

Future of the International Air Transport in Asia-Pacific Region



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Narita Airport

Connecting Japan to the World

- 1. Business Environment for Narita Airport**
- 2. Narita Airport's Advantages**
- 3. Narita Airport's Initiatives**
- 4. Summary**

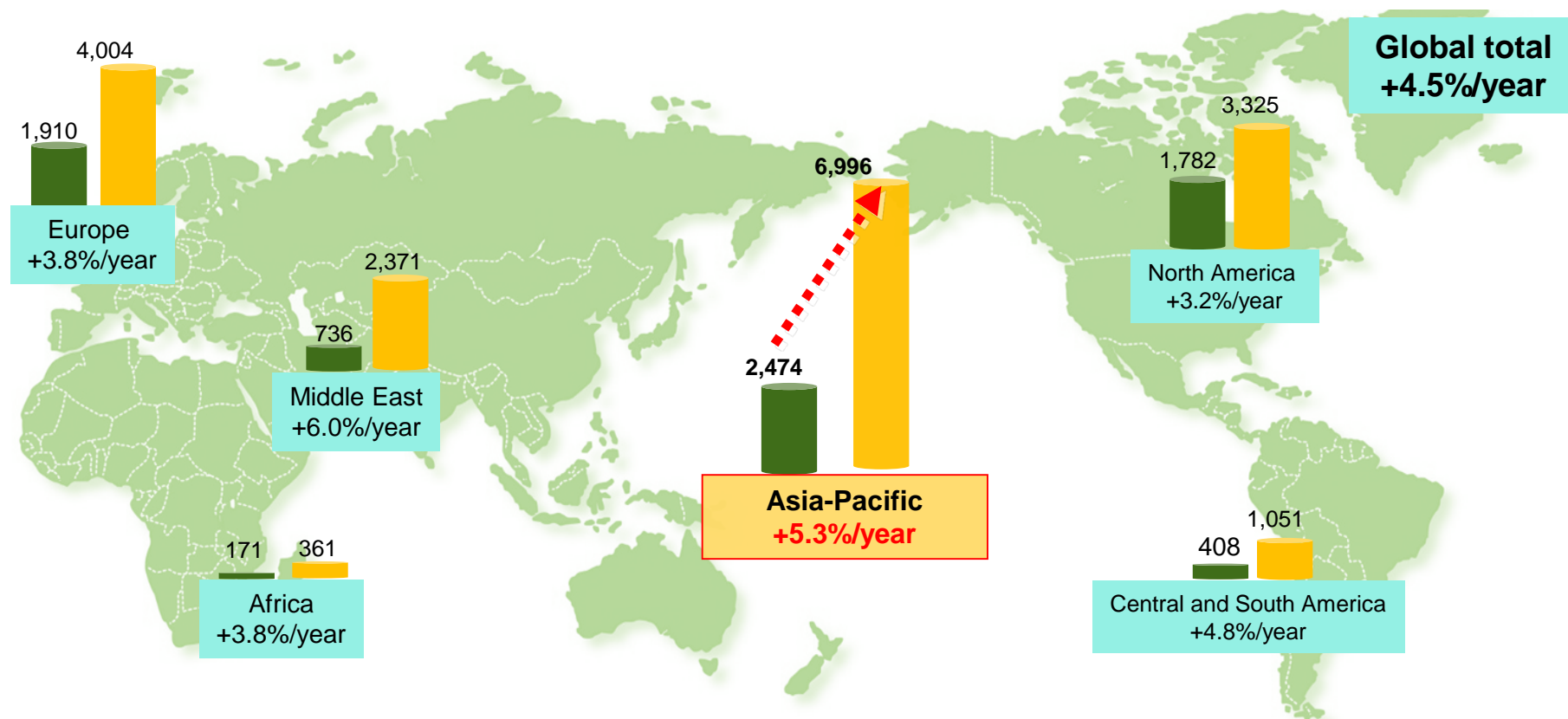
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2. Narita Airport's Advantages

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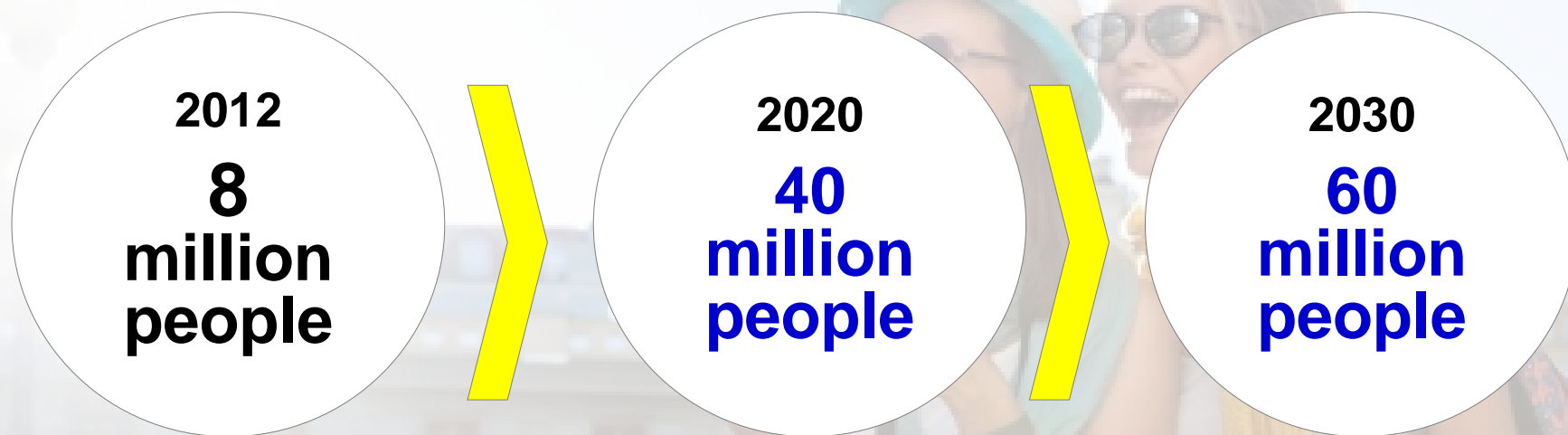
4. Summary

Forecast of global air transport passenger traffic volume (2018 to 2037)



Passenger traffic in Asia is forecasted to grow at an **annual average rate of above 5%** over the next **20 years**.

Target numbers of foreign tourists to Japan



Tourism Vision Realization Program 2019

- Facilitating the immigration procedure
- Improving the tourism environment
- Development of tourism resources
- Cooperation with JNTO (Japan National Tourism Organization)

Intensifying competition between airports

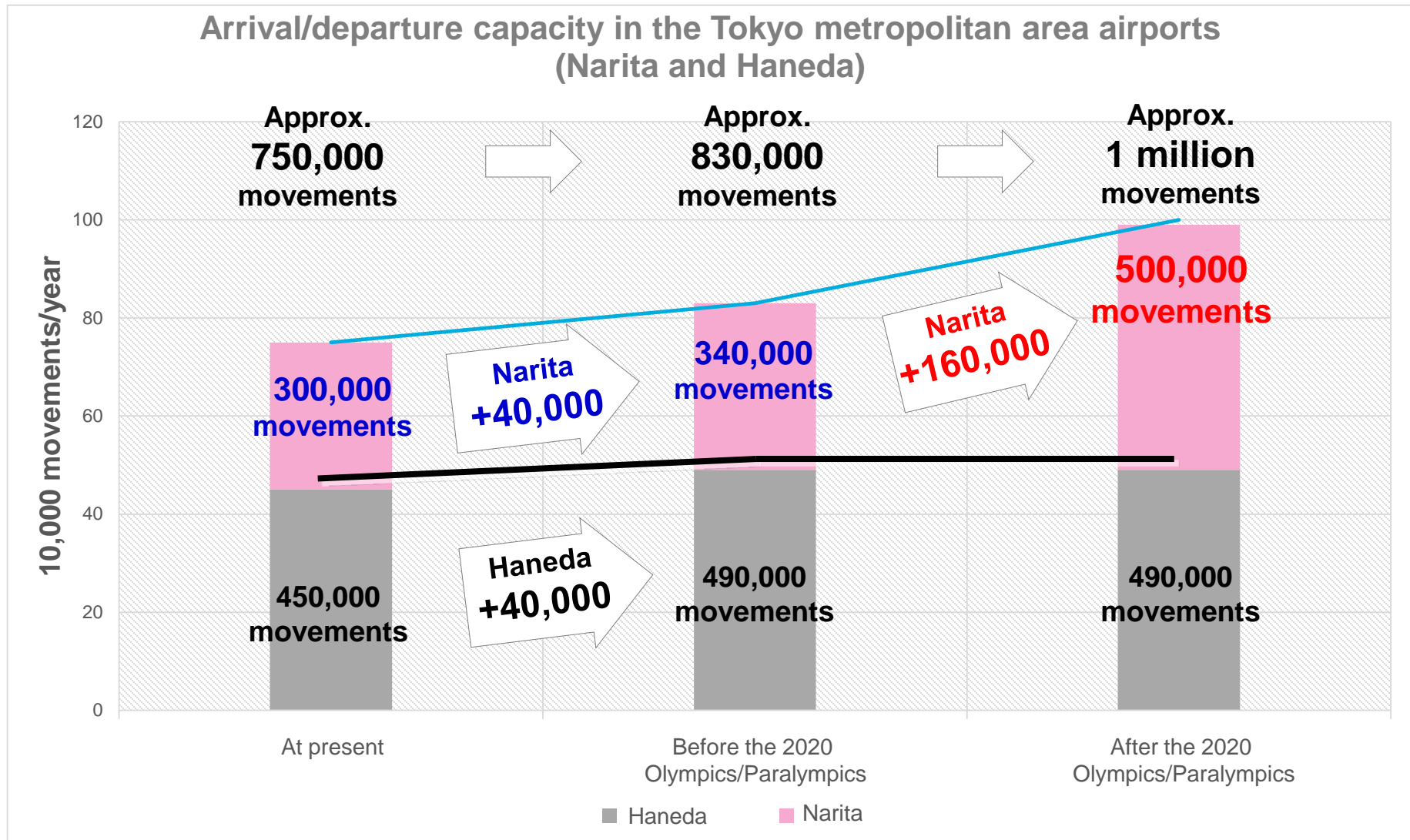
Asian airports planning large-scale expansion



- Intensifying competition to open new routes
- An opportunity to win over passengers



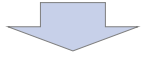
Strengthening of the Tokyo metropolitan area airports' functionality (Annual arrival/departure capacity)



Narita's capacity and functionality enhancements

Annual number of slots

300,000 slots



500,000 slots

Runway

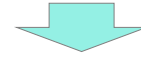
Two runways
(4000m & 2500m)



Three runways
(4000m×1)
(3500m×2)

Operating hours

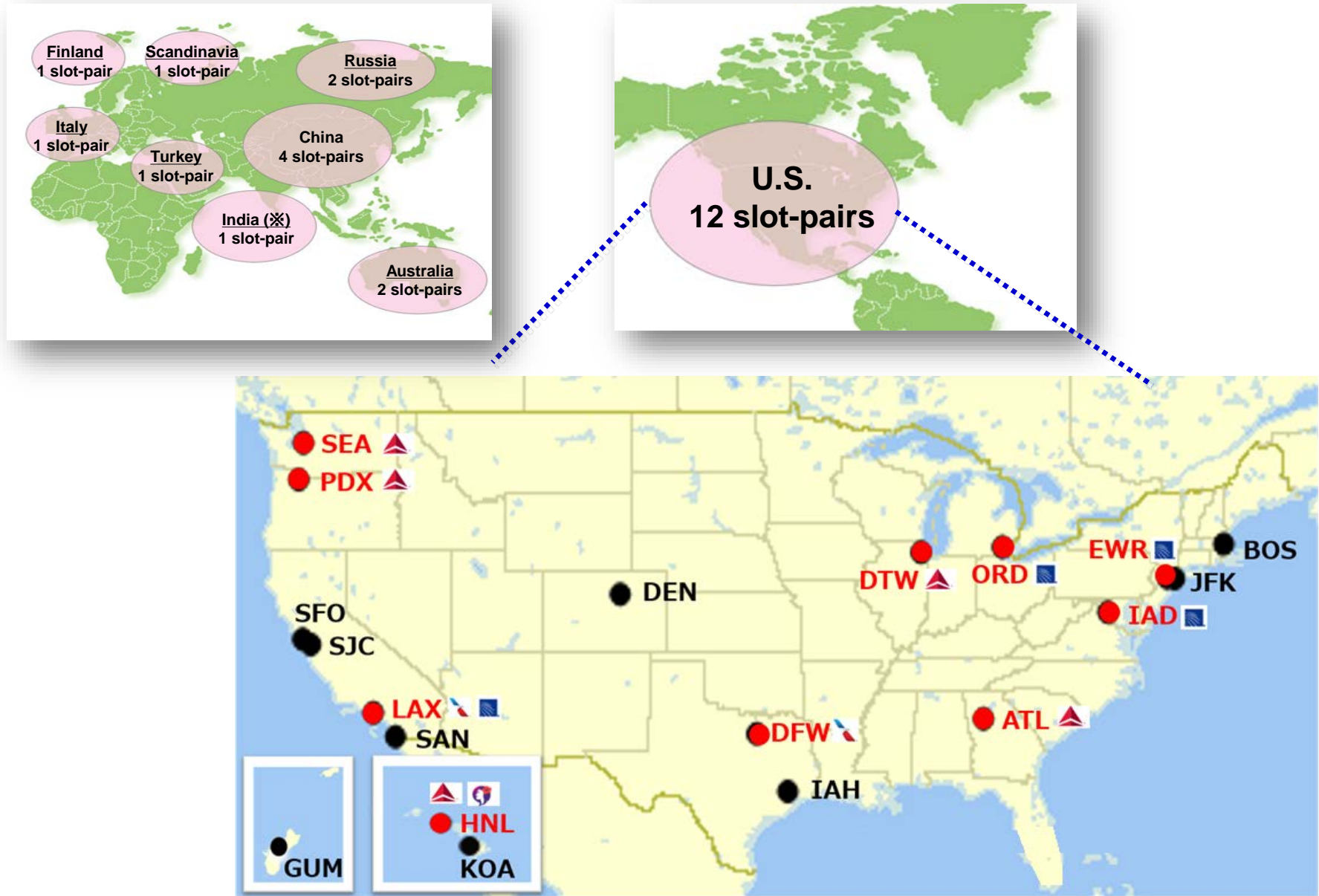
6 a.m. to 11 p.m.



5 a.m. to 12:30 a.m.



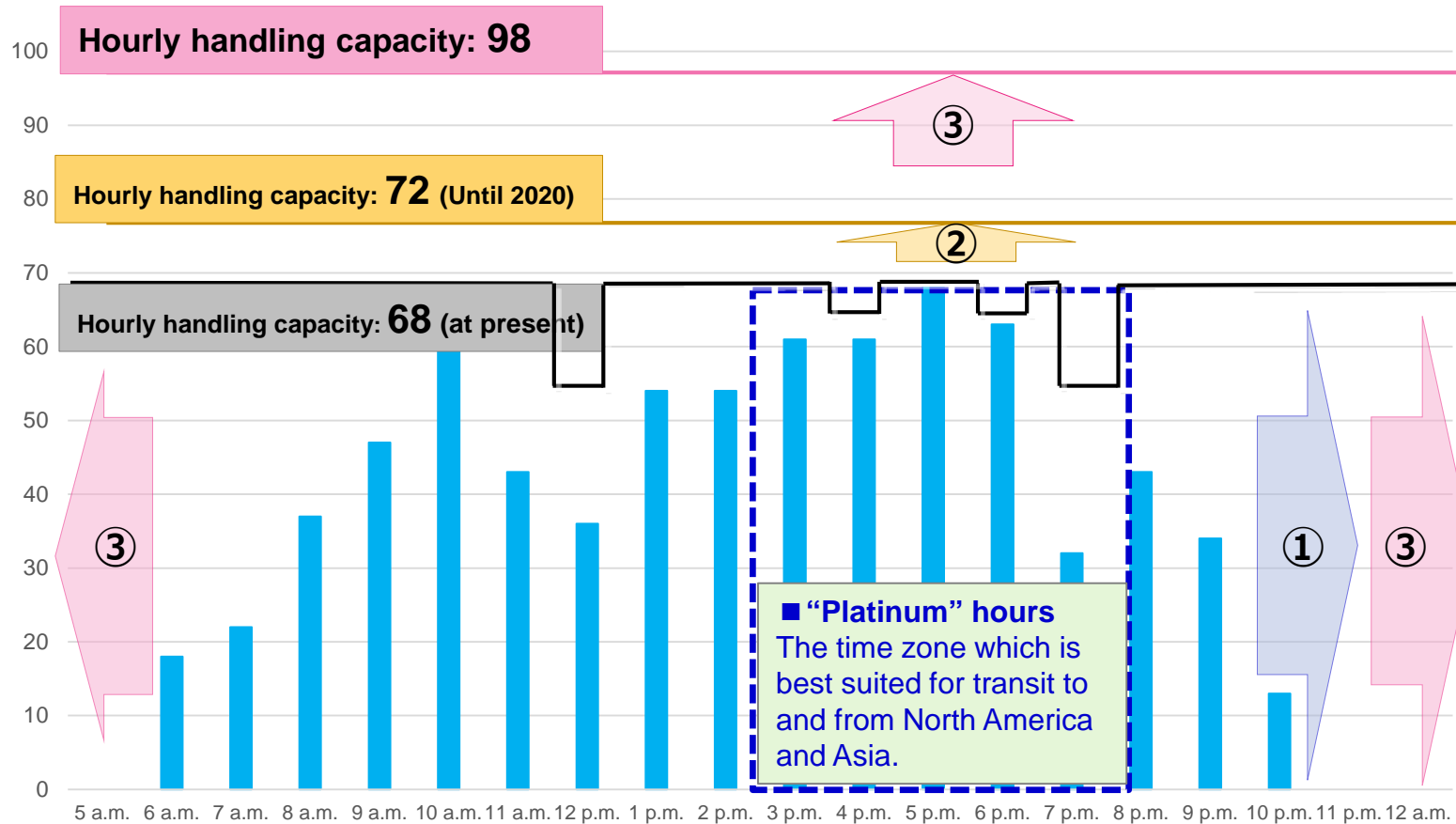
Impact of the 3rd increase in slots at Haneda



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Advantage (1): Increase in hourly arrival and departure slots

[Number of hourly arrivals/departures]



■ **“Platinum” hours**
The time zone which is best suited for transit to and from North America and Asia.

- ① **2019 Winter schedule**
- Extend the operating hours from 6am to 12:00am.
 - Remove the restriction on number of flights operable after 22:00.

- ② **2020 summer schedule**
- Increase the hourly capacity to 72.

- ③ **After the opening of Runway C**
- Extend the operating hours from 5 a.m. to 12:30 a.m.
 - Vary the operating hours by runway

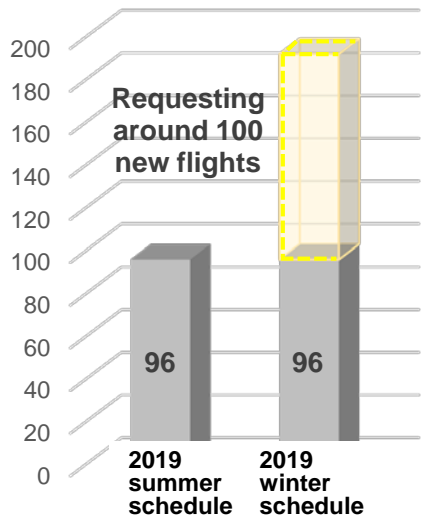
Advantage (2): Room for flight network expansion on China routes.

《Legends》

- Cities served between Narita: 21 cities
- Candidates for new destinations: 17 cities



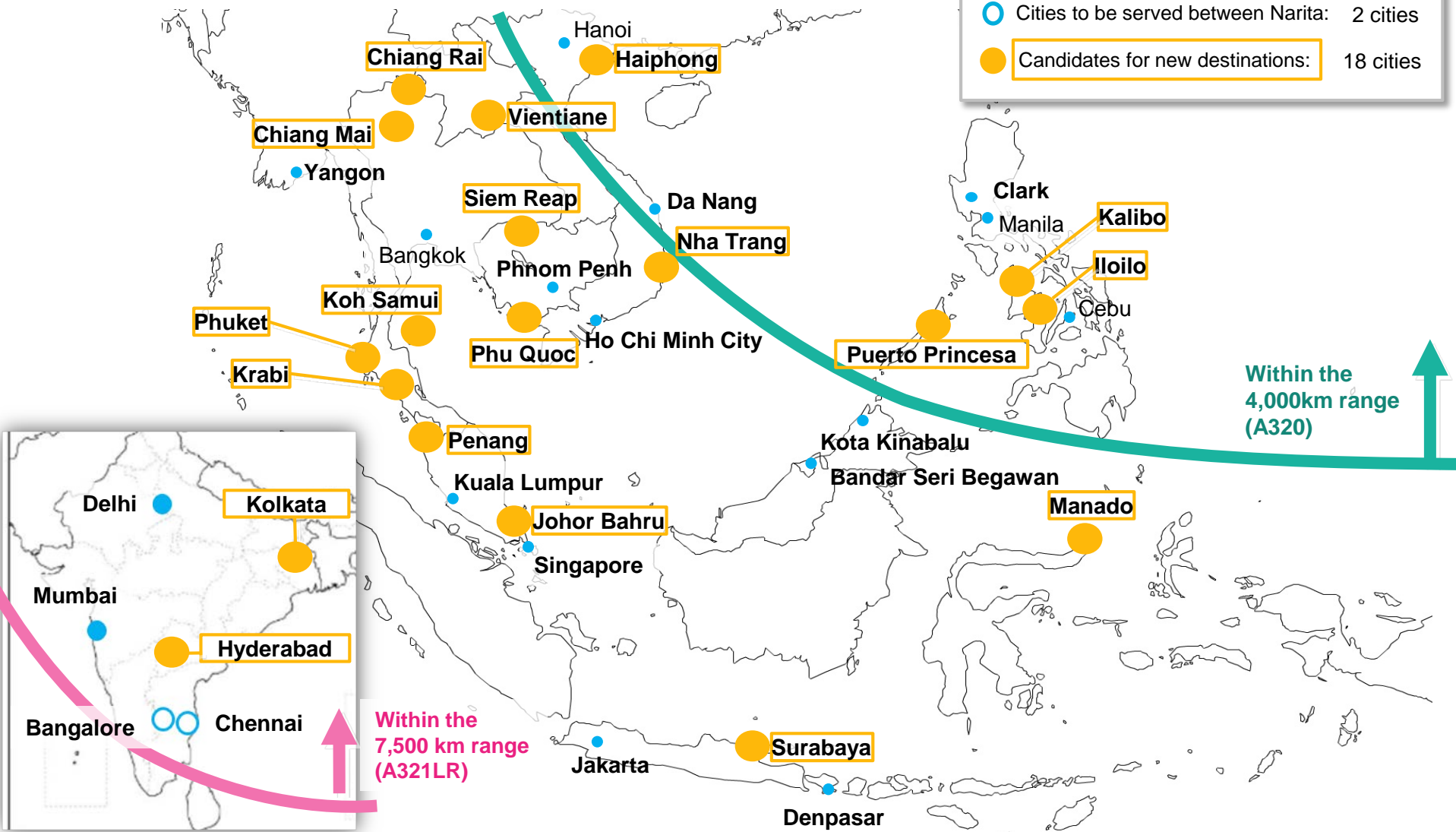
Expected increase in flight services with the expansion of traffic rights



Advantage (2): Room for flight network expansion on Southeast Asia and India routes.

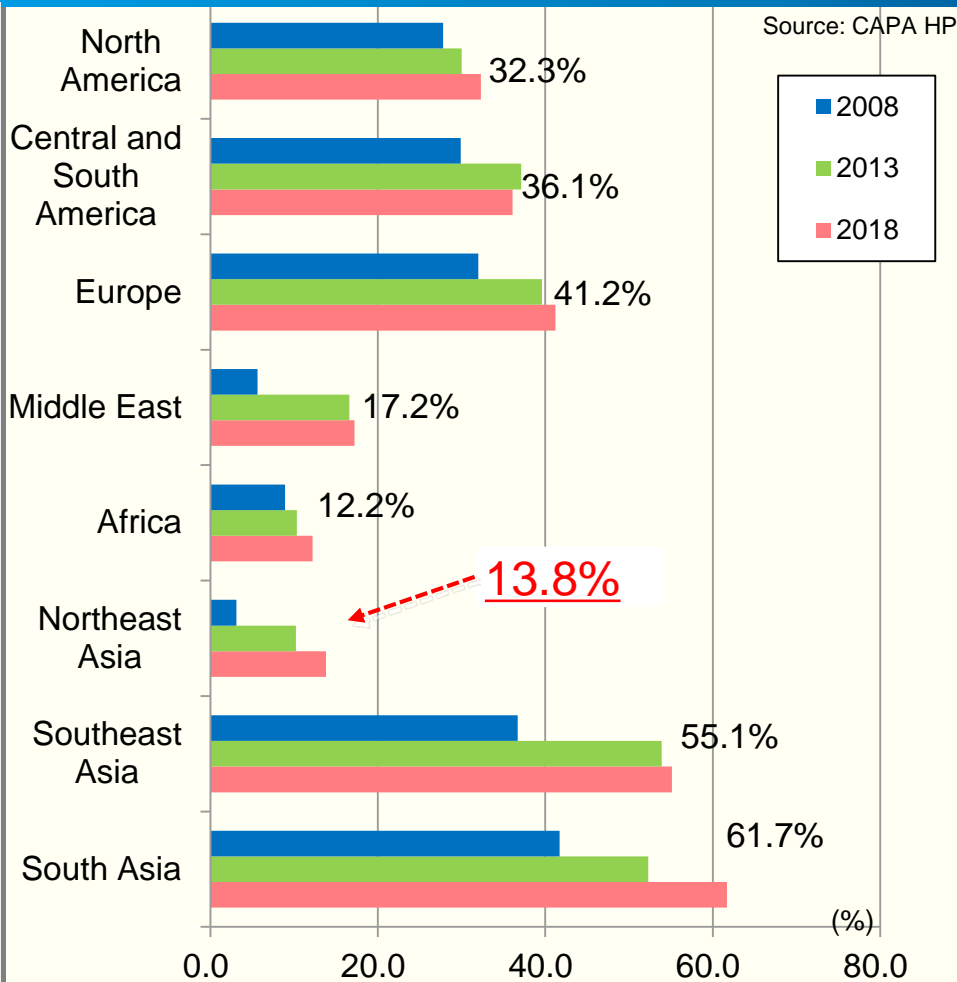
《Legends》

● Cities served between Narita:	17 cities
○ Cities to be served between Narita:	2 cities
● Candidates for new destinations:	18 cities



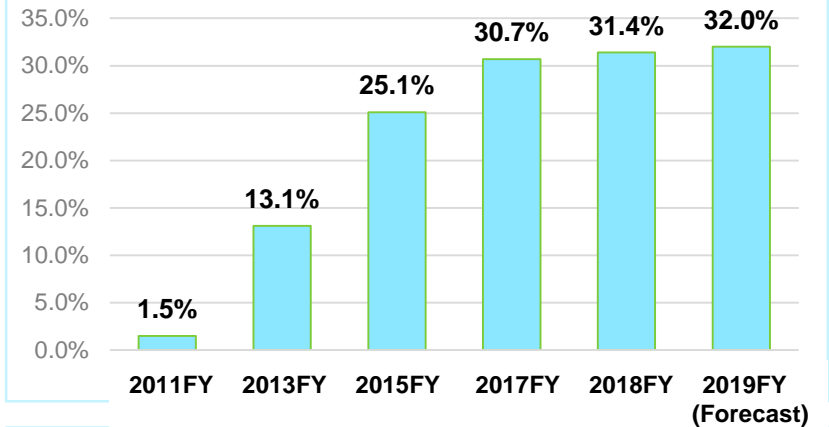
Advantage (3): Growing LCC market

LCCs' market share by region (number of seats provided within the region)

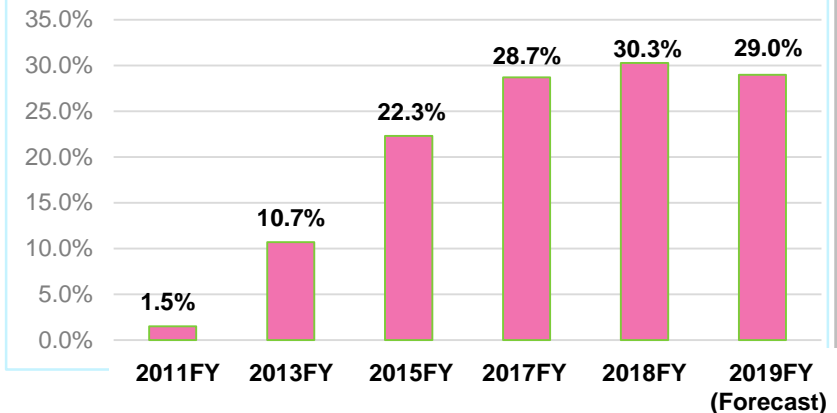


LCCs' share at Narita Airport

Share in terms of number of flights (passenger flight services)



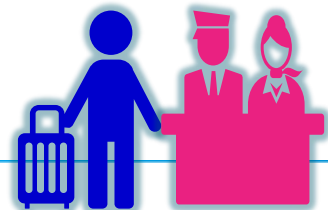
Share in terms of the number of passengers



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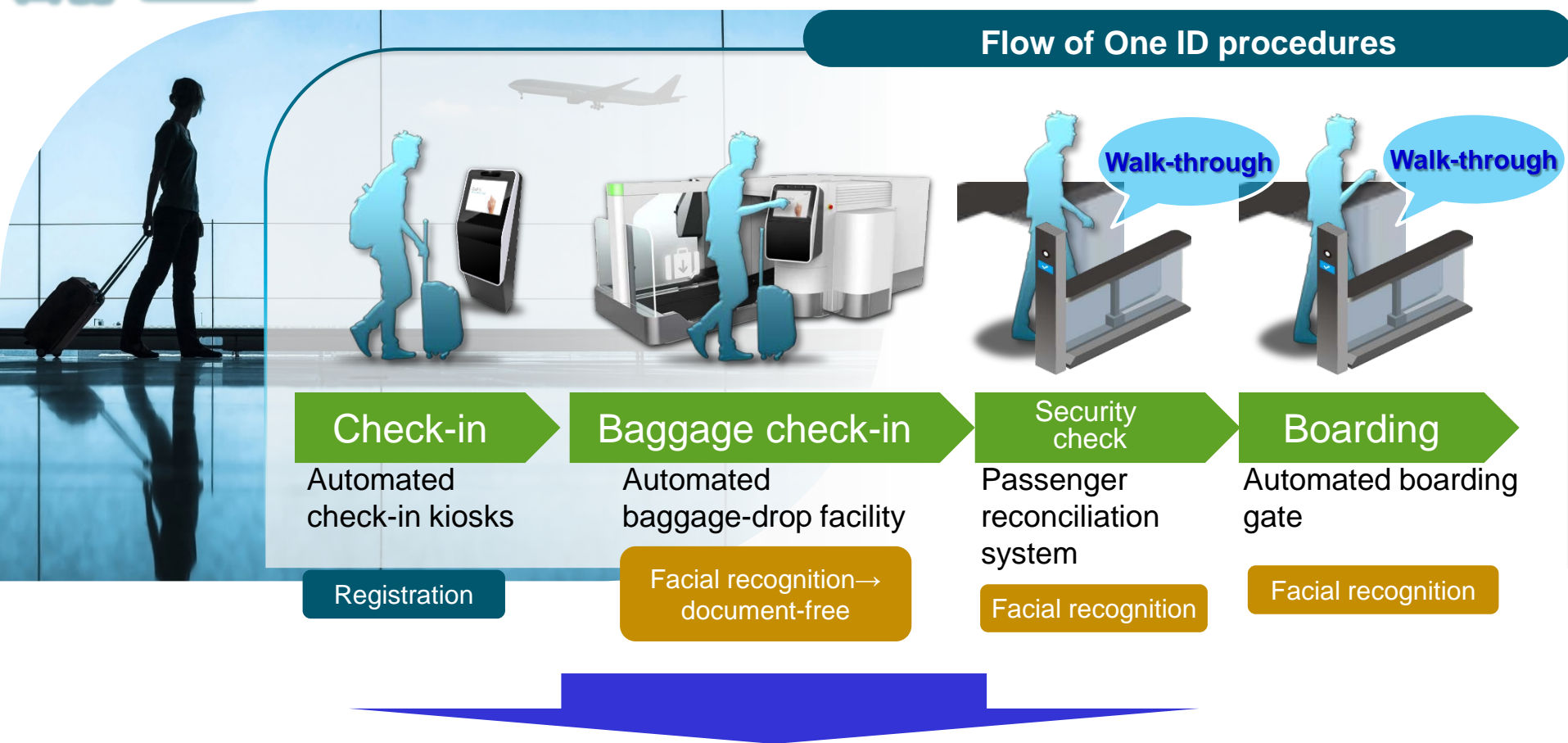
Key success factor is increasing satisfaction



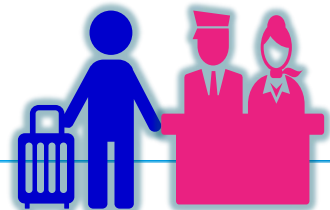


One ID facial recognition

Flow of One ID procedures



The new system will be introduced at Terminal 1 south wing and at Terminal 2 by spring 2020



One-stop security



- Shorten transit time
- Reduce cost

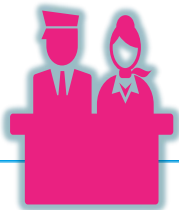


- Reduce the burden on passengers
- Increase convenience



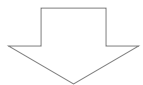
- Ease congestion in peak hours
- Increase retail sales at airport shops

The coverage of the “one-stop security” will be expanded to all flights from the United States from November 2019



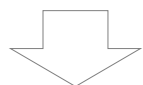
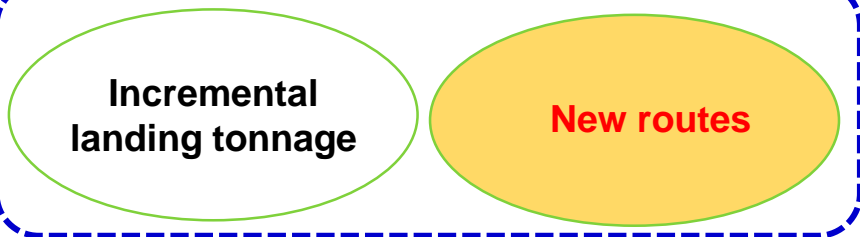
Enriching incentives

2013

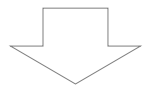


Narita Promotional Incentives

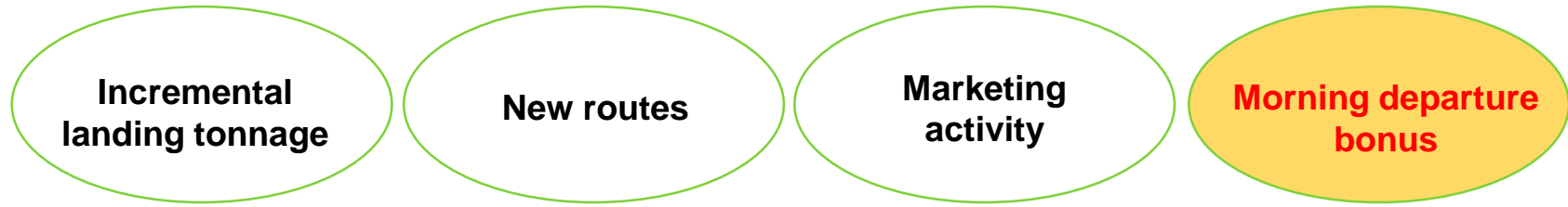
2015



2017



2019



20XX

Narita will continue to strategically and flexibly introduce incentive schemes

Reduction of total costs

Conduct market analysis

Implement measures (reduction of total cost)



For passengers

Expansion of the network of low-cost bus (LCB) services



Expansion of the networks of LCCs and FSCs



For carriers

Proposing a comprehensive fee and charges scheme with economic rationality.



Reduction of operational cost

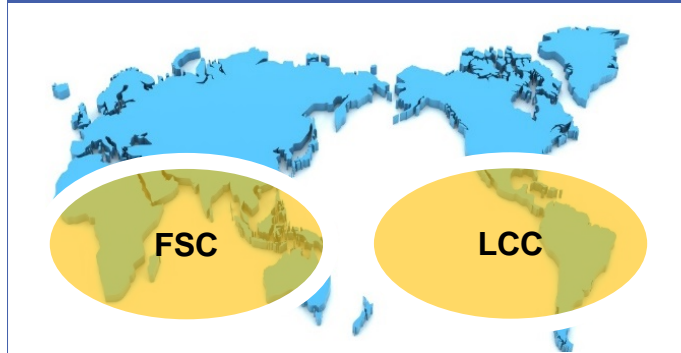


Narita will become the “airport of choice” that is convenient and easy to use

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Narita's role

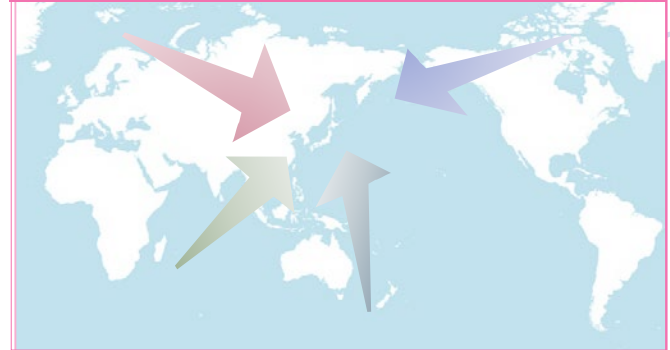
International services



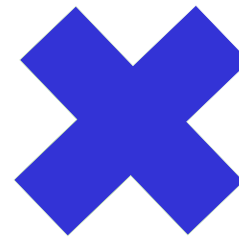
Domestic services



The government's in-bound tourism policy

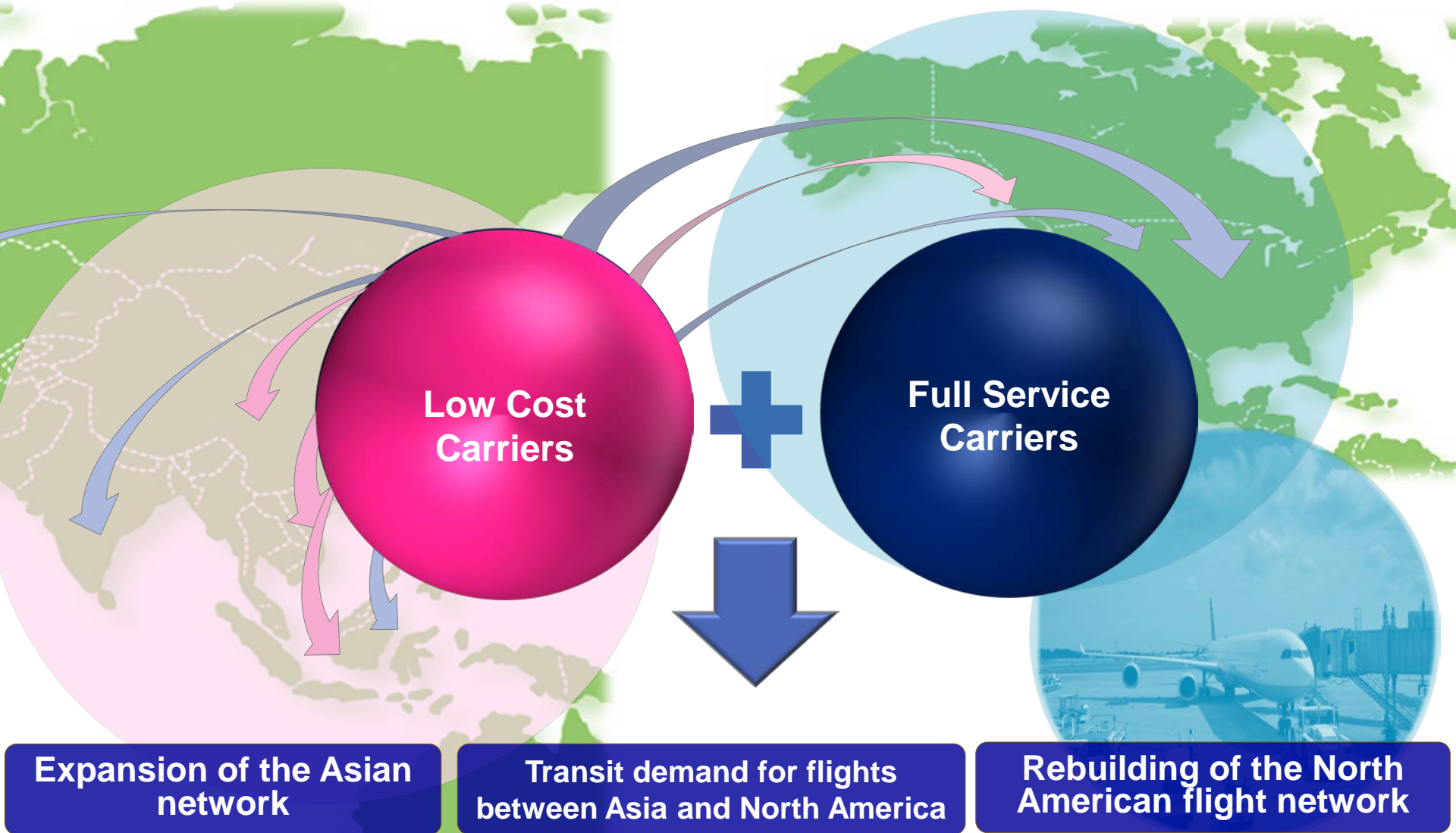


Strengthening of Narita Airport's functionality



Narita will fulfill its role as the main arrival point in the Tokyo metropolitan area by developing a business environment that enables carriers to achieve growth.

FSCs and LCCs will act as the twin drivers of growth





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