

KEY OVERSEAS VISITOR MARKETS 2011 FACT SHEET

- Provisional data from the IPS shows that in 2011, London welcomed 15.2 million overseas visitors, 3.5% more than in 2010.
- Expenditure, buoyed by the continuing weakness of sterling, reached almost £9.4 billion, a 7.1% boost over 2009.

- The USA remained London's largest international market, with visits equalling 1.84m in 2011. It is a particularly high-value market, with receipts of nearly £1.34bn.

- The US market received a strong boost from both business and leisure arrivals, reflecting improving consumer and business confidence as the economy continues its steady recovery.

- The main economies of Europe dominate the remainder of London's Top 10 origin markets. Chief among these is France, followed by Germany, Italy and Spain.

- Both France and Germany yielded slightly fewer visitors than in 2010. But towards the end of 2011, there was more widespread fallout from several Eurozone markets, reflecting the growing economic stress in the Eurozone.

- Asia Pacific continued to make a bigger impact in London's visitor mix, buoyed by rapid volume growth from China, and its neighbouring economies.

- With its strong currency delivering a very favourable exchange rate, Australia performed strongly again in 2011.

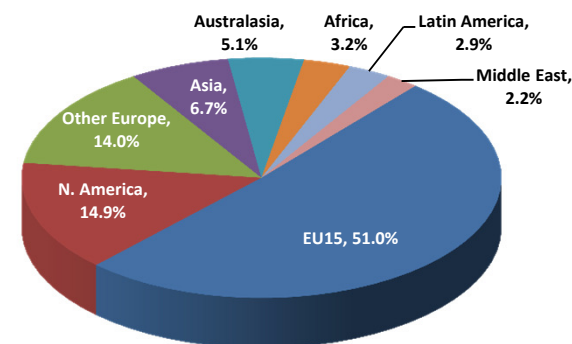
- The standout performer on the other side of the World was Brazil. Buoyed by fast-growth economic performance, Latin America's power-house economy generated 40% more arrivals for London than in 2010.

LONDON: TOP 30 OVERSEAS VISITOR MARKETS 2011 BY VISITS AND EXPENDITURE

Visits Thousands	% change vs 2010		Expenditure £million	% change vs 2010	
USA	1,840	4.2%	USA	1,382	6.7%
France	1,595	-1.8%	Italy	539	23.4%
Germany	1,208	-3.9%	France	528	-2.8%
Italy	999	7.1%	Australia	499	15.3%
Spain	887	1.3%	Germany	477	2.5%
Australia	679	8.8%	Spain	432	7.1%
Netherlands	625	0.6%	Canada	266	9.5%
Ireland	620	-5.5%	Netherlands	239	-9.5%
Sweden	453	2.4%	Sweden	236	14.0%
Canada	429	10.0%	Norway	235	15.0%
Belgium	406	-16.9%	Switzerland	232	43.2%
Switzerland	389	23.7%	Russia	232	93.1%
Norway	378	1.6%	Ireland	230	-10.3%
Poland	354	-0.6%	Brazil	207	75.4%
Denmark	336	22.9%	Saudi Arabia	174	71.1%
India	233	-1.2%	India	164	-23.0%
Brazil	210	40.9%	Denmark	158	11.2%
Japan	166	-1.5%	UAE	141	-19.2%
Austria	164	-1.3%	Poland	140	-12.7%
Portugal	163	-5.6%	Belgium	130	-22.9%
Russia	152	27.8%	Japan	109	-7.0%
Finland	123	18.8%	Singapore	106	37.1%
UAE	118	9.8%	Hong Kong	105	23.6%
South Africa	109	-11.6%	China	88	0.3%
Hong Kong	98	15.8%	South Africa	88	-17.4%
New Zealand	95	-14.6%	Austria	79	-7.7%
Singapore	89	-0.3%	Portugal	75	0.9%
China	80	44.2%	Finland	72	37.9%
Saudi Arabia	66	22.1%	New Zealand	67	6.1%
Argentina	61	15.9%	Argentina	26	-23.9%
All London Visits	15,216	3.5%	All London Spend	9,364	7.1%

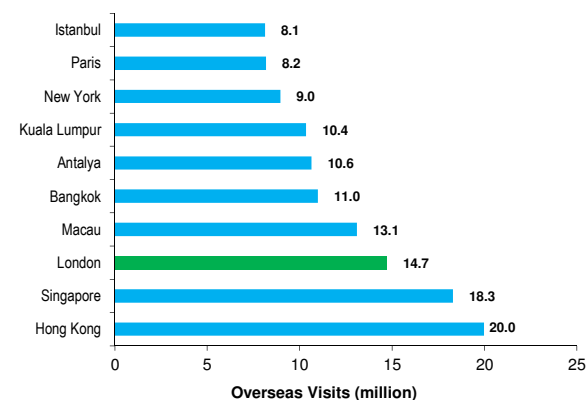
Source: ONS, International Passenger Survey, 2011 preliminary figures

ORIGIN OF LONDON OVERSEAS VISITS 2011



Source: ONS, International Passenger Survey, 2011 preliminary figures
Asia Pacific includes Australia, New Zealand, India, China, Singapore, Hong Kong & Japan
North America includes USA & Canada

LEADING CITIES FOR INTERNATIONAL TOURISM 2010



Source: Euromonitor International's Top City Destinations Ranking, January 2012
NB. In the 2012 survey, changes to the method used for counting international visitors to Hong Kong (to include mainland China arrivals) and Singapore (now includes visitors from Malaysia) were introduced. This resulted in London being displaced from the top spot in these rankings, a position the city had held since the origin of the survey.