

## 京都市フランクフルト情報拠点レポート(2019年12月・2020年1月分)

### 1 統計

○訪日旅行者数(ドイツ)

・2019年12月13,600人(2018年12月12,466人)(伸率9.1%)

・2020年1月11,200人(2019年1月11,358人)(伸率-1.4%)

※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12月2,090人(2018年12月1,471人)(伸率42.1%)

対象施設数:58ホテル

・2020年1月1,922人(2019年1月1,302人)(伸率47.6%)

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

#### **Global trends:**

#### **WHO declares international health emergency**

In China, the number of infected people has increased surprisingly strongly despite quarantine measures. The WHO has now declared an international health emergency. The German Foreign Office and the USA advise against travel to the country. (SPIEGEL)

#### **Travel ban for Chinese costs tourism billions worldwide**

Now that the Chinese authorities have banned all groups and package tours abroad for the time being, many destinations in Asia, America and Europe are expecting high revenue losses. However, the German National Tourist Board points out that the main travel season for long-distance travel for the Chinese is in the summer months. (Hotel vor9)

#### **Global tourism continues to grow**

According to figures from the World Tourism Organization (WTO), around 1.5 billion international arrivals were registered globally in 2019, four percent more than in the previous year. For this year, the organization is again expecting growth of three to four percent. (countervor9)

#### **Trending: bleisure travels**

In the Travel Trend Report from Avis, 31 percent of the German employees surveyed said that they would extend their business trips with a holiday in order to spend more time at their destination. Among Italians, the figure is as high as 53 percent, followed by Spaniards (42%) and French (34%).

### **German Market Trends:**

#### **German business climate stable towards the end of 2019**

The German economy is entering in 2020 with more confidence, reports the Ifo Institute. The assessment of the current situation and expectations are more optimistic than in November 2019. In the service sector, the indicator has risen to its highest value in six months. Cautious optimism is emerging with regard to the coming months.

In retail, the business climate has deteriorated. Traders were more satisfied with their current business situation. However, their outlook for the coming months clouded over. In manufacturing, the index recovered. This was due to noticeably less pessimistic expectations among entrepreneurs. By contrast, they assess their current situation as worse. Production plans continue to be geared towards cutbacks. In addition, it is currently more difficult for firms to obtain new loans. (reisevor9)

#### **Air traffic: further growth expected**

The German Aerospace Center (DLR) expects passenger numbers to increase by 3.7 percent per year to 9.4 billion by 2040. During the same period, the number of flights will increase by 1.6 percent annually from 35.5 million to 53 million. If the number of passengers is to grow faster than the number of flights, this can only work with the increased use of larger aircraft and better capacity utilization. Accordingly, the researchers predict that in 20 years there will be an average of 179 passengers per flight on board. In comparison: in 2016, there were only 111. The DLR experts are convinced that future demand will exceed supply. "Despite the enormous growth in global air traffic and the increased use of larger aircraft, we expect that by 2040, around 255 million passengers will not be able to be served due to capacity bottlenecks," explains Marc Gelhausen from the DLR Institute for Airports and Air Traffic in Cologne. This would be more than the total German passenger volume in 2018 or three percent of the global air traffic forecast for 2040, already including capacity expansions at airports. Hubs such as London-Heathrow will be most affected by capacity bottlenecks in the future, which is why the DLR expects the focus of such bottlenecks to shift towards Asia by 2040. (reisevor9)

## **Consumers Trends:**

### **Luxury travel is on the rise**

The luxury market is still on the upswing: global sales of high-quality clothing, shoes, leather goods, perfume and jewellery are expected to rise to 281 billion euros in 2020, an increase of 4 percent. This development is being driven by three main factors: enjoyment- and travel-loving Chinese, self-confident and discerning young shoppers and the continuing online boom in the luxury segment. These are the results of the new "Worldwide Luxury Market Monitor" by management consultancy Bain & Company. The "extended luxury market", i.e. premium travel, cars, food, etc., will also grow by 4 percent in 2020 - to now. 1.3 trillion euros. Above-average growth was recorded for cruises (plus 9 percent), cars (plus 7 percent) and gourmet food (plus 6 percent). Among the personal luxury goods, business with shoes and jewellery (each up 9 percent) and leather goods (up 7 percent) is developing particularly well. Chinese customers in particular are becoming increasingly important for the luxury goods industry. Sales in China increased by 26 percent to 30 billion euros. Thus, the country accounts for 90 percent of global growth in personal luxury goods. Europe is once again recording a slightly positive trend with a further increase of 1 percent. With 88 billion euros in 2019, the continent remains the world's largest regional sub-market for luxury goods. Spain and Great Britain perform best, while consumption in Germany and France is slightly weaker.

The generations Y and Z continue to cause a sensation in the luxury goods market. They are responsible for the entire global growth, with young consumers from China and Southeast Asia dominating. In 2035, these two generations will account for up to 85 percent of the total luxury market volume. The online trade also continues to gain in importance. In 2019, the Internet trade in luxury goods has grown by 22 percent to 33 billion euros, and now has a market share of 12 percent. Online and stationary trade increasingly influence each other. As a result, the physical channel is continuously interrupted. Social responsibility also remains an important issue for luxury customers and encompasses more than environmental protection during production. 80 percent - especially young consumers - prefer brands that act in a socially responsible manner. According to the Bain study, the number of luxury customers worldwide is expected to rise to 450 million by 2025. Currently, there are 390 million. (wuv)

### **How to catch the Millennials' interest in brands**

"Mental health is currently the most discussed issue among millennials," reports Steven Bartlett, head of the social media agency The Social Chain. Another major topic is the environment: "Millennials feel obliged to save the planet. Brands can score points with them if they address these issues. Authenticity, genuine commitment and emotion are important here. According to Bartlett, the target group appreciates the focus not being on an immediate sales goal. He sees a successful example in the Nike commercial with the American football player Colin Kaepernick. He demonstrated against discrimination by

kneeling down before the match while the national anthem was being played. The spot polarized and brought Nike both hatred and a lot of respect. "Nobody can doubt that it was authentic," Bartlett noted in an interview. (reisevor9)

### **Television is not as important to Generation Z as social media**

The age groups from 1996 onwards spend on average over two hours a day (126 minutes) on platforms such as Facebook, Instagram and Twitter. Television only comes to 102 minutes, radio to 42, newspapers and magazines to 34 minutes. A study by the online newsstand Readly showed that television usage is ahead of all other generations. (Horizont)

### **Digital marketing:**

#### **Court bans Whatsapp, Instagram and Facebook in Germany**

The Munich Regional Court has upheld a Blackberry patent suit and banned Whatsapp, Facebook, Facebook Messenger and Instagram in their current form in Germany. The judgement is not yet final, but Blackberry can already enforce it. Facebook explained that they would rather rebuild the apps than shut them down in Germany. (Süddeutsche Zeitung)

#### **Influencers gain influence in marketing**

An analysis of 20,000 Instagram accounts shows that the engagement rate for influencer marketing campaigns has increased by 3.5 percent over the past four years - but this is primarily due to micro-influencers. Observations show: The higher the number of followers of brand ambassadors grows, the more the like rate decreases. (Meedia)

#### **Facebook now has 2.5 billion users**

Despite all the prophecies of doom, the social network continues to grow. 2.5 billion people use Facebook at least once a month, 1.66 billion every day. The Facebook family, which includes WhatsApp and Instagram, has 2.89 billion users a month. This corresponds to around 37 percent of the world's population. Horizont

### **Tour Operators and Online Travel Agencies:**

#### **DER Touristik grants cancellation right for Asian bookings**

Because many travel agencies and customers are unsettled by the spread of the coronavirus, DER Touristik grants its tour operators a special cancellation and rebooking right for Asian tours. This means that Asian holidays can be booked without worries. A free cancellation is possible if the virus spreads further. (counter vor9)

### **Reisen mit Sinnen launches new hiking brand "Activida"**

The program of the new brand Activida hiking tours includes trips in Europe and to Cape Verde. According to the fair and sustainable approach of Pardon/Heider Touristik GmbH, all Activida tours are 100 percent climate neutral: All emissions caused by transfers, overnight stays and meals are compensated by atmosfair. About half of all Germans state that they go hiking occasionally as hiking leads to calmness, clarity, peace and joy of life. Active relaxation lifts the body and mind, which is also reflected in the Activida logo - a hiking shoe with wings. In addition, the decelerated mode of transport fits in well with the tour operator's approach to intensively experience the travelled country. On foot, travellers can also reach sights and viewpoints that would usually not be accessible. Activida Hiking Tours focuses on the pure hiking experience; sightseeing tours, however, are included if the places are en route and can be reached without detour. Attractive routes, competent travel guides, encounters en route, charming accommodation and regional food, wherever possible in organic quality, form the pillars of the concept. Besides Cape Verde, the small groups explore the Azores, Madeira and La Gomera as well as various European countries such as Italy, Norway, Portugal, Poland, Austria and Germany. (tip-online)

### **Urlaubsguru discontinues cruise portal**

"Captain Cruise" falls victim to restructuring and is shut down at the end of January. "The demand for cruises has changed dramatically since the summer. This certainly has to do with the current debate on sustainability. Our target group is rather young and involved in the topic, so cruises don't fit in so well anymore", explains holiday guru founder Daniel Marx. (TravelTalk)

### **Lonely Planet Teams With Intrepid Travel To Launch Tours**

Travel site and digital media company Lonely Planet is partnering with Intrepid Travel, an Australia-based adventure travel company, to offer more than 300 sustainable group tours worldwide. It is Lonely Planet's first move into the tour business, bringing its travel content to life. (Media Post)

### **Airlines & Cruises:**

#### **Lufthansa sells LSG to Gategroup**

The Lufthansa Group has concluded a purchase agreement with the Gategroup for its catering subsidiary LSG. The European business of its catering division is being sold. Simultaneously, Lufthansa has agreed a long-term catering partnership with Gategroup. Beginning of December 2019, the Lufthansa Supervisory Board approved the sale of the catering division LSG, and Lufthansa announced mid-December that the sale was completed. Lufthansa will remain a minority shareholder in the Munich and Frankfurt plants of a new joint venture to be established. This will ensure a "seamless transition of the catering business". The partnership guarantees "a high degree of job security", said

Lufthansa CEO Carsten Spohr. The trade union Verdi had opposed the sale. In the contract Lufthansa commits itself for many years to purchase in-flight catering at the long-haul locations Frankfurt, Munich and Zurich from the Gategroup. Lufthansa wants to concentrate more on the airline business. The deal is still subject to the approval of the antitrust authorities. The remaining parts of the in-flight catering division are to be sold in 2020. LSG Sky Chefs employs about 35,500 people worldwide. Around 7100 employees work in the sold parts of the company, which generated annual sales of 1.1 billion euros. According to Lufthansa, the sale to Gategroup has "no significant impact" on the operating result and profit in 2019 and 2020. The buyer Gategroup is a global leader in its field. It is active in more than 60 countries and serves more than 700 million air travellers annually. The Zurich-based group has 43,000 employees and the equivalent of 4.5 billion euros in sales. (fvw)

### **Costa Cruises initiates cooperation with Flixbus**

Customers of Costa Cruises can now also travel to their port of departure by Flixbus. The two companies have agreed on a cooperation that applies to around 500 direct connections from Germany. These include for example cruises from/to Kiel, Hamburg, Bremerhaven, Warnemünde, Savona, Genoa or Venice. "We are delighted about this cooperation, which is unique in the cruise market because it makes our product more accessible and therefore more attractive to a broad and growing target group," says Mario Alovisei, Vice President of Costa Cruises. The Flixbus tickets can be booked at travel agencies or at the Costa Contact Center. (trvlcounter)

### **Cruise growth reaches its limits**

Market researcher Martin Lohmann, head of the annually published study Reiseanalyse, is convinced of this. Although the number of interested parties is growing rapidly, the number of those who are actually planning a cruise is increasing much more slowly. For the majority of those who could imagine a cruise, this form of travel is only one possibility among many. (fvw)

### **Lufthansa cancels all flights to China**

Lufthansa, Swiss and Austrian Airlines are cancelling their flights to and from China until 9 February. Lufthansa wants to fly to their China destinations again before then, among other things to bring their own crews back to Germany. Previously British Airways had already discontinued its China connections. (Counter vor9)

### **Best Practice:**

#### **Public transport in Innsbruck free of charge for tourists**

Tourists staying two nights or longer travel free of charge with the municipal public transport in Innsbruck from 1<sup>st</sup> May 2020. Travellers can obtain the required Welcome

Card directly from their landlord. This makes Innsbruck the first city in Austria where tourists can use public transport free of charge. Due to public areas, squares and main streets being congested on peak times or during holidays, the city aims to shift the traffic caused by individual cars to the public transport. The Tyrolean traffic situation could not only be improved with driving bans, said Transport Minister Ingrid Felipe (Greens), explaining the initiative. There is also a need for attractive alternatives and offers in the public transport network in order to make the changeover easier, especially for tourists. Already in the past, guests with the Welcome Card received numerous benefits such as discounts for swimming pool admissions and bathing lakes as well as participation in the mountain hiking program. Martin Baltes, managing director of Innsbrucker Verkehrsbetriebe (IVB), does not opine that the new service will overload the city's "public transport" system: "Tourists normally use public transport at different times than locals who commute to work or school," he argued. Thus, Innsbruck would become a "pioneer in sustainable mobility", said Innsbruck's mayor Georg Willi (Greens). Ultimately, the free ticket is financed by the tourists themselves, who pay the visitors tax. (orf)