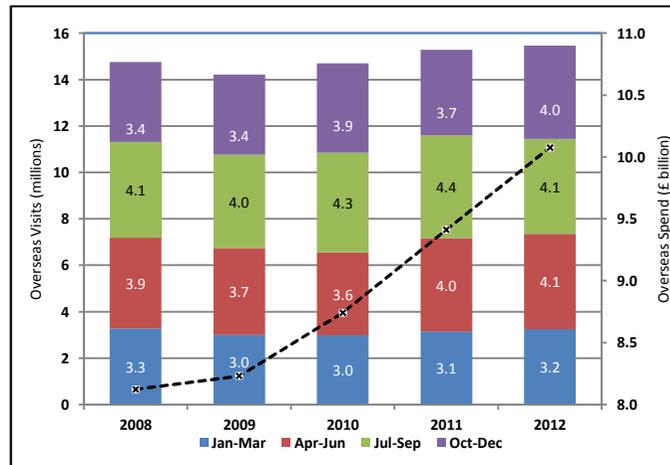


- Data from the International Passenger Survey shows that in 2012, London welcomed 15.5 million overseas visits. This 1% upwards trend yielded about 170,000 more visitors than in 2011.
- Tourism receipts increased by £700 million, buoyed by continuing Sterling weakness and a strong Olympics-related uplift during the third-quarter, to reach almost £10.1 billion. This was a 7.1% boost over 2011.
- About one-half of London's overseas visitors in 2012 originated from EU15 source markets, dominated by arrivals from France, Germany, Italy and Spain. The trend for EU15 was marginally down on the previous year, reflecting the economic stress in Eurozone markets.
- In marked contrast, the Rest of Europe (15% of volumes) improved 7%.
- North America accounted for nearly 15% of London's visitor profile. Performance in the year was neutral, gains in leisure arrivals being offset by fewer business arrivals, notably in the period around the Olympics.
- The highest rates of growth were seen in the emerging geographies of Latin America (+9%), Asia (+7%), Africa (+4%), while Middle East arrivals were positive to the tune of 8%. Collectively, these markets comprised about 16% of London's total.
- The holiday sector, about one-half of international visits to London, nudged upwards 0.4%. This reflected tough economic conditions in European markets generating a large proportion of holiday volumes.
- Business visits advanced at a similar rate, partly held-back by reduced US volumes across the year. VFR arrivals were the key source of additional visits. These rose by 5%.

LONDON: OVERSEAS VISITS, NIGHTS & SPEND
2007 - 2012

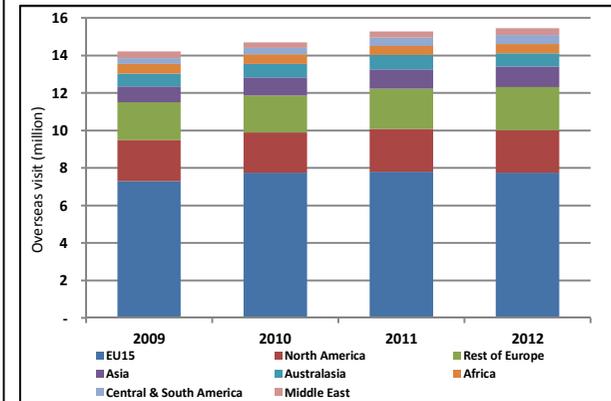
	2008	2009	2010	2011	2012
Overseas Visits (m)	14,753	14,211	14,706	15,289	15,461
Yr/yr %	-3.8%	-3.7%	3.5%	4.0%	1.1%
Overseas nights (m)	90,815	85,686	90,318	91,498	94,300
Yr/yr %	-5.2%	-5.7%	5.4%	1.3%	3.1%
Overseas spend (£bn)	8,126	8,238	8,741	9,411	10,075
Yr/yr %	-0.8%	1.4%	6.1%	7.7%	7.1%
£ per visitor per day	89.48	96.14	96.78	102.85	106.84
Yr/yr %	4.7%	7.4%	0.7%	6.3%	3.9%

QUARTERLY DISTRIBUTION OF OVERSEAS EXPENDITURE



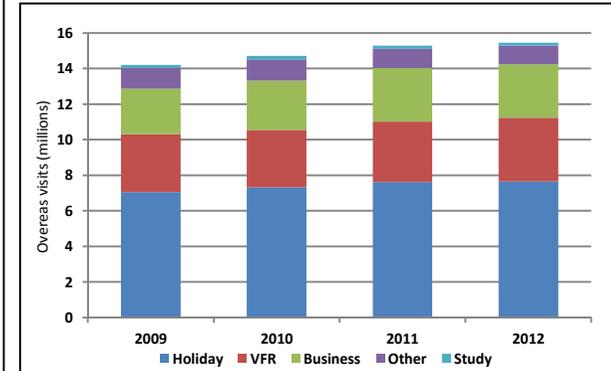
Source: ONS, International Passenger Survey, 2012

ORIGIN OF LONDON OVERSEAS VISITS 2009-2012



Source: ONS, International Passenger Survey, 2012
 Asia Pacific includes India, China, Singapore, Hong Kong & Japan
 Rest of Europe includes all countries outside the original 15 EU signatories.
 North America includes USA & Canada. Latin America includes Central and South America

LEADING PURPOSE OF OVERSEAS VISITS 2009-2012



Source: ONS, International Passenger Survey, 2012
 VFR – Visiting friends and relations