

京都市フランクフルト情報拠点レポート(2018年10月・11月分)

1 統計

○訪日旅行者数(ドイツ)

・2018年10月 24,900人 (2017年10月 22,081人) (対前年比+12.8%)

・2018年11月 18,500人 (2017年11月 15,911人) (対前年比+16.3%)

※出典「日本政府観光局(JNTO)」

○京都市内39ホテル対象宿泊実人数(ドイツ)

・2018年10月 2,905人 (2017年10月 2,573人) (対前年比+9.1%)

・2018年11月 1,246人 (2017年11月 1,238人) (対前年比-5.5%)

※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

Japan related updates – Germany

Lufthansa relocates more long-haul routes to Munich

Numerous jets will be withdrawn from Frankfurt and stationed in Munich in the future.

Lufthansa plans to expand MUC into a hub with an Asian focus. Next summer, the crane will increase frequencies there to Seoul and Singapore and start a new flight to Bangkok. The connection to Osaka will also be transferred from Frankfurt to Munich.

Source: Aerotelegraph,

Market Intelligence

Millennials conquer the luxury travel market

The digital natives are young, travel-loving and have a high level of education. In addition, they are willing to spend a lot of money on travel. The number of trips by the Millennials in 2017 rose by 15 percent compared to the previous year. Now they have a market share of over 40 percent of all foreign trips worldwide. This target group, however, is a challenge for the tourism industry because of its inhomogeneity, the market researchers state. And this is also clear, because young travelers have different demands from those in their mid-thirties, who already have a stable income and go on holiday with their children. The fact that the millennials are doing well is shown by the fact that half of all international luxury holidays are already booked by them, and the trend is rising. According to IPK, Millennials are also among the guests in the luxury segment with the highest average spending. At the same time, according to the study, this target group also books

more inexpensive holidays compared to the overall market. The USA is the top travel destination. They were visited by most of the Millennials in 2017. This was followed by Spain, Germany and France. The Asian destinations Japan, South Korea and India as well as Australia and the European countries, Ireland and Scandinavian countries, also record an above-average share of millennials. (reisevor9)

Lufthansa stays committed to NDC pricing

Lufthansa is one of the pioneers in terms of introducing the IATA standard NDC (New Distribution Capability) as its core pricing tool. Through the new tool, the airline will have much more flexible pricing than through the current system of tariffs. Moreover, NDC will also enable Lufthansa to increase sales of ancillary products such as on-board offers but also destination services such as car rental or excursions. The primary objective, however, is to regain more control over sales distribution and increase direct sales compared to indirect sales through third parties such as GDS providers and travel agents. Lufthansa's proportion of direct sales has already increased significantly in the last three years, and now make up 50% of sales, the same proportion as through GDS channels. In 2015, the proportion was 70-30 in favour of GDS. But travel agents claim NDC means the most attractive fares will only be available for booking through direct channels and will leave travel agents offering less attractive tariffs. In a controversial move in October, Lufthansa took its Economy Light and Business Saver fares for European routes out of reservation systems and now only offers them through direct sales channels. In response, Norbert Fiebig, president of the German Travel Association (DRV), criticised the airline's behaviour with agencies as "unacceptable" and accused the airline of abusing its dominant market position and distorting competition. But despite this criticism, Lufthansa sales chief Heike Birlenbach told fvw in an interview that the airline will press ahead with NDC. She admitted that the travel industry has been "shaken up" by the move and the airline is receiving "many questions" about the new fares distribution policy. (fvw)

Germans book strongly for the winter and early for next summer

Late sales for the months September and October 2018 were up by 3%, the monthly analysis from market researchers GfK showed. This growth went completely to online sales channels, however, with travel agency revenues dropping by a slight 1%. Overall, summer 2018 sales are now 12% ahead of last year on a cumulated basis, with one more sales month to go. This means that both online and offline sales channels will end the year with strong growth rates. The top seller in travel agencies and online were winter holidays, which accounted for over 40% of revenues, the market researchers' analysis of sales by 2,000 representative travel agencies, OTAs and tour operator websites found. Sales grew by 11% in September, leaving cumulated sales 9% ahead of the same time last year. Early bookings for next summer were also an important factor, representing over 23% of total revenues. Summer 2019 revenues are so far showing double-digit growth, although the basis is too low for solid forecasts, according to GfK. (fvw)