

京都市マドリッド情報拠点レポート(2019年6月・7月分)

1 統計

○訪日旅行者数(スペイン)

- ・2019年6月 9,800人 (2018年6月 8,288人) (伸率 18.2%)
 - ・2019年7月 15,800人 (2018年7月 13,486人) (伸率 17.2%)
- ※出典「日本政府観光局(JNTO)」

○京都市内ホテル対象宿泊延べ人数(スペイン)

- ・2019年6月 8,075人 (2018年6月 6,776人) (伸率 19.2%)
対象施設数:57ホテル
 - ・2019年7月 14,970人 (2018年7月 11,919人) (伸率 25.6%)
対象施設数:58ホテル
- ※出典 「京都市観光協会データ月報」

2 市場動向

・ Forecasting effects on future travelers and visitors to Japan

- Summer trends according Spanish National Board of Statistics (INE) and Observatorio Nacional de Turismo
 - A 98% of Spaniards decided between May and June going on summer holidays and 54% made a decision on their summer destinations between both month of Spaniards
 - The number of Spaniards traveling abroad increases this year: a 63% will travel to an international destination this summer, the majority to new, bucket list destinations.
 - As per the expenditure, the tickets will be similar as last year summer, around 714 per person. A 49% of the Spaniards will spend on destination less than 1,000 euro, but 2% will spend more than 2,000 euro.
 - The favorite destinations will be sun & beach, whereas 26% will choose cultural destinations and plans, and 15% will look for relax and wellness.
 - The profile of the Spanish summer traveler is a family person, traveling with their relatives during an average of eight days in August (or in July); they spend their own savings or earnings (not by using credits or loans, as only a 8% do so), prefer hotels for their stays and book an plan using the Internet. When tend to travel in groups of friends or family (more than men) and are more daring (44% look for

original and new plans and destinations vs. 38% men), but men spend more, 762 euro per person vs 665 euro in women's case.

- Young people tend to look for cheaper accommodations, such as holiday rentals, and the older the traveler is, the more likely chooses a hotel. Younger generations travel in peak season (July, August) and book last minute, while 35-54 years old travelers tend to travel in August or September, this last month, the preferred choice for older generations (+65 years old).

▪ **Popular destinations, lifestyles, purchasing trends**

- Purchase trends, according to a survey from Booking.com in Spain:
 - Spaniards are looking for transformational trips, that provide certain amount of learning and discovery, including experiences that imply cultural exchange or even as volunteers. And 42% seek travel experiences that make them feel as kids again.
 - Travelers appreciate technology, but with a purpose: 31% of travelers are keen to interact with a virtual travel agent that provides information, inspiration or helps to book flights, hotels and activities. Technology should be useful and relevant, and help to facilitate all the travel journey.
 - Travelers feel travel guides as we know them will disappear, instead technology will provide a more relevant and personalized interaction, based on prior experiences or preferences.
 - Destinations will be also scrutinized from an environmental and human rights point of view, as travelers will tend to discard countries or places that do not protect or guarantee social, political, human or environmental rights, a strong trend among younger generations.
- Other summer trends, analyzed by the report "Perspectives and forecast for summer holidays in Spain, 2019", by BrainTrust for American Express
 - They forecast a slight reduction of the overall spend in summer holidays, as 42% will spend 1.000 to 2.500 euros, 33% will spend less than 1.000 euros and 20% will increase their budget for summer holidays.
 - Booking window is longer each and every year, as 66% of the Spaniards book three months or more before their holidays, and 71% complete the booking process via Internet.
 - Travelers from Madrid expect to spend 50% more than the ones from Barcelona, making Madrid travelers the high-spender travelers for this season.
 - On average, 58% Spaniards will make one to two-weeks trips and 33% will do three-weeks to one-month holidays (4 points more than last year). Data show that the average duration of the holidays increased slightly, staying around 15.8 days in total: in any case, Gen Z and +50 years old travelers travel for 17 days in total.
 - Catalonians tend to travel more to long haul destinations, such as US (5%), Asia (10%), Latin America and the Caribbean (4%), while the majority of Madrid

citizens travel to European destinations (20%), followed by Asia, US and Latin American destinations.

- Exploring new destinations and countries, the heritage and culture value proposition and gastro are the key motivators to choose a destination this summer.
- Trade & Industry Trends in Spanish market (June - July 2019)
 - **Travel agencies increase their sales by 7.7% in May.**
Travel agencies and tour operators have increased their sales by 7.7% in May compared to last year, according to the National Institute of Statistics. Agencies and tour operators are among the highest turnover rates at 3.3%.
 - **Travel agencies increase their sales for this summer by 7%.**
According a survey carried out by ACAVE among 500 associated travel agencies, reservations for summer holidays in 2019 is approximately 7% above the same period last year. Trends seem to indicate that Spaniards are booking their reservations increasingly earlier, and that the quality-price ratio is still a key deciding factor for tourists.
 - **Nuba expects to bill 100 million in 2019 thanks to the purchase of two agencies in Mexico.** The Nuba group, tour operator specialized in luxury and high-end travel, expects to bill 100 million in 2019 thanks to the purchase of the Lozano Travel and International Travel Group (ITG) agencies in Mexico. The company has been growing steadily since 2009, and they aim to continue their growth through international expansion to other Latin American countries such as Colombia, Chile, Panama and Costa Rica.

• Future issues and challenges

- Japan is perceived as an expensive destination. When compared with other destinations nearby, Japan always comes higher on cost per trip. However, this perception can also be modified if we turn around the message towards the uniqueness of the experience and the out-of-the-beaten paths possibilities when in destination.
- The perception of the Spanish market to Japan as it relates to safety on the destination is extremely positive, however, when it comes to communication, this becomes a challenge, since most Spanish do not speak Japanese (and some of them are not fluent in English) and on the other hand, not all Japanese speak English so communication can become a barrier when deciding traveling to a destination.
- The current Spanish political scenario is in a standby. After general elections on May 2019, Spain slipped onto a path towards a fourth general election by the end of July, as acting prime minister Pedro Sánchez failed to secure the parliament support he needed to form a new government.
 - Pedro Sánchez's Socialist Party (PSOE) has been unable to form a coalition to get a majority with further-left Unidas Podemos after a hectic and disappointing negotiation over a possible agreement to get all the necessary votes to win the decisive confidence vote in Congress. With the parties opposed on which

ministerial posts should be granted to the potential junior partner led by former communist Pablo Iglesias, Unidas Podemos abstained, whilst the conservative People's Party (PP), liberal Ciudadanos and far-right Vox voted against Mr. Sánchez.

- Sánchez, who swept to power in June 2018 through a confidence vote aided by Unidas Podemos, has two months to regain its backing for a coalition or another minority administration, or Spain will return to the ballot boxes in November.
- Socialists are now negotiating with all parties to find a way out to this blockage, before September 22nd, aiming at creating a pact similar to Portugal, by designing a program with Unidas Podemos, without including any of their representatives in the government.

• Beneficial information on other cities inside and outside the country

- According to an analysis from the metasearcher BuscoUnViaje.com, the best-seller destinations in Spain to travel abroad are medium (Europe and North Africa) and long haul (US and Japan).
 - After the US, Japan is the most desired and booked long haul destination for Spaniards, who choose the country to explore its culture and traditions, its heritage, and other unique experiences, as gastronomy, technology, manga and anime, among others.
 - Japan is considered by the travelers surveyed for this report, the best Asian destination and the fourth best world cultural destination.
 - The itinerary Spaniards prefer to visit Japan is, on average, 14 days long, and includes Tokyo, Hiroshima, Kyoto and Osaka.
 - This analysis shows also interesting trends based on the choices of the Spanish travelers for summer season: explore culture (US, Greece and Germany), enjoy nature and landscapes (Greece, Ireland, Germany, Iceland), discover off-the-beaten path destinations (Russia and Norway), or sun& beach, wellness and relax (Brazil and Maldives).

Consumer trends on Japanese culture (that benefit in the inspiration process)

- Summer is the busiest season for weddings in Spain, and some lifestyle media have considered as a trend to wear traditional and artisan kimonos for special occasions and parties, such as weddings.
- Also in the gastro news (and [widely reported by general media](#)), one of the most relevant supermarket networks in Spain (Mercadona) withdrew frozen daifukus they manufacture from their shelves (due to a quality issue they are solving), causing a lot of distress among Spanish consumers who registered a petition in Change.org to request Mercadona to bring back the “mochis” (as are known in our country). Last summer, this product became a big

success and consumers are hoping they return back to shelves before the end of the summer.

- The 2019 Loewe Foundation prize winner has been announced and it went to Genta Ishizuka, a 37-year-old sculptor from Kyoto who works with lacquer. The foundation informed to art media and to its database about Ishizuka crafts and his relevance. The prize, though only in its third year, has made an impact at a time when craft is becoming less associated with wholesome country fairs and more with contemporary luxury, and when its organic qualities are seen as a counterpoint to digital culture. The prize was established in 2017 by Jonathan Anderson, the luxury Spanish fashion house's creative director since 2013. A keen collector of ceramics, he says that he knew three weeks after joining Loewe that he wanted to start an initiative to support the sector.
- Spaniards want to lean Japanese in summer: general media have also reported that the Official Foreign Languages Centers said Japanese is one of the most demanded languages by students in Spain, especially among those planning to devote summer holidays to learn a new language.