

京都市マドリード情報拠点レポート(2019年12月・2020年1月分)

1 統計

○訪日旅行者数(スペイン)

・2019年12月7,300人(2018年12月5,990人)(伸率21.9%)

・2020年1月5,200人(2019年1月4,382人)(伸率18.7%)

※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12月3,341人(2018年12月3,021人)(伸率10.6%)

対象施設数:58ホテル

・2020年1月2,020人(2019年1月1,720人)(伸率17.4%)

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

- Data for January 2020 regarding Spaniards visiting Japan has not been released yet. However, from the data of December 2019, it can be observed that there has been an increase in tourist arrivals from December 2018 to 2019 by 21,9%.
- The yearly data for 2019 reveals that throughout the year approximately 130.200 Spaniards visited Japan which shows a yearly increase of 9,5%.

・ Forecasting effects on future travellers and visitors to Japan

- The millennial luxury traveller spends an average of more than 3,800 euros per trip.
 - Motivated to discover new destinations, the 'marquistas' who mostly belong to the Baby Boom generation have a high rate of travel consumption forecast 74.9%.
 - Classic travellers have the lowest travel consumption forecast of the segments, with its index at 63.1%.

- Although Fardones are the segment that travel less per year they have a forecast of travel consumption of 69.9%
 - Tailored travellers have a high forecast of travel consumption of 76.1% as they often fill their free time by travelling.
 - The travel consumption forecast index for “design” travellers is 73.5%
- More than 130,000 Spanish tourists to visit Japan in 2019. During 2019, a total of 130,200 tourists travelled from Spain to Japan, an increase of 9.5% compared to 2018, according to the data of the breakdown by country of the total number of travellers who visited Japan in 2019.
- Corporate travel spending will grow by 10% in Spain, according to Aervio
 - Companies will spend 10% more year-on-year in Spain on corporate travel during 2020 and a 5% increase is also expected with respect to 2019 in the number of people travelling under these circumstances, according to data from the corporate travel management company Aervio. Spain is the European country where growth is expected to be the fastest, compared to a potential 6% in the other major European countries.
 - In this context, 70% of the investment made by Spanish companies for their corporate travel is aimed at building relationships with established clients or seeking potential clients for their commercial development.
- Tourism in Japan and ANA propose to travel to the country from 479 euros
 - Between January and November 2019, 122,900 Spaniards have visited Japan, 8.8% more than the same period last year, according to data from the Japan National Tourism Office (JNTO). This figure already exceeds the total number of Spanish tourists who travelled to Japan throughout
 - These data place Spain among the main European countries that have increased the number of tourists who have visited Japan between January and November 2019, only behind the United Kingdom (27.5%), France (10.1%) and Germany (9.9%).
- Nintendo's original headquarters in Kyoto will reopen as a hotel
 - NINTENDO's original headquarters are in Kyoto and thousands of visitors pass by every day to have their picture taken with the poster of its foundation and brand. But soon this place will be transformed into a hotel, giving tourists more reasons to visit this emblematic building. The

opening is planned for the summer of 2021 and will attract a lot of interest.

- Spain ranks as fifth European issuing market for travellers to Japan
 - o During 2019 a total of 130,200 tourists travelled from Spain to Japan, which represents an increase of 9.5% compared to 2018. This data strengthens Spain as the 5th European issuing market for travellers going to Japan.
 - o the spectacular spring flowering of cherry trees or "Sakura" is a tourist attraction that has said to have boosted tourism to Japan.

- Millennials pursue personal growth in their travels
 - o Up to 32% of Millennials have already decided to experience Japanese practices such as immersing themselves in hot springs and mineral baths in order to stimulate blood flow, circulation and metabolism.

- The Spaniard enjoys up to five trips a year
 - o The Spanish tourist enjoys about 4 or 5 trips throughout the year, as he makes between two or three short-distance national getaways or two trips to European destinations and an average long-distance trip, according to the "Tourism Habits and Trends Study 2020" prepared by Atrápalo.
 - o Japan, Mexico, Cape Canaveral (Florida, United States), Israel, Uganda, Egypt, Azerbaijan, Indonesia, Vancouver (Canada) and Bhutan will stand out as the main long-distance destinations for 2020.

- **Popular destinations, lifestyles, purchasing trends**
 - The millennial luxury traveller spends an average of more than 3,800 euros per trip. Based on the socio-cultural level, each generation conceives luxury as a different concept, being an evolution that society itself has been experiencing in recent decades in Spain, going from a concept of having to a concept of being.
 - o The luxury market accounts for 3.5% of the total in terms of number of travellers, but in terms of spending they are three or four times more than the market average and represent a segment to be taken into account to position brands or tourist products

- According to Braintrust's analysis, luxury travellers can be broken down into 'marquistas' (22%), 'classics' (18%), 'fardones' (19%), 'tailored' (21%), and 'design' (20%).
 - 'Marquistas' luxury is determined by the prestige and exclusivity of the brand. These travellers mostly belong to the Baby Boom generation. They'll make 4.8% trips per year and spend an average of 3,553 euros on each trip. They combine both domestic and international trips.
 - 'Classics' understand luxury as high prices and personalized services and their average trip cost is 2,654 euros. Their purchases are influenced by the opinions of their acquaintances and loyalty to the brands, rather than the price.
 - 'Fardones' are said to be on the search for social recognition. Travellers from generation X and with a lower level of education, whose concept of luxury is to be socially recognized, their average expenditure is high, standing at 3,122 euros.
 - 'Tailored': luxury is quality tailored to your interests'Tailored' views luxury as a quality customised to your interests they are mainly millennials with a very high level of education, who live as a couple but have no children. Aware of the environment and sustainability, these travellers seek to try new things. Their average expenditure is the highest of all the segments at 3,829 euros.
 - 'Design' travellers believe luxury is modernity and design, these are mostly Generation Z meaning they are the youngest who have an average expenditure of 2,631 euros.
- Corporate travel spending will grow by 10% in Spain, according to Aervio
 - Nowadays, travel trends have changed, and it is sought that the traveller in addition to a business relationship live a life experience in their business trip.
 - Mystical and fascinating destinations for travel in 2020
 - Daigo-ji is a Shingon Buddhist temple in Fushimi-ku, Kyoto, Japan. It is called the "Temple of Flowers" and is a UNESCO World Heritage Site. It is the oldest building in Kyoto (the first parts have a thousand years of history). This place is in the mystical monuments to see in 2020.
- **Trade & Industry Trends in Spanish market (December - January 2020):**
 - More than 130,000 Spanish tourists to visit Japan in 2019

- JNTO and the Japanese airline All Nippon Airways (ANA) have launched a tourist promotion campaign for travel to Japan with an offer starting at 479 euros for round trips. This campaign returns in 2020 to bring Japan closer to travellers and is active from this Thursday, January 16, until February 13, 2020. This means that tickets can be purchased for travel in different periods between January 23 and August 31, 2020.
 - In addition, all those who travel to Japan with this offer and select the option 'multiple cities' at the time of purchase, may add two domestic flights to choose from 45 destinations within the country, with a stopover from the city of arrival, starting from major cities like Tokyo, Osaka or Nagoya. This will allow you to visit destinations such as Hokkaido, in the north of Japan, or the paradisiacal tropical archipelago of Okinawa, the southernmost prefecture of the country, among others.
- Agencies confirm that Christmas reservations are stable
 - European Market: Most people who go to a travel agency to book their vacation are in their "40s and 50s."
 - When it comes to booking, several travel agents have noted that this year people have booked "a little earlier but insist that the "last-minute customer" still predominates.
- Millennials pursue personal growth in their travels 95% of millennials travel to enrich themselves and improve their day to day. This is confirmed by the "Generation Travel" study recently launched by Hotels.com.
 - The so-called Generation of personal enrichment consists of travellers interested in vacations which are based on learning and retreats that can improve mental health and well-being (53%).
 - 75% Of these travellers would be willing to pay more for a vacation that benefited them mentally, physically and emotionally, 80% said they would pay up to 50% more.
 - 43% Are willing to give up alcohol, social networks (51%), internet (40%) and makeup (32%) in exchange for the reward of a journey of self-improvement.
- **Future issues and challenges**
 - Spain ranks as fifth European issuing market for travellers to Japan
 - Despite the increase in Spanish travellers to Japan, they still do not explore many parts of the country, such as the Tohoku region in the

north of the country. Nor do they visit places such as the southern island of Kyūshū that are a unique from the well-known tourist sites.

- Spain | Fourth quarter improvement leads to 451,600 jobs by 2019
 - The labour market regained some of the momentum lost during the year. Despite the negative seasonality, EPA employment increased by 92,600 people (2.1% y/y) and the unemployment rate fell 0.1pp to 13.8%. On average, 451,600 jobs were created during the year (2.3% y/y) and the unemployment rate fell by 1.2pp to 14.1%

- Tourism in Asia, a collateral victim of the Chinese virus
 - In Tokyo, the fall of Chinese tourism has already been felt in Asakusa, a tourist district of the capital with small shops, restaurants and temples.
 - Due to the virus, it will be "very difficult" for Japan to reach its target of 40 million tourists by 2020, even with the Olympic Games this summer, warned Yuki Takashima, economist at Nomura Securities consulted by the AFP.