

## Trends Update – Issue 20 (6 September 2005)

### Weather

- England and Wales enjoyed below average rainfall, close to average temperatures and well above average amounts of sunshine during August. In Scotland both rainfall and sunshine totals were close to average whereas temperatures were above average

### Transport and tour operator news

- Despite industrial action BA report revenue passenger kms down just 0.7% in August compared with 2004
- Sky Europe will connect Salzburg to Manchester and Poprad (Slovakia) to Stansted with twice weekly services from December
- Bulgaria Air will launch a twice weekly service from Sofia to Manchester from October
- From October Jet2 will operate four times a week from Cork to Newcastle
- Ryanair reduces its service to Newquay, but flybe announces that it is considering the viability of introducing a route from the London region to the Cornish airport
- bmi to open up a daily route from Brussels to Luton and from Munich to Edinburgh starting March 2006
- UKInbound report July visitor arrivals down 7.4% and forward bookings down 9.3% on July 2004
- Sales of off-peak One Day Travelcards in London are still running at around 20% below this time last year

### Domestic Economic News

- Sharp decline in UK consumer confidence in August
- Sterling is 2.7% cheaper than a year ago based on a basket of currencies reflecting the inbound visitor mix

### European Economic News

- German business confidence continues to improve

### US Economic News

- Hurricane Katrina may knock 1% off US GDP in both the 3<sup>rd</sup> and 4<sup>th</sup> quarters according to Global Insight as imports and exports are disrupted, the sheer scale of devastation and most importantly the disruption to the supply of oil and gas keeping energy prices high

### Global Economic News

- The United Nations Conference on Trade and Development warns of serious risks to the global economy due to unsustainable trade deficits and the increasing cost of oil

### Domestic Tourism News

- PKF figures for July show hotel room occupancy in London stood at 79.4%, down from 83.5% at the same time last year, with occupancy in the regions remaining fairly stable at 76.9% this July compared with 77.4% a year ago
- New figures show that the number of people over 85 years old in the UK increased to 1.1 million in 2004 (1.9% of the total population)

### Global Tourism News

- A poll by SITA and Airline Business magazine says 30% of all airline tickets are now e-tickets
- WHO says risk of human pandemic is "great" and "will persist": 3 Vietnamese civet cats die of avian flu, the first time the species contracts the virus. France orders 200 million protective masks and enough anti-viral drugs for the entire population

### Pictorial Summary of Prevailing Conditions for British Tourism

[http://vbnet/Images/Communications/pie%20060905\\_tcm17-8615.doc](http://vbnet/Images/Communications/pie%20060905_tcm17-8615.doc)

#### About "Trends Update"

Issued fortnightly TU highlights the latest facts, figures and trends that impact on tourism. TU doesn't cover the main tourism surveys or Market Intelligence Reports circulated separately by International/England Research and Overseas Operations.

Trends and Forecast (Tourism, Economic, Demographic)

<http://vbnet/Communications/PartnershipsPlanning/ForecastingTrends/ForecastingAndTrends.asp>

International Marketing Research:[http://vbnet/InternationalMarketing/international\\_research/default.asp](http://vbnet/InternationalMarketing/international_research/default.asp)

England Marketing Research:<http://vbnet/EnglandMarketing/EnglandResearch/default.asp>

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