travel by Car.

This year, the discounts on ETC charges for expressways are to run throughout the seven days from April 29 through May 5. It is now a year or more since these discounts were introduced, and magazines have been running articles on how to take best advantage of them. This seems sure to encourage not just day trips and journeys to the ancestral home but also more trips by car for overnight stays.

More Tourists will Visit Kansai to Celebrate the 1,300th Anniversary of Japan's Ancient Capital, Nara Heijo-kyo.

On April 24, the reconstructed Imperial Audience Hall of the Heijo Palace will be opened, and the main celebrations of the 1,300th anniversary will finally begin. Visitors are expected to flock to Kansai not only for specific events but also to see the cultural treasures of Nara's temples and shrines.

Long-Running TV Dramas Attracts Interest in Kochi, Matsuyama and Nagasaki.

The dramatization of the short life of a hero of the Meiji Reformation and a major multi-year production of one of Japan's most popular authors are attracting interest in their settings (in Kochi, Matsuyama and Nagasaki), and many more visitors are expected this year during Golden Week.

Each of these areas, keen to convey their history and living culture attractively, are drawing attention by encouraging visitors to explore their cities in detail on foot or by providing bicycles.

Survey Details

Survey locations:	200 locations throughout Japan.
Survey period:	March 4 through 16, 2010.
Respondents:	People of both genders aged from 15 to 79
Sample size:	1,200 individuals
Survey content:	Travel planned between April 24 and May 4, 2010, involving at least one overnight stay away from home, (including overseas travel but excluding commercial or business trips).
Survey methodology:	Individual questionnaire-based interviews

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Table 5: Golden Week Overseas Travelers' Trends by Destination

(Overseas departures between 4/24 and 5/4, 2010)

	GW 2010	GW 2009	%age Change
Total	508	487	+4.3
Asian Subtotal	306	296	+3.4
Korea	98	103	-4.9
China	90	80	+12.5
Hong Kong	21	20	+5.0
Taiwan	24	23	+4.3
Thailand	21	21	0
Singapore	8	8	0
Indonesia	15	14	+7.1
Malaysia	8	8	0
Others	21	19	+10.5
N. American Subtotal	106	103	+2.9
Hawaii	36	35	+2.9
Guam & Saipan	33	31	+6.5
US Mainland	33	33	0
Canada	4	4	0
European Subtotal	67	63	+6.3
Oceania Subtotal	19	18	+5.6
Australia	15	14	+7.1
New Zealand	2	2	0
South Pacific	2	2	0
Others (Africa, Middle East, Latin America)	10	7	+42.9

Units: thousands

Table 6: Traveling Companions

	%	Change from Previous Year
With family	71.3	+5.1
With children (up to junior high school)	37.3	+0.1
Just husband and wife	17.6	+1.6
Others (grandparents/grandchildren, mothers & daughters, etc)	16.4	+3.4
Friends/acquaintances	17.1	+2.5
As a couple with a close friend	7.0	+2.6
As a group of two or three friends	10.1	-0.1
Group (from work, etc.)	2.0	-4.2
Alone	6.0	-2.4

Table 7: Purposes of Travel (top ten)

	Position and Purpose	%	Change
1	Visit ancestral home, family.	23.1	+1.3
2	Relax at hot springs, resorts.	19.1	+2.2
3	Enjoy time with the family	13.6	+0.7
4	Enjoy nature & scenery	10.6	-1.0
5	Visit theme parks, leisure facilities.	5.5	-0.7
6	Visit famous & historic places	5.0	-1.7
7	Spend time with friends	4.5	-2.2
8	Sample gourmet & regional cuisine	4.5	+0.5
9	Enjoy and concentrate on my hobbies	4.0	-0.4
10	Enjoy strolling and shopping	4.0	+2.2

Table 8: Length of Trips

	Length	%	Change
2 days, 1 night.	35.7	-3.0	
3 days, 2 nights	34.7	+4.0	
4 days, 3 nights	16.6	-3.8	
5 days, 4 nights	4.5	+1.4	
6 days, 5 nights	1.5	+0.2	
7 days, 6 nights	1.5	+1.4	
8 days, 7 nights	2.0	-0.2	
8 or more nights	1.9	+0.2	

(Tables 6, 7 and 8: Single answers only)

Table 9: The Top Ten Reasons for Not Traveling (multiple answers)

Reasons and Their Ranking		%	Change
1	Golden Week gets so crowded.	37.0	-0.5
2	I'd rather take it easy at home.	22.7	-2.5
3	Travel costs are high during Golden Week.	22.0	+0.3
4	I have to work Sundays and national holidays.	19.1	+2.8
5	Can't get time off work.	17.6	+1.5
6	Cutting back in the face of poor economic prospects	17.0	-5.4
7	Family budget limitations	11.7	-2.4
8	No particular reason	11.4	-2.4
9	I'd rather travel at a different time.	9.8	-5.8
10	There are reasons I can't leave the house.	9.1	+0.1

Table 10: Intended Changes in Future Travel Expenditures (in the survey month)

Figures are percentages, those in parentheses are percentage point changes from the previous year.

	March 2010	March 2009	March 2008
Want to spend more	16.9 (+3.0)	13.3 (-3.0)	16.3 (+ 1.0)
Want to spend about the same	52.9 (+2.4)	50.5 (-5.7)	56.2 (-1.0)
More trips at lower cost per trip	12.5 (+1.3)	11.2 (-1.1)	12.3 (0.0)
Fewer trips at higher cost per trip	7.3 (+0.8)	6.5 (-1.8)	8.3 (0.0)
Similar numbers of trips and costs	33.1 (+0.3)	32.8 (-2.8)	35.6 (-1.0)
Want to spend less	28.0 (-6.4)	34.4 (+10.6)	23.8 (-1.0)

(Single answers)

Note: Totals in the above tables may not equal 100% because of unanswered questions.

Table 11: Trends in Golden Week Travel (from 1998 to the present)

	No. of Travelers (in thousands)			Average Costs (in yen)		Total Costs (in billion yen)		
	Total No.	Domestic	Overseas	Domestic	Overseas	Overall	Domestic	Overseas
	% of prev. yr	% of prev. yr	% of prev. yr	% of prev. yr	% of prev. yr	% of prev. yr	% of prev. yr	% of prev. yr
1999 (4/28~5/8)	20,644 5.5%	20,112 5.2%	532 18.5%	40,636 5.7%	213,327 1.2%	930.8 12.2%	817.3 11.2%	113.5 20.0%
2000 (4/27~5/7)	21,504 4.2%	20,940 4.1%	564 6.0%	40,433 -0.5%	228,558 7.1%	975.6 4.8%	846.7 3.6%	128.9 13.6%
2001 (4/26~5/6)	22,065 2.6%	21,526 2.8%	539 -4.4%	41,767 3.3%	239,072 4.6%	1,028.0 5.4%	899.1 6.2%	128.9 0.0%
2002 (4/25~5/5)	21,693 -1.7%	21,203 -1.5%	490 -9.1%	39,595 -5.2%	246,005 2.9%	960.0 -6.6%	839.5 -6.6%	120.5 -6.5%
2003 (4/24~5/4)	20,907 -3.6%	20,673 -2.5%	234 -52.2%	38,983 -1.5%	254,369 3.4%	865.4 -9.9%	805.9 -4.0%	59.5 -50.6%
2004 (4/24~5/4)	21,698 3.8%	21,169 2.4%	529 126.1%	39,334 0.9%	245,720 -3.4%	962.7 11.2%	832.7 3.3%	130.0 118.5%
2005 (4/27~5/7)	21,755 0.3%	21,211 0.2%	544 2.8%	38,890 -1.1%	253,180 3.0%	962.6 0.0%	824.9 -0.9%	137.7 5.9%
2006 (4/26~5/6)	22,016 1.2%	21,466 1.2%	550 1.1%	38,993 0.3%	250,584 -1.0%	974.8 1.3%	837.0 1.5%	137.8 0.1%
2007 (4/25~5/5)	22,023 0.0%	21,487 0.1%	536 -2.5%	39,100 0.3%	251,700 0.4%	975.0 0.0%	840.1 0.4%	134.9 2.1%
2008 (4/25~5/5)	21,254 -3.5%	20,800 -3.2%	454 -15.3%	39,100 0.0%	254,700 1.2%	928.9 -4.7%	813.3 -3.2%	115.6 -14.3%
2009 (4/25~5/5)	21,786 +2.5	21,299 +2.4	487 +7.3	36,900 -5.6	213,100 -16.3	889.7 -4.2	785.9 -3.4	103.8 -10.2
2010 (4/24~5/4)	22,008 +1.0	21,500 +0.9	508 +4.3	38,000 +3.0	223,100 +4.7	930.3 +4.6	817.0 +4.0	113.3 +9.2

Note 1: Surveys began in 1969.

Note 2: Average costs have been estimated for domestic & overseas separately since 1993. Adjustments have been made to some figures before 2003 to reflect the actual results not the previous year's estimates.

Note 3: Numbers of overseas travelers are the actual results.

Note 4: Numbers of domestic travelers and travel expenditures are estimates. Adjustments have been made to some figures before 2003 to reflect the actual results, not the previous year's estimates.