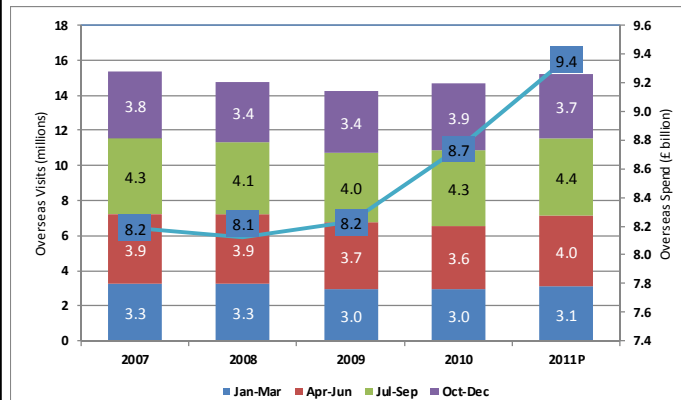


- Provisional data from the IPS shows that in 2011, London welcomed 15.2 million overseas visitors, almost half a million more than in 2010.
- Tourism receipts increased by £700 million, buoyed by continuing Sterling weakness, to reach almost £9.4 billion. This was a 7.1% boost over 2010.
- About one-half of London's overseas visitors in 2011 originated from Eurozone countries, dominated by arrivals from France Germany, Italy and Spain. The trend for Eurozone arrivals was neutral, reflecting growing economic stress in the region.
- In stark contrast, the Rest of Europe (14% of volumes) improved 8%.
- North America accounted for 15% of London's visitor profile, up 5% driven by steady growth from the USA, London's biggest single market.
- The most rapid growth (+29%) came from Latin America, transmitting the 40% rise in visitors from Brazil. One tenth of London arrivals were from Asia, a market that increased about 8% on the previous year.
- The holiday leisure sector, accounting for one-half of international visits to London, grew very much in line with the total market, by 3.4%.
- A notable aspect of London's visitor activity in 2011 was further sustained growth for the business sector (+7.4%), in the wake of some heavy losses since 2007.
- VFR arrivals were more than one-fifth of London's market. A more discretionary segment of the market, it was badly affected by the recession, but returned to volume growth in 2011.

### LONDON: OVERSEAS VISITS, NIGHTS & SPEND 2007 - 2011

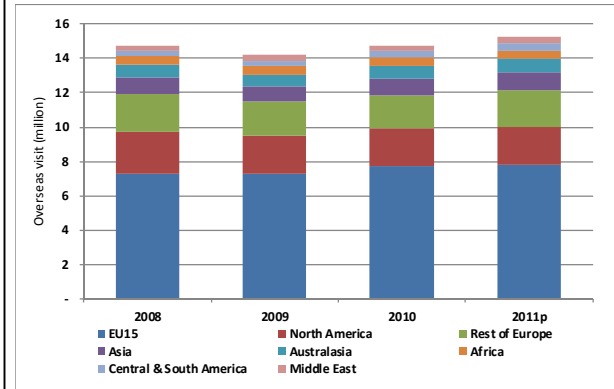
	2007	2008	2009	2010	2011
<b>Overseas Visits (m)</b>	<b>15,340</b>	<b>14,753</b>	<b>14,211</b>	<b>14,706</b>	<b>15,216</b>
Yr/yr %	-1.6%	-3.8%	-3.7%	3.5%	3.5%
<b>Overseas nights (m)</b>	<b>95,846</b>	<b>90,815</b>	<b>85,686</b>	<b>90,318</b>	<b>91,020</b>
Yr/yr %	-5.2%	-5.2%	-5.7%	5.4%	0.8%
<b>Overseas spend (£bn)</b>	<b>8,192</b>	<b>8,126</b>	<b>8,238</b>	<b>8,741</b>	<b>9,364</b>
Yr/yr %	4.7%	-0.8%	1.4%	6.1%	7.1%
<b>Spend per visitor per day (£)</b>	<b>85.47</b>	<b>89.48</b>	<b>96.14</b>	<b>96.78</b>	<b>102.88</b>
Yr/yr %	10.4%	4.7%	7.4%	0.7%	6.3%

### QUARTERLY DISTRIBUTION OF OVERSEAS EXPENDITURE



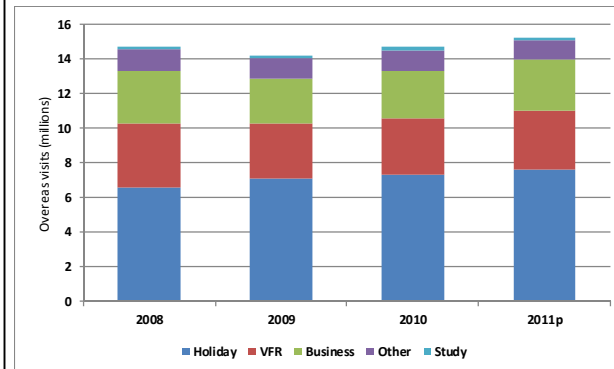
Source: ONS, International Passenger Survey, 2011 preliminary figures

### ORIGIN OF LONDON OVERSEAS VISITS 2008-2011



Source: ONS, International Passenger Survey, 2011 preliminary figures  
 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 2008-2011



Source: ONS, International Passenger Survey, 2011 preliminary figures  
 VFR – Visiting friends and relations