

京都市マドリッド情報拠点レポート(2019年8月・9月分)

1 統計

○訪日旅行者数(スペイン)

・2019年8月 20,000人 (2018年8月 19,265人) (伸率 3.8%)

・2019年9月 11,500人 (2018年9月 10,566人) (伸率 8.8%)

※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8月 20,604人 (2018年8月 19,851人) (伸率 3.8%)

対象施設数:58ホテル

・2019年9月 10,168人 (2018年9月 10,135人) (伸率 0.3%)

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

▪ Objective data

- 20,000 Spaniards visited Japan in August 2019, which represents an increase of 3.8% YOY.
- According to the most recent data released by Japan National Tourism Office, when comparing Jan – August 2018 and 2019 there has been an increase of 7,887 Spaniards visiting the destination.

▪ Forecasting effects on future travelers and visitors to Japan

- End of summer – beginning of autumn Spanish trends according to:
 - *La Vanguardia, survey*
 - September is the favorite month, according to the survey, that respondents go on vacation (31%) followed by August with 23% (although more trips are still made in August). However, younger generations still prefer to go on vacation in August (39%).
 - Some of the reason's travelers choose September: less crowded destinations (62% of respondents), lower prices (34%) and milder temperatures. While 4 out of 10 tourists choose to go on a long-haul destination during September due to better offers.
 - *Observatorio Nacional del Turismo Emisor*

- 17.2% of Spaniards will go on vacation in September, which implies a 13% increase from the same period in 2018. Out of these people travelling in September, 60% will stay between 7 and 12 days. Only 13% (7 points less than in 2018) will spend more than 15 days on vacation.
- In September, 3 out of 10 travelers choose to go on cultural trips, followed by the beach (20%), wellness (19%) and nature (15%),
- The accommodation of preference chosen in September are hotels (63.3%), followed by holiday apartments (33.1%) and rural housing (20.9%). Health resorts are also taken into consideration.
- Planes (53.3%) are the transportation method used the most frequently this month of September, followed by the car (37.4%), train and bus.
- *TripAdvisor, 'Dreamed Vacations' survey*
 - While 5 out of 10 Spaniards usually go on vacation in Europe, a vast majority would rather visit other continents. **Japan is positioned as the third most desired destination for Spaniards (after Australia and the USA).**
 - Spaniards would like to travel between 15 and 30 days (36% of respondents) although 47% of respondents say they usually travel between 7 and 15 days.
 - 46% of the ones polled spend between 1,000 and 2,999 euros when travelling, including accommodation, transportation, restaurants and leisure activities. 20-40% of the budget is spent in restaurants while 10-20% is spent in visiting places such as, attractions and museums.
 - 36% of Spaniards think they would need between 5,000 and 10,000 euros to make their dream travel plans and 23% said between 10,000 and 20,000 euros. They would like to stay in a 5-star hotel, a luxury resort, an exclusive villa or a castle.

▪ Popular destinations, lifestyles, purchasing trends

- *Purchase trends, according to a research made by Weekendes.es:*
 - Spaniards are worried about climate change. 45% are willing to book short trips in order not to take a plane to reduce the environmental impact. However, 28% declare not to be aware of this issue.
 - Destinations within 2 hours have become a priority after the 'flygskam' (flight-shaming) movement.
 - **Only 7% of travelers take long vacations. There is a growing tendency in spreading the holidays out throughout the whole year.**
 - *Summer expenditure analysis by Cetelem Observatory*

- 2019 has been a good year in terms of tourism expenditure for the Spanish travel market. Moreover, there has been a growing tendency in the last two years: since 2016, travel expenditure has grown 24%.
 - 18% of respondents spent their summer holidays abroad.
 - **Spaniards have spent an average of 1,160 € in trips during the summer months, a 14% increase from the previous year.** However, Spaniards usually stick to their budget, not spending more than planned.
 - **The total average expenditure in trips throughout 2019 has been 1,798 €.**

- *Other Spanish traveler trends analyzed by Bnext in their 'Study of the Traveler Profile':*
 - The youngest travelers (aged 19-24) travel an average of 11 days while young adults (25-34) usually spend 8 days on their trips. **Adults between the ages of 35 and 54 take a week of vacation and over 55 tourists travel for 6 days.**
 - Those travelling "low-cost" spend an average of 4 days in a destination while those travelling for shopping usually take 8 days for their vacation. **Cultural travelers usually visit the destination for 9 days while backpackers take 12 or more holidays.**
 - Average expenditure in destination made by Spaniards is 550€. Adults aged between 35 and 44 are the ones spending the most. The youngest travelers are the ones spending the least.
 - **Backpackers and cultural tourists will spend the most in destination, followed by shopping tourists and then low-costs travelers.**

- Trade & Industry Trends in Spanish market (August-September 2019)
 - Travel agencies hired 2,949 more workers in August, an increase of 2.7%.
 - **The tourism industry achieves the best results in history for August, according to Turespaña** (National Tourism Board). This increment of outbound tourism in Spain has been noticeable in all the Autonomous Communities of Spain, being especially remarkable for travelers leaving from Andalusia, Catalonia, Valencia, Madrid, Balearic Islands and Galicia.
 - **Trips in autumn, a growing tendency:** There has been an increase of 20% in reservations made in autumn since 2017, according to Atrápalo. To this we can add the 28% decrease in the prices when travelling in autumn. The more demanded destinations by Spaniards are European capitals, such as Rome, Paris, London, Lisbon, Berlin and Amsterdam, along with some international options like Morocco, Jordan, India and the USA.

- **Spain is the fourth country with the most “sustainable travelers”:** In Spain, 17% of trips were cancelled or dismissed in the last 6 months in order to not contribute to the pollution of our planet. Additionally, 8 out of 10 sustainable travelers (of which 62% are millennials or generation Z) have chosen the train as an alternative to planes in the last 6 months. However, only 56% of traditional travelers have opted for this transportation in this period of time.
- **CWT 2020 Report on future trends in meetings and events**, published in mid-September, states that MICE market is worth 760,000 million euros per year, and it is expected to grow 8% in 2020. Some of the highlights:
 - A growing interest in unconventional destinations, which scale positions to the detriment of the most typical places to date to organize such events, such as London, Milan, New York or Barcelona.
 - **New travelers seek to live the destination as locals more than high-end corporate travel**, as they prefer activities that connect with the destination and the locals, in a relevant and sustainable way.
 - There is a strong trend on sustainable and environmental incentives, as it is connected with the ideals of younger generations of travelers: sustainable destinations and activities including reforestation of protected areas, cleaning beaches or other efforts to protect the environment will be a trend.
 - New MICE destinations are gaining momentum, especially less-known locations like Manchester, Porto, Rome, Nice and Seville in Europe, or Hanoi (Vietnam), Macau and Dalian (China), Kuala Lumpur (Malaysia) or Perth (Australia); or Portland, Austin, Minneapolis, Indianapolis or Houston in the US, as well as Latin American cities as Guadalajara and Puebla (Mexico), Quito (Ecuador) and Campinas and Porto Alegre (Brazil).

▪ **Future issues and challenges**

- Some media have discussed the lack of accessible lodging in Japan (and in Tokyo in particular) as Tokyo 2020 approaches; a huge hurdle in terms of time, investment and infrastructure that Japan has acknowledged and is addressing, considering the striking increase of travelers Japan has been receiving in the most recent years (up to 31 million in 2018, according to JNTO). Measures as public investment in revamping ryokans or loosening the restrictions to holiday rentals are being undertaken, but still JNTO says that 30% of Japanese prefectures do not have neither enough lodging nor accessible alternatives.
- As per Spain's economic challenges, Banco de España (Spain's Central Bank) has published a report by the end of September, in which the experts certify a downturn of the country's economy, and reduces the growth forecast from 2.4% to 2%. The report mentions, in any

case, that the low level of the household saving rate suggests durable goods spending will continue to be less buoyant in future quarters; conversely, consumption continues to be buoyed by the sustained, yet slower, rate of job creation, the ongoing low level of financing costs and the strength of the financial position of the household sector at aggregate level.

- The current Spanish political scenario will lead to our fourth elections in the last four years. Acting prime minister Pedro Sánchez failed to secure the parliament support he needed to form a new government.
 - Opinion polls show that the Socialist Party of Prime Minister Sanchez would win an election with 31% of the vote – this is up from 28.7% in the April election.
 - The Southern European economy has been at a political impasse since a general election in April. At the time, Prime Minister Pedro Sanchez won the vote but without a majority and he has, since then, struggled to find support from other political groups to form a government. As a result, he has asked Spanish voters to head to the polls again, hoping the next election will provide a clearer outcome, with a majority enough to govern or at least, reach more favorable agreements with potential coalition partners.
- The collapse of Thomas Cook has left a huge hole in the Spanish tourism industry. The British travel group, which ceased activity on September 23rd after failing to secure funding, is one of the largest sources of tourists to Spain, bringing around 3.6 million passengers to the country every year. Spanish companies, especially in the Canary and Balearic Islands, where Thomas Cook brought in an annual 3.2 million visitors, fear the collapse could lead to millions of euros in losses, while Spain's CGT labor union has also warned that thousands of jobs could be at risk.

Thomas Cook was one of the five largest international hotel operators in Spain, with three airlines (Condor, Thomas Cook Airlines and Thomas Cook Airlines Scandinavia), and a fleet of 105 planes. In Spain, the group manages 63 hotels, most of which belong to one of eight hotel chains. These hotels employ 2,500 workers and provide 12,000 of the 40,000 beds offered by Thomas Cook in Europe. What's more, Thomas Cook had made more than one million reservations for the coming months, many of them in Spain. The Meliá hotel chain announced on Monday that it would refund the reservations made by Thomas Cook customers who were planning on staying at the hotel.

Some figures illustrate the dimension of this crisis:

- More than 13,000 jobs are at risk in the Canary Islands, according to the CGT labor union
- Thomas Cook brought 25% of all visitors that travel to Canary Islands every year. The situation in the Canary Islands is particularly precarious, given that low-cost airline Ryanair has already announced plans to shut down its base on the island of Tenerife. If Condor halts its Canary Islands operations, the area could be left without a large proportion of its connecting flights.

- A million visitors travel to the Balearic Islands every year on Thomas Cook flights – 15% of all visitors to the island.
 - Thomas Cook owes more than €200 million to the Spanish tourism sector. Sources from the industry say that Thomas Cook settled invoices after 90 days, meaning that many bills from the summer season have been left unpaid. This money is owed not only to the hotel sector but also to the service industry and to AENA.
 - While 60% of the figure is owed to the hotel sector, bus companies, rental car services, guides and excursions – in other words the services provided by the tour operator in their holiday packages – have also been affected.
- Beneficial information on other cities inside and outside the country
 - On September 4th, 2019, JNTO launched a special offer to travel to Japan with Iberia, Japan Airlines, British Airways and Finnair (from 530 euro, round ticket), so any person traveling from Madrid, Barcelona, Bilbao, Malaga or Valencia (via Madrid or via any other European city) can fly to Japan and have two domestic flights to any of the 30 Japanese cities connected by Japan Airlines. The offer is available from October 4th on, to fly from November 2nd, 2019 to June 30th 2020, except flights from Spain from March 15th to 28th 2020.
 - New long-haul flights were also announced on early September connecting Barcelona El Prat airport with Asian and Middle Eastern countries, thanks to an agreement between IAG's Vueling and Hainan Airlines, Singapore Airlines, Air China and Etihad Airways, to connect their long-distance flights with those offered from El Prat.
 - Moreover, during this period Globalia, one of the most important Spanish tour operators has announced that the agencies of the group (Halcón Viajes, Viajes Ecuador and Globalia Corporate Travel) will sell travel packages to Tokyo 2020 Olympics, which is a great opportunity to gain visibility and strengthen connections from Spain to other Japanese destinations.
 - Consumer media has covered an international report about the 15 hottest destinations billionaires are traveling to in 2019, publishes by Business Insider and boutique luxury travel agency Original Travel. According to this report, investing in travel is becoming an increasingly popular way for the ultra-rich to signify their status - and they're extending it far beyond the classic idea of a vacation. As it is stated in this report, this travelers' segment is taking months-long, multimillion-dollar trips to recharge or reconnect with family because they're often burnt out, in the form of extreme adventures, luxurious getaways, and educational excursions. While a few classics made the list, such as Britain, Iceland and France, far-flung countries - from The Seychelles, Rwanda, Oman, Chile to India, Buthan or Myanmar - made an appearance on the list, too. Japan is the second most desired and booked place for this segment, after Egypt.

- Thomas Cook crisis and its consequences for the long and medium haul: Spanish hoteliers are getting ready to reduce prices to attract new customers and mitigate the impact in occupation rates, expected to happen as a result of Thomas Cook bankruptcy, as it has been announced by Juan Molas, president of the Spanish Confederation of Hotels and Tourist Accommodation (CEHAT). Spanish hoteliers demand this rates reduction to be part of a larger plan to guarantee airline connectivity to key destinations as Gran Canaria, Tenerife, Lanzarote and Girona; a reduction of airport taxes for all flights to the Canary Islands and other affected airports in Andalusia, Costa Blanca, Catalonia and the Balearic Islands; and a communication and promotion campaign to alleviate the lack of UK and German travelers expected after the collapse of Thomas Cook. So, it is very likely to see an aggressive promotion campaign to retain Spanish travelers and bring international tourists to Spanish destinations until late 2019.








Activities

<Content>

Media Coverage (*information obtained from miscellaneous general media regardless of involvement*).
Articles, programs, rankings, etc. covering Kyoto and Japan

During this period, the activity on media regarding Kyoto has been hectic and extensive. We have classified the contents in country reputation issues, consumer trends on Japanese culture (that benefit in the inspiration process), travel plans & itineraries (that feature Kyoto as a recommended destination to go); inspiration from alternative sources (design, architecture, gastronomy, literature); and relevant events to be held in Spain we can create synergies with to promote Kyoto in Spain.

The news pieces were categorized as follows:

	Country reputation: Kardashian issue
	Country reputation: Kyoto Animation fire
	Country reputation: Others
	Consumer trends on Japanese culture
	Travel plans & itineraries (mentions to Kyoto)
	Inspiration from alternative sources
	Relevant events in Spain

Country reputation issues

Several issues have been covered extensively in Spain in regards to Japan and Kyoto in particular:

- Some pieces made reference to the “kimono issue” after the celebrity Kim Kardashian announced the new name of her lingerie brand. The references were neutral in terms of Japan and Kyoto, only reminded the issue that led Kyoto Mayor to send a letter to Kardashian explaining a kimono is more than a brand.
- Following the extensive coverage of Kyoto Animation fire, media also informed about the arrest of the main suspect as well as the arrest of a person who wanted to mimic the massacre in Square Enix (Tokyo).
- Some media made reference to official data on the rise of Japan’s consumer price index (CPI), that increased 0.5% year over year in August, being the thirty-second consecutive month that this index grows, mainly due to the increase in household goods. There are also references to the plan announced by Japan's environment minister, who said contaminated water from Fukushima nuclear plant may have to be released into the ocean because storage space will run out in 2022, a measure that has received criticism from several instances.

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

- As August and September are months when Spaniards plan to return back home after holidays, some lifestyle and consumer magazines share inspiration and décor ideas for the new season: some of these articles on decoration trends mentioned Japanese minimalism as a decoration trend for next season and 2020.
- Fashion is also a strong trend when it comes to inspire about a culture or a destination. Several media reported the opening of the first MINISO in Barcelona this fall, as part of the expansion plan of the brand aimed at opening 250 stores in Spain and Portugal in the next four years.
- Starting on October 4th, Cadiz City Hall will host a Manga festival, an event organized in this Spanish Southern city since 2006, with the support of several manga aficionado associations in the area, aimed at young people and with a strong connection with Japanese culture and imagery.
- Gastronomy is also a very strong trend related with Japan and Kyoto in Spain: several news on diverse issues regarding gastronomy were published during this period, as traditional ingredients (Konjac, a novelty among Europeans, who the options it offers); ancient restaurants (mentioning 15th century Honke Owariya); or culinary experiences such as the praised showcooking from Koji Kimura and Shuji Niitome in Madrid, an experience that one of Spain’s most important food critics, José Carlos Capel, was invited to enjoy and review. Also, Euronews made a special feature on sake, in which they showcase the beauty of a rice plantation, in Ine, near Kyoto, where Yamada rice variety is cultivated and used to

elaborate sake. And El Confidencial made a list of the best places to eat ramen in Madrid, sharing a traditional recipe for those who prefer to cook it at home.

- Two openings, happened during this period are worth to mention: the Nobu Hotel in Barcelona, and a karaoke based on Lost in Translation movie in Madrid, two good venues to organize meetings or events to promote Kyoto with either press or trade representatives.

Travel plans & itineraries (that feature Kyoto as a recommended destination to go)

- Fabián León, young chef who was first runner up in Masterchef Spain (a culinary contest extremely popular in Spain), has been interviewed by national newspaper La Vanguardia, and he explains Japan has changed his life and has taught him lots of things on gastronomy; moreover, the photos of the newspiece are in Fushimi Inari-taisha Shrine. Kyoto was featured as the number one place to go when visit Japan in 100sitiosquever.com, in a list shared by the most important Spanish travel influencer and travel journalist and writer, Paco Nadal.
- Some pieces recommended to explore and discover the lush forest of Arashiyama, highlighting the variety of bamboo species coexisting in this place and the connection to nature that visitors can enjoy there. There were also references to Kyoto being named the best Asian city by the Urban Development Department of Mori Building.
- GQ magazine included Kyoto in its selection of the 10 best destinations to travel for your fall vacation, and Esquire included GranVia Kyoto Hotel in the list of 15 cool and luxury hotels anyone can stay in. Furthermore, the economy newspaper Expansion (read by Spanish executives, entrepreneurs, business people, etc.) created a last minute itinerary for travelers with no plans for summer to explore new cities and hotels, in which is mentioned the The Thousand Kyoto Hotel, its guest experience and some plans to enjoy Kyoto in a different and more relaxed way. Also, El Español listed Japan and Kyoto as a good destination for silver travelers (active seniors) interested in exploring new cultures and places. And Cerodosbe suggested to travel Japan in a cruise, discovering destinations as Kyoto traveling from the sea.
- Several pieces offered itineraries to visit the “unknown” Kyoto, as Lugares con Historia, that combines several popular attractions with less known places, tips and recommendations to move around Japan and Kyoto, or OK Diario, that focuses on curiosities only to be seen in the city; or itineraries based in culinary experiences, as the ones published by Plateselector (especialized in gastronomy and destinations) who featured two articles about the most delicious cities of Japan, and Kyoto was included as a “gastro lovers destination”. Moreover, El Economista published a special feature on The Japanese Culinary Academy, located in Kyoto, informing that the academy launched japanese-cuisine.com, a website to promote Japanese cuisine abroad, mentioning that it is a great opportunity for Spaniards to learn more about Japanese culinary tradition.

Inspiration from alternative sources (design, architecture, gastronomy, literature)

- Summer is the busiest honeymoon season in Spain and some lifestyle media have mentioned Kyoto in their lists of honeymoon destinations, such as Estilo y Vida. Also, the summer trips of Spanish celebrities and influencers to Kyoto were also mentioned in lifestyle media.
- During this period, museums and art have been closely associated with Kyoto, as the convention of the International Council of Museums (ICOM), took place in the city. Media outlets devoted their culture section coverage to this news, especially El País, who had a correspondent onsite. It is interesting the idea behind several publications, stressing the fact Kyoto is a monumental city, full of art, heritage and monuments worth to get lost in.
- During this period, several media, especially tech and lifestyle outlets, have informed about 130th anniversary of Nintendo, a brand close to many Spanish people who have grown or are raising their kids with its videogames. For example, Gizmodo tells the story of the company, reminding that it was founded in Kyoto in 1889 by Fusajiro Yamauchi.
- Cultural attractions such as manga, the virtual idol Hatsune Miko, or the robot buddhist priest, were mentioned by media as things only to be seen in Japan and closely related to Kyoto idiosyncrasy, which inspire readers and consumers in different ways.
- Civitatis, an ancillaries and activities aggregator which is very popular in Europe, published a “sustainable travel manifesto”, in which the company recommends how to travel and behave to preserve the places and cultures that make destinations so appealing for travelers. They mention the tea ceremony in Kyoto as a very important tradition, worth to be experienced, in comparison to how we drink tea in Europe, with no traditions attached.

Relevant events to be held in Spain we can create synergies with to promote Kyoto in Spain

Finally, a series of events to happen in Spain in the coming months have been announced lately that may become interesting opportunities to showcase Kyoto as a destination from different points of view. If authorized, we will start contacting the organizers of these events to look for synergies:

- Salón del Manga 2019 (October 31st – November 1st, Barcelona): is a Spanish anime and manga convention held annually in Barcelona and is the largest anime convention in Spain and a key event for entertainment industry in our country.
- Foro España – Japón 2019 (November 26th-27th, Castellón): global multilateral meeting to promote collaboration between Spain and Japan in key economy sectors to both countries.
- Hatsune Miko concert in Barcelona (January 28th, 2020, Barcelona): the Japanese virtual idol will have a show next January 28th, 2020 in Sant Jordi Club, in Barcelona.
- Japan Week 2020 (November 20th – 27th, Sevilla): Considered the most important event around Japanese culture, the event will return to Sevilla. It is organized by the key tour

operator Miki Travel, and the International Friendship Foundation, an entity that depends on the Cabinet Office of Japan, aimed at striving for international friendship regardless of race, nationality or religion; to contribute to world peace and the basic well-being of all peoples; to promote mutual understanding and to encourage the harmonious development of friendly relations between Japan and other countries of the world; and in so doing, the foundation will carry out its objective. Japan Week has, as a key goal, to develop international exchange and to promote friendship and mutual understanding with host cities by introducing life culture, accomplishments, art, music, fashion, sports, economics, and so forth. It is an amazing opportunity to engage with travel and trade in Spain, in a very didactic, yet colorful kind of way.