

## Trends Update – Issue 111 (4 September 2009)

### Weather

- Met Office figures reveal that across the UK temperatures in August were above average for the time of year, sunshine amounts were close to average but rainfall totals were exceptionally above average

### Transport news

- OAG report that global airlines offered 0.2% more seat capacity this August than a year ago, the first year-on-year increase for a year
- IATA report that premium class air travel declined at an annual rate of 21.3% in June
- IATA estimate that globally airlines are losing up to \$1bn a month
- CAA figures indicate that the volume of schedule air passenger traffic to/from the UK in June was 5.7% down on a year ago
- SkyEurope files for bankruptcy and suspends all operations
- BA carried 1.7% fewer passengers in August than a year earlier with the sharpest drop on routes to/from Asia Pacific which saw 13.1% fewer passengers; traffic to from the Americas was up 0.6% and that to/from Africa and the Middle East up 2.5%
- Ryanair announces that it will not operate any flights to Doncaster Sheffield Airport this winter
- Ryanair will not operate flights between Stansted and Newquay this winter
- easyJet to cease all flights to East Midlands airport and reduce the number of flights it operates to Luton by 20%
- From October Ryanair will switch nine out of the ten routes it operates to Manchester to other airports including Liverpool, Leeds Bradford and East Midlands
- Ryanair will fly twice-weekly from Bremen to Liverpool from October
- From end October Ryanair will fly to Edinburgh from Barcelona, Brussels, Gdansk and Oslo
- From October Aer Lingus will fly to Gatwick from Bucharest, Warsaw, Vilnius and Eindhoven
- From April 2010 bmibaby will operate two flights per week from Lourdes to Manchester
- From October Eastern Airways will operate flights from Bergen to both Aberdeen and Newcastle

### Domestic Economic News

- OECD expect the US and Eurozone to emerge from recession before the UK

### European Economic News

- The European Central Bank keeps Eurozone base rates at 1% but gives a slightly less pessimistic forecast for economic growth in the region; in 2009 the Eurozone economy is set to contract by between 4.4% and 3.8%, and in 2010 it is expected to grow at a rate somewhere between -0.5% and +0.9%
- Eurozone unemployment continues to increase, standing at 9.5% of the workforce in July

### US Economic News

- US manufacturing output grew in August for the first time in nineteen months

### Global Economic News

- Price of oil climbs back above \$70 a barrel
- Both the Hong Kong and Singapore economies emerge from recession in the second quarter of 2009
- Japan's economy emerges from recession in the second quarter of 2009
- The impact of recession in the US and outbreak of swine flu in April resulted in the Mexican economy contracting by 10.3% in the second quarter of 2009
- The Australian economy expanded by 0.6% in the three months to June 2009
- The Indian economy grew at an annual rate of 6.1% in the second quarter of the year, slightly ahead of expectations

### Tourism News

- Global Refund report that sales to inbound visitors reclaiming tax increased at an annual rate of 25% in July
- TRI Hospitality Consulting report that across ten leading European cities hotel room rates declined in July compared to a year earlier, but in six out of ten, including London, occupancy was up

# Factors contributing to tourism trends in Britain, September 2009

