

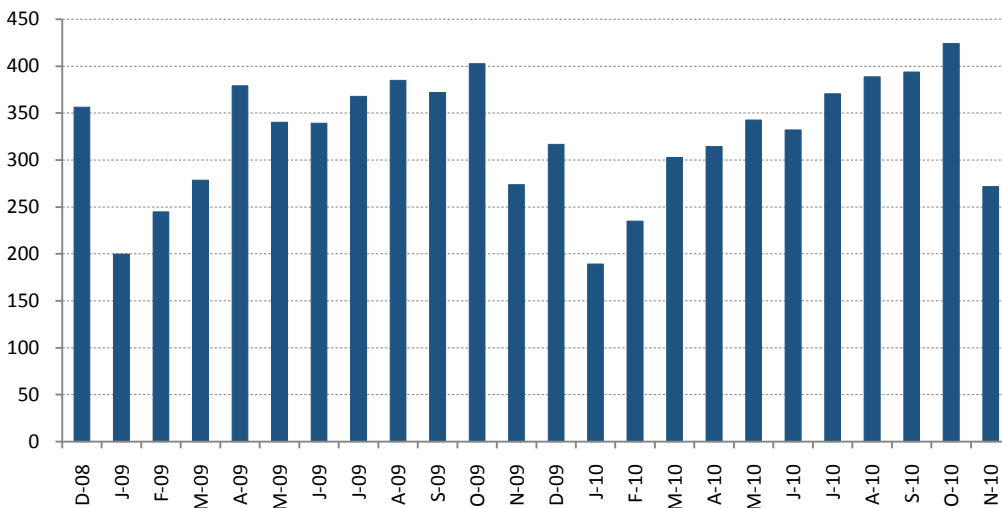


UNITED KINGDOM

MARKET SUMMARY

- Arrivals from the U.K. totaled 3,899,167 in 2009, a decline of nearly 15% from 2008 arrivals.
- Arrivals for November 2010 were 271,717, down about 1% from arrivals for November 2009. Year-to-date arrivals through November 2010 are down 0.5% compared to the same period in 2009.
- Total U.K. arrivals in 2010 are forecasted to increase by 2 to 3,820,000.
- The U.K.'s economic recovery is forecasted to be gradual, with a 2.0% increase in GDP and 0.5% in real private consumption expected for 2011.
- In 2009, the U.S. received a total of \$11.4 billion from U.K. visitors, a decrease of 31.6% compared to 2008. \$8.8 billion was spent on travel while in the U.S., and \$2.7 billion was spent on international airfare.
- Total spending, including spending on international airfare, per U.K. arrival to the U.S. averaged \$2,931 in 2009, a decrease of 20.0% compared to 2008.
- Britain's new coalition government has indicated it will replace the controversial Air Passenger Duty with a per plane tax.
- "Staycations" are expected to remain a popular travel option over the long-term.

Monthly Arrivals to the U.S. (thousands)



Change
Nov 10/Nov 09

-0.7%

% Change
YTD Nov 10/
YTD Nov 09

-0.5%

% Change
Total 09/Total 08

-14.6%

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total	Year End Total
2008	248,272	321,044	401,629	437,342	380,364	366,440	432,075	442,710	415,898	435,349	327,551	356,221	4,208,674	4,564,895
2009	199,739	244,898	278,371	379,050	340,070	339,272	367,749	384,781	371,979	402,713	273,682	316,863	3,582,304	3,899,167
2010	189,333	235,046	302,711	314,235	342,759	332,213	370,643	388,612	393,766	423,961	271,717		3,564,996	

Source: [U.S. Department of Commerce, Office of Travel & Tourism Industries](http://www.dhs.gov)