

京都市フランクフルト情報拠点レポート(2018年6月・7月分)

1 統計

○訪日旅行者数(ドイツ)

- ・2018年6月 14,400人 (2017年6月 12,799人) (対前年比+12.5%)
- ・2018年7月 17,200人 (2017年7月 15,496人) (対前年比+11.0%)

○京都市内39ホテル対象宿泊実人数(ドイツ)

- ・2018年6月 888人 (2017年6月 869人) (対前年比-1.7%)
- ・2018年7月 1,474人 (2017年7月 1,004人) (対前年比+41.9%)

※出典 京都市観光協会・京都文化交流コンベンションビューロー「外国人客宿泊状況調査」 ※対前年比は総営業部屋数の差異を補正反映

2 市場動向

German Market Trends: Vacation trips of Germans to developing and emerging countries

In the German source market, travel to countries of the Global South increased again in 2017. More than one in five foreign holidaymakers travelled to a developing or emerging country. After a significant decline in 2016, which was mainly due to the collapse of tourism in Turkey, holiday tourism in developing and emerging countries increased again in 2017: On the basis of their main holiday trip with a minimum duration of five days, 9.0 million German-speaking holidaymakers aged 14 years and over travelled to a country in the Global South (2016: 8.0 million). This is 17% of all holidaymakers and 22% of holidaymakers abroad. 4.8 million were in a developing or emerging country in the Mediterranean region nearby: The majority of this was accounted for by the emerging market Turkey (3.4 million), with a further 1.4 million holiday destinations in North Africa (Egypt, Tunisia, Morocco). 3.7 million visited long-haul destinations in Asia, Latin America/Caribbean or sub-Saharan Africa. 0.5 million took holidays in the CIS states (including the emerging country Russia) or Mongolia. The recovery in the number of holidaymakers in the German source market for travel to countries of the Global South in 2017 resulted primarily from a (mainly Egypt-related) increase in North African travelers and a further increase in visitors from developing and emerging countries.

Prospects for 2018: How the total volume of holidaymakers in developing and emerging countries will develop in the German source market in 2018 will depend not least on tourism to Turkey. After all, the drastic decline in German holidaymakers visiting Turkey in 2017 had not continued to the same extent. And in January 2018 the strong negative trend in the market potential for holiday trips to Turkey, which has continued since January 2016, was stopped: the three-year potential of German holidaymakers to Turkey had fallen by 8.2 million to 11.1 million (-43%) between January 2015 (19.3 million) and January 2017. At the beginning of 2018, the figure is 11.2 million for the period 2018-2020 (+0.1%). The extent to which a clearly positive turnaround in German tourism to Turkey will take place in 2018 will depend above all on the extent to which the negative political conditions are reduced and contribute to a desirable reimage of Turkey in the German source market. The tourist offer should remain attractive. The number of visitors to North Africa in 2017 was already significantly higher than in the previous

year. The same applies to the group of distant developing and emerging countries. The potential for those Germans who could imagine in January 2018 to travel to "fairly safe" or "generally" North African destinations or distant countries of the Global South in the next years until 2021 has also increased. At 15.1 million, the North African potential even shows an increase of 24% - after a significant decline in 2016 and 2017. (studienkreis)

German Market Trends: Holiday bookings beat World Cup diversion

Germans continued booking summer and winter holidays in good numbers in June despite the diversions of the World Cup and hot weather, according to the latest monthly GfK sales analysis. Holiday bookings grew 7% year-on-year in revenue terms in June, with summer sales up by 4% and early winter bookings up by 13%, the market researchers' analysis of sales by 2,000 representative travel agencies, OTAs and tour operator websites found. This was slower growth than in the months before but still a good performance. Overall, summer 2018 sales are so far 13% ahead of 2017 and 91% of 2017's total revenues have already been reached. In terms of departure months, June closed with a slight 1.1% sales increase. Demand has been high for July with a 13.4% rise in booked revenues. Once again, OTAs were the main winners last month with solid late sales for summer holidays, while travel agencies suffered a 1% drop in summer bookings. Observers are now awaiting the July sales figures to see whether an expected surge in late bookings following Germany's early exit from the World Cup has materialised or not. Norbert Fiebig, president of the German Travel Industry Association (DRV), pointed out earlier in July that many Germans had booked their holidays earlier than usual in 2018 but travel agents and tour operators still had plenty of available capacity for this summer. Benjamin Jacobi, head of TUI's last-minute sales specialist L'Tur, told fvw: "A brake on bookings that we see every two years with the World Cup and the European Championship has disappeared with the German team's exit." According to Jacobi, there are more late bargains for the Canary Islands than in recent years but fewer for Greece. The most popular destinations for German holidaymakers in the summer of 2018 remain the Mediterranean coastal regions, led by Spain, Greece and Turkey, as well as Germany's Baltic and North Sea coastlines, according to the DRV. Egypt, Tunisia and Morocco have high growth rates along with Croatia and Bulgaria. (fvw)

German Travel Law: Tour operators turn hotel-only bookings into package holidays

Travel agents and tour operators in Germany are gearing up for the implementation of the complex new package travel law with last-minute administration and new offers for holidaymakers. Under the new law, which implements the EU Package Travel Directive, consumers will get more legal protection for online bookings as well as for 'combined' travel agency bookings of separate travel products from different suppliers (such as flights and hotels). Consumers will also have more time (up to two years) to seek compensation for verifiable holiday problems, such as in hotels. Another important change is that tour operators will be able to increase a package holiday price by up to 8% up to 20 days before departure if they can prove that their costs (e.g. taxes, charges, fuel prices) rose after the booking was made. The previous limit was 5%. However, they also have to reduce the price if their costs fall. The German travel industry has been working intensively to prepare for the new law. The German Travel Industry Association (DRV) said the law would bring "countless" advantages for holidaymakers, while travel agents would be able to provide "appropriate" advice to their customers. In the future, travel agents will provide customers with a form informing them of their legal rights before advising them about travel products and making bookings. Leading tour operators have responded with an important product change. In future, hotel-only bookings will be combined with a 'service package' (such as destination services) in order to turn them into package holidays, which automatically include customer support in case of problems or emergencies, and which are fully covered by insolvency insurance.

Examples of service packages include TUI's Plus Paket, Thomas Cook's Sunny Heart package and similar deals from DER Touristik and other top tour operators (with the prominent exception of Alltours). This move could give tour operators a significant competitive advantage over direct bookings of hotel accommodation or holiday homes, which are not legally defined as package holidays. TUI also announced that "in the interest of customers" it will not take advantage of the new opportunity to increase prices by up to 8% after the booking. (fvw)