

京都市トリノ／ローマ情報拠点レポート(2019年8月・9月分)

1 統計

○訪日旅行者数(イタリア)

・2019年8月 22,800人 (2018年8月 22,055人) (伸率 3.4%)

・2019年9月 13,400人 (2018年9月 12,273人) (伸率 9.2%)

※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(イタリア)

・2019年8月 21,906人 (2018年8月 23,388人) (伸率 -6.3%)

対象施設数:58ホテル

・2019年9月 9,678人 (2018年9月 9,428人) (伸率 2.6%)

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

1. Recent Tourism Market Trends and News

1.1 Market insights and trends

Italy politics & economics today

The official establishment of the new government on June the 1st formed by leading party Five Star Movement (M5S), led by Luigi Di Maio and the League party, led by Matteo Salvini, marks the first time a purely populist administration holds power in a founding member of the European Union. In a historic success for the far-right, Salvini's League party wins the most votes in the May 2019 European elections in Italy with 34 percent.

On August 7th at a parliamentary vote, M5S votes against the financing of a multi-billion-euro high-speed train line between Lyon and Turin. The next day Salvini steps up the pressure, pulling his support for the coalition and calling for snap elections as soon as possible. The abandoned M5S finds an unexpected ally in the opposition Democratic Party (PD). On August 28th, the M5S and PD, once bitter foes, agree to govern in a coalition under Conte. The next day President Mattarella gives Conte a mandate to form a new government. The political turmoil in Italy, may indeed have consequences for the country's economy. According to the financial newspaper Il Sole 24 Ore, Italy's political uncertainty will over two years cost the country an extra 5 billion euros in interest on its debt. A public debt that is already colossal; exceeding 2.3 trillion euros, 134 per cent of Italy's Gross Domestic Product. After Greece, Italy's debt is the largest in the euro zone in proportion to its

output. The country's economy has stalled. Despite margin growth in the first quarter of the year, between April and June it stagnated.

Travel trends in Italy

More than 27 million Italians went on holiday last year, + 7% compared to 2017. Italy remains the favourite destination with 73% overnight stays more than foreign destinations.

Source: <http://www.guidaviaggi.it/notizie/198660/>

This season has recorded the increase of foreign destinations for Italians. 36% of Italian holidaymakers have chosen a foreign destination (7.7 million) in Europe or overseas. Far East and South American destinations have attracted many tourists; North America is on the other hand decreasing.

Source: https://www.travelnostop.com/news/turismo/462759_462759

Still, as Eurostat confirms, in Italy about the 43.7% of the population cannot afford a holiday. The research is based on data of 2018.

Source:

https://www.travelnostop.com/news/cronaca/oltre-40-degli-italiani-non-puo-per-mettersi-vacanze-soprattutto-le-famiglie_464004

Overtourism

There is increasing talking about overtourism. According to the UNWTO, the forecast is close to the two billion tourists who will cross the border in 2030. Many are the emblematic cases of cities, destinations, places that are taking action to face this major issue.

Source:

https://www.ttgitalia.com/stories/attualit/154711_citt_travolte_dal_turismo_ adesso_si_co_rre_ai_ripari/

2.2 Industry news

The Record of Discussion between Italy and Japan aimed at expanding the air services market starting from 2020 has just been signed. The agreement provides for a significant increase in direct flights between Italy and Japan. In particular, with regard to passenger connections with Tokyo, the new agreement finally sees the possibility for Italian companies to operate on Tokyo-Haneda airport up to 7 weekly services, while services on Tokyo-Narita are completely liberalized. For cargo services, an increase in frequencies was envisaged, specifically 10 weekly frequencies, and a table of liberalized routes. *Source:* <https://www.lagenziadiviaggi.it/piu-voli-per-il-giappone-lenac-firma-laccordo/>

Korean Air

Due to the difficult relationship between South Korea and Japan, the airline company Korean Air declared it will decrease flight connections to Japan in favour of China, Far East and Oceania.

Source:

<https://www.lagenziadiviaggi.it/tensioni-giappone-korean-air-sposta-le-sue-rotte-verso-cina-sudest-asiatico/>

Sales of Japan product in Italy

1. Quality Group The months from January to August for the Quality Group recorded a volume growth of 7%. Individual tailor-made trips registered + 12%. Japan is the spearhead of programming (Mistral Tour) establishing itself as the first product in all categories: group travel, individual tailor-made trips, honeymoons, catalogue travels.

2. Mappamondo Japan has earned its place among the long-range destinations that perform best. 50% come from honeymoon couples, often in association with other destinations such as Polynesia and New Caledonia.

3. I Viaggi del delfino + 10% compared to 2018 for Japan although it is not the destination that today grows most in the portfolio of the t.o.

4. H.I.S + 5% sales for the month of August. Increasing families and young couples.