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OVERSEAS VISITS, Q3 2010

FACT SHEET

• Latest provisional data from the International Passenger Survey for Q3 shows a significant 5.4% improvement over the same period in 2009.

• There were 4.24 million visits to London from overseas in the quarter, equivalent to an additional 200,000 over 2009.

• The increase in visitor volumes finally brought to an end a sustained period of quarterly declines seen since Q1 2007.

• As a result, in the year to September, London's visitor count was on par with the previous year. In the wake of a 3.7% loss seen for 2009, and in spite of some difficult operating conditions earlier this year, there is an underlying positive momentum driving London's tourist economy through 2010,

• Holiday visitors (+5.4%) were the main source of growth in the quarter, while the business sector (+18%) continued its recovery trend.

• Expenditure improvements were less marked, at a modest 0.7%, adding about £15 million to London tourism receipts. The trend for number of nights correlated more closely with that for visits, up 7.8%.

• This means that during London's peak period, while the average length of stay improved slightly, visitors were spending a bit less than in the previous year.

• The main factor behind this was fewer high-spending North American visitors (-5.4%) in the quarter.

• European visitors were the main source of gains in the quarter, increasing 8.8%. While the majority of these were holiday visitors, there was an eye-catching 26% boost from European business arrivals.

LONDON: OVERSEAS VISITS, NIGHTS & SPEND, Q3 2010

	Q3 2010	% Change
Visits (000s)	4,240	5.4%
Spend £m	2,436	0.7%
Nights (000s)	30,202	7.8%

LONDON: OVERSEAS VISITS BY MAJOR REGION, Q3 2010

Q3 2010	Visits (000s)	% Change	Spend (£m)	% Change
Europe	2,526	8.8%	556	14.0%
N America	701	-5.4%	447	-3.1%
Others	1,013	5.3%	903	-10.2%

LONDON: OVERSEAS VISITS BY PURPOSE, Q3 2010

Q3 2010	Visits (000s)	% Change	Spend (£m)	% Change
Business	656	18.1%	532	21.2%
Holiday	2,296	5.4%	1,232	4.4%
Study*	85	43.5%	153	-28.1%
VFR	926	3.0%	384	-5.8%
Other	277	-16.5%	135	-24.8%

*Small sample size

Source: ONS, International Passenger Survey, Q3 2010 figures

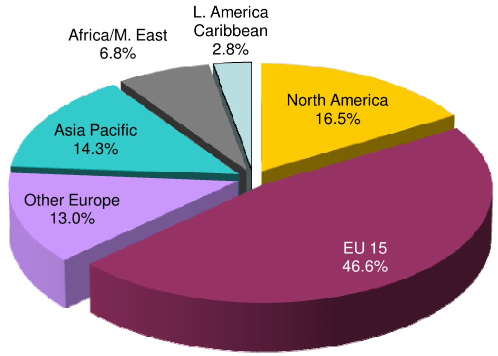
LONDON: HOLIDAY VISITS & SPEND BY MAJOR REGION, Q3 2010

Q3 2010	Visits (000s)	% Change	Spend (£m)	% Change
Europe	1,393	5.7%	556	8.8%
N.America	358	-4.1%	209	6.7%
Others	546	12.1%	467	-1.4%

LONDON: BUSINESS VISITS & SPEND BY MAJOR REGION, Q3 2010

Q3 2010	Visits (000s)	% Change	Spend (£m)	% Change
Europe	417	26.4%	214	30.0%
N.America	125	10.5%	153	11.4%
Others	114	1.3%	165	20.3%

LONDON: ORIGIN OF OVERSEAS VISITS Q3 2010



Source: ONS, International Passenger Survey, Q3 2010 figures

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OVERSEAS VISITS, Q3 2010

Key Overseas Markets

LONDON: LEADING OVERSEAS MARKETS, Q3 2010

VISITS	Visits ('000)	% change
USA	563	-7.9%
France	393	10.7%
Germany	350	21.2%
Italy	266	62.4%
Australia	251	18.0%
Spain	250	-9.8%
Irish Republic	146	-7.5%
Canada	137	6.0%
Netherlands	137	-21.5%
Poland	113	28.2%
Belgium	112	51.5%
Sweden	108	29.3%
Norway	99	25.7%
Switzerland*	69	-28.2%
India	68	14.2%
Denmark*	60	-34.6%
All other E.Europe*	55	12.1%
New Zealand	51	30.2%
Brazil*	50	22.3%
Austria	50	14.9%
Japan	46	-20.2%
United Arab Emirates	46	-3.1%
South Africa*	44	13.8%
Portugal*	41	43.5%
Israel*	41	-8.2%
Nigeria*	39	-18.6%
Romania*	39	36.5%
Russia*	38	69.2%
Czech Republic*	34	-21.8%
South Korea*	33	37.1%

Source: ONS, International Passenger Survey, Q3 2010 figures

* Small sample , less than 100

LONDON: LEADING OVERSEAS MARKETS, Q3 2010

EXPENDITURE	Spend (£m)	% change
USA	361	-9.9%
Italy	158	101.6%
Australia	156	-1.8%
Spain	132	6.8%
France	128	36.4%
Germany	115	31.4%
Canada	85	42.6%
India	67	32.3%
United Arab Emirates	65	-29.2%
Norway	53	22.3%
Saudi Arabia*	51	3.9%
Nigeria*	50	-14.6%
Poland	46	10.7%
Netherlands	45	-16.0%
Sweden	44	32.2%
Irish Republic	43	-16.3%
Russia*	38	87.9%
Belgium	36	35.8%
Japan	36	4.1%
Malaysia*	35	-31.0%
South Africa*	35	49.8%
China*	32	71.0%
Brazil*	31	17.8%
Other Gulf States*	30	-43.5%
Switzerland*	29	-41.2%
Denmark*	28	-23.2%
Kuwait*	28	-22.7%
All other E.Europe*	26	-32.6%
New Zealand	26	-5.3%
Hong Kong*	24	35.5%

Source: ONS, International Passenger Survey, Q3 2010 figures

* Small sample , less than 100

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OVERSEAS VISITS, Q3 2010

Key Highlights

HOLIDAY visits highlights

- Holiday arrivals made the main contribution to London's strong Q3 performance, up 5.4%, translating to about 100,000 more leisure visitors in the peak Summer period compared to last year.
- But the headline figure disguises the contrasting fortunes of the European and North American markets. Leisure arrivals from North America were 4% fewer, mainly reflecting the uncertainty in the US consumer economy. In addition, in the wake of April's volcanic emissions, there may have been a more cautious mood among visitors crossing the North Atlantic.
- Leisure visitors from Europe increased 7.5%, about 75,000. Among the leading markets, France (+31%), Germany (+6%) and Italy (+50%) all performed very strongly, while the deepening economic gloom in Spain may well have contributed to a 14% loss in leisure volumes.
- Other noteworthy increases in Q3 included 17% more Swedish leisure arrivals. Further afield, Australia (+29%) was a very strong market, where the strong $Aus has been making London exceptional value. Among the BRIC nations, China made the standout contribution with a doubling of leisure visitors, while Brazil saw an uplift of 58%.
- Over the quarter, leisure visitors spent £1.23 billion, an improvement of 4.4% on 2009, equivalent to a £100 million boost. Receipts from European leisure arrivals were 9% higher, while North American visitors – in spite of being fewer on the ground – increased their spending by 6.7%.

BUSINESS visits highlights

- London's business travel sector continued its post-recession revival, an 18% increase in the quarter accelerating the 4.7% improvement seen for the 6-months ending June. This is totally consistent with the performance of the major flag carriers, particularly at Heathrow, who are reporting buoyant demand from premium passengers. Receipts from business travellers advanced at a similar level to volumes (+21%).
- Although the business travel sector is still far short of its pre-recession levels, its fortunes have swung impressively upwards as the year has progressed. In the 12-months to September, the trend has turned positive to the tune of almost 6%, a marked turnaround from the 2009 calendar year in which business arrivals finished 18% down.
- In some contrast to its Q3 performance in the holiday market, North American business arrivals grew by 10%. But the main driver behind the improvement in the business market came from short haul European markets, with a 26% boost in visitors. Italy and Germany registered noteworthy gains, although these were to some extent offset by big losses from Spanish arrivals, as well as those from France.
- Elsewhere around Europe, smaller business travel markets such as Austria, Netherlands and Norway performed very strongly in the quarter.

Source: ONS, International Passenger Survey, Q3 2010 figures