

OVERSEAS VISITS, QUARTER 2 2012

FACTSHEET

- Q2 results delivered a solid 2.2% increase in arrivals over the same period in the previous year. This builds on the 2.3% uplift in Q1.
- Tourism receipts were particularly strong in Q2, nearly 10% higher, consolidating the first quarter's 3% rise
- From these figures, if there was any early pre-Olympics displacement, it was extremely minimal; and that a combination of the Diamond Jubilee and roster of exclusive events and attractions over the past year were crucial in neutralising its impact.
- The highlight of Q2 was the very strong performance of London's largest market, the USA. This translated into a healthy 10% rise in holiday visits, while business travel was up by about a third.
- The main pressure point on London's performance continues to be economic stress in EU markets. Volumes down by 5% and a more substantial 10% loss in receipts meant fewer visitors from this source - and those that were coming to London were spending less.
- Within the Eurozone, Germany, Netherlands and Spain generated substantial losses.
- Elsewhere, visitor numbers from Rest of World were very positive (+5%), with China, Indian, Saudi Arabia and UAE making notable contributions.
- Holiday arrivals were 1.4% higher, with the main gains from higher numbers of leisure arrivals from emerging and long-haul markets rather than core European sources.
- Business visits showed a healthy 4.7% increase, recovering the 2% loss seen for the previous quarter.

LONDON: OVERSEAS VISITS, NIGHTS & SPEND, Q2 2012

	Q2 2012	% Change
Visits (000s)	4,109	2.2%
Spend £m	2,481	9.8%
Nights (000s)	22,281	2.2%

LONDON: OVERSEAS VISITS BY MAJOR REGION, Q2 2012

Q2 2012	Visits (000s)	% Change	Spend (£m)	% Change
Europe	2,537	-2.0%	1,214	3.3%
N America	735	13.6%	509	21.8%
Others	837	4.9%	755	15.9%

LONDON: OVERSEAS VISITS BY PURPOSE, Q2 2012

Q2 2012	Visits (000s)	% Change	Spend (£m)	% Change
Business	801	4.7%	661	10.0%
Holiday	2,140	1.4%	1,118	3.1%
Study*	40	37.9%	180	181.2%
VFR	895	11.2%	373	6.5%
Other*	233	-24.8%	148	-7.5%

*Small sample size

Source: ONS, International Passenger Survey, Q2 2012 figures

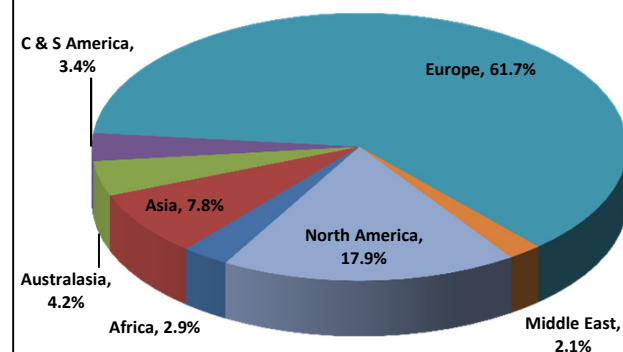
LONDON: HOLIDAY VISITS & SPEND BY MAJOR REGION, Q2 2012

Q2 2012	Visits (000s)	% Change	Spend (£m)	% Change
Europe	1,347	-1.7%	555	-7.3%
N.America	353	11.4%	205	15.2%
Others	440	2.1%	357	16.0%

LONDON: BUSINESS VISITS & SPEND BY MAJOR REGION, Q2 2012

Q2 2012	Visits (000s)	% Change	Spend (£m)	% Change
Europe	490	-5.2%	278	-4.5%
N.America	166	+29.6%	183	+28.9%
Others	145	+19.8%	201	+19.6%

LONDON: ORIGIN OF OVERSEAS VISITS Q2 2012



Source: ONS, International Passenger Survey, Q2 2012 figures

OVERSEAS VISITS, QUARTER 2 2012

FACTSHEET

LONDON: LEADING OVERSEAS MARKETS BY VISITS, Q2 2012

Country	Visits ('000)	% change
USA	602	14%
France & Monaco	396	1%
Germany	319	-16%
Italy & San Marino	235	-4%
Spain & Andorra	193	-18%
Netherlands	150	-13%
Australia	147	-8%
Eire	143	4%
Sweden	142	1%
Belgium	141	10%
Switzerland	134	35%
Canada	132	15%
India	116	29%
Norway	106	12%
Poland*	95	1%
Denmark*	80	9%
Brazil*	50	-10%
All other E.Europe*	50	-25%
Austria*	43	7%
Japan*	39	9%
Russia*	39	14%
Finland*	38	-8%
Portugal*	34	-12%
South Korea*	32	11%
South Africa*	31	10%
Nigeria*	30	4%
United Arab Emirates*	29	44%
Gibraltar/Malta/Cyprus*	28	48%
Argentina*	28	7%
Hungary*	28	40%

* Small sample, less than 100

Source: ONS, International Passenger Survey, Q2 2012 figures

LONDON: LEADING OVERSEAS MARKETS BY SPEND, Q2 2012

Country	Spend (£million)	% change
USA	430	30%
Switzerland	155	186%
France & Monaco	140	13%
Germany	135	-2%
Australia	111	-4%
Italy & San Marino	98	-43%
Spain & Andorra	94	-15%
Canada	79	-6%
Sweden	69	1%
India	65	60%
Norway	57	-15%
Eire	50	1%
United Arab Emirates*	50	103%
Netherlands	50	-31%
Belgium	46	24%
Kuwait*	45	80%
Denmark*	45	28%
Saudi Arabia*	41	40%
Nigeria*	38	-13%
All other E.Europe*	37	-13%
South Africa*	33	62%
Other Gulf States*	33	34%
Russia*	31	-22%
Brazil*	31	-26%
China*	29	78%
Japan*	27	-3%
Singapore*	27	-8%
Gibraltar/Malta/Cyprus*	26	133%
Poland*	26	-7%
Other Middle East*	23	14%

* Small sample, less than 100

Source: ONS, International Passenger Survey, Q2 2012 figures