FORESIGHT

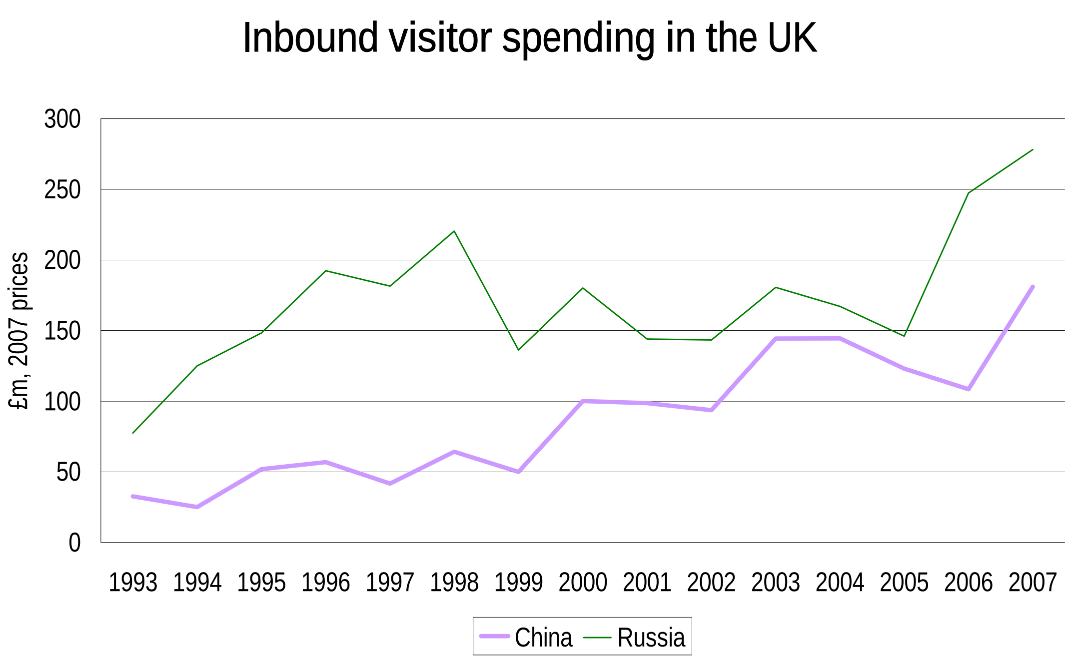
Issue 58 August 2008

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' covers Russia and China, two of the world's most important emerging source markets for international tourism. 'Issue of the Month' marks the fact that it is now just four years before London hosts the Summer Olympic and Paralympic Games in 2012 by examining the potential tourism benefits on offer, and how recent host cities of major sporting events have performed in attracting and retaining higher tourism volumes.

Market Focus – Russia and China

There is a certain edge to political relations between the UK and both Russia and China at present, but this has not prevented 2007 from being a strong year in terms of inbound tourism to Britain from both of these markets. Provisional International Passenger Survey data[1] indicates that Britain welcomed 226,000 visitors from Russia, slightly down on 2006, and a record 144,000 visits from China.

Both markets generate healthy average spend per visit (typically over £1,200), leading to total spending by visitors from Russia at £278m and from China of £181m. The following chart shows that there has been steady growth in spending (in real terms) from both markets over the longer-term, meaning that they now account for 3% of inbound visitor spending in the UK.



Wealth

According to the latest edition of the Merrill Lynch and Capgemini 'Wealth Report' China was home to 415,000 'high net worth individuals' (that is someone with investable assets of more than US$1 million) in 2007, an increase of 20% on 2006. This means that 4% of the world's 10.1 million 'millionaires' now reside in China. Growth in Russia was 14% in 2007, taking the nation's tally of high net worth individuals up to 136,000 (by comparison, the UK is home to 495,000 high net worth individuals). Clearly some of the growth can be pinned on a weakening US dollar, but by-and-large the story is one of rapid expansion in the number of 'super rich' in both Russia and China.

The Centre for Economic and Business Research recently forecast that the Chinese economy may see a sharp slowdown in growth, from around 11% this year to 7.5% in 2009. Not only will the investment boom surrounding the Beijing Olympic and Paralympic Games have come to an end, but if the US and European economies are, at best, growing well below their trend rate, demand for Chinese exports will falter.

As for the Russian economy both the World Bank and the IMF believe that the economy is overheating leading to a doubling in the rate of inflation over the past year. Demand from Russian consumers is rising rapidly and industry is running near full capacity, all of which means that wages are growing faster than productivity. A further concern is the rapidly rising cost of food imports due to the global rise in commodity prices, and although Russia has benefited from the high price it is achieving from its energy exports the economy is still over-dependent on this sector, indeed, Russia is the world's largest exporter of gas and second-largest producer of oil according to a recent Merrill Lynch report.

Chinese tourism booms

China is a major destination for international tourism, with the provisional United Nations World Tourism Organisation 'league tables' for 2007 revealing that China welcomed 54.7 million inbound visitors (including those from Hong Kong, Macau and Taiwan) in 2007, making it the fourth most visited destination worldwide. China earned $41.9bn from international tourism, putting the country in 5th place in the international tourism receipts rankings, now only $0.8bn behind Italy in fourth place.

Provisional UNWTO figures for 2007 indicate that outbound tourism expenditure from China reached US$29.8bn, pushing China up to fifth spot in the outbound tourism expenditure rankings, some two places ahead of Japan which had held this position in 2006. Although now an extremely significant generator of outbound tourism expenditure it is worth remembering that 1.3 billion Chinese still spent less than half that of 60 million Britons on outbound tourism last year.

There are relatively few parts of the world that remain 'off limits' to Chinese 'group leisure travel', with the USA entering the family of countries to which China has granted 'Approved Destination Status' as of June 2008. However, it is worth emphasising that only around one-in-eight outbound trips from China are to a long-haul (beyond Asia) destinations.

The domestic tourism market in China is huge, with the UNWTO estimating that it is set to double by 2020. The latest detailed figures on domestic tourism published by the China National Tourist Administration cover data for 2007, a year in which an estimated 1.61 billion trips were taken, representing a 15.5% rise on 2006. Of note is the fact that urban residents took 135 domestic tourism trips per 100 persons whereas rural residents took just 76 such trips per 100 persons. More stark still is the contrast between the average expenditure per capita on domestic tourism trips between those living in cities versus those in the countryside, with a ratio of more than 3 to 1.

The figures for Russia are not quite in the same league as those for China, but nonetheless are worthy of mention; more than 20 million international tourists visited Russia in 2006 and citizens of the Russian Federation are the 9th most important source market for international tourism expenditure according to United Nations World Tourism Organisation figures for 2007, spending US$22.3bn. The number of domestic overnight stays in all forms of accommodation establishments has increased from 147 million in 2002 to 172 million in 2006.

The difference between being Chinese and being a resident of China

We have seen many times in *Foresight* that it is helpful to dig beneath the surface of figures from the International Passenger Survey in order to explore the nationality of visitors from different countries.

The table tells us that only seven out of every ten visits to the UK in 2007 by someone living in China was by a Chinese national, with around a sixth of visits from China being made by British nationals. The table also reveals that more than 27,000 of the 130,000 Chinese nationals visiting the UK did not have China as their country of residence; not surprisingly Hong Kong accounted for the highest such figure.

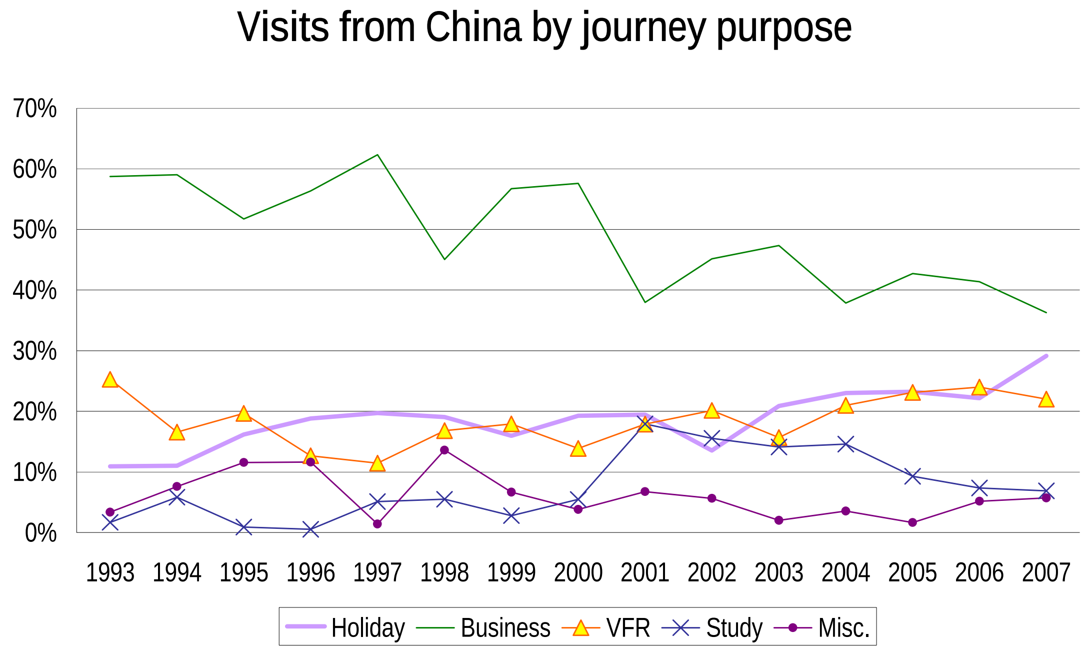
Visits by residents of China			Visits by Chinese nationals		
Nationality	Visits	%	Country of residence	Visits	%
Chinese	103,257	71%	China	103,257	79%
British	23,614	16%	Hong Kong	12,235	9%
Australian	5,010	3%	USA	3,760	3%
American	2,624	2%	Germany	2,598	2%
French	1,725	1%	Finland	1,323	1%
Total	144,498		Total	130,725	

Studying

Although not at the record levels seen a few years ago (possibly due to higher visa fees), British Universities remain a popular choice for Chinese students wishing to undertake degree courses outside China. The latest figures from UCAS show that in 2007 more than 5,000 Chinese students were accepted onto courses at UK universities, representing 10% of the total number of foreign students admitted during 2007.

Although not directly comparable with the figures for university entrants, IPS data on the number of visitors to the UK from China who have ‘study’ as their primary journey purpose support the contention that this market has decline slightly in recent years. The following chart shows the proportion of visits accounted for by each of the major journey purpose categories since 1993, and it is evident that whereas nearly one-fifth of visits in 2001 were ‘study’, this has now declined to just 7% of all visits.

The chart signals another trend too, namely that of the share of visits for ‘business’ to be gradually declining (this does not equate to an absolute decline in the number of business trips), as it becomes easier for Chinese citizens to visit Britain for a holiday thanks to the UK now having ‘Approved Destination Status’.



Visas

All Russian and Chinese nationals planning a trip to Britain for whatever purpose require a visa, and a 'biometric' application process has recently been rolled out, meaning that all members of the potential travel group are now required to visit a visa issuing centre in order to have a ten-digit finger print and digital photograph taken before discovering whether or not their application is successful.

Figures from UKvisas for 2006/7 reveal that the Chinese and Russians were the fourth and fifth most important nationalities measured in terms of application volumes. Out of 240,000 visa applications received from the Russian Federation and CIS countries in 2006/7 224,000 were issued, with a refusal rate of 5% - with the equivalent refusal rate for applications made in China being fractionally higher.

Visas have been in the news not only in the UK, but in Russia and China too over recent weeks, with the Russian authorities making special arrangements for the European Champions League final between Manchester United and Chelsea that took place in Moscow, and the British government showing equal flexibility in allowing fans of Zenit St Petersburg with tickets for the UEFA Cup Final in Manchester to be issued with free visas.

More recently the media has been focussing on China's tougher visa rules implemented ahead of the Olympic and Paralympic Games in Beijing. The new rules along with publicity over severe snowstorms earlier in the year and the devastating earthquake in the south west of the country has resulted in the number of international visitors to Beijing showing a marked year-on-year decline during May and June. However, as we will see in 'Issue of the Month', the Chinese authorities fully expect to start reaping the tourism reward of hosting the Games over the next few weeks.

Issue of the Month – The Olympic and Paralympic Games

It was back in October 2004 that *Foresight* considered London's 'Olympic bid', nine months prior to the announcement in Singapore on 6th July 2005 that London had succeeded in fighting off the challenge of the other candidate cities, including Paris, to be awarded the prize of hosting the Summer 2012 Olympic and Paralympic Games.

The London 2012 Games will open on 27th July 2012, with the closing ceremony sixteen days later on 12th August, followed by the Paralympic Games between 29th August and 9th September. Prior to this London and Britain will play host to the Cultural Olympiad, innumerable business events and countless sporting activity in preparation for the Games, all of which will help to boost the volume and value of both domestic and inbound tourism. This month we look at the scale of opportunity on offer to British tourism, and analyse evidence from cities that have hosted mega sporting events in recent years.

The London Games – facts and figures

The London 2012 Olympic and Paralympic Games will see 14,700 athletes competing in 26 Olympic and 22 Paralympic sports, overseen by 6,000 Olympic officials, cheered on by around 9.2 million ticket holders (and countless others watching events taking place along public highways), reported on by 20,000 press and media and watched by a potential global television audience of a staggering 4 billion.

Events will not only take place in many different London venues (including the Olympic Park, the O2, Greenwich, Wimbledon, Lords Cricket Ground and Hyde Park) but additionally at locations across Britain; Weald Country Park, Broxbourne, Eton Dorney, Weymouth and Portland, Hampden Park, the Millennium Stadium, Old Trafford, St James' Park and Villa Park, meaning that Games events will occur in no fewer than 34 separate venues.

The Olympic Delivery Authority is aiming for 100% of spectators to arrive at the Olympic Park venue by public transport, with all ticket-holders being entitled to free public transport within London on the day of the event. Stratford Regional, Stratford International and West Ham stations will act as 'gateways' to the Games, served by some 12 separate railway lines.

London 2012 - what is the scale of benefit for British tourism?

An Oxford Economics report commissioned for Visit London and VisitBritain in 2007 quantifies the potential contribution of the 2012 Olympic and Paralympic Games to UK tourism over the period 2007 to 2017, through a comprehensive analysis of previous mega sporting events (including Olympic Games) held in Europe in the last fifteen years. These events were organised in already-mature tourism economies, providing a more robust comparison for the London/UK case than Olympic Games that took place in other continents that were, at the time, developing their tourism potential.

Results were obtained for a central-case scenario and for two alternatives scenarios reflecting 'low' and 'high' figures. Under the central-case scenario, the Games are forecast to generate tourism gains totalling £2.34bn (at 2006 prices) over the period 2007-17 for the UK as a whole, of which £1.85bn is for London.

Once allowances for displacement effects are made (people leaving or avoiding London/UK because of the Games), the contribution is still £2.09bn for the UK, including £1.47bn for London (meaning that 30% of the benefits are generated outside London).

Within these figures, a legacy effect for the post-Games period (2013-17) worth £1.27bn is forecast for the UK, nearly a third of which (£400m) falls outside London. These gains are generated largely by higher numbers of visitors from emerging markets for UK tourism (primarily China, India and Russia), who decide to visit London or Britain as a consequence of the media exposure and publicity associated with the Games.

The figures assume a number marketing and planning practices based on successful events are implemented in London and Britain, emphasising the need for investment and planning to make the London Games a success.

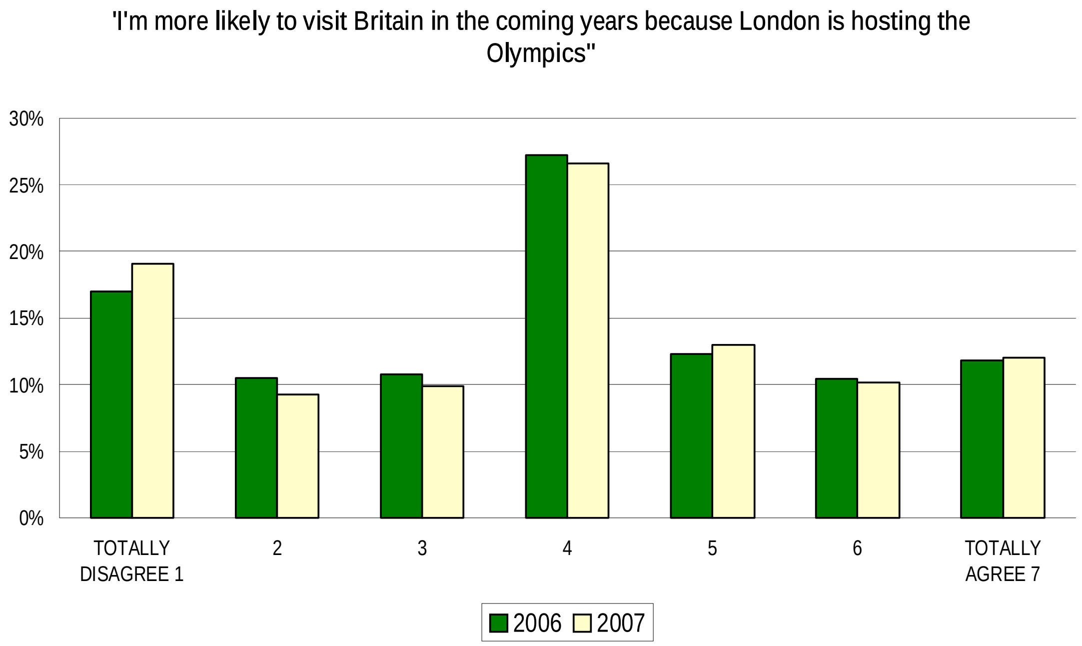
An example of where action is already being taken to ensure the maximum benefits can be achieved relates to ongoing work being undertaken by VisitBritain and the London Organising Committee of the Olympic Games (LOCOG) to develop a Pre-Games Training Camp Guide. The on-line guide, which will be launched during the Beijing Games, is being offered to pre-Games training camp venues being offered to Olympic and Paralympic national teams in the build up to the 2012 Games.

The report highlights the fact that it is not only holiday tourism that is set to benefit, with over 20% of additional tourism spending expected to come courtesy of business tourism. This estimate may well be on the conservative side, as business tourism will benefit in many different ways, before, during and after the Games, but in summer 2012 London will be host the world's biggest convention and incentive trip with business people and decision makers from every corner of the globe in one place.

Attracting new visitors

What is the evidence to suggest that much of the post-Games tourism legacy will come from 'emerging markets'? One pointer as to who is more likely to visit London or Britain in the coming years thanks to the fact that the Olympic and Paralympic Games will be held in London in 2012 comes from a VisitBritain sponsored question included the Nations Brand Index Survey.

The following chart reveals that a similar proportion of respondents said they were more likely to visit Britain in the coming years because of the Olympic Games in 2006 and 2007. Of particular note is the fact that respondents most likely to agree with the statement included those in China, India, Mexico, Malaysia and South Korea (vital new markets set to deliver significant outbound growth in the coming decade) whereas respondents in more mature markets such as Norway, Netherlands and Switzerland had a higher tendency to disagree with the statement. Results from the 2008 GfK Nations Brand Index Survey are likely to show a similar picture to that in earlier years, with fieldwork having been undertaken ahead of the Beijing Games, at the end of which a multi-billion television audience will witness London take hold of the Olympic Flag.



Beijing Olympic and Paralympic Games

The Beijing Games will open on 8th August 2008 with the closing ceremony on 24th August. The handover ceremony from Beijing to London will take place at around 2.30pm UK time, followed by the Paralympic Games which will run between 6th and 17th September.

According to the International Olympic Committee Beijing will play host to half a million international visitors during the course of the Games, but this is a mere fraction of the expected 2.4 million domestic visitors to the city over the same time period.

China fully expects to be the world's top international tourism destination by 2014 and sees hosting the Beijing Games as a key vehicle for delivering this ambition. According to provisional 2007 figures released by the United Nations World Tourism Organisation China is the world's fourth most visited destination with 54.7 million international tourists and the fifth highest earner from international tourism, with receipts totalling $41.9bn, just $800m behind Italy in fourth place.

The Beijing Games represent the firing of the starting pistol for London and Britain as host city and nation for the upcoming four-year Olympiad. In addition to gaining an understanding of Games-time operations from a host destination perspective a huge effort will be undertaken during the Games to ensure that opportunities are fully grasped, with VisitBritain activity falling in to a number of distinct strands:

- the running of two programmes, one during the Olympic Games and the other during the Paralympic Games, for representatives from the nations and regions to experience the Games and showcase their sports facilities and venues to National Olympic Committees (NOCs) and National Paralympic Committees (NPCs) at two events
- the running of a targeted relationship-building programme in partnership with Visit London focussing on all the key Olympic stakeholders who will be in Beijing during the Games, including members of the Olympic Family, sponsors, broadcasters and media from key markets

- supporting London's presence at the Beijing Games and providing a key contribution towards the Handover celebrations, the point at which Britain needs to get the maximum attention from global coverage of the event
- in co-operation with a range of public diplomacy partners promoting London and Britain as a first class destination for investment, education, business and travel; and
- building the image and reputation of Britain in China, one of the world's most important emerging source markets for international tourism

The moment on 24th August at which the Olympic flag is handed from Beijing to London will be marked not just in Beijing but back in Britain too. Among the celebratory events announced by LOCOG is a free party for 40,000 people on The Mall; the 'VISA London 2012 party' will feature top bands and acts, Olympians and special guest stars.

Besides this showpiece event people are being invited to celebrate across the UK as the Olympic Flag is handed over. Big screens at 'Live Sites' across the country will carry Games-time action and the Closing ceremony of the Beijing Games. Local authorities are being offered a specially designed flag to mark the moment, inviting local sports personalities and community heroes to raise the flag.

London 2012 - 'more than four weeks of sport'

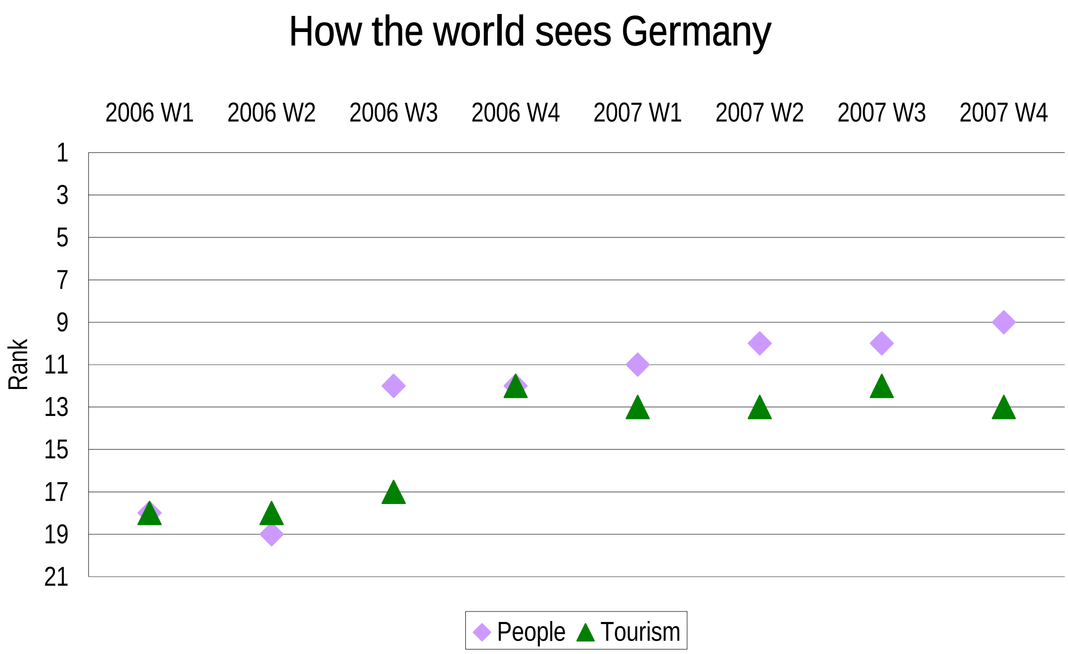
Britain's Cultural Olympiad will be launched with events right across the country on the weekend of 26-28 September, the aims of which will be to promote the start of four years of cultural celebrations, announce upcoming large-scale creative projects and to begin a campaign to ensure that the public is fully aware of the Cultural Olympiad.

It is very much the case that all of the 'nations and regions' of the United Kingdom are set to benefit from the Cultural Olympiad, with hundreds of events (big and small) planned across the country throughout the four year period. A number of major cultural projects featured in London's Bid included 'Film and Video Nation', 'World Cultural Festival' and 'Festival of Carnivals'. The June 2008 edition of *Foresight* explored the vital role played by cultural attractions and activities in underpinning British tourism, and the Cultural Olympiad will enable many such venues to reach new audiences.

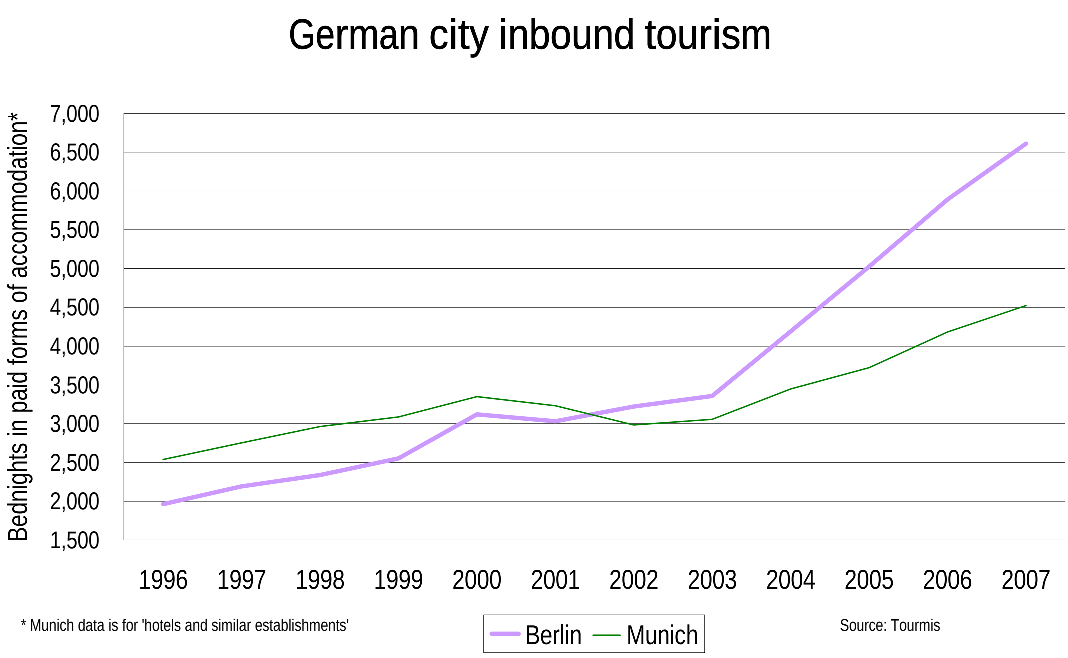
Evidence: 2006 FIFA World Cup

The 2006 FIFA World Cup was held across 12 German cities and is estimated to have attracted two million visitors to the country, but perhaps more importantly research conducted by the German Tourist Board demonstrates that 9 out of 10 visitors found Germany to have exceeded their expectations and would recommend the destination to friends and relatives.

Germany ran a very successful 'Nationwide Service and Friendliness' campaign to enhance the image of Germany among visitors and to ensure that a lasting legacy would be secured in terms of the quality of welcome and improved service standards. Evidence from the Anholt-GMI Nations Brand Index would certainly tend to indicate that Germany has succeeded in enhancing its global image. On both the 'people' and 'tourism' measures Germany was being ranked by a global on-line panel in the high teens (out of about three dozen countries), whereas by the end of 2007 German 'people' were achieving a top ten rank, and as a potential tourism destination Germany was being ranked in the low teens.

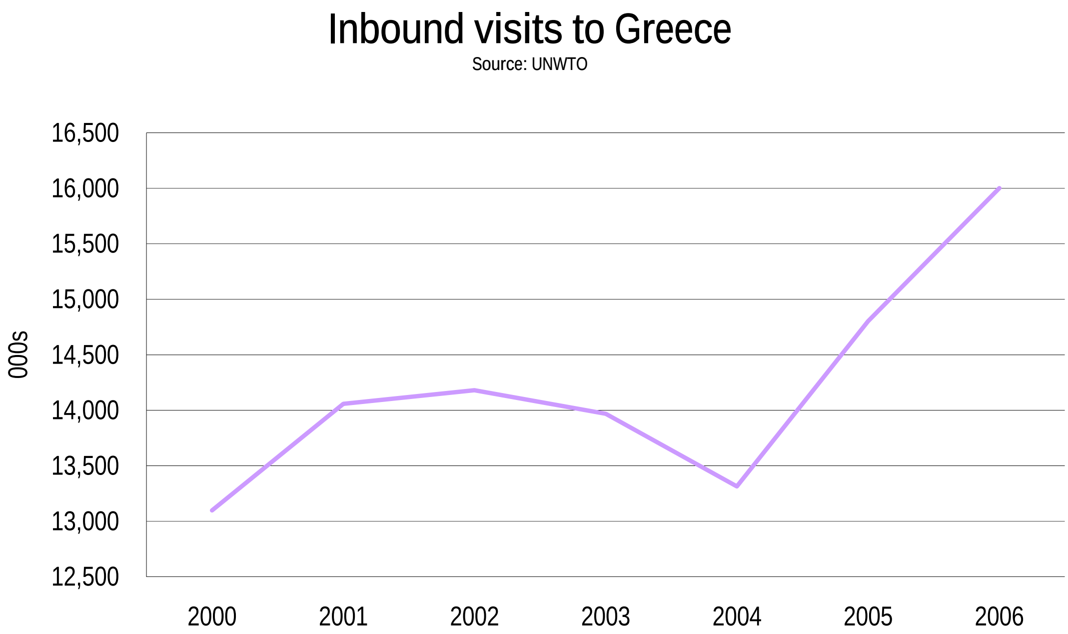


The Nations Brand Index is all about perceptions, but it is apparent from the following chart that key German cities have enjoyed a sustained uplift in inbound visitor bednights since hosting the tournament in the summer of 2006.



Evidence: Athens Summer Olympic and Paralympic Games 2004

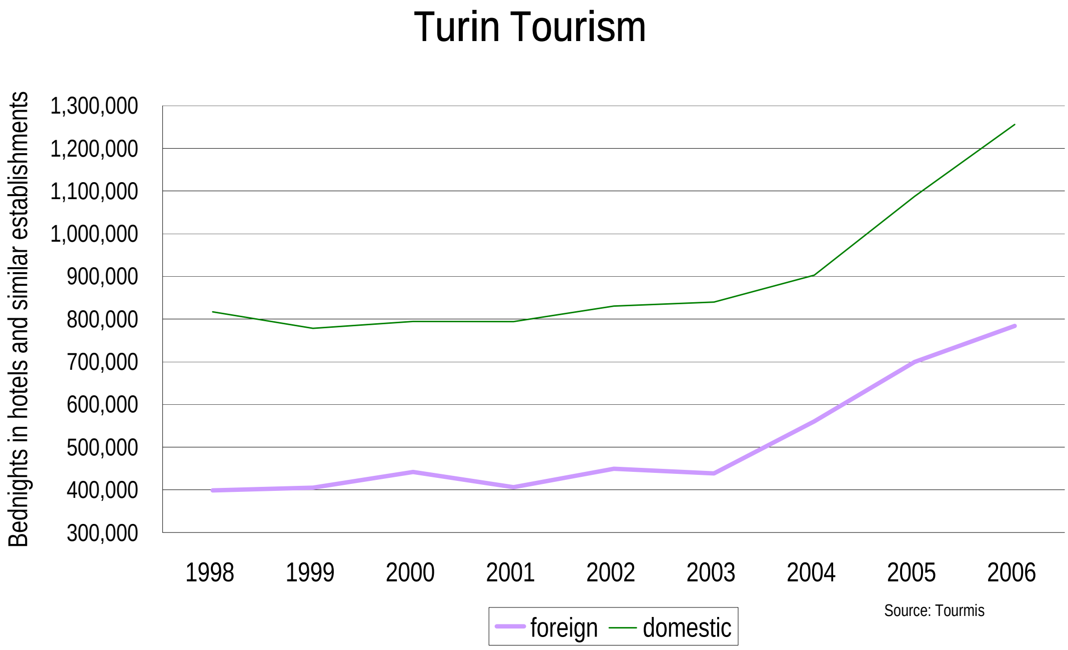
There is limited data available to analyse the impact of the Games on inbound tourism to Athens, but the following chart highlights the fact that although Greece witnessed a decline in the number of inbound visitors during 2004 itself, there has been significant growth in the proceeding years (figures for 2007 are not yet available and may be impacted by the forest fires that swept across parts of Greece last summer).



Hard statistics don't tell the entire story of course, with Athens having benefited in a myriad of different ways thanks to hosting the Games; the skills of tourism sector workers have been developed, hotels enjoy improved occupancy rates, better seasonal spread has been achieved and the overall 'quality of life' for both Athenians and visitors alike has been considerably enhanced courtesy of infrastructural investment in new railways, public spaces and transforming the Athens 'seafront' into a tourism asset. This investment has delivered better air quality, a greater sense of civic pride and greater diversity of tourism product on offer.

Evidence: Turin Winter Olympic and Paralympic Games 2006

The Turin Winter Games were held in early 2006, and overall Italy welcomed 13% more international visitors that year than in 2005, with earnings from international tourism jumping almost 8% in US Dollar terms. The Games enabled Turin to promote itself as a 'city of culture, tourism, commerce, education and sports', with very tangible benefits in terms of accommodation stock; 103 new hotels, 11,017 new guest bedspaces and four new 5 star hotels. As yet there is no firm data for 2007, but the following chart indicates that Turin has benefited from hosting the Games in terms of visitor bednights in hotels and similar establishments (both foreign and domestic).



In addition to ensuring that Turin remains firmly on the 'tourist map' through work with travel editors, the city is striving to be seen as a centre for regional cuisine and a top-class destination for international students, with the Olympic village set to become student accommodation. Turin can point to the Olympics as being a catalyst for winning the prize of hosting numerous 'events', for example 'World Books Capital', the chess Olympics and fencing tournaments.

Evidence: Melbourne Commonwealth Games 2006

The most recent Commonwealth Games took place between 15th and 26th March 2006 in the Australian city of Melbourne. The City of Melbourne undertook a wide-ranging series of research projects to understand the impact of hosting the Games, including a visitor survey geared at capturing the views and perceptions of international and inter-state visitors. The focus was on presentation, access, vitality and safety of the city, the friendliness/helpfulness of the people of Melbourne and the likelihood that visitors would leave the city as ambassadors for Melbourne.

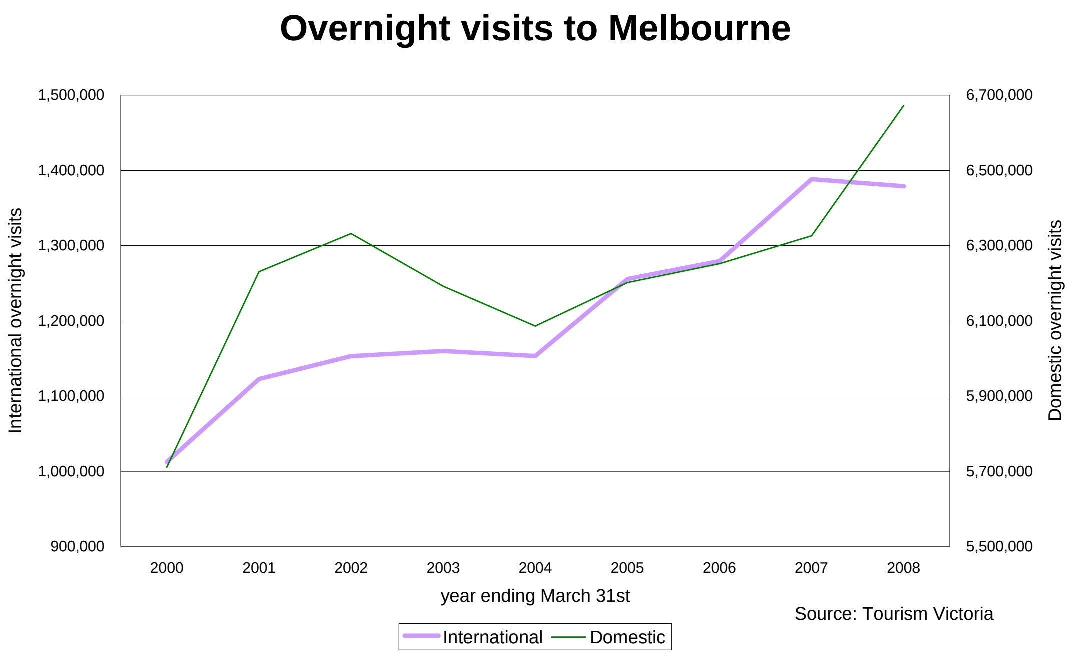
The survey recorded very positive results, including:

96% said Melbourne people were friendly and helpful	98% said the city was well-presented
96% said the city had beautiful parks	97% said the city is vibrant and lively
92% said the city was easy to get around as a pedestrian	95% said they felt safe

Research was also conducted among 500 local residents to ascertain community perceptions towards the Games, and once again the findings were overwhelmingly upbeat, including:

81% felt that the Games had left a positive legacy that would improve the quality of life for Melbourne residents
85% felt that Melbourne's reputation as the events capital of Australia had been enhanced
86% felt that Melbourne's reputation as the sporting capital of Australia had been enhanced
80% thought there had been improvement to the city's appearance; 36% saying it had been a great improvement
84% believed Melbourne's profile within Australia had increased
79% felt that Melbourne's international profile had been boosted
80% believed there was an enhanced sense of Melbourne as a city of energy and vitality
73% felt their sense of pride in the city had grown as a result of the Games

In terms of hard evidence the following chart reveals that the number of overnight visits to Melbourne from foreign visitors and domestic visitors is now markedly higher than in the pre-Games period.



Challenges and opportunities

There are a number of challenges that British tourism faces if the enormous potential gains that hosting the Olympic and Paralympic Games offers is to be fully realised; the coverage that London and Britain receives across the globe, but particularly in 'new markets' such as China and India, must be fully utilised, the chance to put Britain on the radar for global youth (namely tomorrows' tourists) must be seized, some of the negative consumer perceptions about London and Britain must be challenged (in particular that relating to 'Welcome') and every effort must be made to ensure that Britain succeeds in winning many more events (both small and large, sporting and non-sporting) on the back of a hugely successful Games.

Initiatives already underway to ensure that the opportunities deliver tangible results go far beyond events earmarked for the Handover Ceremony on 24th August in Beijing. VisitBritain is working closely with Visit London to ensure that British tourism is a credible marketing partner for Olympic and Paralympic commercial sponsors and public diplomacy bodies; the VisitBritain events strategy, 'eventBritain', has been developed to help provide professional support to nations, regions and destinations bidding for international events throughout Britain, and a 'Welcome Charter' is being developed to help accelerate improvements in Britain's welcome with a view to guaranteeing visitors exceptional customer service and visitor experiences during the 2012 Games and beyond.

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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
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Issue 39	January 2007	USA and Canada	Second homes
Issue 40	February 2007	Ferry passenger visitors	Accommodation choices
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Issue 46	August 2007	Inbound visitors using the Channel Tunnel	The impact of the Channel Tunnel Rail Link
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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
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Issue 56	June 2008	The DCMS 'Taking Part' Survey	
Issue 57	July 2008	USA	Inbound visits to friends and relatives

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