

# Travel Business Analyst

## Markets + Marketing + Strategy

EUROPE • JULY 2009

### Market Monitor

Not all sources shown, for reasons of space; not shown are usually relevant principals. Percentage change unless noted otherwise. Months start from Sep 08.

- World Travel Industry Index: Mar -11-E; Feb -10.8-P; Jan -7.0; Dec -6.3; Nov -5.6; Oct -2.0; Sep -2.5. TBA.
- World airport passengers: Apr ttl -3.0, intl -1.8; Mar -8.3 -10.7; Feb -10.3 -11.3; Jan -6.2 -6.7; Dec -5.8 -5.7; Nov -7.8 -5.8; Oct -3.4 -1.4; Sep -4.2 -2.7. ACI.
- World air traffic (RPKs): May -9.3; Apr -3.1; Mar -11.1; Feb -10.1; Jan -5.6; Dec -4.6; Nov -4.6; Oct -1.3; Sep -2.9. IATA.
- World travel stocks index: May 48 (on 100); Apr 43; Mar 35; Feb 35; Jan 40; Dec 44; Nov 43; Oct 47; Sep 57. TBA.
- World visitor arrivals: Apr -2.3; Mar -13.3; Feb -10.3; Jan -7.8; Dec -2.3; Nov -3.0; Oct -0.8; Sep -2.8. WTO.
- Europe airlines international seat sales: Apr -2.5; Mar -9.4; Feb -9.8; Jan -5.9; Dec -4.0; Nov -5.4; Oct -1.6; Sep -1.6. AEA.
- Europe airport passengers: Apr ttl -4.5, intl -2.5; Mar -12.5 -13.2; Feb -13.8 -12.9; Jan -10.9 -8.9; Dec -7.8 -6.5; Nov -8.4 -6.4; Oct -4.2 -2.7; Sep -2.9 -2.0. ACI.
- Europe air traffic, RPKs: May -9.4; Apr -2.7; Mar -11.6; Feb -10.1; Jan -5.7; Dec -3.4; Nov -3.4; Oct +1.8; Sep -0.5. IATA.
- Europe hotel occupancy, pts: Apr -11.4; Mar -11.7; Feb -10.2; Jan -9.6p; Dec -5.8p; Nov -10.3p; Oct -4.3p; Sep -0.7. TBA.
- Europe travel stocks index: May 44 (on 100); Apr 41; Mar 33; Feb 35; Jan 39; Dec 43; Nov 42; Oct 42; Sep 50. TBA.
- Europe visitor arrivals: Apr -3.3; Mar -18.1; Feb -13.2; Jan -7.4; Dec -4.1; Nov -5.2; Oct -1.8; Sep -3.5. WTO.
- Air France-KLM seat sales: May ttl -7.8 Eur/dom -8.0; Apr -3.7 -4.7; Mar -9.8 -10.0; Feb -8.1 -9.5; Jan -6.1 -8.8; Dec +0.2 -0.4; Nov -5.2 -7.7; Oct +5.7 +3.7; Sep -1.5 -2.5.
- American Airlines seat sales: May -13.2; Apr -4.1; Mar -9.9; Feb -13.0; Jan -12.7; Dec -8.2; Nov -15.9; Oct -9.1; Sep -10.0.
- Amsterdam airport passengers: Apr -6.3; Mar -14.5; Feb -13.7; Jan -9.0; Dec -5.7; Nov -5.8; Oct -2.4; Sep -2.9.
- Austria visitor arrivals: Apr +42.4sic; Mar -29.5; Feb -5.8; Jan +12.8; Dec +3.4; Nov -1.1; Oct 7.3; Sep -2.2. Tourism.
- Berlin Tegel airport passengers: Mar -0.8; Feb -10.7; Jan -8.0; Dec -2.3; Nov -3.7; Oct +2.7; Sep +5.7. ACI.
- Berlin hotels: May occupancy -4.0pts, rate -14.9; Apr -3.5p -16.1; Mar -0.4p -4.7; Feb -4.7p -7.4; Jan -2.1p -1.5; Dec +1.7p -6.8; Nov -7.5p -4.6; Oct -3.5p +7.6; Sep -1.8p, +0.6. TRI.
- British Airways seat sales: May ttl -7.3 Eur/dom -7.8; Apr +1.3 +1.4; Mar -8.2 -8.7; Feb -10.1 -12.0; Jan -4.0 -6.6; Dec -4.5 -5.2; Nov -7.8 -9.3; Oct -5.6 -6.5; Sep -5.6 -5.9.
- Cathay Pacific RPKs Europe: May +8.2; Apr +8.1; Mar +3.4; Feb -3.5; Jan -0.8; Dec +3.1; Nov -1.3; Oct -5.7; Sep -6.8.
- Delta Airlines seat sales: May -7.5; Apr -7.3; Mar -11.5; Feb -11.4; Jan -5.1; Dec -1.1; Nov -7.5; Oct -4.8; Sep -4.6.
- Dubai airport passengers: Mar +0.1; Feb -0.2; Jan +6.1; Dec +4.8; Nov +6.3; Oct +10.8; Sep -4.6. ACI.
- France visitor arrivals: Feb -18.1; Jan -5.9; Oct -3.8; Sep -7.9. WTO.
- Frankfurt airport passengers: Mar -9.2; Feb -13.3; Jan -10.4; Dec -5.3; Nov -7.0; Oct -4.9; Sep -3.9. ACI.
- Germany visitor arrivals: Apr -8.1; Mar -7.5; Feb -9.9; Jan -9.0; Oct -1.2; Sep +1.4. WTO.
- Hawaii visitor arrivals: Mar -17.2; Feb -13.4; Jan -12.4; Dec -15.2; Nov -13.9; Oct -12.3; Sep -18.5. PATA.
- Italy visitor arrivals: Mar -6.3; Feb -3.3; Jan -6.5; Oct -1.8; Sep -3.1. WTO.
- Japan Airlines seat sales Europe: May -19.9; Apr -14.3; Mar -13.9; Feb -14.0; Jan -21.2; Dec -16.8; Nov -21.3; Oct -20.3; Sep -20.5.
- Jet Blue Airways seat sales: May +1.5; Apr +0.8; Mar -4.4; Feb -4.1; Jan -3.8; Dec +2.5; Nov +2.6; Oct +3.3; Sep +3.7.
- London airports international passengers: Apr Gatwick -3.1 Heathrow +3.0 Stansted -12.1; Mar -18.6 -7.7 -15.2; Feb -14.4 -9.0 -15.0; Jan -10.3 -1.7 -9.7; Dec

contd on p2

### Aviation

#### A glimmer?

Latest data indicates the decline for Europe's airlines may have reached its nadir. But there is no similar encouraging indication for the world's airlines:

Table 1

#### Percent growth in seats sold in Europe airlines\*, 2009

Region	YTD	May	Apr
Europe	-10.6	-9.1	-6.2
North Atlantic	-8.9	-9.0	-3.9
Europe-AsPac	-7.9	-10.3	-6.4
Longhaul	-7.1	-9.3	-3.1
International	-8.1	-8.4	-2.5
Total	-9.5	-8.7	-4.9

Notes: \*Members of AEA. Source: Association of European Airlines.

Table 2

#### Percent growth in air passenger traffic\*, 2009

Region	YTD	May	Apr
Asia Pacific	-11.5	-14.3	-8.6
Europe	-7.8	-9.4	-2.7
Middle East	6.0	9.5	11.2
North America	-9.4	-10.9	-4.2
World	-7.7	-9.3	-3.1

Notes: \*In revenue passenger kilometres. Source: International Air Transport Association.

• AEA. For Europe's main airlines, there are tiny signs of improvement - or, rather, one sign. Europe (domestic and within Europe) was more than one-point better in the latest month, see Table 1, than YTD. There must be a possibility that half-year figures will confirm this, with YTD growth matching the latest month.

In 'normal' times, this would hardly be considered an improvement, of course, but these are a long way from 'normal'.

Looking deeper, there are signs that traffic on the North Atlantic may also be about to reduce its fall - both May and YTD falls were touching 9%.

• For IATA member airlines the bad news is that many YTD-2009 figures look bad. Worse news is that latest-month figures are worse. IATA results for 2008 show Asia Pacific as the worst-performing region among the main ones.

Traffic for IATA's Europe-registered airlines fell 8%, see Table 2, matching the worldwide decline. The decline in North America, where the economic recession is supposed to be worst, is greater than Europe's, but not by much.

### World

#### Visitors down

Visitor arrivals fell 11% in the first quarter, see table, according to the WTO (World Tourism Organization). Europe, counting more than half the world total, fell more, by 13% in Q1, but after Q1 there were signs of

contd on p2

Main News...2; Market News...2; Crisis Market Monitor...1; Market Intelligence...1; ZERO...3; Extracts (Net Value or People-in-Travel)...5; Trends...11; Market Data Tables (Airline results; Air passenger traffic; Visitor arrivals; Resident departures; Hotel results; Airport traffic; Travel stock prices/indexes; Agency sales; GDS; Internet Sales; Channel tunnel; Economics)...6

-14.2 -2.0 -12.1; Nov -13.5 -4.3 -12.8; Oct -10.4 -3.7 -6.9; Sep -6.5 -3.7 -5.1. BAA.

- London hotels: May occupancy +1.4pts, rate -5.4; Apr 1.6p -11.8; Mar 0.2p -3.4; Feb -2.0p -8.0; Jan -3.3p -8.4; Dec +0.8p -3.2; Nov -5.4p -5.0; Oct -3.1p -1.3; Sep -4.2p -1.9. TRI.
- Lufthansa seat sales: May ttl -5.1 Eur/dom -3.1; Apr -6.1 -4.5; Mar -2.3 -1.9; Feb -10.5 -9.1; Jan -9.3 -7.6; Dec -3.7 -2.2; Nov -2.3 -3.5; Oct -1.4 -3.0; Sep +1.1 -0.4.
- Netherlands visitor arrivals: Mar -21.3; Feb -12.1; Jan -8.6; Dec -10; Nov -10; Oct -10; Sep -15. WTO.
- Paris CDG airport passengers: Mar -9.0; Feb -8.7; Jan -6.4; Dec -2.6; Nov -3.7; Oct +3.4; Sep -2.8. ACI.
- Paris hotels: May occupancy -5.8pts, rate -13.7; Apr -8.9p -11.9; Mar -7.4p -8.8; Feb -12.1p -13.0; Jan -3.5p -3.7; Dec -4.7p +1.0; Nov -9.4p +3.2; Oct -5.5p -12.1; Sep -9.4p -9.8. TRI.
- Rome FCO airport passengers: Mar -1.9; Feb -6.2; Jan -8.6; Dec -6.5; Nov -5.8; Oct +0.7; Sep +5.7. ACI.
- Ryanair seat sales: May +8.9; Apr +11.8; Mar +4.8; Feb +7.4; Jan +10.9; Dec +10.6; Nov +10.9; Oct +18.2; Sep +20.3.
- Southwest Airlines seat sales: May -8.3; Apr -1.5; Mar -5.2; Feb -9.9; Jan -9.7; Dec -3.1; Nov -10.7; Oct +0.4; Sep -8.1.
- Spain visitor arrivals: May -11.7; Apr -1.7; Mar -20.8; Feb -15.9; Jan -10.1; Dec -14.0; Nov -12.0; Oct -5.4; Sep -6.0. gov.
- Switzerland visitor arrivals: Apr -3.6; Mar -13.4; Feb -11.1; Jan -3.3; Nov -8.2; Oct -1.9; Sep -2.8. WTO.
- Turkey visitor arrivals: May -1.8; Apr +4.5; Mar -8.2; Feb +0.5; Jan -4.0; Nov 7.7; Oct 13; Sep 5.0. WTO.
- UK resident departures: Apr -9.0; Mar -20.0; Feb -21.3; Jan -14.3; Dec -9.2; Nov -0.1; Oct -9.2; Sep -7.0. gov.
- UK visitor arrivals: Apr -2.6; Mar -9.7; Feb -20.1; Jan -9.1; Dec -10.9; Nov -8.9; Oct +2.7; Sep -10.0. gov.
- United Airlines seat sales: May -16.2; Apr -13.1; Mar -13.8; Feb -16.0; Jan -11.7; Dec -9.2; Nov -17.8; Oct -9.4; Sep -7.9.
- US air international passengers: Feb -5.0; Jan -6.2; Dec -3.3; Nov -4.6; Oct -7.7; Sep -0.3. gov.
- US hotels occupancy: May -11.8; Apr -11.1; Mar -11.6; Feb -10.1; Jan -10.7; Dec -6.8; Nov -10.6; Oct -6.5; Sep -5.9. Smith.
- US hotel rooms planned: May -22.2; Apr -19.7; Jan -7.3; Mar -17.1; Feb -2.5; Dec -0.4; Nov -6.8. Smith.
- US resident departures: Nov -4.7; Oct -7.1; Sep -7.2. PATA.
- US travel agency sales: May -29.1; Apr -26.1; Mar -22.8; Feb -26.1; Jan -24.7; Dec -7.0; Nov -20.6; Oct -11.6; Sep +4.2. ARC.
- US visitor arrivals: Mar -19.9; Feb -11.6; Nov -8.8; Jan -9.1; Dec -7.1; Oct -2.0; Sep 0.0. PATA/WTO.

## Market Headlines

Full-year market results.

### Outbound

- Europe; visitor arrivals 488m +0.1%.
- France 2008; outbound spending \$40b +10%; visitor spending \$52b -5%; visitor arrivals 79m -3%.
- Germany 2008; outbound spending \$85b +2%; visitor spending \$37b +4%; visitor arrivals 25m +2%.
- Italy 2008; outbound spending 2008; \$29b +5%; visitor spending \$43b -0.1%; visitor arrivals 43m -2%.
- Netherlands; outbound spending 2008; \$20b +6%.
- Russia; outbound spending 2008; \$25b +12%.
- Spain; visitor spending 2008; \$58b -0.4%.
- Turkey; visitor arrivals 25m +12%.
- UK; outbound spending 2008; \$62b -13%; visitor spending \$38b +3%; visitor arrivals 30m -2%.

## Growth in 2009 visitor arrivals, %

Source	YTD	Q1	Apr	Mar
<b>Europe</b>	-10.4	-13.4	-3.3	-18.1
France	-12.6	NA	NA	NA
Germany	-8.6	-8.8	-8.1	-7.5
Italy	-5.4	-5.4	NA	-6.3
Spain	-11.8	-16.3	-1.7	-20.8
UK	-10.0	-12.7	-2.6	-9.7
<b>Americas</b>	-5.4	-6.4	-2.0	-12.4
US	14.3	-14.3	NA	-19.9
<b>Asia Pacific</b>	-6.1	-7.7	-1.2	-7.1
China	-9.0	-11.3	-3.2	-14.6
Australia	-1.1	-3.5	7.4	-4.9
<b>World</b>	2.0*	-10.6	-13.3	-10.3

Notes: NA = not available, YTD = year-to-date, mostly Mar or Apr. \*Sic, despite declines in every month. Source: World Tourism Organization.

improvement - meaning a reduced fall. The Americas was down 6% and also showing improvement. Asia Pacific was down less, 8% although it too was showing, much clearer, improvement.

An irony is that these results are almost switched for air traffic - AsPac is down more than other main regions.

There are complications with reading these results. Figures for France - which reports the highest visitor counts in the region - has reported only through February. Thus its large 13% decline weighs heavily on other results. Although there are no special indicators than visitor arrival counts in France will be much better or worse than general patterns, that fall does seem high.

Spain, the destination we count as the largest visitor destination in the region (because of the counting methodology in France, and higher transit traffic), reported the biggest decline of the main destinations. However, its 16% fall is mainly because it has a high share of visitors from Germany and the UK (totalling 45%); two outbound markets, and economies, which have been particularly hard hit in this crisis.

The surprise, though, is the steep

fall in the UK - also down 13%. Why? Although the economy can be blamed for the similar fall in UK-outbound travel, why inbound? The economy's fall has also caused the UK's currency to fall and that, together with price mark-downs by the industry, should make the destination particularly price-attractive this year.

That said, much of the UK's growth in recent years was coming from new markets such as East Europe - almost heavily touched by the economic crisis (which includes temporary workers in the UK).

The US still accounts, just, for the highest single share of visitors (11%), and that market has fallen fast, low prices or not. However, airline traffic figures indicate that the worst of the fall is over - see other report in this issue.

These world totals are worse than the WTO expected, and so it has marked downwards its forecasts for this year. The organisation has been constantly downgrading expectations for 2009: in November 2008, it forecast 0-2% growth in arrivals for 2009, in February this year 0% to -2%, although adding that it could be -3%. Just before mid-year it said it was expecting a 2-3% fall for all-2009.

Currently, the WTO forecasts a fall of 4-6% for 2009. Following that 11% Q1 decline and around -8% Jan-Apr, the WTO forecasts a 4-6% fall May-August, then 3-5% September-December.

WTO does not combine all-world spend figures over part-years, but we estimate a fall of around 8% YTD. But WTO's spending data is skewed by currency movements, and the general shortcomings in the original data. In 2008 growth in US dollars was 10.2%, but 2.7% in Euros; WTO estimates real growth was up 1.8%, near-matching the 1.9% growth in arrivals.

Our own World Travel Industry Index - see page 1, column 1 - shows an 11% fall in March following

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# ZERO

An occasional column/section/report  
on the travel business and the  
environment

## Under-developments

A selection of environmental developments from Australia:

- **Alto Hotel**, Melbourne. The hotel: has water-flow restrictors on all showers (saving 8 litres per minute) and taps (6L); uses rain-water for public-toilet cisterns, gardening, and cleaning; has 'on demand' gas-fired water heaters for rooms; has double-glazed and heat-reflecting windows, and which can be opened; uses bio-degradable bin-liners; has replaced plastic bottles for toiletries with refillable, pump-action dispensers; offers free car parking for guests arriving in hybrid or electric vehicles (*but not for LPG-fuelled cars, which are better than hybrid in that they have zero emissions; is it because in Australia there are many more LPG-driven cars than hybrids?*).

- **Australian Tourism Exchange**. This year, the Tourism Australia organisers of June's Australian-products travel mart tried to make the event more eco-friendly. Measures included moving to paperless information where possible, reducing food miles and wastage, buying green power, offsetting flights, planting a tree for each buyer and media delegate.

- **Darwin Central Hotel**, Northern Territory. When it planned an upgrade two years ago, it decided to make the hotel more energy efficient, spending US\$750,000 (A\$1mn) to reduce CO2 emissions. Its property-developer owner, resistant at first, is now looking at what it can copy elsewhere. The hotel has not increased room rates because of its eco-friendly practices.

The hotel has solar power for heating water. Management expects a 20% reduction in energy bills over a year from this and other changes. F&B supplies are ordered in bulk, which saves in packaging and sometimes in delivery costs, with a lot arriving by train (Darwin has only a twice-weekly service, from Adelaide). The hotel cannot grow its own food, because of shortage of space in the

city, plus the hard fight with nature in Australia if it establishes its own garden outside the city.

- **Down Under Tours**, Queensland. Implemented a bus-management system not only to reduce fuel consumption, but also to prolong the life of its vehicles. By recording different signals, the system can note driving patterns such as heavy acceleration, heavy breaking, and idling time - all of which impact on fuel consumption and the company's carbon footprint.

- **Eco Beach**, Broome, West Australia. Closed after cyclone damage in 2000, but presumably a commercial failure because it was not rebuilt and reopened until this year - as an eco-resort. Includes solar heating, climate-control sensors in the villas.

- **Harmony Hill Retreat**, Tasmania. Due to open late August on a 17ha site on a mountain in Margate, 25 minutes from Hobart. Plans to use solar energy, rainwater collection, and its own wetland to purify grey water and recycle it. All therapy treatments will use products that are made on site by the resort's owners.

- **Kangaroo island**, South Australia. The 21-room Southern Ocean Lodge, run by Bailey's Lodges, opened in 2008 as an eco-resort.

- **Melbourne Convention Centre**, due to open this month. Includes large glass facade reducing need for artificial light (*but requiring more air-conditioning in summer?*), slab heating and cooling with pipes in concrete floor, black-water treatment plant.

- **Northern Territory**. Customer research indicates 1-in-6 purchased their product/service because of a reduction in emissions.

- **Ocean Eco Adventures**, Coral Coast, West Australia. Has a system where photos of guests that swim with whale sharks - an activity that we do not support - are used for the official research bodies to track the sharks' activities. Hopes the coastal region will become a

world heritage site in 2010.

- **Rose Gums**, Queensland. In 2008, the resort earned 'carbon credits' of 325 tonnes. The resort's 20,000 plants retained 460 tonnes of CO2, while the resort itself emitted only 135 tonnes (including those from guests travelling to and from the property from the entry points of Cairns and Townsville).

- **Tasmanian Devil Conservation Park**. New conservation 'voluntourism' programs. The master plan includes letting visitors into old animal enclosures and involving them in the park's conservation work.

- **Wilson Island**, Great Barrier Reef. The eco-tents at the resort are labelled 'eco-chic', with solar-powered showers and more. The island closes late January to end-February to allow one type of bird to hatch.



- **Wayoutback Desert Safaris**, Northern Territory. Converted fleet of turbo-diesel 4WD vehicles to gas/diesel.

- **Wolgan Valley Resort**, New South Wales. Oft delayed; currently due this September, but dates have changed often, so this may be no more than the latest target. The resort has set a 160km radius for regional, seasonal, and where possible, organic food-&beverage produce.

*As this is Australia, some environmental efforts need to be protected against the environment - contradictory as that sounds. For instance, the 40-villa resort has introduced animals into its site, but has had to keep local wild animals out with fencing - because otherwise they would probably destroy the introduced animals.*

the same in February, and 7% in January.

Hotels

## Rep counts

Hotels magazine, which prefers to hide bad news, nevertheless lists the facts in its many surveys. We are thus grateful that these lists enable us to analyse developments.

There are a few for its list showing the leading hotel representation companies (which may offer marketing and/or reservations services) in 2008:

- Utell has more hotels than the total of the rest of the top-10.

- The leading names lost share in 2008, with a 3% fall in hotels and 2% in rooms. We assume this is more a loss to brandnames than to smaller rep groups.

- Movement up and down for rep groups can be greater than for hotel management companies. Great Hotels, for instance, lost half its hotels and one-third its rooms in 2008.

- Hotusa, a name hardly known in the industry, has become third largest, thanks partly to the large fall at Great. Associated with Hotusa is Keytel; counts of the two are assumed to have been separated, but this is not clarified.

- We have calculated average hotel size. If the figures are to be believed, there is a large difference, from 665 rooms to 19, and an average of 117.

- Of the large notable changes, Preferred grew over 20% in 2008, and World fell 14% in hotel numbers.

Jackson, Presley

## The shows go on

Entertainment is certainly a key element for theme parks, of which the biggest count around 20mn visitors annually. The death of Michael Jackson last month has brought another into the major league - his previous home, Neverland. News on that, and updates on the other king of rock:

- Graceland, Memphis, US. The last home of Elvis Presley. Primarily a mansion on just 6ha of land. Visitation is around 750,000 annually; revenues were US\$55mn in 2008, but this may include non-Graceland revenue from the Presley business - which is owned by a company called CKX.

Work is planned that would increase annual visitation to 2mn.

- Neverland, Los Angeles, US. Bought by Michael Jackson in 1988, the 1100ha location was sold in 2005 to Colony Capital, which has strong links in the travel business, including part-ownership of Fairmont, Raffles, and Swissotel hotel groups, and some gambling resorts.

Although there is uncertainty over Neverland's ownership, claims, and facilities, the venue would seem to have good potential to attract many more visitors than Graceland - 5mn annually in an opening year?

Neverland could be a double-bill attraction - Jackson memorabilia for older people, and a fun park for children.

Notes: Some data from Wikipedia.

Alitalia

## Backtracking

Alitalia has restarted reporting its traffic results. No comparison is made with 2008, but we have added previously-reported figures for Alitalia and Airone, now merged, to show change. See table.

Even if these measures are still bad, they are an improvement of declines at around 60% that Alitalia was reporting for end-2008.

YTD measures still show a substantial decline - just over 30% in seats sold, for instance. But for the latest month, the decline was down to 15% - not much worse than for some other airlines.

### Alitalia group traffic results, 2009

Item	Measure	May growth, %	Jan-May	Growth, %
Seats sold	x1000	-14.9	7737	-30.8
Capacity	mn	-3.6	16849	-22.4
Traffic	mn	-10.3	9666	-32.4
Seat factor	%	NA	57.4	NA

Notes: Includes Airone. Figures calculated by TBA from previously-reported AEA data for Airone and Alitalia. Source: Association of European Airlines, Travel Business Analyst.

Meanwhile, Alitalia has issued an extraordinary statement questioning the move of some low-fare-airlines from Rome's secondary Ciampino airport - ironically, becoming overcrowded - to the city's main Fiumicino airport.

Alitalia proposes the airlines go to airports further away from Rome - as they do, it adds, in Barcelona, Brussels, Frankfurt, Hamburg, London, Paris, and Stockholm. (Ignoring, for the moment, those airlines do that by choice; Easyjet, for instance, was forced to operate some flights from Paris CDG rather than its preferred Paris Orly.)

To us, this illustrates one of the problems that Alitalia faces. It believes it has a right to what it has - its passengers. We believe the passengers have the choice, and Alitalia must attract them.

Outbound

## Swiss moves

A survey by Mondial Assistance, travel insurance, published in Travel Manager, finds that 74% of travellers from Switzerland will maintain their travel frequency this year.

However, making the survey hard to believe is the finding that 21% of travellers expect to travel more, leaving just 5% who plan to travel less.

We believe either the questions were framed wrongly, or the travellers are not telling the truth.

### Leading hotel marketing representatives, 2008

Company	HQ	Hotels		Rooms			
		Number	Growth, %	No, x1000	Growth, %	Per hotel	Growth, %
Utell/Unirez	US	11282	3.5	1381	0.9	122	-2.5
Supranational	UK	1662	-1.2	297	-0.6	179	0.6
Hotusa	Spain	2150	8.4	192	8.4	90	0.0
Great	UK	672	-57.7	184	-31.9	274	61.1
Keytel*	Spain	1581	-10.6	142	-7.6	90	3.4
Preferred	US	730	21.7	140	20.7	192	-0.8
World	Germany	518	-13.7	101	-6.3	195	8.5
Associated Luxury	US	132	10.9	88	11.2	665	0.2
Leading	US	460	2.2	84	6.6	183	4.3
Others:							
Logis*	France	2935	-7.5	57	-6.9	19	0.6
Small Luxury	UK	485	10.2	25	8.2	51	-1.8
Design	Germany	175	2.9	13	-2.3	74	-5.0
Relais & Chateaux	France	486	1.7	11	1.7	23	0.1
Average	na	23268	-2.9	2716	-1.6	117	1.3

Notes: May not be full or complete name. \*Hotels estimate for 2007. Source: Hotels.

## Spanish outbound

Total outbound trip volume by Spanish travellers reached some 4.5mn in 1997 - up 10% - and preliminary indications suggest that this level of growth will have been exceeded in 1998. In the first half of 1998, spending on travel abroad - the only reliable measure available - increased 13.4%, according to the Bank of Spain, to Pts323.2bn.

Growth in trips and spending is particularly impressive given the continuing weakness of the peseta against the US dollar and other hard currencies, before the Euro link was established at the start of this year.

Package sales by Spanish tour operators were expected to increase by more than 10% in 1998 - following a 15% rise in 1997.

The Spanish outbound market grew strongly at the end of the 1980s and early 1990s from a small base. This was followed by a sharp slowdown as the economic boom ended, following an increase in unemployment and a devaluation of the peseta. Official figures need to be interpreted with caution, however, as there have been a number of changes in data collection methodology, which obviously distort trends.

Europe still dominates in terms of Spanish destination preferences, accounting for close to 90% of all arrivals, although Asia and the Americas have grown faster in the past few years. Package holidays represent a modest 13% of total holiday trips, with pre-booked trips generally more popular than independently organised travel abroad.



## People-in-Travel

### Tracking Travel's Leaders

#### Rolf Freitag

Head of the IPK research company - and who has now moved from his beloved Munich to Pisa.

We are impressed with his World Travel Monitor, although we do not like the way he mixes outbound and inbound data with alacrity, as though they were the same. He must know, but he sometimes gives the impression that he does not know these two measures will never be the same - because one outbound traveller may visit more than one destination, and thus produce more than one 'arrival'.

In addition, Freitag's presentations on market developments are often prefaced and inter-mixed with a lot of economic, political, and sociological comment.

We all have opinions, and sometimes strong ones, particularly about the current crisis, and always about the state of the world. But we are not interested in who Freitag blames for the crisis ("the Americans") and who is suffering ("the poor").

- There is insufficient space here to show the rest of this report. Subscribers wishing to see the full report, please email [TBAoffice@gmail.com](mailto:TBAoffice@gmail.com).

This is an extract from **People-in-Travel**, a monthly report tracking travel's leaders. A combination subscription to PinT costs €35 for one year; full price is €100. For more information, contact Raymonde Perpignani at Travel Business Analyst, [TBAoffice@gmail.com](mailto:TBAoffice@gmail.com)

## This month

Main contents in current issues of other Travel Business Analyst newsletters and reports:

### Travel Business Analyst, Europe:

- World visitor totals; progress.
- Meetings counts.
- Shows go on: Jackson, Presley, Disney.
- Plus: Crisis Market Monitor; ZERO; Extracts from Net Value and People-in-Travel; Market Headlines; Market Outlook; and 18 regular tables of market data.

### Net Value:

- PhoCusWright reports; China market; others. Excerpts from the single-page Net Value report are included in the Asia Pacific and Europe editions of Travel Business Analyst. **Net Value** is delivered only via email.

### People-in-Travel:

- Rolf Freitag; Geoff Buckley; Other Australia; others. Excerpts from the single-page People-in-Travel report are included in the Asia Pacific and Europe editions of Travel Business Analyst. **People-in-Travel** is delivered only via email.

### Foxtrots (recent):

- PAGPFT (People Are Getting Paid For This): Air Asia; UK (Birmingham, Stansted, King's X, St Pancras); Francesco Frangialli; WTO's STEP.

### ZERO (recent):

- Under developments - Australia news.

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See back page for more offers.

## Headlines

### Comments on tables pages 6-12

**Aviation.T1.** Airlines. YTD indicates some shake-outs - *BMI* (-21%, a greater decline than before its sale to Lufthansa; was it buying traffic growth?), *Brussels* (another Lufthansa subsidiary in trouble, -18%), *Iberia* (-16%, but Spain's economy a mess as well), *Lot-Polish* (-19%; suffering alone; terminal?), *SAS* (-19%; Why? Nordic economies are not that bad. Will this mean more organisational changes for poor much-meddled SAS?). *Turkish* (what crisis? +11%). Among combines, the big *LH group* -9%. Among LFAs/hybrids, *Air Berlin* in trouble (not sure what loads this complex hybrid needs, but that 73% looks low), *Easyjet* (down YTD, but getting better), *Ryanair* (holding well, and getting better). **T2.** First-quarter for airline association member airlines in the US (seat sales -11%), Asia Pacific (same). YTD for AEA members slightly better than those other regions; -7%. **T3.** Airports. First-quarter for airports whose data supplied us by ACI, which is most. And for *all-Europe* (total -12%; international also -12%). Note the big falls - Barcelona, Brussels (thanks to its main airline, of the same name), Copenhagen (ditto, SAS), Milan (but this started pre-crisis by a failing Alitalia; Malpensa may continue to do worse, because most airlines prefer one of the other two airports, Linate or Bergamo), Moscow (bad business, bad vibes). Among our 'low-fare-airports' biggest trouble for *London Luton* (-19%). **T4.** First-quarter air passenger traffic to/from UK (a heavy -13%); the biggest drop (-19%) is on the biggest country-pair (t/f Spain); this is primarily lower-end tourist travel which we thought would be less hit. Also Q1 for t/f Paris total (-8%).

**Inbound.T14.** Visitor spending. Updates for *France* (all-2008, -5%), *Germany* (ditto, +4%), *Italy* (ditto, flat), *Spain* (ditto, flat), *UK* (ditto, +2%), courtesy WTO. **T15.** Visitor arrivals. Updates for *France* (all-2008, -3%), *Germany* (ditto, +2%), *Italy* (ditto, -2%), *Turkey* (ditto, +12%), *UK* (ditto, -2%), courtesy WTO.

**Outbound.T6.** Outbound spending updates for *France* (all-2008, +10%), *Germany* (ditto, +2%), *Italy* (ditto, +5%), *Netherlands* (ditto, +6%), *Russia* (ditto, +12%), *UK* (ditto, -13%), courtesy WTO. **T7.** Outbound totals; no change. **T8.** Internet; Iberia updates.

**Hotels.T10.** Europe YTD occupancy down 8 points to 60%, average room rate down US\$70 to US\$204, making yield fall US\$66 to US\$122. Measures not comparable across regions, but US occupancy -6pts, Asia Pacific -10pts, World -8pts.

**Others.T5.** Most stock market prices increase! But big decline for SAS (traffic figures are bad, but this is worse; does the market expect another attempt to break-up the airline?), bad for *Thomas Cook* (whose retail-company parent is fighting bankruptcy), and *TUI* (also linked to a retail group, so this may be contagion). **T11.** As last month, showing annual update of travel agency performance. **T12.** Stock price index for Europe, Asia Pacific, and the World, based on Dec 06; slight upturn. **T13.** Economic indicators. Q1 GDP growth for *France, Italy, Spain, UK, US*.

# MARKET DATA

## Special

### Europe air-seat patterns, mid-2009

The number of seats worldwide fell 3.5% in the first half of this year, according to OAG\*. Europe did slightly worse; capacity to-and-from fell only 2.6%, see table, but intra-Europe fell 6.5%.

Those results appear to support what most pundits say - that longer-haul is suffering more than shorter-haul. (In the past, we have noted that figures do not generally support that belief; these do.)

A mini-shock is that low-fare-airlines seem to be suffering equally - intra-Europe total capacity down just over 6%, but LFAs down just under 6%. Within the EU the gap is even less. Only LFA growths were in two tiny sectors - to/from Europe (19%), and within East Europe (26%).

Some LFAs seem at risk. Monthly declines at EE-based Sky Europe have been over 20%, for instance. Tough for any airline; for an LFA, threatening.

Yet LFA share continues to grow. Intra-EU has already topped 50% for, and intra-West Europe is now at 49%. Intra-Europe LFA share is almost at 46%; on current patterns, it will reach 50% in 2011.

\*All data extracted from the monthly OAG Facts. Data for Jan-Jun. Some calculations by Travel Business Analyst. For more information on this product - of which this report is but a tiny part - contact facts@oag.com.

### Air seats to, from, and intra Europe, mn

Region	2009†	Growth,%	AAGR*,%	Share‡,%	2001†
To/from region	126	-2.6	3.8	7.3	93
low-fare	4.0	18.9	na	0.2	none
Intra region	392	-6.5	3.2	22.8	303
low-fare	123	-5.7	31.6	7.1	14
To/from W Eur	158	-3.5	5.1	9.2	106
Intra W Eur	326	-6.5	2.2	19.0	274
low-fare	107	-4.9	29.5	6.2	14
To/from EU	159	-2.8	3.0	9.2	125
Intra EU	301	-7.8	3.6	17.5	227
low-fare	106	-7.1	30.6	6.2	13
To/from E Eur	41	-7.2	11.0	2.4	18
Intra E Eur	7.9	0.1	8.7	0.5	4.1
low-fare	0.6	25.9	na	0.03	none

Notes: Most data shown is calculated by Travel Business Analyst from OAGF data. EU = European Union. \*Average annual growth rate, 2001-8. †Jan-Jun. ‡Of world. Source: TBA, OAG Facts - facts@oag.com.

## 1 Regular-airline traffic\*, 2009

## Low-fare-airline traffic, 2009

Airline	Apr 09		YTD		YTD		YTD		YTD		YTD		Airline	YTD	
	SS,x1000	+/-,%	RPK,mn	+/-,%	SS,x1000	+/-,%	ASK,mn	+/-,%	RPK,mn	+/-,%	SF	+/-,pts		SS,x1000	+/-,%
Air France	4185	-2.8	10661	-1.9	14799	-7.2	52286	-3.1	39582	-5.4	75.7	-1.8	Air Berlin	Apr 09	YTD
Europe†‡	4339	-4.7	3474	-2.7	14799	-4.7	18118	-2.9	11547	-2.7	63.7	-2.1	SS,x1000	2166	7636
Austrian	714	-10.1	1246	-8.6	2478	-13.3	6252	-10.5	4359	-14.3	69.7	-3.1	Growth,%	-3.4	-5.4
BMI	639	-21.7	764	-14.8	2339	-20.5	3945	-23.6	2594	-15.1	65.8	6.5	SF,%	76.4	72.9
British AW	2749	1.0	9320	0.5	9848	-1.1	47255	-3.5	35024	0.4	74.1	2.9	Easyjet+GB-E	Apr 09	YTD
Europe‡	1693	1.4	1763	3.0	5825	1.4	9318	-3.9	5870	3.0	63.0	0.0	SS,x1000	3777	13129
Brussels	427	-10.6	613	-5.4	1379	-18.1	3421	-11.0	1986	-14.6	58.1	-2.4	Growth,%	6.3	-1.2
Czech	395	-2.5	472	0.6	1244	-8.9	2603	-4.4	1461	-9.7	56.1	-3.3	SF,%	84.2	82.9
Finnair	517	-12.7	1221	-6.0	2006	-10.3	7050	-7.0	4949	-5.2	70.2	1.3	Ryanair	Apr 09	YTD
Iberia	1886	-3.9	4346	2.4	6527	-15.7	20635	-5.2	16109	-6.5	78.1	-1.1	SS,x1000	5281	18188
KLM	1934	-3.8	6105	-3.8	6834	-5.7	29097	-2.6	22763	-4.6	78.2	-1.7	Growth,%	11.8	8.7
LOT-Polish	293	-12.3	453	-12.3	997	-19.3	2335	-13.8	1457	-20.2	62.4	-5.0	SF,%	82.0	78.6
Lufthansa	4530	-6.4	9981	-5.3	16079	-7.1	48875	-3.0	36513	-6.6	74.7	-2.9	SS,x1000	Apr 09	YTD
Europe†‡	4631	-4.5	3624	-0.4	16211	-4.5	18874	-0.1	12331	-0.4	65.3	-2.0	Germanwings	618	1999
Olympic	426	-2.2	485	-4.2	1344	-12.4	3004	-3.5	1529	-16.4	50.9	-7.8	Growth,%	0.6	-7.5
SAS	1864	-22.9	2067	-19.4	6794	-18.9	10953	-12.7	7198	-18.5	65.7	-4.7	Norwegian	862	2659
Swiss	1146	2.0	2270	0.4	4060	-0.7	11421	3.7	8493	-1.0	74.4	-3.5	Growth,%	17.5	12.5
TAP	760	8.3	1742	4.9	2564	-0.6	9993	-2.5	6210	-4.5	62.1	-1.3	Sky Europe	203	725
Turkish	1959	15.1	3048	18.5	6813	11.1	15519	19.5	10505	12.8	67.7	-4.0	Growth,%	-27.5	-32.2
Virgin A'tic	485	-1.9	3520	-1.0	1724	-7.3	17103	-5.5	12689	-6.5	74.2	-0.8	Southwest	7552	27322
AF+KL	6119	-3.1	16766	-2.6	21633	-6.8	81383	-2.9	62344	-5.1	76.6	-1.7	Growth,%	-1.5	-6.3
BA+IB	4635	-1.1	13666	1.1	16375	-7.5	67890	-4.0	51133	-1.9	75.3	1.7			
LH+LX	5676	-4.8	12251	-4.3	20139	-5.9	60296	-1.8	45005	-5.6	74.6	-3.0			
LH+LX+BD+SN+OS	7457	-7.4	14874	-5.3	26335	-8.8	73913	-4.5	53944	-7.2	73.0	-2.2			

Notes: See Master Notes this page. SS and SF for low-fare-airlines includes free tickets and no-shows. E = TBA estimate, pts = points. \*Domestic and international.

†Includes KLM for AF and Swiss for LH. ‡Includes (national) domestic, including Switzerland for LH. Source: airlines, Association of European Airlines, Travel Business Analyst.

Master Notes: AL = Airline, ASK = available-seat km, AW = Airways, CH = Switzerland, DE = Germany, E = TBA estimate, ES = Spain, FR = France, GB = UK, IT = Italy, J-D = January-December, LF = load factor, NA = not available, na = not applicable, NL = Netherlands, P = provisional, Pax = passenger, RPK = revenue-passenger km, Q = quarter (of year), SE = Sweden, SF = seat factor, SS = seats sold, YTD = year-to-date.

# MARKET DATA

## 2 Operating results of airline groups in Europe, US, and Asia Pacific

Item	Europe,AEA		Feb 09	Growth,%	Mar 09	Growth,%	Apr 09	Growth,%	YTD	Growth,%
	Jan 09	Growth,%								
SS,mn	15.5	-5.9	15.1	-9.8	17.9	-9.4	19.9	-2.5	68.4	-6.8
ASKs,mn	71,529	-2.0	63,977	-6.8	73,089	-2.1	73,737	-2.3	282,332	-3.1
RPKs,mn	51,765	-3.2	45,425	-8.5	53,083	-9.1	56,687	-2.0	206,959	-5.7
Pax LF,%	72.4	-0.9	71.0	-1.3	72.6	-5.6	76.9	0.2	73.3	-2.0
US,BTS										
	Dec 08	Growth,%	Jan 09	Growth,%	Feb 09	Growth,%	Mar 09	Growth,%	YTD	Growth,%
SS,mn	7.3	-5.9	7.2	-7.6	6.3	-11.9	7.6	-13.4	21.2	-11.0
ASKs,mn	40,650	-3.3	41,294	-3.3	36,515	-7.5	41,298	-6.2	119,216	-5.5
RPKs,mn	31,140	-4.5	30,138	-6.7	25,003	-12.5	30,851	-13.6	86,056	-10.9
Pax LF,%	76.6	-1.0	73.0	-2.7	68.5	-3.9	74.7	-6.4	72.2	-4.4
Asia Pacific,AAPA										
	Dec 08	Growth,%	Jan 09	Growth,%	Feb 09	Growth,%	Mar 09	Growth,%	YTD	Growth,%
SS,mn	11.2	-12.0	11.4	-8.3	10.1	-13.8	11.2	-10.6	32.7	-10.8
ASKs,mn	65,284	-4.7	66,179	-2.5	57,858	-8.6	63,387	-6.4	187,424	-5.8
RPKs,mn	47,405	-11.2	48,335	-9.3	41,335	-14.1	45,660	-13.2	135,330	-12.1
Pax LF,%	72.6	-6.8	73.0	-7.0	71.4	-5.9	72.0	-7.3	72.2	-6.8

Notes: International. \*Points. Source: Association of European Airlines, Bureau of Transportation Statistics, Association Of Asia Pacific Airlines.

## 3 Passengers through: Europe's leading airports and city-group airports,x1000

Airport	Month	Month	Growth,%	YTD	Growth,%	Airport	Month	Month	Growth,%	YTD	Growth,%
Amsterdam	May	3,895	-11.6	16,414	-11.0	Rome*,x2	Mar	3,027	-2.1	7,735	-5.4
Barcelona*	Mar	2,098	-20.0	5,485	-21.0	FCO	Mar	2,634	-1.9	6,692	-5.3
Berlin*,x3	Mar	1,669	-1.6	4,393	-4.9	Zurich*	Mar	1,651	-8.8	4,572	-6.3
TXL	Mar	1,158	-0.8	3,023	-6.3						
Brussels*	Mar	1,262	-14.7	3,302	-16.4	Europe total*	Mar	99,721	-12.4	267,432	-12.0
Copenhagen*	Mar	1,510	-15.7	4,117	-16.2	intl	Mar	68,909	-14.1	185,114	-12.2
Frankfurt*,x2	Mar	4,285	-9.4	11,615	-10.6						
FRA	Mar	4,030	-9.2	10,917	-10.9						
intl	Mar	3,465	-10.3	9,406	-11.2						
London,x5	Mar	9,976	-12.2	27,299	-10.6						
LHR*	Apr	5,613	2.6	20,030	-4.0						
intl	Apr	5,159	3.0	18,364	-3.8						
LGW*	Apr	2,578	-3.0	8,867	-11.5						
Madrid*	Mar	3,882	-14.7	10,318	-16.5						
Milan*,x3	Mar	2,619	-21.2	6,367	-29.9						
MXP	Mar	1,383	-29.6	3,714	-31.2						
Moscow*,x2	Mar	2,561	-19.2	7,267	-17.2						
Paris*,x3	Mar	6,733	-9.5	18,570	-8.3						
CDG*	Mar	4,524	-9.0	12,448	-8.1						
intl	Mar	4,136	-9.4	11,384	-8.1						
ORY*	Mar	2,004	-11.2	5,561	-9.5						

### Europe's 'low-fare' airports†,x1000

Airport	Month	Month	Growth,%	YTD	Growth,%
Berlin Schonefeld*	Mar	511	1.5	1,370	3.6
Cologne*	Mar	680	-8.0	1,815	-11.3
Frankfurt Hahn*	Mar	255	-11.9	698	-7.2
Dublin*	Mar	1,688	-14.0	4,563	-11.4
Geneva*	Mar	1,080	-16.1	3,013	-9.3
London					
LTN*	Mar	673	-19.9	1,796	-18.6
STN	Mar	1,534	-15.9	4,118	-14.6
Milan Bergamo*	Mar	528	-2.5	1,425	0.6
Rome Ciampino*	Mar	394	-3.8	1,043	-6.0
Paris Beauvais*	Mar	205	-3.7	561	0.2
LFA total‡	Mar	7,548	-12.3	20,403	-10.1

Notes: \*Domestic and international; marked when international-only. †Airports with sizeable portion of LFA traffic (some are also in main city counts). ‡Of those listed here. Source: Airports Council International, except for Amsterdam and BAA London (LHR LGW STN).

## 4 Air passenger traffic to/from selected countries, x1000

From/to	France†				Germany				UK				US‡			
	Apr 09	+/-* %	YTD 09	+/-* %	Apr 09	+/-* %	YTD 09	+/-* %	Mar 09	+/-* %	YTD 09	+/-* %	Feb 09	+/-* %	YTD 09	+/-* %
Belgium	5	24.8	18	11.2	110	-16.1	407	-13.1	108	-10.6	284	-20.1	64	-11.9	143	-8.1
France	na	na	na	na	573	-7.0	1943	-12.0	839	-16.7	2321	-10.7	314	-7.4	698	-8.6
Germany	385	-2.5	1337	-8.0	na	na	na	na	836	-11.4	2266	-12.0	502	-19.1	1111	-15.8
Ireland	67	10.0	255	4.5	125	2.5	438	-0.1	984	-11.9	2603	-11.1	125	-8.2	263	-10.5
Italy	532	0.0	1739	-6.9	900	-5.4	2715	-12.0	730	-14.7	1848	-14.6	101	-15.9	238	-13.2
Netherlands	87	-14.7	310	-15.0	221	-5.2	776	-6.8	567	-14.8	1559	-15.1	241	-12.9	559	-8.2
Spain	521	-3.9	1632	-14.6	1724	2.1	5274	-9.6	1895	-21.4	4908	-19.4	109	15.1	242	9.9
Switzerland	156	4.6	577	-2.8	449	-7.3	1670	-6.5	597	-15.2	1672	-9.9	86	-13.2	192	-11.6
UK	364	-3.0	1282	-10.4	910	1.5	3155	-8.4	na	na	na	na	917	-10.2	2041	-7.9
US	505	1.3	1651	-4.9	720	-8.5	2444	-15.0	1173	-19.9	3211	-15.3	na	na	na	na
<b>Total</b>	<b>6733†</b>	<b>-9.5†</b>	<b>18570†</b>	<b>-8.3†</b>	<b>11008</b>	<b>-2.0</b>	<b>37125</b>	<b>-8.4</b>	<b>12932</b>	<b>-14.8</b>	<b>35261</b>	<b>-12.5</b>	<b>8324</b>	<b>-5.0</b>	<b>18365</b>	<b>-5.7</b>

Notes: \*Over same period, year earlier. †(Three) Paris airports; total is month and YTD- month earlier. Source: Aeroports de Paris, Statistisches Bundesamt, Civil Aviation Authority, Department of Transportation.

# MARKET DATA

## 5 Stock market last-day closing prices

Company	Market	Price, local currency*				Growth†, %	
		Dec 05	Dec 08	Apr 09	May 09	stock	market
<b>Airlines</b>							
Air France	Paris	18.4	9.2	8.2	11.2	36.4	-4.2
British Airways	London	334	180	143	156	8.7	-3.8
Easyjet	London	381	280	302	313	3.6	-3.8
Iberia	Madrid	2.29	1.98	1.34	1.60	19.4	3.9
Lufthansa	Frankfurt	12.6	11.2	8.80	9.77	11.0	-2.7
Ryanair	Dublin	8.30	2.97	3.12	3.63	16.3	-0.6
SAS	Sweden	17.1	6.19	7.89	4.08	-48.3	1.0
<b>Hotels</b>							
Accor	Paris	46.9	35.1	30.0	31.3	4.5	-4.2
InterContinental	London	840	562	633	654	3.3	-3.8
Marriott	New York	33.5	19.5	20.8	23.3	12.0	-1.1
Sol Melia	Madrid	11.0	4.26	3.48	3.94	13.2	3.9
<b>Others</b>							
Avis Europe	London	72.8	3.93	18.00	18.00	0.0	-3.8
Carnival	New York	53.5	24.3	25.6	24.9	-2.5	-1.1
EADS	Paris	32.0	12.0	11.0	11.5	4.4	-4.2
Expedia	New York	NA	8.24	10.30	17.31	68.1	-1.1
Fraport	Frankfurt	44.9	30.9	29.0	29.0	-0.1	-2.7
Kuoni	Zurich	557	360	295	355	20.3	1.0
Thomas Cook	London	NA	177	266	222	-16.6	-3.8
TUI	Frankfurt	17.8	8.05	7.50	6.25	-16.7	-2.7

Notes: See Master Notes, page 6. \*Euro in Euro countries (in table includes FR, DE, IE, IT, ES). †Latest month over month earlier. ‡Reissue means not all prices comparable; now privately-owned. Source: respective stock markets.

## 6 Spending on foreign travel by residents

Source	Jan-	+/-, %	US\$bn	Jan*-	US\$bn	+/-, %
Austria	Sep‡	-2.1	10.4	Dec‡	10.6	0.8
Belgium	Sep‡	2.6	17.6	Dec‡	17.2	1.7
Czech R	Sep‡	4.7	3.8	Dec‡	3.6	18.3
Denmark	Sep‡	7.1	9.4	Dec‡	8.8	7.7
Finland	Sep‡	1.7	4.1	Dec‡	4.0	6.8
France	na	na	na	Dec‡	36.7	7.8
	Dec‡	9.6	40.2	Dec‡	36.7	7.8
Germany	na	na	na	Dec‡	83.1	2.9
	Dec‡	2.3	85.0	Dec‡	83.1	2.9
Greece	Oct‡	6.8	3.6	Dec‡	3.4	4.3
Hungary	Sep‡	28.8	3.7	Dec‡	2.9	27.4
Ireland	Sep‡	14.5	10.1	Dec‡	8.8	17.3
Italy	na	na	na	Dec‡	27.3	8.4
	Dec‡	4.9	28.6	Dec‡	27.3	8.4
Luxembourg	Sep‡	3.1	3.7	Dec‡	3.6	4.0
Netherlands	Dec‡	6.2	20.3	Dec‡	19.1	2.6
Norway	Sep‡	17.0	16.0	Dec‡	13.7	6.9
Poland	Sep‡	6.1	9.0	Dec‡	8.5	5.1
Portugal	Oct‡	4.3	4.1	Dec‡	3.9	7.5
Russia	Dec‡	11.8	24.9	Dec‡	22.3	22.1
Spain	Oct‡	1.0	19.9	Dec‡	19.7	8.3
Sweden	Sep‡	9.6	15.2	Dec‡	13.9	11.0
Switzerland	Sep‡	-4.4	9.8	Dec‡	10.2	6.4
Turkey	Oct‡	8.3	3.6	Dec‡	3.3	18.8
UK	na	na	na	Dec‡	71.4	4.1
	Dec‡	-13.0	62.1	Dec‡	71.4	4.1

Notes: Growth may not tally with previous figure shown. \*2006 unless stated otherwise. †2007. ‡2008. Source: WTO.

Notes: †2007 or ‡2008; full year, based on YTD growth rate shown.

## 7 Outbound travel by residents

Country	Jan thru*:	Departures x1000	Growth %	Source:
Austria-BH	Dec‡	9,677	-2.0	Eurostat
Belgium-BH	Sep‡	8,059	10.0	Eurostat
Cyprus	Dec‡	1,039	12.4	Eurostat
Denmark	Dec	5,895	16.4	Eurostat
Finland-BH	Dec‡	4,885	5.9	Eurostat
France-BH	Jun‡	11,684	16.5	Eurostat
Germany-BH	Dec‡	86,201	5.0	Eurostat
Hungary-BH	Dec‡	5,058	8.3	Eurostat
Ireland-BH	Sep‡	5,237	3.0	Eurostat
Italy	Dec‡	40,057	7.9	Eurostat
Latvia	Dec‡	1,169	1.2	Eurostat
Netherlands-H	Sep‡	12,547	4.3	Eurostat
Norway-BH	Dec‡	7,600	6.7	Eurostat
Poland-BH	Dec‡	6,530	7.8	Eurostat
Portugal	Dec	3,663	-6.9	Eurostat
Spain-BH	Sep‡	7,813	-0.4	Eurostat
Sweden	Dec 01	10,500	1.0	WTO
Switzerland	Dec 00	12,351	4.5	WTO
UK	Dec	68,413	3.0	NTO
	Dec	61,821	-6.9	Eurostat

Notes: \*2006 unless stated otherwise. †2005. ‡2008. BH = business trips + holidays only, ETM = European Travel Monitor (figures often do not tally one year to next), NTO = national tourist office, Ot = Other. Source: See column.

## 8 Internet bookings/sales of selected companies/markets

Company/description	(same)	Period	Number	Previous	Source
US online travel	(prev fcst \$104b) share	2009	\$93b	-3%	PCW
		2009	39%	35%	PCW
UK online travel	Share of Europe	current	33%	na	PCW
Carrefour Voyages	online share	2013	33%	16% '8	T Hebd
Ebookers, Switzerland	sales	2009	13-15%	\$94m	T Mgr
Iberia online	share	2008	9.8%	9.1%	company
	sales/visit	2008	\$5.8	3%	company
	daily visits	2008	335k	3%	company

Notes: See Master Notes, page 6, and Net Value. All \$s are US\$s. Source: various.

## 9 Networks of computer reservations systems

System	Country
Amadeus	Ww: A84000† S269000. Ap: A11077 S34658. Eu: A37567 S125299. Na: A5066 S11551. FR: A4470 S9952 (B: Q1-05 \$770m). DE: A16300 S41300. IT: A492 S804. ES: A4800 S13000. CH A200. GB: A126 S370. B: 386mn.
Galileo	Ww: A43000† S176100. Ap: A7250† S20708. Eu: A18300† S38596. Na: A14200† S62125. BE: A214 S652. FR: A710† S380. IT: A467 S1221. NL: A786 S2286. ES: A360 S3000. CH: A261 S1752. GB: A1683 S9503. B: \$345mn.
Sabre‡	Ww: A56000† S124828. Ap: A11771† S4500. Eu: A5783† S13428. Na: A17478. FR: A401 S937. DE: A736 S1856. IT: A797 S1473. NL: A61 S130. ES: A150. CH: A380 S1184. GB: A854 S3546. B: \$467mn.
Worldspan	Ww: A20000† S49500. Ap: 714. Eu: A10208† S11000. Na: A35106. BE: A251 S541. FR: A180 S700. DE: A480. IT: A192 S304. NL: A220 S600. CH: A140 S981. GB: A1450 S1980. US: A8560.

Notes: See Master Notes, page 6. Latest figures available; A and S dates may not be the same; †denotes later figure. A-Agencies/other outlets, Ap-Asia Pacific, B-bookings (in numbers or US\$), BE-Belgium, Eu-Europe, Na-North America, S-Screens, Ww-worldwide. ‡With Abacus. Source: companies.



# MARKET DATA

## 10 Hotel results in Europe\*, April

Location	Occupancy,%				Average room rate,				Revpar,				
					local	US\$*			US\$*				
	2009		2008		2009	2009		2008		2009		2008	
	Mth	YTD	Mth	YTD	YTD	Mth	YTD	Mth	YTD	Mth	YTD	Mth	YTD
<b>Amsterdam-all</b>	68.5	54.5	80.8	68.5	158	201.39	205.85	320.75	275.14	138.00	112.18	259.21	188.46
<b>U-4</b>	68.9	54.2	86.5	69.2	132	169.74	172.65	245.44	217.31	116.88	93.55	212.24	150.48
<b>5-star</b>	68.2	54.8	81.3	71.4	181	230.98	236.26	368.75	313.75	157.56	129.45	299.73	223.95
<b>Berlin-all</b>	58.8	56.7	70.6	62.6	140	163.91	183.22	240.86	228.40	96.32	103.94	170.07	142.97
<b>L-4</b>	62.3	55.7	68.6	64.7	106	124.73	138.20	198.04	173.39	77.66	76.93	135.80	112.25
<b>U-4</b>	57.8	57.0	71.2	62.0	150	175.93	195.73	252.61	244.76	101.63	111.63	179.83	151.72
<b>Brussels</b>	NA	62.0	76.3	69.7	122	NA	159.63	251.11	211.18	NA	98.95	191.66	147.18
<b>Copenhagen</b>	NA	66.7	78.8	72.3	1037	NA	181.95	244.45	211.53	NA	121.31	192.64	153.00
<b>Frankfurt-all</b>	48.8	54.3	70.9	66.1	130	147.84	170.22	221.51	206.21	72.17	92.39	156.95	136.23
<b>L-4</b>	32.2	43.2	64.6	54.5	108	116.67	141.08	173.76	163.12	37.57	60.97	112.30	88.86
<b>U-4</b>	53.1	57.1	72.4	68.2	135	152.69	175.87	232.42	212.55	81.03	100.44	168.38	144.96
<b>Geneva</b>	53.2	55.0	74.5	64.0	340	271.03	296.00	364.25	342.63	144.08	162.85	271.32	219.42
<b>Istanbul</b>	66.1	54.1	78.1	66.2	343	231.41	208.09	327.05	270.94	152.89	112.49	255.53	179.24
<b>London-all</b>	81.1	74.9	79.3	76.0	129	188.27	185.30	355.37	338.08	152.65	138.71	281.70	257.05
<b>L-4</b>	88.8	80.2	87.5	83.0	88	131.15	126.08	217.04	204.11	116.43	101.13	189.97	169.31
<b>U-4</b>	72.9	68.5	72.2	69.9	171	246.27	245.74	432.34	412.89	179.58	168.41	312.29	288.81
<b>5-star</b>	77.2	72.0	76.5	72.4	277	403.89	399.64	556.68	536.24	311.86	287.76	426.06	388.15
<b>LHR AP</b>	73.7	71.2	89.3	86.3	66	92.57	95.44	150.94	144.91	68.24	67.91	134.84	125.01
<b>Madrid</b>	NA	49.9	70.2	64.0	135	NA	175.79	263.53	296.26	NA	87.71	184.99	189.53
<b>Moscow</b>	63.5	59.7	78.1	73.4	7402	215.88	214.60	386.76	350.47	137.03	128.20	302.08	257.10
<b>Paris-all</b>	72.8	65.3	76.3	69.6	205	275.52	268.07	378.23	332.80	200.47	175.03	288.53	231.47
<b>U-4</b>	80.6	73.7	83.6	73.4	153	189.90	199.60	279.73	242.23	153.06	147.18	233.74	177.91
<b>5-star</b>	74.5	62.6	79.9	68.8	277	362.66	361.60	460.00	451.33	270.06	226.27	367.58	310.60
<b>CDG AP</b>	66.1	66.0	64.7	63.6	115	153.64	149.69	186.36	195.00	101.55	98.87	120.67	124.07
<b>Rome</b>	NA	55.9	76.6	59.2	165	NA	215.55	321.98	274.71	NA	120.47	246.69	162.61
<b>Vienna</b>	76.9	57.8	77.1	63.1	104	114.33	136.05	185.20	171.45	87.95	78.62	142.86	108.17
<b>Warsaw</b>	54.1	51.3	73.2	64.0	425	132.89	122.16	180.24	166.81	71.92	62.73	131.98	106.80
<b>Zurich</b>	68.5	66.1	79.4	75.8	217	179.87	188.70	259.92	236.29	123.18	124.78	206.51	179.04
<b>OTHERS</b>													
<b>Beijing</b>	60.9	50.2	79.5	67.4	763.45	109.00	111.67	182.38	149.75	66.42	56.02	144.97	100.89
<b>Dubai*</b>	71.9	74.5	NA	NA	695.23	176.62	189.26	NA	NA	126.91	141.02	NA	NA
<b>Los Angeles</b>	62.8	62.3	73.6	72.5	117.10	113.18	117.10	128.90	128.90	71.05	72.94	94.86	93.46
<b>Miami</b>	69.1	71.2	77.6	80.5	170.28	155.11	170.28	176.23	196.61	107.16	121.17	136.78	158.28
<b>New York</b>	79.7	68.5	83.5	78.5	197.51	203.58	197.51	274.74	250.19	162.17	135.30	229.48	196.33
<b>Sydney</b>	75.7	80.1	82.9	82.9	237.09	162.94	160.22	237.85	240.74	123.29	128.37	197.21	199.52
<b>Tokyo</b>	62.2	62.8	NA	NA	23813	264.19	248.44	NA	NA	164.34	156.01	NA	NA
<b>Europe</b>	64.6	60.1	76.0	68.4	na	199.52	203.74	300.73	275.31	129.50	122.21	229.36	188.67
<b>US†</b>	56.4	52.6	63.6	59.2	99.67	98.37	99.67	108.07	108.01	55.48	52.46	68.76	63.99
<b>Asia Pacific‡</b>	60.7	61.9	70.5	72.3	na	126.95	133.11	165.75	165.94	79.54	84.20	120.80	123.03
<b>World</b>	60.6	58.2	70.0	66.7	na	141.62	145.51	191.51	183.09	88.17	86.29	139.64	125.23

Notes: See Master Notes, page 6. Not all categories are shown every month; all categories available at low additional cost. Source: \*Travel Business Analyst Europe (Dubai YTD data starts July), †Smith Travel Research, ‡Travel Business Analyst Asia Pacific.

# MARKET DATA

## 11 IATA travel agencies† in Europe, 2008

Country	Loc-	Growth ations	Net % US\$mn*	Growth sales	Per % US\$mn*	Growth agency
Austria	226	-0.9	1486	10.5	6.57	11.4
Balkans	70	0.0	98	203	1.41	203
Belgium†	567	-8.4	2479	10.5	4.37	20.6
Bulgaria	192	8.5	256	20.4	1.33	11.0
Croatia	88	0.0	167	21.9	1.90	21.9
Cyprus	152	2.7	415	16.4	2.73	13.3
Czech R†	222	0.0	794	24.7	3.58	24.7
Finland	240	-0.4	1556	11.3	6.48	11.7
France	3,633	0.0	14455	12.5	3.98	12.5
Germany	3,490	-16.5	14715	13.5	4.22	35.9
Greece	938	-2.8	1843	13.7	1.97	16.9
Hungary	244	-6.5	418	11.4	1.71	19.2
Ireland	350	-2.8	784	0.8	2.24	3.7
Italy†	2,980	-36.4	8384	10.0	2.81	73.0
Malta	76	0.0	79	6.5	1.04	6.5
Netherlands	343	-15.3	4103	15.2	11.96	36.1
Nordics†	1,326	-8.1	7829	7.0	5.90	16.4
Poland	321	-15.7	956	24.0	2.98	47.1
Portugal	899	4.2	1314	11.0	1.46	6.6
Romania†	291	4.3	616	22.1	2.12	17.0
Russia	501	150.5	1282	1187.4	2.56	413.9
Serbia†	164	0.0	209	36.3	1.28	36.3
Slovenia	48	0.0	130	25.1	2.72	25.1
Spain†	7,643	-4.7	8396	7.7	1.10	13.1
Switzerland†	847	-0.6	3414	14.4	4.03	15.0
Turkey	450	0.4	1226	25.8	2.72	25.3
Ukraine	294	1.0	543	66.0	1.85	64.3
UK	2,339	0.0	18369	-1.5	7.85	-1.5
Europe	28,934	-8.7	96,316	10.6	3.33	21.1
US	17,673	-3.2	79,566	-0.4	4.50	20.2
Asia Pacific	13,704	-0.6	73,446	8.2	5.36	32.8
World	60,311	-5.4	249,328	6.2	4.13	32.4

Notes: See Master Notes, page 6. World; regions listed here. IATA = International Air Transport Association. \*Quoted in US\$. †Under the IATA billings and settlement plan. ‡Additional countries, in order of listing: Luxembourg, Slovakia, San Marino, (3) Baltics, Moldova, Montenegro, Andorra, Liechtenstein. Source: IATA, Airlines Reporting Corporation.

## 12 TBA100 travel stock indices\*

Region	May 2009
Asia Pacific	68
Europe	44
World†	48

Notes: \*Base is last trading day in December 2006. †Comprising Asia Pacific (10 stocks), Europe(12), US (8). Source: Travel Business Analyst.

## 13 Economic indicators of major markets in Europe, 2008

Country	GNP/GDP		Retail sales		Consumer prices†		Wages/earnings‡	
	1 year	3 mths*	1 year	1 year	1 year	year ago	1 year	year ago
France	-3.2 Q1	-4.7	-2.3 Mar	-0.3	3.3 May	3.1	2.7 Q4	
Germany	-1.7 Q4	-8.2	-1.9 Mar	0.7	2.4 Apr	2.5	2.6 Feb	
Italy	-6.0 Q1	-10.1	-5.2 Mar	0.9	3.6 May	3.5	2.8 Apr	
Netherlands	-0.6 Q4	-3.8	-4.7 Feb	2.0	2.2 Mar	3.6	3.1 Mar	
Spain	-3.0 Q1	-7.4	-8.2 Mar	-0.9	4.6 May	4.9	3.7 Q4	
Switzerland	-0.1 Q4	-1.2	-3.1 Feb	-0.4	2.6 Mar	2.0	1.6 '08	
UK	-4.1 Q1	-7.4	2.4 Apr	2.2	3.3 May	0.8	4.0 Apr	
Euroland	-1.5 Q4	-6.2	-4.2 Mar	0.6	3.6 Mar	3.9	3.2 Q4	
Others								
Japan	-4.3 Q4	-12.1	-2.4 Jan	-0.1	1.0 Feb	-1.9	-0.4 Dec	
US	-2.6 Q1	-6.1	-6.8 Mar	-0.4	4.0 Mar	3.4	3.8 Mar	

Notes: All figures are percentage changes, at annual rate. \*Average of latest 3 months compared with average of previous 3 months, at annual rate. †Figures not seasonally adjusted. ‡Germany, hourly wages; Japan and UK, monthly earnings; USA, hourly earnings. Source: The Economist.

## 14 Visitor spending in Europe destinations

Destination	Jan-	+/-,%	US\$bn	Jan-	US\$bn	+/-,%
Austria	Sep†	6.8	20.2	Dec†	18.9	4.0
Belgium	Oct†	7.7	11.5	Dec†	10.7	-4.5
Bulgaria	Oct†	11.9	3.5	Dec†	3.1	10.8
Croatia	Sep†	9.6	10.1	Dec†	9.3	7.3
Cyprus	Aug†	-3.7	2.6	Dec†	2.7	3.8
Czech R	Sep†	-0.7	6.6	Dec†	6.6	7.7
Denmark	Sep†	1.6	6.2	Dec	6.1	0.9
Estonia	Sep†	10.8	1.1	Dec†	1.0	-7.8
Finland	Sep†	1.5	2.9	Dec†	2.8	8.9
France	Dec†	-4.6	51.7	Dec†	54.2	7.2
Germany	Dec†	3.5	37.3	Dec†	36.0	0.6
Greece	Oct†	3.3	16.0	Dec†	15.5	-0.3
Hungary	Sep†	17.7	5.6	Dec†	4.7	2.3
Iceland	Sep†	11.7	0.7	Dec†	0.7	30.5
Ireland	Sep†	-0.1	6.1	Dec†	6.1	3.9
Italy	na	na	na	Dec†	42.7	2.5
	Dec†	-0.1	42.6	Dec†	42.7	2.5
Latvia	Jun†	15.5	0.8	Dec†	0.7	28.3
Lithuania	Sep†	9.2	1.3	Dec†	1.2	1.8
Luxemb'g	Sep†	4.6	4.2	Dec†	4.0	1.4
Malta	Sep†	-1.4	0.9	Dec†	0.9	9.4
Netherl'ds	Sep†	-3.4	13.0	Dec†	13.4	8.4
Norway	Sep†	3.8	4.5	Dec†	4.4	6.4
Poland	Sep†	-4.4	10.2	Dec†	10.6	30.9
Portugal	Oct†	2.9	10.4	Dec†	10.1	10.8
Romania	Sep†	17.0	1.7	Dec†	1.5	3.3
Russia	Sep†	53.1	14.7	Dec†	9.6	25.9
Slovakia	Sep†	8.4	2.2	Dec†	2.0	10.6
Slovenia	Oct†	10.9	2.5	Dec†	2.2	13.6
Spain	na	na	na	Dec†	57.8	3.6
	Dec†	-0.4	57.6	Dec†	57.8	3.6
Sweden	Sep†	-1.1	11.9	Dec†	12.0	21.1
Switzerl'd	Sep†	7.2	12.7	Dec†	11.8	6.4
Turkey	Oct†	18.9	22.0	Dec†	18.5	9.7
UK	na	na	na	Dec†	37.6	2.7
	Dec†	1.6	38.2	Dec†	37.6	2.7
Ukraine	Sep†	38.2	6.4	Dec†	4.6	31.9

Notes: See Master Notes, page 6. Growth may not tally with previous figure shown. \*2006 unless stated otherwise. †2007. ‡2008. Source: WTO.

Notes: †2007 and ‡2008; full year, based on YTD growth rate shown.

## 15 Visitor arrivals in Europe destinations

International arrivals						
Destination	*Jan-	Growth %	Arrivals x1000	Source	Stay days	PVPD US\$-C
Albania	Dec†	23.5	2,723	WTO	NA	NA
Austria	Dec	2.5	20,766	WTO	5.2-F	142.90
	Dec†	5.5	21,908	WTO	5.2-F	156.17
Belgium	Sep†	1.5	7,151	WTO	7.0-E	231.39
Bulgaria	Sep†	14.5	5,898	WTO	2.8-F	48.39
Croatia	Nov†	1.2	9,419	WTO	5.0-E	182.47
Cyprus	Dec†	-0.5	2,404	WTO	11.0	59.13
Czech R	Sep†	2.2	6,827	WTO	2.8-F	48.39
Denmark	Nov†	-5.0	4,525	WTO	3.60	1928-V
Estonia	Nov†	4.5	1,986	WTO	5.40	28.31
Finland	Oct†	1.7	3,579	WTO	5.86	62.92
France	Dec	3.8	81,900	WTO	7.16-F	77.69
	Dec†	-3.2	79,279	WTO	7.16-F	79.23
Germany	Dec	3.9	24,420	WTO	7-F	194.05
	Dec†	1.9	24,884	WTO	6.0-E	224.53
Greece	Aug†	-5.5	16,555	WTO	14.0	20.23
Hungary	Sep†	1.0	8,724	WTO	3.41-F	15.19
Iceland	Nov†	3.7	1,093	WTO	2.8	267.56
Ireland	Nov†	-2.1	8,157	WTO	11.0-F	39.06
Italy	Dec	6.3	43,654	WTO	4.36-F	178.42
	Dec†	-2.1	42,737	WTO	4.36-F	196.89

continued on page 12

## Airlines graded

Starting in 2003, the Association of European Airlines has bravely been compiling reports where most of its member airlines list baggage mishandling and flight delays.

AEA asks that this list not be treated as 'best-and-worst', but unfortunately that is inevitable. It also adds that non-AEA member airlines should not make statements on comparative results – because criteria and measures may be different.

Partly for that reason we provide a list of AEA member airlines who did not provide data to their association, and who thus could be considered the 'worst'.

In addition, non-AEA-member airlines are included in our resulting 'worst' list. Although slightly unfair, inclusion is to encourage such airlines to participate in AEA studies, not necessarily by becoming AEA members.

However, we accept that for some low-fare-airlines, this becomes a cost factor that would eventually threaten their LFA status. (Unusually, then, Ryanair is an airline that does keep similar records, and often claims it is better than AEA members, although its measurement criteria are not known.)

We suggest – as we have done to no avail since 2004 – that AEA asks non-members for the same data, and simply list them in the table if they do or do not respond. It now does this for AEA members, in some lists.

AEA members that have come in after initial absence are Icelandair, LOT-Polish, Luxair, and Swiss; dropping out is Meridiana. A committed non-reporting AEA member airline is Aer Lingus plus, in some categories, Virgin Atlantic.

Of the best and 'second-worst', see tables,

the only sizeable airline in the best list was KLM, but in the 'second-worst', there were a few – Air France, Alitalia, Iberia, and Turkish. As these findings are weighted (per 1000 passengers, for instance), this indicates airlines seem to have an operational problem as they get bigger.

However, we find it difficult to believe Air Malta's and Icelandair's frequent claims to 100% 'flight regularity' (meaning percentage of flights performed as planned; not

shown in this report) – particularly as both airlines have also figured in the 'second-worst' lists for late arrivals or departures.

Presumably, any change that the airlines make to their schedules is defined as 'planned'. AEA should either drop this section, or institute a reality-check; we no longer include this section in our report.

AEA says 98.1% of short/medium-haul flights operated as planned in 2008, and 99.3% for longhaul. These are better than earlier years, although difficult to imagine, when change is from, say, 98.8% to 99.0%.

Table 2

### Best airlines in Europe for baggage and punctuality

	On-time arrivalst,%	On-time departures†,%	Bags delayed/ 1000 pax
<b>2008</b>			
Luxair	90	Tarom 92	Turkish 5
KLM	90	Luxair 92	Air Malta 5
Austrian	90	Icelandair 90	Virgin 5
<b>2007</b>			
Luxair	87	Tarom 89	Air Malta 5
KLM	85	Czech 89	Turkish 5
Austrian	84	Luxair 88	Cyprus 9
<b>2006</b>			
Luxair	90	Luxair 91	Air Malta 4
Brussels	87	Tarom 88	Turkish 5
KLM	87	Brussels 88	Air One 8
<b>2005</b>			
Finnair	88	Luxair 89	Air Malta 4
Luxair	87	Finnair 88	Turkish 5
Brussels	86	Tarom 88	Tarom 8
<b>2004</b>			
Finnair	90	Tarom 93	Meridiana 4
Luxair	87	Luxair 90	Turkish 4
SAS	86	Finnair 89	Air Malta 6
<b>2003</b>			
Finnair	91	Luxair 93	Turkish 4
Luxair	91	Tarom 93	Air Malta 5
SAS	89	Brussels 92	Meridiana 6
<b>Start</b>			
Spanair	88	Spanair 89	Turkish 1
Finnair	83	Brussels 88	Spanair 8
Brussels	82	Tarom 87	Tarom 9

Notes: Started in early 2003. Punctuality is for short/medium-haul flights. \*See text; for missing baggage and punctuality, based on AEA members. †Within 15 minutes of scheduled time. Source: Association of European Airlines.

Table 1

### 'Worst'\* airlines in Europe

Aer Lingus  
Aeroflot  
Easyjet  
Alitalia  
Ryanair  
Spanair††  
Turkish††  
Virgin††

Notes: \*See text; for missing baggage and punctuality, based on non-reporters, and larger non-AEA members. †AEA member. ††Partial inclusion. Source: Association of European Airlines, Travel Business Analyst.

Table 3

### 'Second-worst\*\*' airlines in Europe for baggage and punctuality

	On-time arrivalst,%	On-time departures†,%	Bags delayed/ 1000 pax
<b>2008</b>			
Cyprus	69	Turkish 73	Iberia 19
Iberia	70	Iberia 75	Air France 19
Turkish	70	Alitalia 76	Air Portugal 17
<b>2007</b>			
TAP	60	British 68	Air Portugal 28
Spanair	63	Air Malta 68	British 27
Cyprus	64	Olympic 69	Alitalia/KLM 20
<b>2006</b>			
TAP	54	TAP 62	British 23
Icelandair	62	Icelandair 69	TAP 21
Air Malta	68	Air Malta 70	Lufthansa 18
<b>2005</b>			
Icelandair	65	Olympic 65	KLM 19
Turkish	67	Icelandair 73	British 18
TAP	69	TAP 74	Austrian 16
<b>2004</b>			
TAP	66	TAP 71	Austrian 17
Icelandair	68	Air Malta 74	British 18
Turkish	74	Olympic 76	KLM 20
<b>2003</b>			
Turkish	69	Olympic 77	Air France 19
Alitalia	68	Swiss 76	Alitalia 22
Air Portugal	67	Alitalia 75	KLM 23
<b>Start</b>			
JAT	65	Austrian 73	Air France 36
Air Portugal	64	Air Portugal 72	KLM 37
Alitalia	57	Alitalia 71	Luxair 55

Notes/Source: See Table 2.

# MARKET INTELLIGENCE

continued from page 10

## 15 Visitor arrivals in Europe destinations

### International arrivals

Destination	*Jan-	Growth %	Arrivals x1000	Source	Stay days	PVPD US\$-C
Latvia	Dec†	3.9	1,717	WTO	5-E	61.11
Liechtenstein	Oct†	0.4	55	WTO	2.10	NA
Lithuania	Sep†	9.3	2,502	WTO	6.00	15.93
Malta	Nov†	4.5	1,300	WTO	8.40	52.70
Netherlands	Dec†	-7.3	10,204	WTO	3.67-F	221.99
Norway	Nov†	-6.2	4,024	WTO	7-E	445-V
Poland	Dec†	-13.9	12,893	WTO	4.7	56.32
Portugal	Oct†	4.9	12,925	NTO	7.0	70.73
Romania	Nov†	-5.1	1,472	WTO	3.20-F	21.16
Russia	Jun†	5.0	22,269	WTO	3.67-F	221.99
Serbia	Nov†	-7.0	647	WTO	4-E	NA
Slovakia	Sep†	7.3	1,808	WTO	3.60	4.17
Slovenia	Dec†	0.9	1,767	WTO	3.12	4.84
Spain	Dec	1.7	59,193	WTO	12.7	38.16
	Dec†	-2.6	57,654	WTO	12.7	68.78
Sweden	Nov†	-0.8	5,182	WTO	7-E	338.65
Switzerland	Nov†	2.1	8,625	WTO	3.8-F	200.17

Destination	Jan-	Growth %	Arrivals x1000	Source	Stay days	PVPD US\$-C
Turkey	Dec	17.6	22,245	WTO	8.0	111.68
	Dec†	12.3	24,985	WTO	8.0	111.68
UK	Dec	0.1	30,677	WTO	10.1	69.41
	Dec†	-2.2	30,002	WTO	10.1	110.11
Europe	Dec†	0.1	487,935	WTO	5-E	na
	Mart	-13.4	422,552	WTO	5-E	na

### International arrivals

City/region	Period	Number	Growth,%	Stay,days	Comment	Source
Balearics	2007	10.2m	1.2	NA	none	NTO
Berlin	2006	2.32m	18.7	2.6	none	CTO
London	2006	15.6m	12.3	6.5	none	CTO
Paris	J-Sep 7	6.62m	5.6	NA	hotels	CTO

### Domestic arrivals

Destination	Period	Number	Growth,%	Stay,days	Comment	Source
London	2006	10.96m	2.4	2.2	none	CTO
Spain	J-Sep 07	119.7m	8.5	NA	trips	NTO

Notes: See Master Notes, page 6. WTO changes data, so its data should always be considered provisional. Growth may not tally with previous figure shown. \*2007 unless stated otherwise. †2009. ‡2008. B = Bednights. H = Nights at hotels. Source: NTO = national tourist office (or equivalent), Ot = Other, WTO = World Tourism Organization.

Notes: See Master Notes, page 6. Latest figures; ‡full year at YTD growth rate. E = Travel Business Analyst estimate (some based on statistically-incompatible measures), PVPD = per visitor per day. C = Quoted in US\$. F = In hotels. V = Per visitor. Source: As 'Source' above.

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