

### **Outlook for Travel to Britain**

- The forecast is not very positive especially due to the cancellations that occurred in December for December-January. Lower outbound travel compared to previous year.

### **Britain in the News**

- The H1N1 (swine) flu news related to the UK reported during the summer ceased in Autumn and became more domestic focused, but it will have a high impact in Greeks' traveling habits.
- The anticipated strike of British Airways during the holiday season caused travellers to start cancelling their bookings for the Christmas period, to avoid losing any money.
- With the government reshuffle on 4 October and the appointment of the new Secretary of the Ministry of Culture & Tourism, the issue of the return of the Parthenon marbles was raised again.

### **General Market Mood**

- Economic crisis has had a heavy impact to Greek economy. GDP in Greece fell 0.4% during quarter 3. A technical recession was initially thought to have been avoided, with GDP estimated to have contracted in 2009Q1 only, but revisions to the data now show that Greece was in its fourth quarter of recession in Q3, with GDP standing 1.7% below the level of a year earlier. Prime Minister George Papandreou has revised up the forecast for the government deficit for 2009 to 12.7% of GDP. On 14 December, Papandreou announced plans to slash the deficit to 3% of GDP by 2013, including spending cuts, tax levies on bonuses and a crackdown on tax evasion. Athens has historically been slow to control its finances, but increased borrowing costs and rising pressure from Europe will force a period of fiscal restraint. With a narrow economic base and mounting debt burden, Greece is likely to be slow to emerge from recession.

### **Consumer Behaviour**

- As flu has increased domestically, people do not make advance plans for travelling, due to the fear they may be sick at the time of travelling.
- Levels of outbound travel have fallen.

### **Media Matters**

- Nothing to report for October to December.

### **Routes and Fares**

- Aegean Airlines opened new route Athens-Heathrow with 2 daily flights.
- Aegean Airlines has announced its cooperation with Bmi to serve additional destinations in UK; Edinburgh, Glasgow, Manchester, Dublin & Belfast. Passengers obtain a ticket and boarding pass when they depart and they transfer plane to reach their final destination.
- Aegean Airlines (Athens-Heathrow), return ticket for 11-13 January (morning flights): €336.43, incl. of taxes.
- easyJet (Athens-Gatwick), return ticket for 11-13 January (noon and morning flights): €208.56, incl. of taxes.
- Olympic Airways (Athens-Heathrow), return ticket for 11-13 January (morning and noon flights): €236.66, incl. of taxes.

## Business Tourism

- Nothing to report for October to December.

## Leisure Travel Trade

- Human Holidays, a local key tour operator reports that business is 40% down compared to last year, as a result of the economic situation, H1N1 (swine) flu outbreak (people are reluctant to make plans in advance or travel, in case they become sick before they travel).
- The proposed strike of British Airways Cabin Crew from 22 December has damaged the existing bookings for the Christmas period, resulting to increased number of cancellations.

## Competitor Activity

- VisitGreece radio spot on Kiss FM. Theme: 'This fall we stay in Greece'.
- A VisitCyprus advertisement was included in British Airways magazine available on board on Athens-London-Athens route.
- A VisitGreece advertisement was included in British Airways magazine available on board on Athens-London-Athens route.

## VisitBritain Activity Update

- Press trip organized in quarter 3 related to the launch of the Sherlock Holmes film and linked to ad hoc itineraries.
- Press trip organize for Homecoming closing event.
- The FCO launched the 'See Britain through my eyes' campaign and the local Embassy invited VisitBritain and British Council to work in partnership with them. One project has been prepared to be submitted by Christmas, an additional project will be finalised in January.

## Upcoming activity

- VisitBritain Greece has partnered locally with Disney rep – Audio Visual Enterprises – for the promotion of the Christmas Carol movie launch on 24 December. Promotion will be made though 2 different cinema companies and VisitBritain Greece will offer 2 prizes (trips to UK).
- VisitBritain's partnership with Warner Brothers (local rep Village Films) for the promotion of the Sherlock Holmes movie launch on 14 January.
- Cities campaign – promoting 7 British cities in partnership with British Airways – will be launched on 18 January. Media plan is pending, subject to offers received from Mediacom Greece, Think Digital and Ogilvy (British Airways' media agency).
- Sales mission: Abbey Tours from Scotland has expressed interest in visiting Athens in February to set up one-to-one meetings with selected agents. VisitBritain Greece assisting in arranging the meetings and escorting the representatives.

## Who's in Town?

- Visit by the UK Astronomy spire team to Thessaloniki on 4 October.
- Official visit of 1st Sea Lord Admiral Stanhope on 1 November.
- Visit of delegation from London Stock Exchange for the promotion of the AIM market on 15 November.