

京都市フランクフルト情報拠点レポート(2019年8月・9月分)

1 統計

○訪日旅行者数(ドイツ)

- ・2019年8月 17,300人 (2018年8月 16,206人) (伸率 6.8%)
 - ・2019年9月 22,800人 (2018年9月 20,006人) (伸率 14.0%)
- ※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(ドイツ)

- ・2019年8月 5,570人 (2018年8月 4,616人) (伸率 20.7%)
対象施設数:58ホテル
 - ・2019年9月 6,528人 (2018年9月 6,000人) (伸率 8.8%)
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

General Tourism and destination news:

Germany: Climate package lowers rail prices and makes air travel more expensive

As expected, the federal government's negotiated package will result in higher air fares and a reduction in VAT on rail travel from 19 to seven percent. According to a key issues paper, ticket prices below the applicable taxes, surcharges, fees and charges will be banned. In addition, the air traffic tax is to increase by a not yet precisely defined rate. (Airliners)

German Market Trends:

Consumer climate in Germany better despite danger of recession

Contrary to expectations, consumer sentiment has slightly improved. GfK's market researchers calculated a slight increase in the consumer climate indicator for October to 9.9 from 9.7 points in the previous month. The fear of negative interest rates is also contributing to the good buying mood. Above all, the monetary policy of the European Central Bank and the associated fear of negative interest rates had contributed to a rise in the buying mood, while the propensity to save was clearly declining. As GfK notes, income expectations are declining, and economic expectations are rising again slightly. "Nevertheless, consumers still clearly see the German economy in a downturn," warned consumer researcher Rolf Bürkl. According to consumers, the risk of a recession has not

been averted. If the labour market does not remain stable and there is a threat of a noticeable rise in unemployment, "this would also put a significant damper on the consumer economy". (countervor9)

Germany's tourism industry is a global leader

Germany's tourism industry can score in a worldwide comparison. According to an evaluation by the World Economic Forum, the industry in Germany is particularly competitive. In other areas, the assessment is less good. According to an evaluation by the World Economic Forum (WEF), Germany's travel and tourism industry is among the most competitive in the world. However, the study presented at a WEF Africa conference in Cape Town confirms comparatively high prices for the German industry and rather low values in most regions for safety and security. Thanks to its good infrastructure and a strong cultural environment, Germany still ranks third among the 140 countries surveyed in the list published on Wednesday, behind the top destinations Spain and France. In the study presented every two years, Great Britain slipped to sixth place, behind Japan and the USA. The sector contributed around ten percent to global value and roughly the same share to global employment - a share that is likely to rise sharply in the coming decade, especially in Asia with its steadily growing middle class. Despite a worldwide travel activity exceeding all forecasts with around 1.4 billion visitors in the previous year, the authors of the study warn against a reversal of the trend in view of the pressure due to rapid growth in the top destinations. (fvw)

Climate debate changes travel behaviour

The "Green Travelers" have a share of 22 percent in Germany. In the last six months they have decided at least once not to book a planned trip in order to reduce their Co2 footprint. This is the conclusion reached by the advertising portal Criteo, which surveyed 13,000 consumers worldwide. The Green Travelers are clearly younger than the population step and in Germany more strongly represented than in the USA or France. (Hoga Presse)

Consumer Trends:

Study: Facebook has fewer and fewer younger users

The number of users in Germany is forecast to stagnate in the current year: It remains at 26.8 million users. Last year, the number of under-35-year-olds is expected to decrease by 2.2 percent and that of 12- to 17-year-olds by 9.1 percent. This trend is expected to continue over the next few years. (Internet World)

Travelers want to experience real hospitality

Anonymous mass tourism is a thing of the past, modern travellers demand individual encounters. According to the trend researchers of the Zukunftsinstitut, this could also counteract the shortage of skilled workers.

Travelers want to be "touched" during their stay, they want more emotional and intensive travel experiences. The tourism industry should therefore continue to develop accordingly. This is one of the central statements of the new study "Resonance Tourism" by the Zukunftsinstitut, based in Frankfurt am Main and Vienna. "Tourism must measure itself against people - and not just against digital data," says trend researcher Harry Gatterer, Managing Director of the Future Institute. Digital booking platforms have changed processes in modern mass tourism, but not its identity. "The purely quantitative maximization is a dead end for tourism professionals and tourists. In many places, tourism is no longer a guarantee of happiness, but merely a stress factor. It damages the environment, burdens the locals, stresses the traveller, overtaxes the employees and increases the price pressure on suppliers," warns Gatterer.

The Zukunftsinstitut has therefore carried out a comprehensive trend study to find out where the future qualities of tourism lie. The study shows that the social change towards a new "we-culture" also demands and promotes resonance experiences in tourism. Gatterer: "People are demanding more and more intensive travel experiences and transformative holiday experiences. They want to be 'touched' on their travels and experience quality of life". This requires a new quality of tourism, which must not only focus on digital data, but also on human values and needs. According to the study, this requires a return to the tourist core value of "hospitality": a friendly offer of quality of life and successful relationships.

A new resonance culture could also counteract the shortage of skilled workers. Employees also want to experience "resonance", i.e. hospitality. Verena Muntschick, head of the study, explains: "Whoever understands leadership as a service and his employees as partners makes all the difference".

The 116-page trend study gathers comprehensive know-how for the theory and practice of a new "resonance tourism" and additional top-class experts, including the head of Österreich-Werbung Dr. Petra Stolba, tourism strategy consultant Dr. Petra Muntschick, and the head of the Austrian Advertising Agency Dr. Petra Stolba. Wolfgang Isenberg, architecture expert and art historian Dr. Dr. Christoph Metzger, Hotelleriesuisse management board member Dr. Ueli Schneider, innovation and design expert Daniel Huber, SV Hotel Director Beat Kuhn, Fineway founder Markus Feigelbinder and business administration professor Dr. Christian Buer. In the trend study, he explains why ground-based travel a trend and what mass tourism concepts is look like in the age of the "Fridays for Future" generation. (fvw)

Digital audio offers gain immensely in popularity

More and more people are using digital audio services. This is the result of several studies presented in September 2019 in Berlin. Web radio offers and music streaming services in particular are enjoying growing popularity, but the spread of the digital radio standard DAB+, which has long been declared dead, is also growing.

Almost 44 million people now use online audio content - three million more than in 2018. This means that around two thirds of the population aged 14 and older (62.2 percent) regularly listens to Internet-based audio content. This is the result of the Online Audio Monitor 2019 of the associations Vaunet and BVDW and several state media authorities. The most popular platform for the use of online audio is the video platform Youtube (44 percent), followed by web radio stations (41.5 percent) and music streaming services (32.2 percent). Podcasts and radio broadcasts on demand, on the other hand, are still a niche phenomenon and are only used by just under 17 percent. Every second person (54 percent) uses an online audio service at least once a month. The most frequently used content is music (86 percent), news (55 percent) and services such as weather or traffic reports (48 percent). Regional content (44 percent) and information programmes (38 percent) as well as entertainment and comedy (35 percent) also enjoy great popularity. By far the most popular device for using audio content is the smartphone (73 percent), followed by laptops (38 percent) and desktop PCs (32 percent). Music streamed in the car is also increasing (28 percent), with many users connecting their smartphone to the car radio. Smart speakers are used by 13 percent of respondents. (horizont)

What is right for millennials also applies to other generations

The boundaries are more fluid than expected, especially with regard to the following group of young adults, notes "Phocuswire". Thus, the strategies for reaching Generation Y are also more generally valid than previously assumed by advertisers. With their strong purchasing power and digital affinity, Millennials are the target group that has marked the turning point in technology. (Phocuswire)

Tour Operators:

Thomas Cook Germany files for insolvency

Shortly after the bankruptcy of the British holding, the subsidiary based in Oberursel, Hesse, is also insolvent. The state government is currently examining federal aid possibilities. It was said that a petition for insolvency had been filed with the court in order to be able to restructure the company. Affected are providers such as Neckermann Reisen, Öger Tours and Bucher Reisen. "Of course, we would have preferred to avoid this legal step, but unfortunately no short-term solution could be reached by negotiation", admitted Stefanie Berk, Head of Thomas Cook Germany. Now the return of the approximately 140,000 travelers, who are stranded in hotels and vacation clubs, must be organized. Thomas Cook Germany had already stopped all new departures and

furthermore cancelled all planned trips until end of October. "We are currently exchanging information with the Federal Foreign Office, the travel insolvency insurer and other partners with the aim of facilitating the orderly return of guests," the company announced. The insurance company Zurich, which has issued the obligatory travel insurance certificates for Thomas Cook customers in Germany, will have to pay for this. It is also intended to replace advance payments already made for booked trips. However, it remains to be seen whether the 110 million euros to which insolvency protection is limited will suffice.

Like the flight subsidiary Condor, Thomas Cook Germany also sees its future in independence. With the insolvency proceedings, Thomas Cook GmbH could "free itself from the complex financial interdependencies and contingent liabilities with the insolvent British Thomas Cook Group", the company explained. In last-minute talks with investors, hotel operators and sales partners, however, they at least gained the confidence that Neckermann Reisen, Öger Tours and Bucher Reisen had a chance for the future. (zeit)

TUI Group signs International Tourism Plastic Pledge

Every year, more than eight million tons of plastic waste are discharged into the sea. It is estimated that by 2050 there will be more plastic waste than fish in the oceans. Some of this is caused by tourism, for example by plastic bottles, straws and plastic bags used by tourists which are not disposed correctly on the spot. The signatories to the International Tourism Plastic Pledge recognize the urgency and need to work together to reduce plastic waste. In September 2019, the TUI Group signed the voluntary commitment. Together, the signatories represent around 200,000 tourism employees and 50 million holidaymakers. In the coming months a concrete plan will be developed to reduce the use of plastic and to avoid plastic waste in the destinations. The "International Tourism Plastic Pledge" was initiated by the organisation MVO Nederland. Thomas Ellerbeck, member of the Group Executive Committee of the TUI Group and responsible for sustainability, stated: "We actively accept our responsibility.

"Last year, 140 million disposable plastic products were replaced in hotels, aircrafts and on ships. Our target is 250 million. More environmentally friendly alternatives are available in many places. Initiatives such as the 'International Tourism Plastic Pledge' are important to arouse awareness and to encourage change. TUI is well-positioned to make holiday offers along the entire travel value chain even more sustainable than they are today. This will also be an important component of the sustainability strategy 2020-2030." By the end of 2018, the TUI Group had already saved 140 million disposable plastic articles. As part of its contribution to the global efforts to reduce plastic waste, TUI plans to increase its disposable plastic savings to 250 million by the end of 2050. The introduced initiatives include 112 million disposable plastic articles saved in hotels, the ambitious Wasteless plastic reduction programme launched by TUI Cruises and the publication of the Guidelines for Plastic Reduction for hotels. The TUI Group is thus contributing to its sustainability strategy 'Better Holidays, Better World'. It comprises four core areas in

which TUI exerts influence in order to implement sustainable tourism in its own company, along the value chain, throughout the industry and locally in holiday destinations. (tuigroup)

Booking remains world leader in overnight stays

In a review of the Wall Street Journal for the first quarter of 2019, Airbnb accounted for 91 million overnight stays, compared with 80.8 million on Expedia. Booking remains the top performer with 217 million. (Tageskarte)

Airlines:

Condor receives interim loan by German government

The federal government of Germany and the state of Hesse want to help Condor with a loan. Initial talks have already been held with potential buyers. Condor has received a guarantee from the federal government and the state government of Hesse for a six-month bridging loan of 380 million euros. The commitment is a precondition for an audit by the European Commission. Only after a positive decision from Brussels, the loan will be disbursed by KfW. It has not yet been decided when the decision will be made. "Condor's 4,900 employees, partners and customers thank the German government and the state government of Hesse for their commitment. Condor is an operationally healthy and profitable company, which will also record a positive annual result in the current year", says Ralf Teckentrup, Chairman of the Management Board. As the liquidity which was initially meant to be used as a buffer for the winter season, has now been used up by the insolvent parent company, Condor needs this bridge financing to secure flights in the upcoming months. The commitment is an important step towards securing the future, says Teckentrup. "We have a proven procedure in such constructions. The federal government takes half and the affected states take the other half", Finance Minister Thomas Schäfer (CDU) told Hessischer Rundfunk. "Since Condor is a Hessian company, the other half would be for the state of Hesse." With Condor, there are currently 240,000 travelers from Germany at their holiday destinations, said Economics Minister Peter Altmaier (CDU). These could now be enabled to return to "acceptable conditions". (fvw)

Best Practice:

No room cleaning service in favour of the environment

The Munich hotel group Cocoon has introduced the Green Rate for bookings via its own website, with which daily room cleaning is not required for stays of two nights or more. In return, guests receive a ten percent discount on the accommodation price, a five-euro voucher for the hotel bars and a bar of "Good Chocolate" from the Plant-for-the-Planet initiative. (Tageskarte)

More and more tour operators refrain from elephant riding

Most recently, Alltours has put an end to elephant excursions that promise tourists direct contact with the pachyderms. According to the animal welfare organisation Pro Wildlife, Alltours was the last major tour operator to offer such tours in 2018. For years, Pro Wildlife has been fighting against elephant riding for tourists and other excursions with direct contact to the animals. The organisation focuses on education and has convinced many tour operators. An up-to-date list of elephant-friendly providers who do not offer such excursions or are currently revising their programmes can be found on the Pro Wildlife website. The same applies to tour operators which are not understanding and continue to visit shows and training camps for elephants with tourists. "So that elephants allow the immediate contact like riding, bathing, feeding and stroking, they are trained with force usually already as young animals, report the animal protectors. Normally, the elephant guide systematically inflicts pain on the animals all their lives in order to make them compliant. Behavioural disorders are the result of these traumatic experiences. "Also, for the tourists themselves the visit of such an institution does not always remain without consequences, because every now and then elephants in captivity attack humans. Travelers have even been injured or even killed. (countervor9)

MICE

MICE travel trade: spirits remain high

Media reports about the unstable economic and political situation have no negative influence on the mood in the Mice industry. The business travel provider American Express Global Business Travel (GBT) is convinced of this and refers to a study by its subsidiary American Express Meetings & Events: According to the "2020 Global Meetings and Events Forecast", the Mice industry can look forward optimistically to the coming year, which promises growth for the fifth time in a row. In some cases, demand exceeds supply, they say.

However, business is not going to get any simpler, says Gerardo Tejado, Managing Director of American Express Meetings & Events: "The challenge for planners now is to get more out of what they already have. The creation of seamless and individualized processes for participants and the use of technology for authentic moments". According to the study, total spending on