

# Japanese Outbound Travel 2010 Outlook

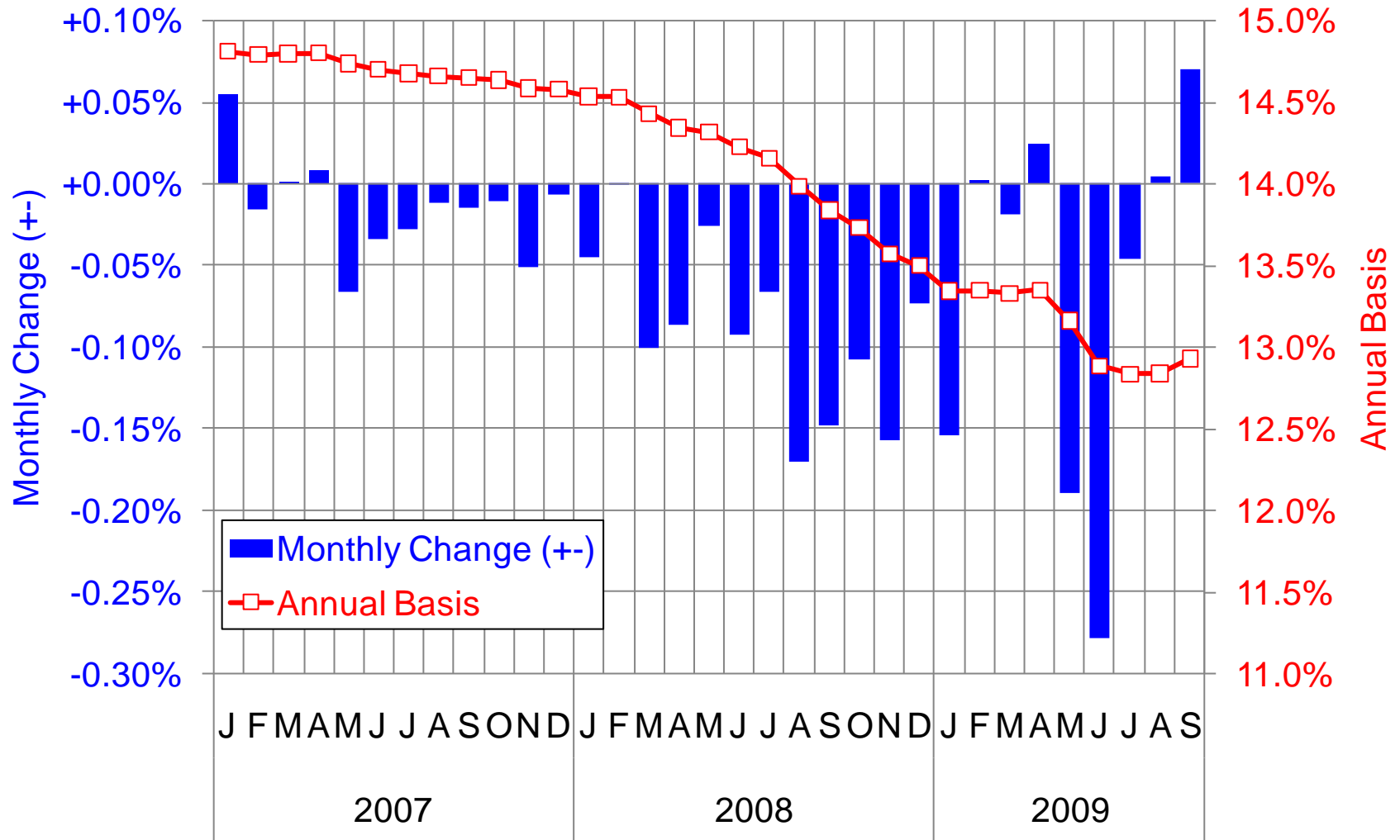
Prepared for 3<sup>rd</sup> Guilin Conference

by

H. Kurosu, JTB Foundation, Tokyo

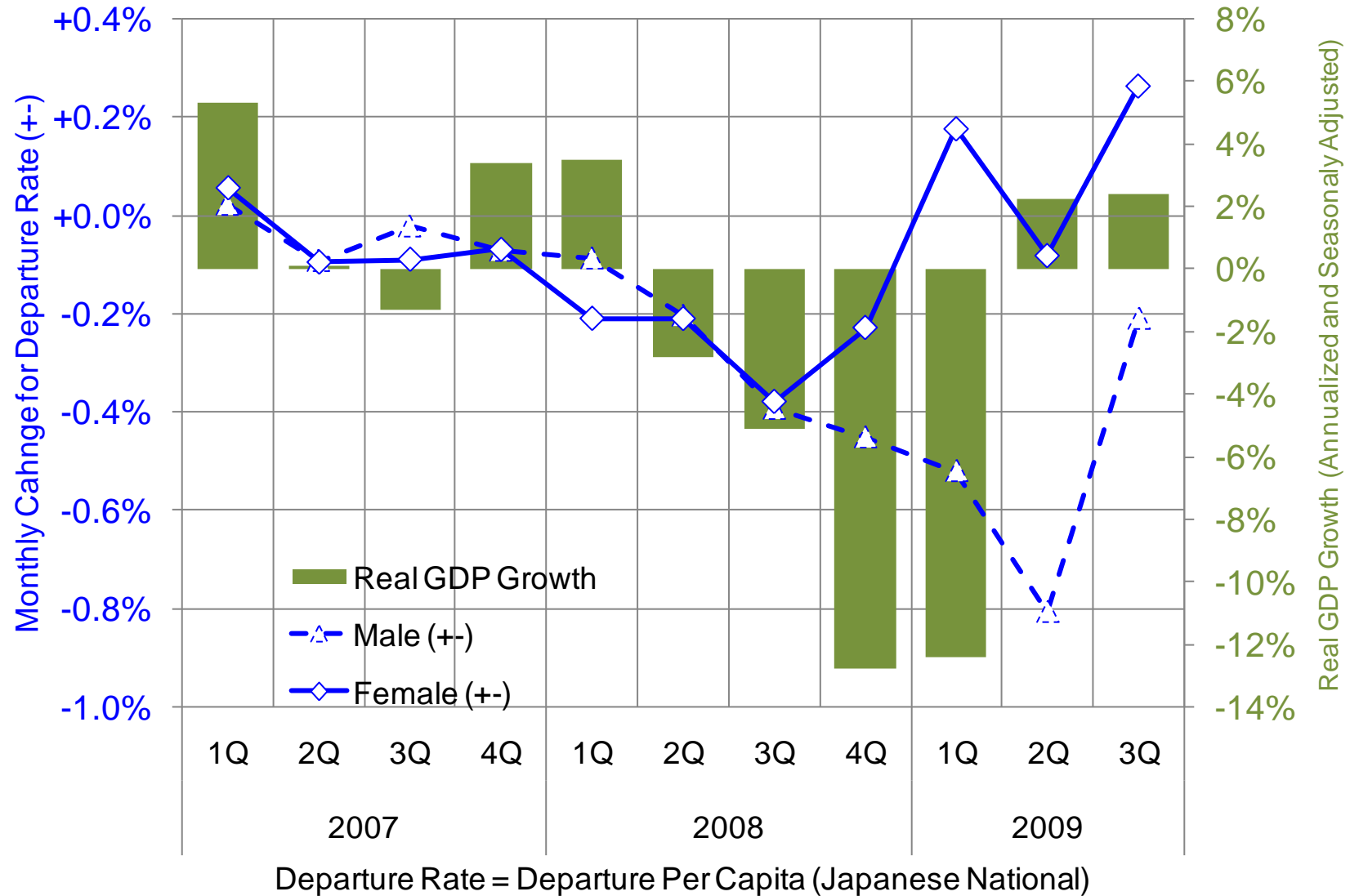
[hkurosu@jtb.or.jp](mailto:hkurosu@jtb.or.jp)

# Japanese Outbound Travel Departure Rate



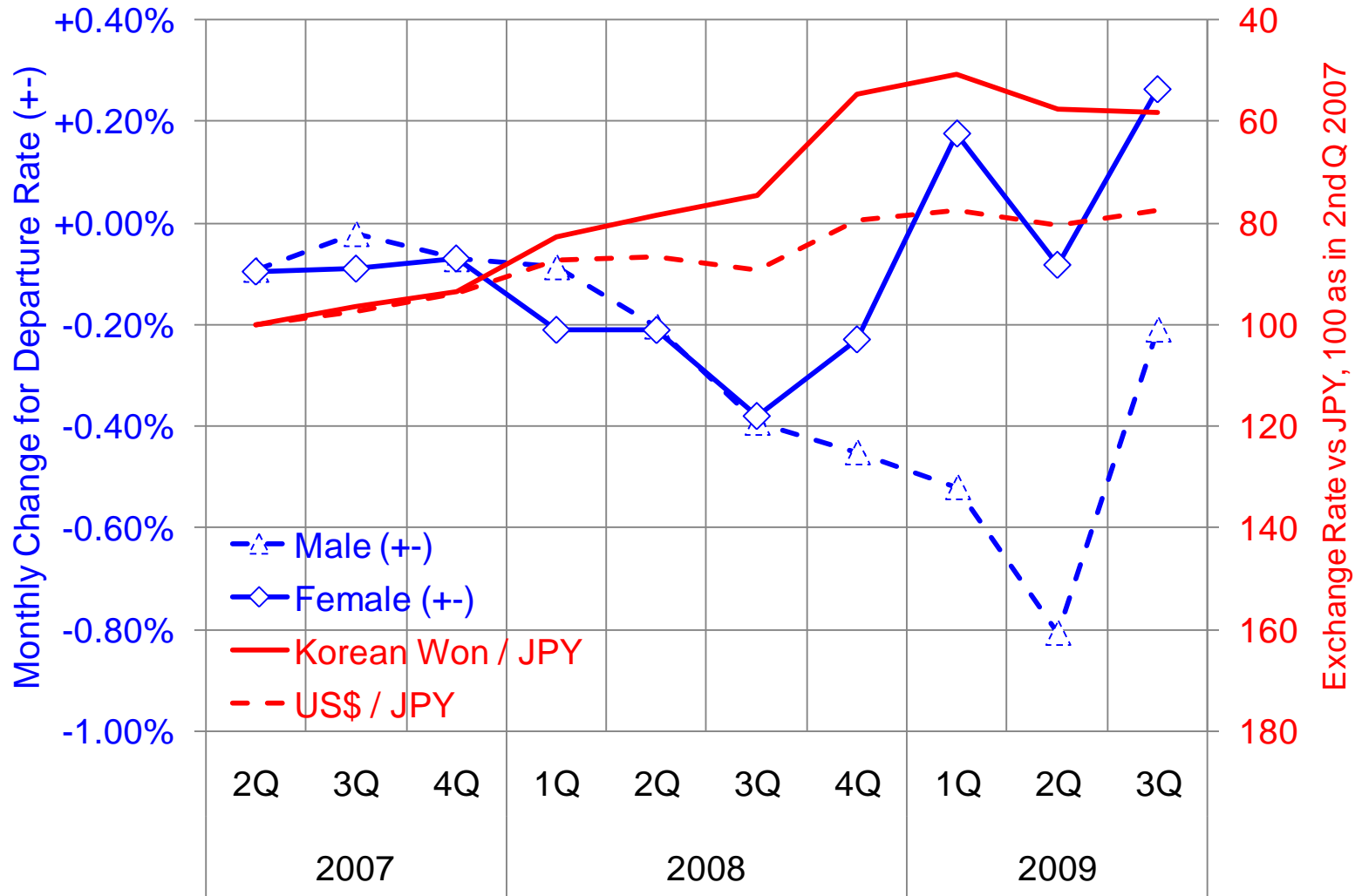
Departure Rate = Departure Par Capita (Japanese National)

# Japanese Outbound Travel GDP vs. Departure Rate by Gender



# Japanese Outbound Travel

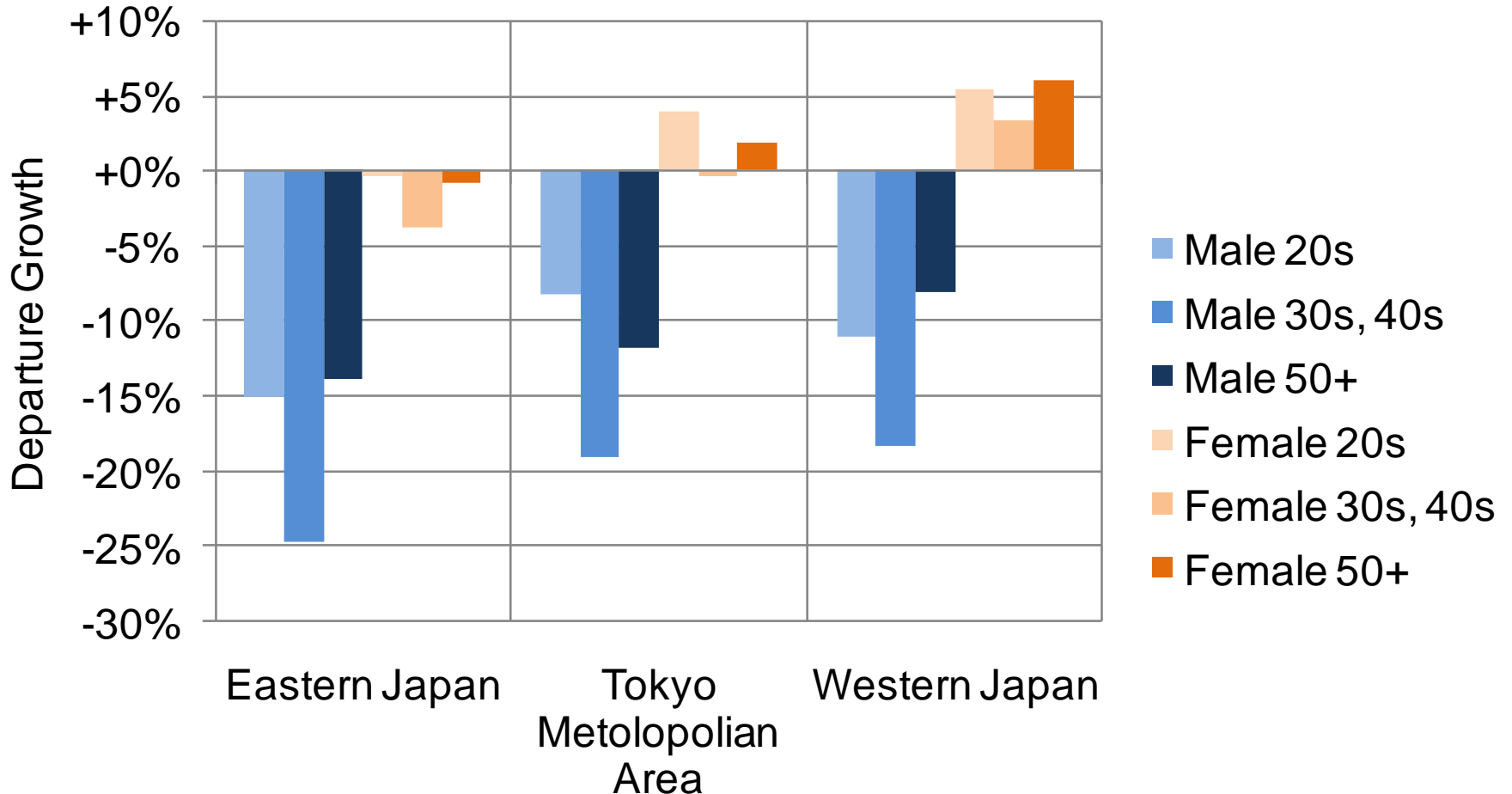
## Exchange Rate vs. Departure Rate



Departure Rate = Departure Par Capita (Japanese National)

# Japanese Outbound Travel Departure Growth by Regions

YTD2009 (Jan-Aug)



# Japanese Outbound Travel 2010 Outlook

- Holiday market will lead the recovery moderately, but Business will remain slow
- Short haul ++ (Korea, China), Europe +, other long hauls will remain mostly negative
- H1N1 wouldn't affect demand like in 2009
- Uncertainty: Significant decrease of seat capacity due to JAL reform
- Departure for full year 2009: -2%
- Outlook for 2010: +6%