FORESIGHT
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FORESIGHT is a monthly commentary on significant issues within the tourism sector. Each month, 'Market Focus' discusses economic, social and political factors that underlie demand for tourism now and in the future. In addition, a spotlight is focused on a significant tourism issue. This month 'Market Focus' looks at a number of Middle East markets, and 'Issue of the Month' considers the potential opportunities, and threats, emerging from the EU/US Open Skies Agreement.

Market Focus – The Middle East

When attentions turn to the Middle East it is often in relation to violence or the supply of oil, but this region of the world represents an important inbound tourism market for Britain. If we define the region as the Arabian Gulf states of Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates, plus Syria, Lebanon, Israel, the Palestinian Territories, Jordan, Yemen, Iraq and Iran then the region constituted 1.9% of all inbound visits to Britain in 2006 (some 623,000 visits), but more importantly 4.6% of inbound visitor spending (an estimated £743m) according to figures from the International Passenger Survey[1].

Market League Tables

The table opposite summarises the number of visits and visitor spending from each Middle Eastern market in 2006 with the United Arab Emirates topping both league tables. Israel generates the second highest volume of visitors, but with a much higher average spend per visit Saudi Arabia is the second most valuable Middle Eastern market for UK tourism.

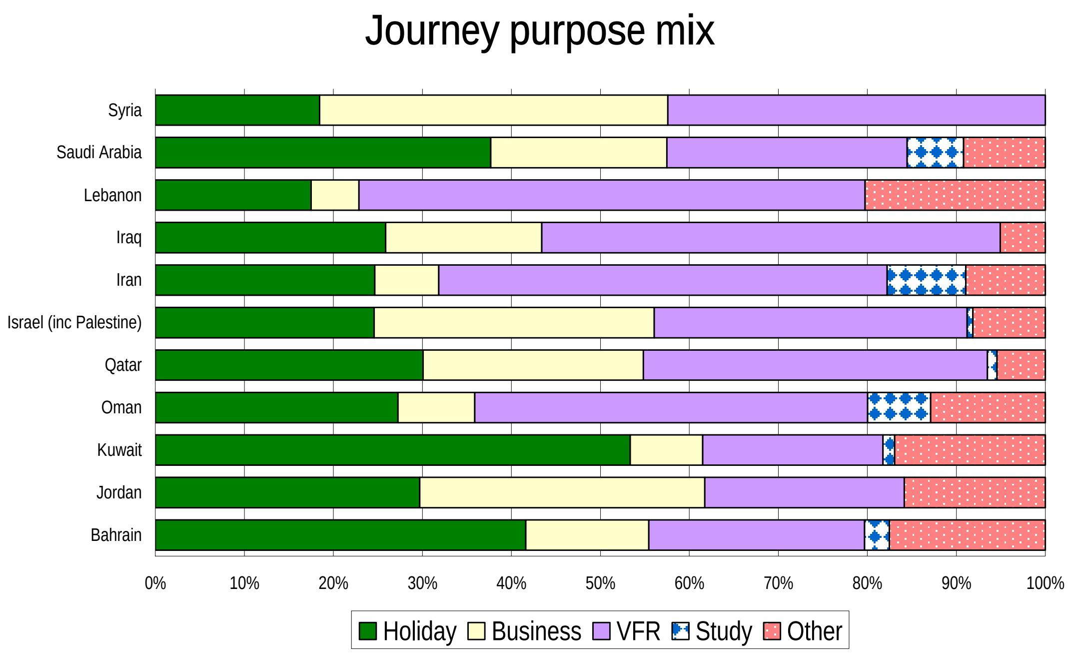
The UAE is covered in great detail by the latest edition of the VisitBritain 'Market and Trade Profiles' series, downloadable from www.visitbritain.com/research and is thus not covered in detail by the remainder of this edition of *Foresight*. Yemen has also been excluded from the analysis as the IPS sampled just four respondents resident in Yemen in 2006.

Visits (000s)		Spend (£m)	
United Arab Emirate:	178	United Arab Emirate:	200
Israel (inc Palestine)	164	Saudi Arabia	132
Saudi Arabia	65	Kuwait	102
Kuwait	59	Israel (inc Palestine)	88
Iran	31	Iran	54
Bahrain	28	Bahrain	44
Qatar	26	Qatar	40
Jordan	20	Jordan	24
Oman	18	Oman	23
Lebanon	12	Lebanon	16
Iraq	11	Iraq	12
Syria	7	Syria	8
Yemen	3	Yemen	1

Market Profile' series covers this market
This edition of Froesight covers this market
Market not covered

Journey Purpose

From the chart we start to get a feel for why visitors from these markets travel to Britain. Those most likely to be in Britain for a holiday are from Kuwait, Bahrain and Saudi Arabia, whereas Syria has the highest share of business visits. Trips to visit friends or relatives represent a significant proportion of all trips from Lebanon, Oman and Iran. The market with the journey purpose mix most typical of a mature market (with holiday, business and VFR having roughly equal shares) is Israel.



Nationality

In a number of cases visits to Britain from countries in the Middle East are not exclusively, or in certain instances even predominantly, by nationals of the market. The table summarises the proportion of visitors from each country that are British nationals, a national of the country itself and nationals of third countries.

Over half of all visitors from Iraq and Oman, and more than two-fifths of visitors from Bahrain are in reality British ex-pats. Markets from which visitors are most likely to be a national of their home country include Iran, Jordan and Israel. Overall there are 110,000 fewer visits to Britain by 'nationals' of these eleven countries than there are by residents of these countries.

	Nationality =		
Country of residence	British	'Home' country	Other
Bahrain	41%	36%	23%
Jordan	10%	82%	8%
Kuwait	12%	80%	8%
Oman	59%	31%	10%
Qatar	31%	31%	38%
Israel (inc Palestine)	11%	82%	7%
Iran	3%	97%	0%
Iraq	56%	17%	27%
Lebanon	15%	52%	33%
Saudi Arabia	23%	50%	27%
Syria	13%	79%	8%

Access to Britain improving

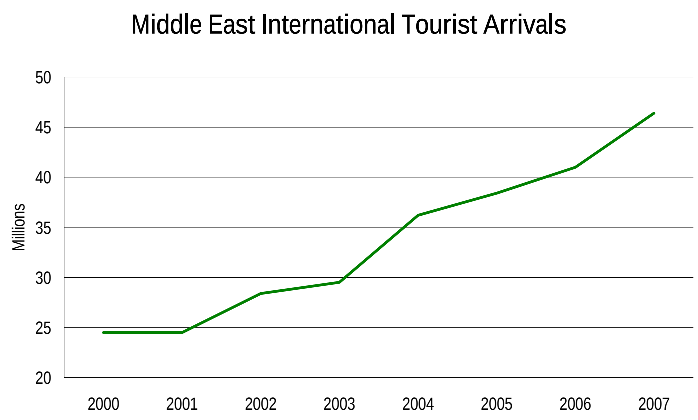
There is considerable competition on the Dubai to London route, with, for example, British Airways increasing its weekly frequency from 14 to 20, but there are also some noteworthy route developments taking place that originate from some of the lesser talked about markets covered this month. For example, bmi launches a daily Tel Aviv to Heathrow service from mid March and continues to expand its offer to the Saudi Arabian market with three flights per week from Dammam (the airline already links both Riyadh and Jeddah to London).

Meanwhile Oman Air now offers non-stop flights from Muscat to Gatwick, bringing to three (British Airways and Gulf Air being the other two) the number of airlines linking the Sultanate with Britain. Qatar Airways is yet another Gulf airline that is boosting capacity, adding a fourth daily flight from Doha to Heathrow at the end of March 2008, meaning that the airline will now be offering 42 flights per week between Qatar and Britain.

The Middle East and global international travel

The Middle East is becoming an increasingly important region in terms of international travel, and as with most other world regions it is intra-regional trips that are driving much of the growth (Global Insight estimate that 45% of all international arrivals within the Middle East are intra-regional in nature, and that 55% of outbound trips from the region are to other Middle East destinations).

The chart, based on figures released by the United Nations World Tourism Organisation (UNWTO), reveals the extent to which the Middle East has seen international tourist arrivals increase over recent years. This trend is forecast to continue too, with the most recent UNWTO forecast suggesting that in 2008 growth in arrivals will be between 6% and 10%.



There are many reasons behind this growth, including the traditional drivers of international travel such as growing disposable income for many residents of the region, but additionally there has been huge investment by governments across the Middle East in tourism product. Recognising that a dependence on oil as a source of national wealth provides a somewhat ephemeral source of economic wellbeing a growing number of destinations are turning to international tourism as a source of future wealth generation.

Dubai and now Abu Dhabi within the United Arab Emirates have been leading the way, investing not only in luxury hotel development, the retail sector, and 'all-inclusive' resorts, but in transport infrastructure, most notably the aviation sector. Emirates has grown into one of the world's most important airlines, and plans to operate a fleet that will include no fewer that 58 double-deck A380 aircraft over the coming years, with Heathrow being served by one of the new aircraft from 1st December 2008.

Government investment in Emirates and airport facilities in Dubai has helped turn a patch of desert into an international hub airport linking the Middle East to every corner of the globe. Meanwhile in neighbouring Abu Dhabi Etihad Airways continues to expand its route network with flights to Ireland, India and Singapore, with a clear intention to continue this expansion, having placed an order for 12 wide-bodied Airbus aircraft in June 2007.

All this is of significance for UK tourism as not only are residents of the Middle East enjoying improved access to Britain, but so too are residents of Asia and Australasia who now have a wider choice of routes available, and typically increased route availability helps to ensure that airfares are competitively priced.

A note of caution though, the existence of state-of-the-art airport facilities in the Middle East with an ever-increasing route network opens up new destinations to tens of millions of Arabs and Asians, whereas in the past London, and thus the UK, were one of a small number of 'easy to reach' destinations, this situation is changing at great speed as the 'destination set' from which consumers make a choice expands.

The 'Credit Crunch' is not a big issue for some

With oil consistently trading at over $100 per barrel, and no sign that the oil producing cartel OPEC is about to increase production, the term 'oil rich' certainly applies to many nations in the Gulf region at the present time. We can see from the table that income per head in a number of these countries is comparable to that enjoyed in the West (for example in the UK the figure for 2008 is forecast to be US$38,742).

There are, however, countries within the region such as Lebanon and Syria where income per head is very low (on average) meaning that international travel is the preserve of a wealthy minority.

	GDP per capita, US$s* in 2008
Qatar	40,458
United Arab Emirates	36,296
Israel (inc Palestine)	34,406
Bahrain	27,465
Kuwait	22,063
Oman	21,249
Saudi Arabia	17,805
Iran	9,681
Jordan	6,287
Lebanon	6,200
Syria	4,634

* = figures based on 'purchasing power parity'

Source: IMF, World Economic Outlook

Although worries about liquidity are certainly not an issue in the oil producing countries covered here, the region faces many challenges that could inhibit economic growth and thus the propensity for outbound travel. For example Israel has recently felt it necessary to venture into Gaza to deter rocket attacks by Palestinian militants, the United Nations has upped its pressure on Iran regarding uranium enrichment and there are very real fears of a civil war in Lebanon.

For UK tourism businesses welcoming visitors from Middle Eastern countries that are benefiting from the current boom in oil revenues prospects for 2008 would appear rosy. It is likely that businesses set to benefit the most will be top end hotels and retailers; this could prove vital at a time when the economic storm clouds continue to gather in the USA, with the possibility that a slowdown combined with weak US dollar will stifle outbound travel by Americans.

Issue of the Month – The EU/US Open Skies Agreement

The past year or so has seen frenzied activity as airlines across the European Union and the United States gear up for the introduction of an 'Open Skies' agreement between the two parties on 30th March 2008. Agreement on the deal was reached rather sooner than many airlines and travel industry analysts had anticipated, and much has been made of the potential impact on Trans-Atlantic air travel, so this month we take a look at what the Agreement will actually change, and what some of the positive, and for that matter, negative, implications for the future of inbound tourism to Britain might be.

What is it?

The 'Open Skies Agreement' is a political settlement between the European Union and the United States of America to increase competition within the aviation sector on routes operating across the North Atlantic between the USA and the 27 member EU bloc. The Agreement is heralded by the EU as an opportunity to generate "billions of Euros in economic benefits, millions of additional passengers and up to 80,000 new jobs over a five year period".

Until now a plethora of bilateral air agreements has existed between individual EU member states and the US aviation authorities. Many such agreements are considered to restrict competition by limiting the number of carriers permitted to offer Trans-Atlantic routes, or the number of destinations that can be served. For example, Heathrow Airport has been covered by what many believe to be the anti-competitive 'Bermuda II' agreement.

From the end of March 2008 EU and US airlines will be permitted to start routes based on consumer demand, without restrictions on the number of flights, capacity or pricing arrangements. Typically if supply is artificially restricted then the price paid by the consumer is kept higher than it would be under 'free market conditions', and many analysts expect that the Agreement will bring about lower fares on certain routes between the US and Europe.

The Agreement will permit:

- any US airline to fly to any airport within the EU as often as consumer demand will allow, without restriction on frequency, capacity or pricing
- any US airline to fly **between** EU airports
- any EU airline to fly from any EU airport to any US airport as often as consumer demand will allow, without restriction on frequency, capacity or pricing – but not between US airports

Some examples of what this could mean:

- Continental Airlines flying from Boston to Budapest
- American Airlines flying from Miami to Madrid, and onwards to Milan with a single aircraft and flight code
- Aer Lingus flying from Philadelphia to Dublin an onwards to London Heathrow with a single aircraft and flight code
- United Airlines flying from Los Angeles to New York and onwards to Paris with a single aircraft and flight code
- Lufthansa flying direct from Chicago to London Heathrow
- KLM flying direct from Las Vegas to Manchester

Airlines based in the European Union will not have the same opportunities to fly **between** US airports as US airlines will have in terms of competing within the 'domestic' EU market – so, for example, although British Airways can fly from Washington Dulles to Heathrow without restriction, it is not able to offer a flight from San Francisco to Heathrow that calls at Washington DC en route.

What has changed for the UK?

The new deal replaces two key restrictions that have restricted flights operating across the Atlantic between the US and Britain in recent years. Firstly, and of most significance, up until March 2008 only four airlines have been permitted to fly from the US into London Heathrow, namely British Airways, Virgin Atlantic, American Airlines and United Airlines. Secondly only British or United States airlines have been able to operate scheduled flights (with certain exceptions) between the US and any airport within Britain.

It is important to note that there have been no restrictions preventing British or US airlines operating between the US and British airports other than Heathrow. So, if a British or US airline believed that there was a commercial case for operating from a city in the US to Aberdeen, Newcastle or Bristol (for example) it has been free to do so – however until the new Agreement was signed non-British EU airlines could not offer flights from the US to British airports.

Air traffic between the USA and UK

Civil Aviation Authority data enable us to analyse the volume of passenger traffic on scheduled flights operating between the USA and UK (and vice-versa) by individual route. The table (overleaf), based on 2006 data, highlights just how popular a number of the routes are, with the New York JFK to/from London Heathrow route being a clear leader, used by nearly 2.8 million passengers. Routes from both Chicago O'Hare and Los Angeles International to London Heathrow conveyed around 1.5 million passengers across the North Atlantic during 2006, with just over one million travelling on flights between Heathrow and both Washington Dulles and San Francisco.

We need to remember that these figures include not just inbound visitors to the UK, but those travelling from the UK to the USA and transit passengers. We can, however, use figures from the 2006 International Passenger Survey (provisional full year 2007 data will be released by the Office for National Statistics in mid April), to discover that of the 3.9 million inbound visits to the UK by residents of the USA in 2006, 3.5 million (or 90%) departed the UK by air. We can dig even deeper into the data to find that of this 3.5 million more than 2 million used Heathrow, with a further 670 thousand using Gatwick as their port of departure from Britain.

It is estimated that around 40% of all business class seat sales between the USA and EU destinations are for travel on planes that depart from or arrive at London Heathrow, so it is perhaps little wonder that there has been such a flurry of interest among airlines on both sides of the Atlantic wanting to grab their share of this apparently lucrative cake.

UK Airport	US Airport	Passengers in 2006	UK Airport	US Airport	Passengers in 2006
HEATHROW	NEW YORK (JFK)	2,751,835	GATWICK	PHILADELPHIA	137,932
HEATHROW	CHICAGO (O'HARE)	1,520,978	EDINBURGH	NEW YORK (NEWARK)	132,935
HEATHROW	LOS ANGELES	1,430,025	MANCHESTER	ATLANTA	128,676
HEATHROW	WASHINGTON (DULLES)	1,040,222	GLASGOW	NEW YORK (NEWARK)	127,987
HEATHROW	SAN FRANCISCO	1,027,864	GATWICK	TAMPA	123,905
HEATHROW	BOSTON	931,456	BIRMINGHAM	NEW YORK (NEWARK)	121,377
HEATHROW	MIAMI	837,465	HEATHROW	BALTIMORE	117,711
HEATHROW	NEW YORK (NEWARK)	689,110	GATWICK	RALEIGH	108,425
GATWICK	ORLANDO	668,338	BELFAST	NEW YORK (NEWARK)	102,317
GATWICK	ATLANTA	506,860	GATWICK	CINCINNATI	102,212
GATWICK	HOUSTON	477,503	HEATHROW	DETROIT	100,275
GATWICK	DALLAS/FORT WORTH	397,584	BRISTOL	NEW YORK (NEWARK)	84,046
GATWICK	NEW YORK (NEWARK)	307,441	MANCHESTER	BOSTON	78,933
MANCHESTER	CHICAGO (O'HARE)	269,956	STANSTED	NEW YORK (JFK)	62,578
GATWICK	LAS VEGAS	262,546	EDINBURGH	ATLANTA	60,316
MANCHESTER	ORLANDO	259,053	GLASGOW	SANFORD	59,805
HEATHROW	PHILADELPHIA	242,757	MANCHESTER	LAS VEGAS	53,501
HEATHROW	SEATTLE (TACOMA)	239,826	GLASGOW	CHICAGO (O'HARE)	51,151
MANCHESTER	NEW YORK (JFK)	204,910	GLASGOW	PHILADELPHIA	40,191
MANCHESTER	NEW YORK (NEWARK)	189,450	GATWICK	CLEVELAND	38,356
HEATHROW	PHOENIX	185,490	HEATHROW	HOUSTON	37,441
GATWICK	DETROIT	180,917	GATWICK	NEW YORK (JFK)	14,965
HEATHROW	DENVER	166,003	STANSTED	WASHINGTON (DULLES)	12,448
GATWICK	CHARLOTTE	147,383	MANCHESTER	MIAMI	12,429
MANCHESTER	PHILADELPHIA	145,945	BELFAST	SANFORD	1,639
GATWICK	MINNEAPOLIS-ST PAUL	145,057	STANSTED	LAS VEGAS	1,404

What are the implications for inbound tourism to Britain?

Route mix at Heathrow

Runway capacity at Heathrow remains unchanged, but if the proportion of wide-bodied aircraft arriving on Trans-Atlantic routes expands at the expense of single-aisle short-haul aircraft then passenger volumes at the airport may well increase courtesy of a jump in the ‘passengers per touch down’ figure.

Civil Aviation Authority figures for 2006 (see earlier table) show that among 190 or so airports that provided flights to Heathrow, fifteen were in the USA, a figure that is set to increase during the course of 2008. In essence what the Agreement means for the Heathrow route mix is more flights on routes from the US that already exist, plus a host of additional US cities being added to the airport’s route network, but with the strong likelihood that Heathrow’s short-haul connectivity will suffer as a consequence of expanding Trans-Atlantic capacity.

Lower Fares?

There has been a good deal of speculation that the Open Skies Agreement will result in lower fares due to the increased level of competition. As we have noted, it is estimated that 40% of all Trans-Atlantic business class travel between the US and Europe currently uses Heathrow, so it is little wonder that so many airlines are looking to tap into this market, and it is perhaps business class rather than economy class fares that may see the largest reductions thanks to 'Open Skies'.

There will no doubt be a limited number of 'bargain' economy class fares offered by new entrants into the market, but Heathrow is not a cheap airport for airlines to operate from, and there is already fierce competition between the four incumbent airlines. The intensified competition for landing slots at Heathrow may lead to the price of a landing slot rising, thereby offsetting some of the lower fare benefits that increased supply would normally be expected to deliver.

Although having been a player in an increasingly crowded niche market, we should take note of the recent collapse of MaxJet (which had been offering 'business class only' flights from the US to London) as this clearly demonstrates that an expansion in capacity will not inevitably lead to increased passenger volumes. Trans-Atlantic fares will only fall to levels that deliver a sustainable 'bottom line' for airlines over the longer term – and with the price of oil now consistently around the $100 per barrel level scope for a significant decline in fares would appear to be limited. Indeed, Virgin Atlantic recently stated that in their belief the deal was unlikely to lead to any significant long-term fare reduction.

Changing planes at Heathrow

Airlines and airport operators are happy for their customers to use Heathrow simply as a transit point as this helps to cross-subsidise other less profitable routes and increases the number of potential customers for airport shops and restaurants. For example, carriers such as Air France will now be able to sell a ticket from Los Angeles to Lyon with the customer routed via Paris on the outbound leg and Heathrow on their way home. None of this sounds as though it is especially helpful to the UK's inbound tourism economy, but the existence of transit opportunities through hub airports is hugely important in sustaining an extensive route network.

If it were not for a proportion of passengers on each plane arriving from the US who are destined to end their journey elsewhere (and remember that a significant proportion of transit passengers at Heathrow are destined for another airport within the UK), then flight frequencies would be reduced, eroding the choice of available flights to potential inbound visitors and making the UK a less attractive destination for doing business or for a holiday.

By-passing Heathrow (and by-passing a stay in Britain)

As we have noted earlier, the Open Skies Agreement is between the EU and the US, meaning that it is not just at Heathrow where there are new route opportunities. Until we get the results of a VisitBritain sponsored question that was included in the International Passenger Survey in 2007 we do not have solid data on the proportion of inbound visitors to the UK who opt to visit multiple destinations on a single trip, but clearly large numbers of long-haul visitors to Britain bolt on other European destinations to build a multi-stop European itinerary.

Heathrow has two runways which are operating at near capacity (unless the Government agrees to permit 'multi-mode' operation, whereby planes will be able to land and take off from both runways as opposed to the current regime of one runway for departing aircraft and the other for arrivals). Contrast this with the situation across the English Channel, where

Amsterdam Schiphol has five operational runways, Paris Charles de Gaulle four and Frankfurt three.

It is possible that airlines unable to find slots at a congested Heathrow will opt to increase the number of US destinations that are linked to these other European hubs, and as we have noted, there is every possibility that US airlines will be able to use their planes on ‘domestic’ EU routes, opening up the prospect of Delta flying from Houston to Amsterdam and on to Munich.

If this scenario proves realistic inbound visitors to continental Europe who had in the past spent some time in the UK because the most convenient routing was via Heathrow will have the option of by-passing Britain altogether and flying direct to a destination across the Channel. The same is true for Europeans ultimately destined for a holiday in the USA who had previously enjoyed a day or two in the UK en route, who may now find that they can reach the USA directly from their home airport.

Linked to the earlier discussion on fares, it is worth noting that an American who in the past found that the best route from Phoenix to Milan was via London, and perhaps a couple of days sightseeing in Britain, would have paid $20 in Air Passenger Duty on the London-Milan leg of their trip and a further $80 on their return from London to Phoenix. It may well be the case that the Agreement will open up new routings enabling the American to reach Milan via Madrid or Munich and save his or herself $100 in airfares.

The story so far…

There will be changes in available routes on offer from ‘Day 1’ of the Agreement on 30th March 2008, but it would be a mistake to assume that the aviation market between the USA and the twenty-seven EU nations signed up to the Deal will reach anything close to a ‘steady state’ in the near future – it is likely to be many months, if not years, before we get a clear understanding of what ‘Open Skies’ truly means for inbound tourism to Britain.

Nevertheless, it is worth taking a brief look at a number of the changes that have already been announced by airlines, many of which help to illustrate the arguments set out earlier in this edition of *Foresight*:

- Newly introduced Aer Lingus routes mean that Americans wishing to visit Ireland can now fly directly to Dublin from San Francisco, Orlando and Washington Dulles, whereas in the past they may have routed via Britain
- Continental Airlines is to be the largest ‘new’ operator at Heathrow, in the short-term at least, with four flights per day, two from Houston and two from Newark, with the required slots costing the airline a hefty $209m (£105m)
- American Airlines is to shift its entire Gatwick operation to Heathrow, including flights from Dallas Fort Worth and Raleigh/Durham
- US Airways is to offer daily flights to Heathrow from Philadelphia
- KLM is to donate three of its Heathrow slot pairs to Northwest Airlines so that Northwest can take advantage of ‘Open Skies’ by operating daily flights to Heathrow from Minneapolis, Detroit and Seattle - KLM is to drop one daily Rotterdam to Heathrow flight from its schedule and switch two flights from Eindhoven to London City
- Air France has announced that it is to cut four flights per day from Paris Charles de Gaulle to Heathrow, citing competition from Eurostar as the primary cause, but the slots are to be

used by SkyTeam Alliance member Delta, operating two flights per day from New York JFK and one from Atlanta, with Air France operating a daily Los Angeles to Heathrow rotation
- British Airways is shifting some of its US to Gatwick flights to Heathrow, including its daily flight from Dallas Fort Worth and double-daily rotation from Houston
- British Airways is also to increase frequencies to Heathrow from New York JFK, Seattle and Washington Dulles
- Demonstrating that the Agreement will increase competition on routes operating between mainland Europe and the US, British Airways is setting up a subsidiary airline called OpenSkies in order to fly (business class only aircraft) between New York and both Brussels and Paris, with plans to serve a number of other key European cities in the coming years
- Financially troubled Alitalia has sold three of its fifteen daily pairs of slots at Heathrow for the reported sum of $132m (about £65m), but it is unclear whether the new owner of these slots will be using them to offer flights from the USA
- Although not stating which airline(s) they may have been acquired from British Airways recently announced that it has gained seven additional slot pairs at Heathrow over the nine months to end December 2007, taking the airline's slot share at the airport to 41%
- bmi (Heathrow's second largest airline) says it will hold fire until 2009 before deciding on its future route network into Heathrow originating from US cities, as it works to absorb BMED (a former BA franchise partner) into its Heathrow operation, but it is a near certainty that the airline will introduce routes from the US as soon as is practical

Ongoing negotiations

In theory the Agreement that comes into force at the end of March 2008 is just the first phase of a wider agreement that should eventually allow EU airlines the same freedom to enter the domestic US market that US airlines now enjoy within the intra-EU aviation market, and allow EU airlines to part-own US carriers. A timetable has been set down for future negotiations, and the EU has the right to deny US airlines their new found freedoms if a full agreement cannot be reached by 2010.

However, the forthcoming US Presidential elections and a change of EU Commission in 2008 and 2009 respectively may stall negotiations. A number of airlines, including Virgin Atlantic and British Airways, have made clear their belief that should negotiations stall the current Agreement should be withdrawn.

Not alone

Over the past few months the UK Government has also signed an 'Open Skies' agreement with Singapore, opening up the possibility that the national carrier, Singapore Airlines, will soon be operating its double-deck Airbus A380 aircraft not just from Singapore to Heathrow, but from cities in North America too. The US authorities have also signed a deal with Australia which looks set to increase competition on routes across the Pacific.

Lessons from history certainly suggest that when anti-competitive restrictions on air travel are rolled back, as they have been within the 'domestic' EU aviation market, consumer choice benefits and airfares decline. The EU/US Open Skies Agreement will open a new chapter in Trans-Atlantic aviation, and many inbound visitors to Britain from the USA will doubtless see lower fares and a greater choice of flights – but the 'net impact' on UK tourism will take some time to emerge and it may well not be as uniformly positive as some analysts anticipate.

Download earlier editions of FORESIGHT: www.visitbritain.com/research

		Market Focus	Issue of the Month
Issue 1	November 2003	USA, Canada and Mexico	Implications of an ageing population in Britain
Issue 2	December 2003	France, Italy, Portugal and Spain	Airport capacity in Britain
Issue 3	January 2004	Poland, Russia, China and South Korea	Visits to Britain by British Nationals living overseas
Issue 4	February 2004	Britain	School holidays and their impact on seasonal spread
Issue 5	March 2004	Australia and New Zealand	West Nile Virus
Issue 6	April 2004	The EU Accession States	
Issue 7	May 2004	South Africa, Nigeria, Kenya and Ghana	The Internet Part 1: Consumers
Issue 8	June 2004	India and Pakistan	The Internet Part 2: Businesses
Issue 9	July 2004	Belgium, Netherlands, Luxembourg and Ireland	Trends in Cross-Channel Travel Behaviour
Issue 10	August 2004	Japan, Hong Kong, Philippines and Taiwan	Cost of visiting Britain compared with other destinations
Issue 11	September 2004	Brazil, Argentina, Chile and Venezuela	What might climate change mean for tourism in Britain
Issue 12	October 2004	Norway, Sweden, Denmark and Finland	London's Olympic Bid – implications for British Tourism
Issue 13	November 2004	Britain	Smoking in public places
Issue 14	December 2004	UAE, Saudi Arabia, Kuwait and Iran	Outlook for inbound tourism to Britain in 2005
Issue 15	January 2005	Germany, Austria and Switzerland	Inbound tourism and the value of Sterling
Issue 16	February 2005	Malaysia, Thailand and Singapore	Britain's ethnic diversity
Issue 17	March 2005	Greece, Romania, Bulgaria and Croatia	Britain's transport infrastructure
Issue 18	April 2005	Israel, Egypt and Turkey	Foreign Direct Investment & inbound business tourism
Issue 19	May 2005	Poland, Czech Republic and Hungary	Inbound study visits
Issue 20	June 2005	USA, Canada and Mexico	Low-cost Airlines
Issue 21	July 2005	France, Italy, Spain and Portugal	Weddings, Stag Weekends and Hen Weekends
Issue 22	August 2005	Latvia, Lithuania, Estonia, Ukraine and Belarus	The Day Visit Market
Issue 23	September 2005	Russia and China	Quality
Issue 24	October 2005	Australia, New Zealand and South Africa	Daylight Saving
Issue 25	November 2005	India, Sri Lanka and Bangladesh	Outlook for Inbound Tourism in 2006
Issue 26	December 2005	Twenty-five years of Inbound Tourism	
Issue 27	January 2006	Benelux and Ireland	Tourism Satellite Accounts
Issue 28	February 2006	Japan, South Korea and Hong Kong	Tourism and the Disability Discrimination Act
Issue 29	March 2006	Brazil, Argentina and the Caribbean	Tourism and the National Lottery
Issue 30	April 2006	Nordic region and Iceland	Next generation aircraft
Issue 31	May 2006	Central Europe	The cruise line boom
Issue 32	June 2006	UAE, Kuwait, Bahrain and Oman	The power of football
Issue 33	July 2006	North Africa, Malta and Cyprus	Wind Farms and the Visitor Economy
Issue 34	August 2006	Inbound tourism - the global context	
Issue 35	September 2006	Singapore, Malaysia and Thailand	International tourism balance of payments deficit
Issue 36	October 2006	Greece, Turkey, Bulgaria and Romania	Inbound visitor decision lead times
Issue 37	November 2006	Inbound visits by the over 55's	Seasonality
Issue 38	December 2006	Outlook for Inbound Tourism in 2007	
Issue 39	January 2007	USA and Canada	Second homes
Issue 40	February 2007	Ferry passenger visitors	Accommodation choices
Issue 41	March 2007	What will shape tourism in the next decade?	
Issue 42	April 2007	The value of tourism in the UK	Holiday activity perceptions (Part 1)
Issue 43	May 2007	India and Japan	Holiday activity perceptions (Part 2)
Issue 44	June 2007	Inbound holiday visitors	The role of nature and wildlife in UK tourism
Issue 45	July 2007	The changing face of overnight domestic tourism	
Issue 46	August 2007	Inbound visitors using the Channel Tunnel	The impact of the Channel Tunnel Rail Link
Issue 47	September 2007	Inbound visitors aged 16-24	Climate change and what it might mean for UK tourism
Issue 48	October 2007	Special edition: Inbound visitors' travel group composition and 'activity mix	
Issue 49	November 2007	Poland, Czech Republic and Hungary	The Credit Crunch
Issue 50	December 2007	Outlook for Inbound Tourism in 2008	
Issue 51	January 2008	Inbound 1-3 night visits	The British Weather
Issue 52	February 2008	Lesser known Asian markets	Heathrow Terminal 5

[1] Data from International Passenger Survey has been made available by the Office for National Statistics and has been used by permission. The ONS do not bear any responsibility for the analysis or interpretation of the data reported here. Crown Copyright 2007. Source: ONS