

- In the wake of the disruption to visitor patterns seen in Q3 as a result of the Olympics, the final quarter of the year bounced back in resounding fashion.
- The 4 million visits were 9% higher than for the same period in 2011. This translates to about a third of a million more visitors in the period.
- Significantly, it suggests there was no post-Olympics hangover that several other host-cities have experienced.
- But, while volumes were substantially up in London, visitor receipts at £2.52 billion were more subdued, only about 1% higher. The number of nights in Q4 accelerated 13%.
- The main source of volume gains in the quarter was from London's European markets (up 9%), somewhat defying the tough economic conditions on the Continent.
- The quarter saw a further resounding increase in visitors from 'other' source markets outside Europe and North America. Their numbers were boosted 18%, with a simultaneous one-fifth increase in spend.
- Holiday visitors drove Q4's performance, registering 10% higher, and signposting an Olympics-inspired bounce in visitor activity.
- Premium business travel activity trended very positively with a 5% rise, while lower-value VFR arrivals improved 13%.
- The final quarter's figures mean that for the full calendar year, London welcomed 1% more visitors than in 2011, while tourism spending was up 8%.

LONDON: OVERSEAS VISITS, NIGHTS & SPEND, Q4 2012

	Q4 2012	% Change
Visits (000s)	4,024	9%
Spend £m	2,516	1%
Nights (000s)	23,014	13%

LONDON: OVERSEAS VISITS BY MAJOR REGION, Q4 2012

Q4 2012	Visits (000s)	% Change	Spend (£m)	% Change
Europe	2,853	9%	1,325	-7%
N America	444	-6%	369	-9%
Others	727	18%	822	22%

LONDON: OVERSEAS VISITS BY PURPOSE, Q4 2012

Q4 2012	Visits (000s)	% Change	Spend (£m)	% Change
Business	851	5%	703	-8%
Holiday	1,851	10%	1,087	12%
Study*	41	-18%	121	-10%
VFR	995	13%	454	2%
Other*	287	4%	151	-19%

*Small sample size

Source: ONS, International Passenger Survey, Q4 2012 figures

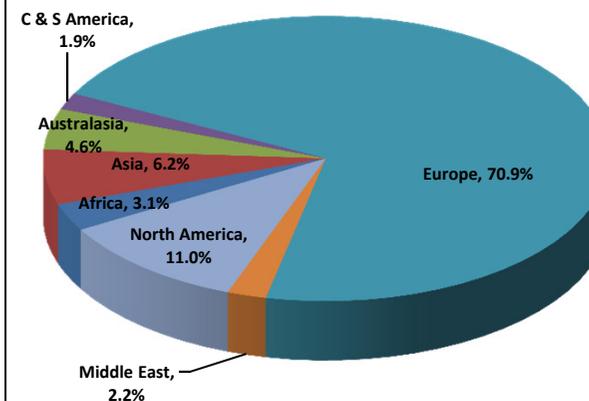
LONDON: HOLIDAY VISITS & SPEND BY MAJOR REGION, Q4 2012

Q4 2012	Visits (000s)	% Change	Spend (£m)	% Change
Europe	1,314	18%	573	-8%
N.America	170	18%	117	18%
Others	367	18%	397	18%

LONDON: BUSINESS VISITS & SPEND BY MAJOR REGION, Q4 2012

Q4 2012	Visits (000s)	% Change	Spend (£m)	% Change
Europe	599	18%	362	-8%
N.America	122	-8%	164	-8%
Others	130	18%	177	18%

LONDON: ORIGIN OF OVERSEAS VISITS Q4 2012



Source: ONS, International Passenger Survey, Q4 2012 figures

LONDON: LEADING OVERSEAS MARKETS BY VISITS, Q4 2012

	Visits ('000)	% change
France & Monaco	477	8%
Germany	364	36%
USA	362	-5%
Italy & San Marino	262	1%
Spain & Andorra	213	4%
Netherlands	192	20%
Australia	162	28%
Sweden	148	18%
Belgium	142	68%
Eire	138	-26%
Switzerland	133	-3%
Norway	122	1%
Poland *	109	34%
Denmark	91	-4%
Canada	82	-11%
All other E.Europe *	73	-1%
Czech Republic *	47	115%
Portugal *	41	-18%
Austria *	41	10%
India *	40	-7%
Israel *	39	35%
Singapore *	37	47%
South Korea *	37	194%
Russia *	35	-12%
Brazil *	33	-29%
Japan *	33	3%
Finland *	32	0%
United Arab Emirates *	31	12%
Hungary *	31	140%
Romania *	29	6%

* Small sample, less than 100, Source: ONS, International Passenger Survey, Q4 2012 figures

LONDON: LEADING OVERSEAS MARKETS BY SPEND, Q4 2012

	Spend (£million)	% change
USA	308	-9%
France & Monaco	173	9%
Germany	134	24%
Australia	126	16%
Italy & San Marino	121	-12%
Spain & Andorra	97	-14%
Norway	86	10%
Switzerland	81	-10%
Netherlands	81	15%
Sweden	77	10%
Saudi Arabia *	65	222%
Canada	61	-9%
Japan *	59	99%
Eire	54	-31%
United Arab Emirates *	51	48%
Singapore *	50	93%
Belgium	49	44%
All other E.Europe *	48	-14%
India *	44	68%
Denmark	42	-14%
Nigeria *	40	-12%
Russia *	39	-60%
Poland *	39	-26%
Kuwait *	39	-41%
Turkey *	38	58%
China *	30	75%
Other Gulf States *	30	0%
Brazil *	28	-19%
Israel *	26	61%
Portugal *	23	-18%

* Small sample, less than 100 Source: ONS, International Passenger Survey, Q4 2012 figures