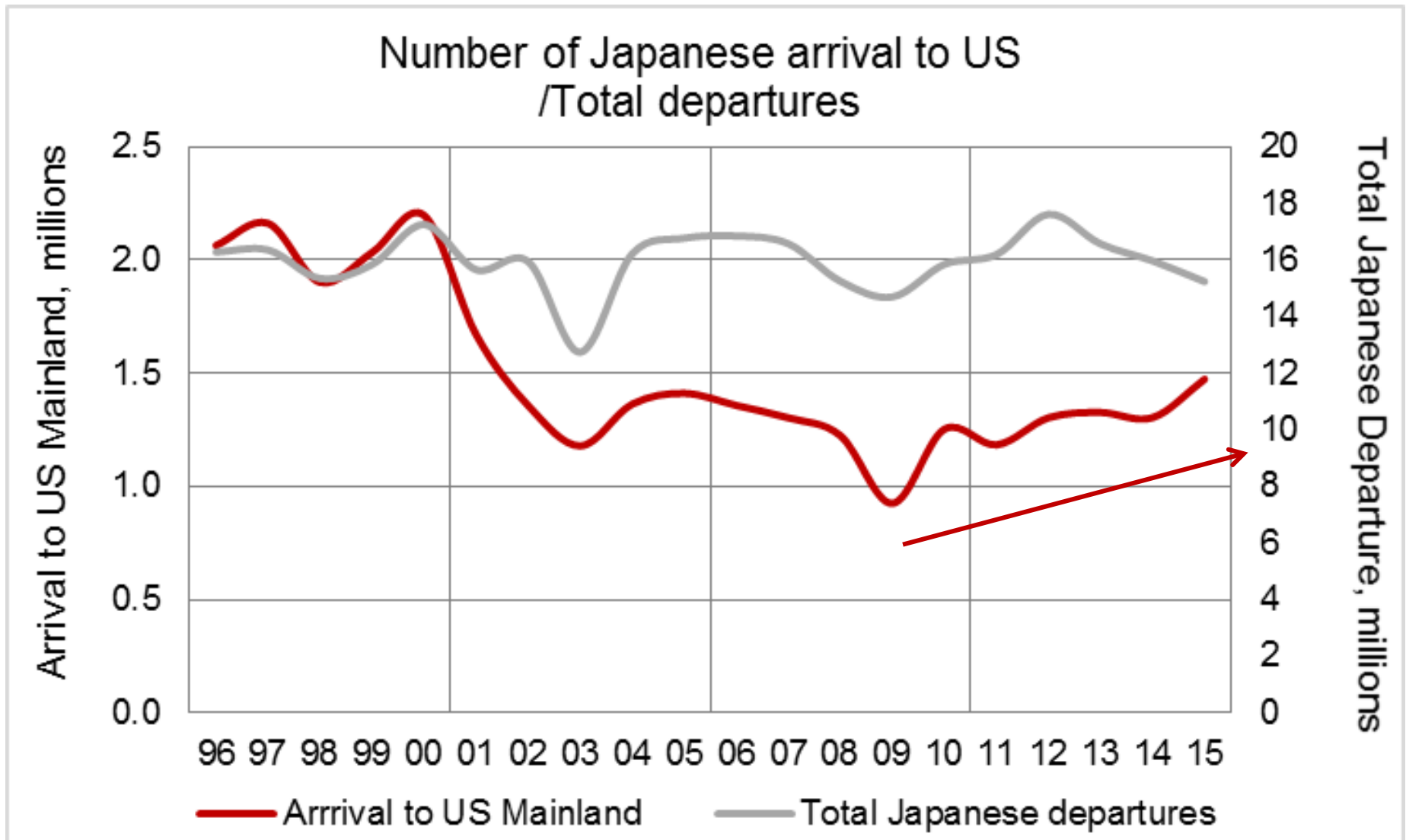


Potential of Japanese Outbound Market to US Mainland

Thursday 27th October 2016

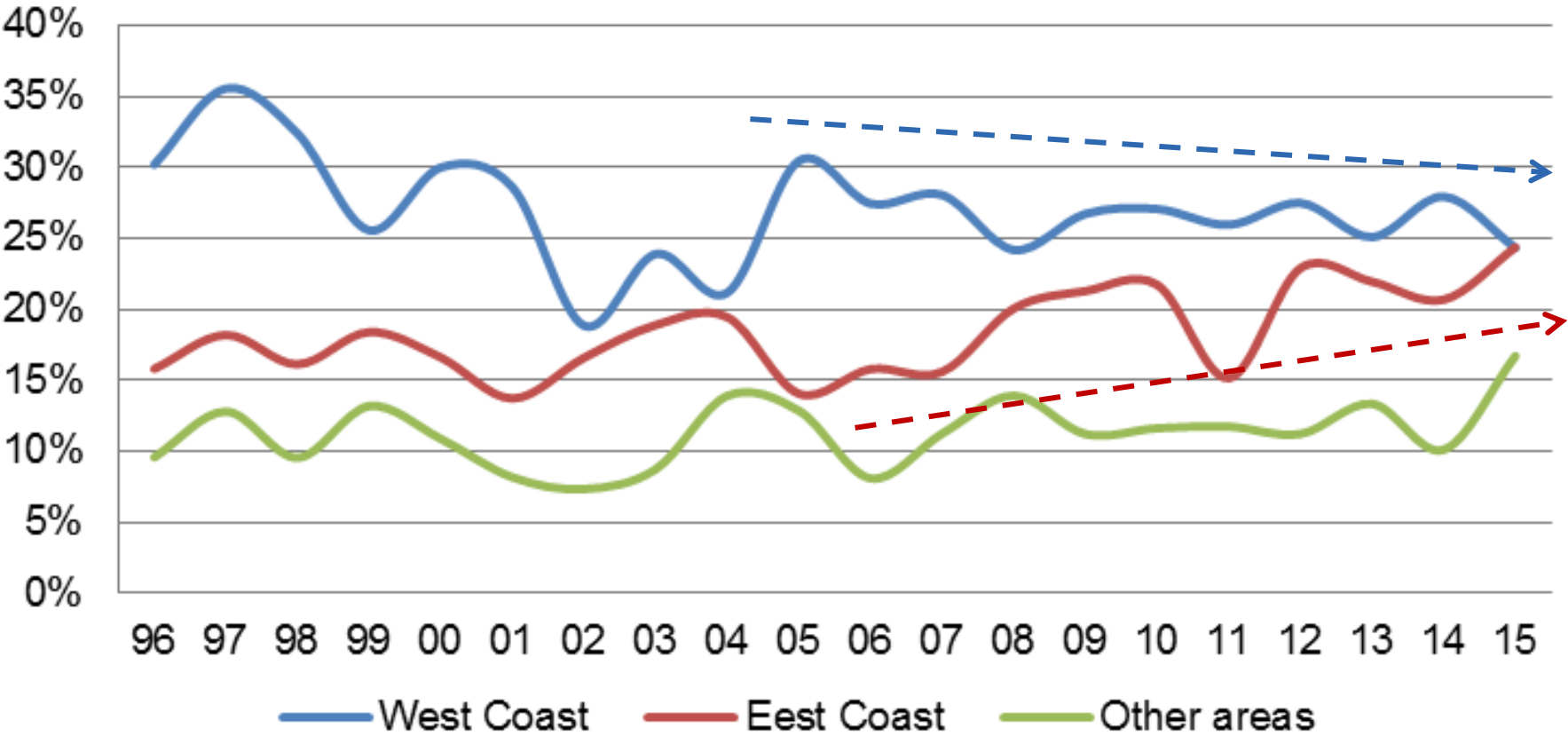
Prepared by JTB Tourism Research and Consulting

No more growth of Japanese tourist?



Where are they visiting?

Visited Areas - Holiday Trips

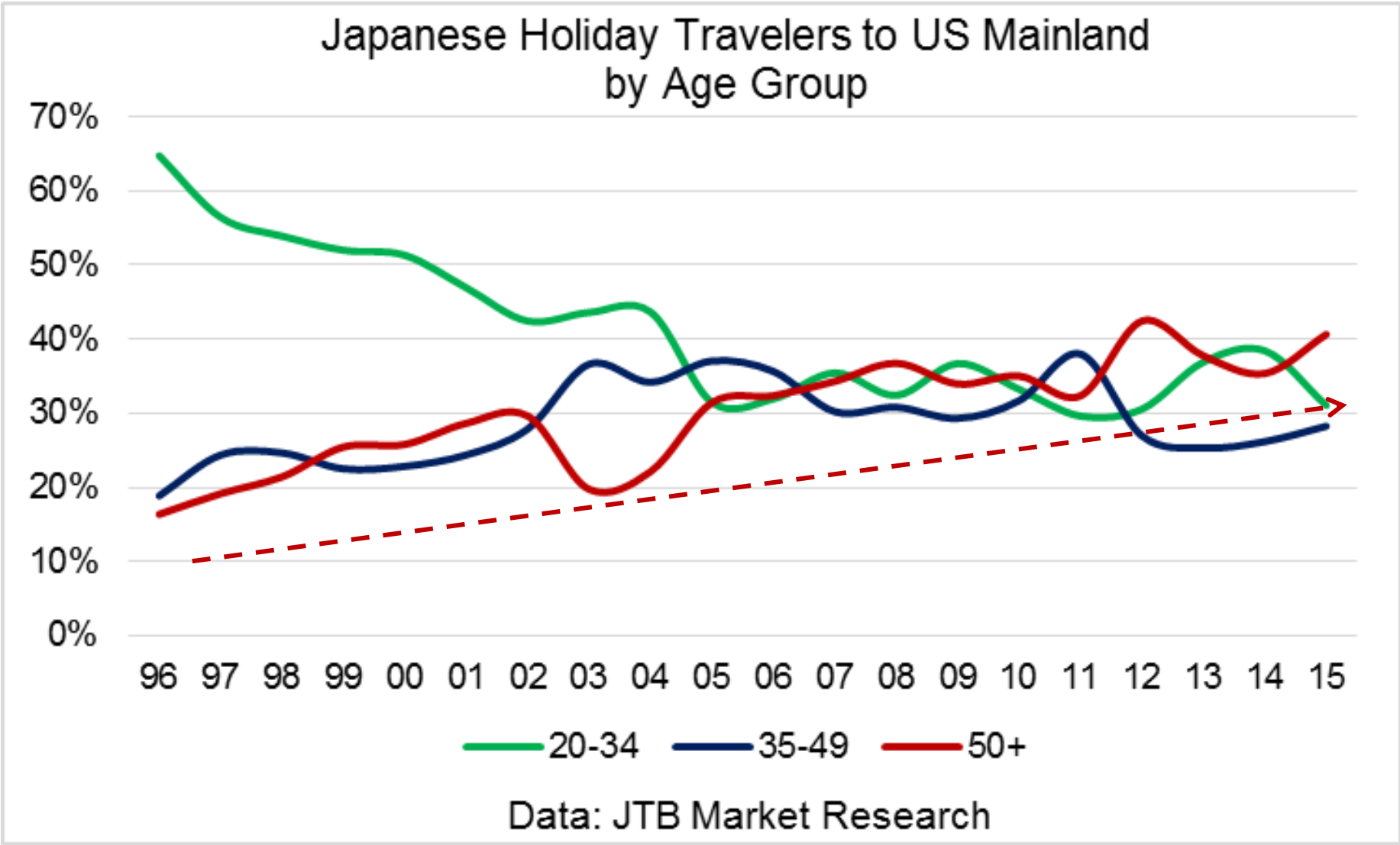


Data: JTB Market Research

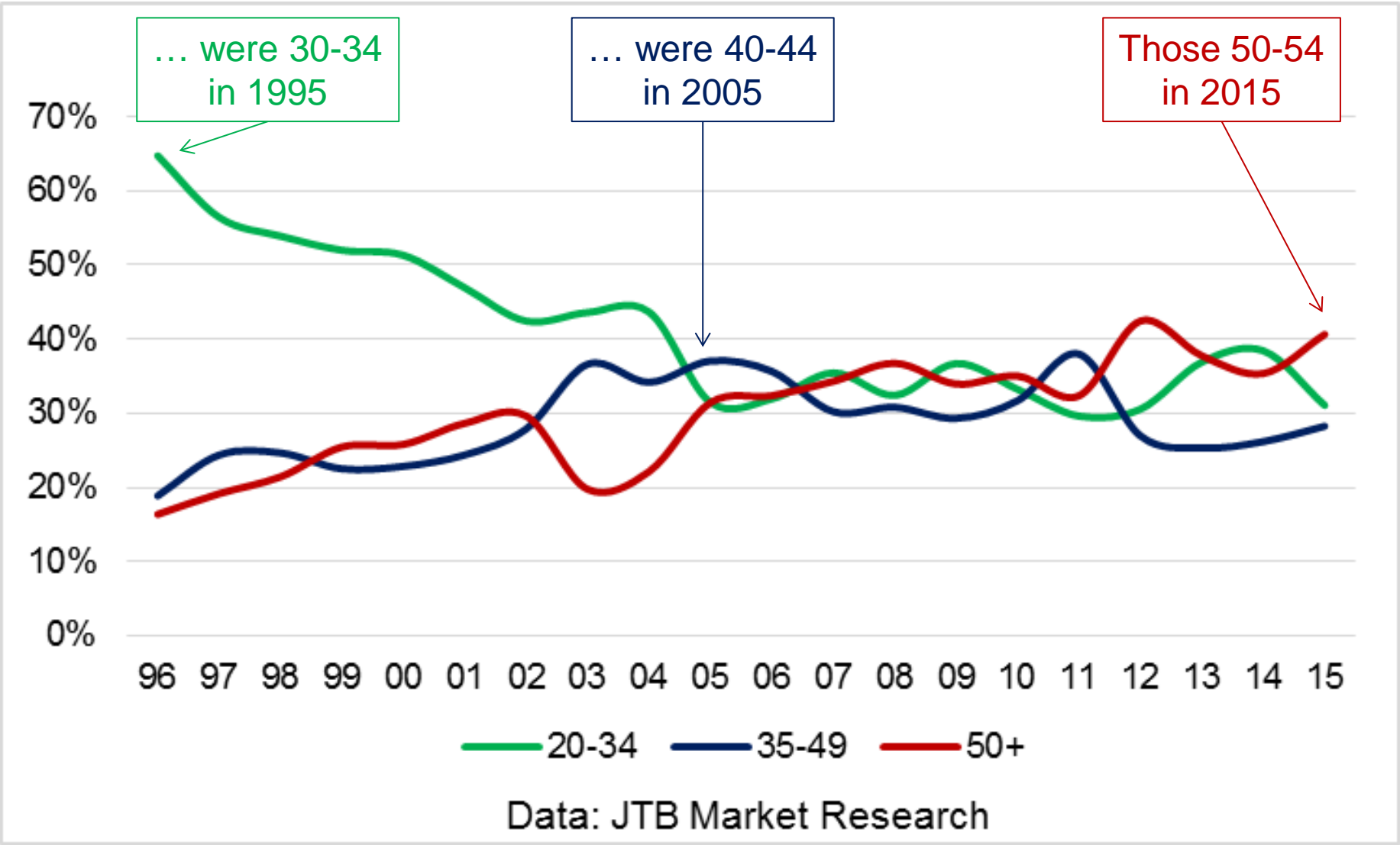
Note: The total surpasses 100% due to multiple answers

Why East Coast?

Who's coming to US?



Who are they?

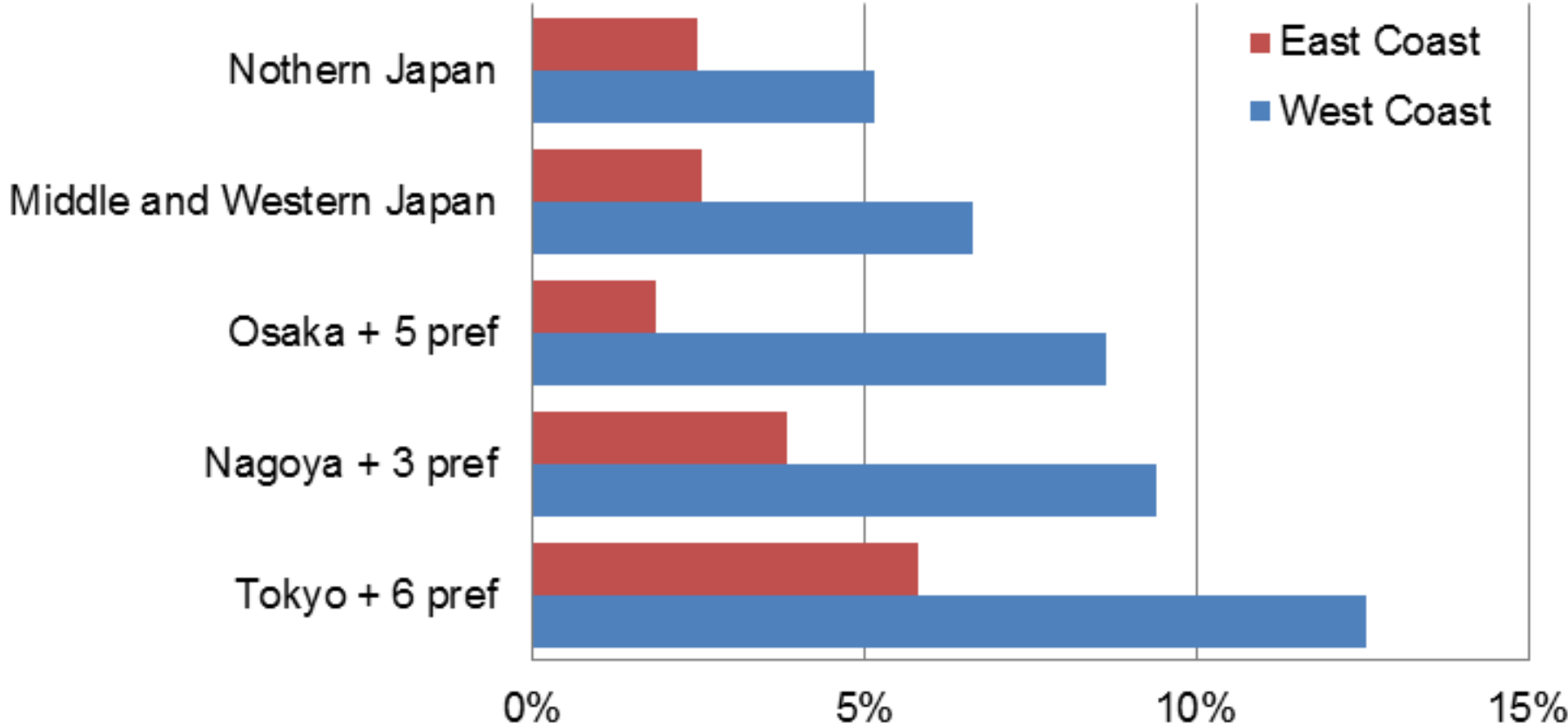


They're called "Gen X"

- ✓ Born in 1954 to 1968
- ✓ Now, 48 ~ 62 years old
- ✓ First generation majority enjoyed overseas travel for leisure in their 20s...
- ✓ Many people went honeymoon in US territory...
- ✓ ... and now finishing child raising
- ✓ Choose FIT rather than group tour...

Why East Coast?

Share of Those Have Been to US by Region



Share of Population
Data: JTB Market Research

Conclusion

- ✓ Recent **increase** of Japanese arrivals likely to **continue**
- ✓ Holiday demand is **shifting to East Coast**
- ✓ **Local market** has good potential, and those areas are **well connected to Haneda** by domestic network
- ✓ **Gen X** is target segment