

- Latest Q2 provisional figures from the International Passenger Survey show an impressive 12.6% gain in arrivals to London over the same period in 2010.

- London registered just over 4 million visits in the quarter, equivalent to an additional 450,000 over Q2 2010.

- However, the 6-day shutdown of UK airspace in April 2010, and some further disruption in May, somewhat flatters this result, to the extent that the underlying growth is possibly closer to half the figure.

- The period 12-months to June reveals a 9% increase in London visits. In the wake of a 2.7% gain seen for full-year 2010, and 4.6% for the year-to-March, these figures certainly point to an accelerating growth trend in visitor traffic.

- Holiday visitors (+14.1%) were the main driver of growth in Q2, followed very closely by business visitors, where the 13.7% increase continues the sector's rapid climb out of recession.

- The VFR segment (+6.7%) lost some of its momentum from previous periods, but is also now clearly recovering some of the losses sustained during the recession.

- In marked contrast to the increase in visits, expenditure gains notched-up a miserly 0.2%, while a modest 3% advance in nights points to a shortening of average stay in the period from about 6 days to 5.5.

- A continuing key feature in Q2's visit numbers was the contribution from 'Other' countries (+20.9%), far outstripping the gains seen from London's core geographies, Europe (+10.4%) and North America (+8.6%).

LONDON: OVERSEAS VISITS, NIGHTS & SPEND, Q2 2011

	Q2 2011	% Change
Visits (000s)	4,014	12.6%
Spend £m	2,272	0.2%
Nights (000s)	21,901	3.0%

LONDON: OVERSEAS VISITS BY MAJOR REGION, Q2 2011

Q2 2011	Visits (000s)	% Change	Spend (£m)	% Change
Europe	2,350	10.4%	1,058	18.0%
N America	647	8.6%	418	2.8%
Others	1,037	20.9%	796	-15.3%

LONDON: OVERSEAS VISITS BY PURPOSE, Q2 2011

Q2 2011	Visits (000s)	% Change	Spend (£m)	% Change
Business	769	13.7%	606	16.4%
Holiday	2,117	14.1%	1,090	-1.3%
Study*	23	-44.6%	56	-69.2%
VFR	808	6.7%	353	13.9%
Other	317	26.0%	167	12.1%

*Small sample size

Source: ONS, International Passenger Survey, Q2 2011 figures

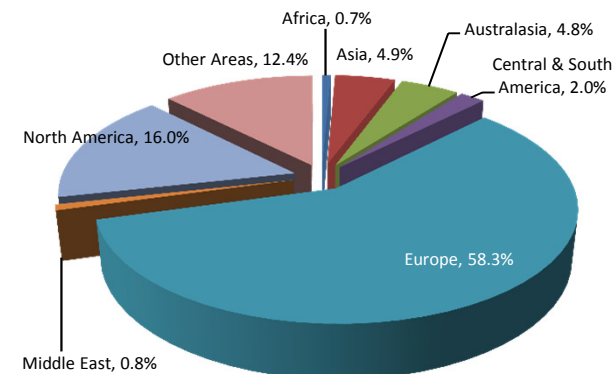
LONDON: HOLIDAY VISITS & SPEND BY MAJOR REGION, Q2 2011

Q2 2011	Visits (000s)	% Change	Spend (£m)	% Change
Europe	1,276	9.6%	555	26.7%
N.America	319	19.1%	179	25.9%
Others	522	23.4%	357	-32.0%

LONDON: BUSINESS VISITS & SPEND BY MAJOR REGION, Q2 2011

Q2 2011	Visits (000s)	% Change	Spend (£m)	% Change
Europe	445	13.6%	245	29.2%
N.America	129	-3.5%	144	7.1%
Others	195	51.7%	217	-9.7%

LONDON: ORIGIN OF OVERSEAS VISITS Q2 2011



Source: ONS, International Passenger Survey, Q2 2011 figures

LONDON: LEADING OVERSEAS MARKETS BY VISITS, Q2 2011

Country	Visits ('000)	% chng 2011/2010
USA	531.3	8.5%
France	393.1	5.1%
Germany	376.5	10.4%
Italy	244.4	11.8%
Spain	238.0	27.9%
Netherlands	172.4	25.0%
Australia	161.5	12.6%
Sweden	142.8	14.6%
Ireland	137.7	-7.2%
Belgium*	128.0	-11.9%
Canada	116.1	9.0%
Switzerland*	98.4	35.0%
Norway	95.5	1.6%
Poland*	93.4	16.5%
India	90.5	9.8%
Denmark*	73.8	11.0%
Brazil*	56.0	35.7%
Finland*	42.3	75.9%
Austria*	40.5	2.1%
Portugal*	38.7	-18.2%
Japan*	36.2	16.0%
Russia*	34.2	24.8%
New Zealand*	31.8	12.8%
Singapore*	29.7	13.1%
South Africa*	28.1	16.9%
Argentina*	26.5	104.2%
Hong Kong*	25.9	67.2%
UAE*	20.4	40.3%
China*	16.6	45.4%
Saudi Arabia*	13.5	105.9%
Other	500.0	19.0%

* Small sample, less than 100

Source: ONS, International Passenger Survey, Q2 2011 figures

LONDON: LEADING OVERSEAS MARKETS BY SPEND, Q2 2011

Country	Visits ('000)	% chng 2011/2010
USA	332.9	-10.2%
Italy	171.9	96.3%
Germany	137.0	5.1%
France	124.2	-7.8%
Australia	116.9	8.4%
Spain	111.2	46.8%
Canada	84.7	43.7%
Netherlands	72.3	-0.7%
Sweden	69.7	26.2%
Norway	67.3	35.2%
Switzerland*	53.7	47.4%
Ireland	49.4	4.2%
Brazil*	41.9	10.9%
India	41.0	-39.6%
Russia*	40.6	25.0%
Belgium*	37.3	-26.5%
Denmark*	35.3	14.1%
Saudi Arabia*	29.7	287.1%
Singapore*	29.3	3.2%
Poland*	27.6	-36.8%
Japan*	27.4	9.2%
UAE*	24.9	-5.2%
Finland*	24.4	86.3%
Hong Kong*	22.3	42.6%
Austria*	21.6	24.6%
South Africa*	20.8	-16.1%
China*	16.7	-28.4%
New Zealand*	15.6	4.6%
Portugal*	14.7	-19.7%
Argentina*	10.2	95.3%
Other	399.7	-28.1%

* Small sample, less than 100

Source: ONS, International Passenger Survey, Q2 2011 figures