

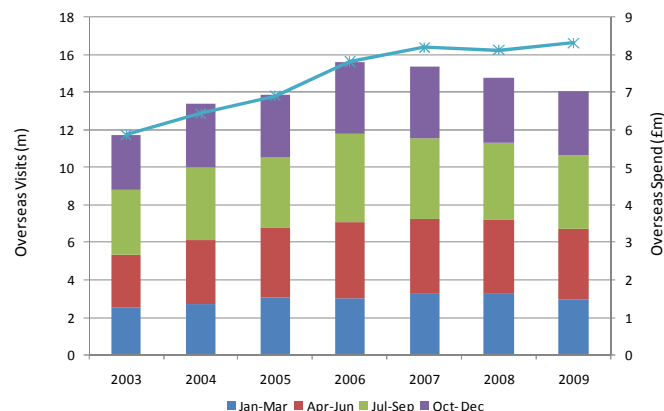
LONDON OVERSEAS VISITS 2009

FACT SHEET

- Provisional data from the IPS shows that in a recession-hit economic climate, London welcomed just over 14 million overseas visitors, 4.6% fewer than in 2008.
- But, in the context of a global downturn in tourism of about 6% in 2009, London's performance put it ahead of many of its main rivals.
- Expenditure, driven by the weak Pound, rose to £8.3 billion (+2.3%).
- Over 50% of London visitors were EU nationals, dominated by arrivals from France Germany, Spain and Italy. A further 14% arrived from the rest of Europe.
- North America generated 15% of London's visitor base. The USA was London's largest market, with 1.8m visits and £1.4 billion spend.
- The buoyant holiday sector underpinned London's performance in 2009. With 7% growth in visit numbers, it now comprises one half of London's market (2008: 44%).
- The global downturn in corporate travel activity was reflected in a 19% loss of business traffic to London; and a corresponding reduction from 21% to 18% of the market
- VFR – a particularly discretionary travel segment - has been adversely affected by the recession (visits down 13%), losing two share points in 2009.

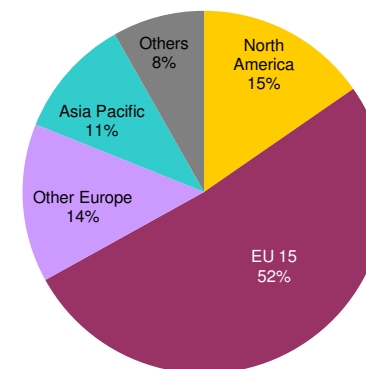
LONDON: OVERSEAS VISITS, NIGHTS & SPEND 2005-2009

	2005	2006	2007	2008	2009
Overseas Visits (m)	13,893	15,593	15,340	14,753	14,074
Yr/yr %	3.76%	12.24%	-1.62%	-3.83%	-4.60%
Overseas nights (m)	91,843	101,068	95,846	90,815	84,797
Yr/yr %	1.78%	10.04%	-5.17%	-5.25%	-6.63%
Overseas spend (£bn)	6,859	7,822	8,192	8,126	8,315
Yr/yr %	6.51%	14.04%	4.74%	-0.81%	2.33%
Spend per visitor per day (£)	74.68	77.39	85.47	89.48	98.06
Yr/yr %	4.6%	3.6%	10.4%	4.7%	9.6%



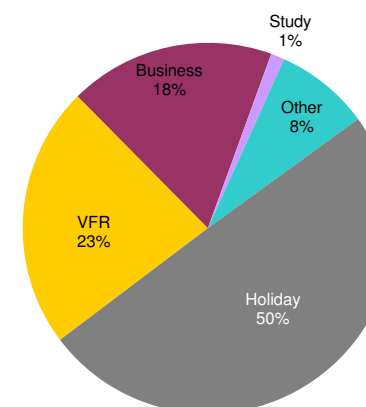
Source: ONS, International Passenger Survey, 2009 preliminary figures

ORIGIN OF LONDON OVERSEAS VISITS 2009



Source: ONS, International Passenger Survey, 2009 preliminary figures
 Asia Pacific includes Australia, New Zealand, India, China, Singapore, Hong Kong & Japan
 Other Europe includes Norway, Poland, Switzerland & Russia
 North America includes USA & Canada while Others includes all the remaining countries

LEADING PURPOSE OF OVERSEAS VISITS 2009



Source: ONS, International Passenger Survey, 2009 preliminary figures
 VFR – Visiting friends and relations