

Travel Trends, 2012

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Theme: **Travel and Transport**

Theme: **People and Places**

Travel Trends 2012: Key Findings

- 2012 presented an unusual year for planning travel and tourism to and from the UK. It saw the UK host the Queen's Diamond Jubilee celebrations in June, the London 2012 Olympic Games in July/August and Paralympics in August/September. Other factors in 2012 that might be expected to impact on travel and tourism included the wettest April to June on record in the UK and some strengthening of the pound against the euro from low exchange rates experienced in 2009 to 2011.
- However, although there was a reduction in visits to the UK in quarter 3 (July to September) and an increase in quarters 1, 2 and 4, visit trends in 2012 displayed a number of similarities to recent years.
- The number of visits to the UK in 2012 as a whole rose by 0.9% from 2011, whereas visits abroad fell by 0.5%. This is the fourth consecutive year that the gap between outbound visits and inbound visits has narrowed.
- Earnings from visits to the UK rose by £0.6 billion (3.6%) to £18.6 billion. Expenditure on visits abroad rose by £0.7 billion (2.4%) to £32.4 billion. This resulted in a broadly unchanged deficit to the UK associated with overseas travel and tourism, the figure being £13.8 billion in 2012.
- Overseas residents made an increased number of overnight visits to London in 2012 compared to 2011, but a reduced number of overnight visits to the rest of England, Scotland and Wales. Earnings on visits to London rose (by 7.0%) whereas those associated with overnight visits to both the rest of England and Scotland fell. This is the third consecutive year that visits and earnings associated with visits to London have grown faster than the average of all visits.
- Visits to the UK fell in quarter 3 2012, the time of the Olympic Games/Paralympics, whereas visits in each of quarter 1, 2 and 4 increased. Despite the fall in visits in quarter 3, earnings increased by 8.5% in that quarter, as people visiting for the Olympics/Paralympics spent more than the average on their visit.
- A total of 471,000 overseas residents visited the UK primarily for the Olympics/Paralympics in 2012 and a further 227,000 attended a ticketed event. The 471,000 came primarily from Europe, and were more likely than average to be male, aged 25-34, to have stayed in London and to have travelled via Heathrow. 90% travelled independently rather than on a package tour.
- There was a continued increase in business visits and those to see friends or relatives in 2012, whereas holiday visits showed no growth either to the UK or abroad.

- There was also an increase in visits to and from Europe, whereas visits from longer haul destinations to the UK were unchanged from 2011 and visits from the UK to these destinations fell.
- Visits to the UK from the 'BRIC' countries (Brazil, Russia, India, China) increased by 1.7% in total in 2012. Those from China (including Taiwan) rose by 34,000 and from Russia by 16,000, but from India fell by 16,000 and from Brazil fell by 17,000.
- Visits to Spain by UK residents have grown in both 2011 and 2012, from 10.4 million in 2010 to 11.1 million in 2012, whereas visits to France have fallen (from 9.8 million in 2009 to 8.8 million in 2012). UK residents have also turned focus away from Egypt in recent years, making 109,000 fewer visits to Egypt in 2012 than in 2011. At the same time they increased their visits to Morocco, Tunisia and other North Africa countries by a similar volume. The number of visits to Egypt has fallen from 749,000 in 2009 to 407,000 in 2012.

Introduction

How this publication may benefit users

Travel Trends is an annual report published by the Office for National Statistics (ONS). It provides estimates and profiles of travel and tourism visits (those of less than 12 months' duration) and associated earnings and expenditure between the UK and the rest of the world.

International travel and tourism involves the exchange of approximately £50 billion of trade each year. Earnings to the UK account for over £18 billion of the £50 billion, equating to approximately 10% of total export of services. Expenditure abroad accounts for over 25% of total imports of services. The information provided in Travel Trends helps users in many areas, including:

- Tracking earnings and expenditure, as an important input to measuring balance of payments.
- Understanding how the volume of visits and earnings to the UK develops, which can be compared with statistics from other countries to assess how effective the UK is in attracting visits a) from key parts of the world, b) for different purposes and c) among different demographic groups.
- To help understand how particular events (for example, in 2012 the London 2012 Olympic Games and Paralympics) held in the UK link to visits and spending. This can aid future decision making.
- To provide insights regarding how effective different parts of the UK are in attracting visits and earnings, in total and from different parts of the world and for different purposes.
- To provide profiles of UK residents travelling to different parts of the world, to aid government and industry in developing policy and strategy.

Understanding overseas travel and tourism statistics

The estimates contained in Travel Trends are drawn from interviews conducted for ONS' [International Passenger Survey \(127.8 Kb Pdf\)](#). They are final estimates for 2012, replacing [provisional estimates](#) published previously. The IPS began in 1961, meaning that a substantial amount of historical travel and tourism information is available. The [Travel Trends 2010](#) publication included a history of the survey, together with a profile of travel and tourism across the decades from

the 1960s. It is a useful source for understanding longer term trends in combination with shorter term trends discussed in this (Travel Trends 2012) publication.

Historical analysis such as that included in Travel Trends 2010 has emphasised that international travel and tourism is impacted by a number of factors, such as currency exchange rates (£1 bought an average 1.23 Euros in 2012, compared with 1.15 in 2011 and a low of 1.12 in 2009 and a high of 1.64 in 2000), weather (the UK experienced the [wettest April to June on record](#) in 2012), government policy, economic and political conditions in the UK and abroad, and special events. It is not possible to identify the exact impact of each aspect on travel and tourism, as recognised by ONS in its [Special Events policy](#). However, Travel Trends does provide important insights to help users draw conclusions about impact. To help facilitate this, in 2012 ONS expanded the coverage of IPS specifically to collect robust estimates of visits to the UK for the [London 2012 Olympic Games and Paralympics](#). ([58.2 Kb Pdf](#))

The estimates contained in Travel Trends (as well as other [Overseas Travel and Tourism statistics](#) produced by ONS) are subject to sampling errors which are driven by the fact that IPS is a survey. It is important for users to understand the factors that dictate the [quality of the estimates](#). ([404.8 Kb Pdf](#)) Confidence intervals relating to a wide range of estimates in this report are provided in Appendix E of this publication and the data tables section below.

Data tables associated with this report

The report includes several data tables, based in most part on annual data although some splits by quarter are included. These data tables are presented in seven sections, containing information on:

[Section 1: The long-term trends in tourism to and from the UK from 1980 to 2012 \(200 Kb Excel sheet\)](#)

[Section 2: The trends in travel and tourism to the UK over the last five years \(2008 to 2012\) \(527 Kb Excel sheet\)](#)

[Section 3: The trends in overseas travel and tourism by UK residents over the last five years \(2008 to 2012\) \(436 Kb Excel sheet\)](#)

[Section 4: The characteristics of visits made by overseas residents to the UK in 2012 \(600 Kb Excel sheet\)](#)

[Section 5: The characteristics of overseas visits made by UK residents in 2012 \(450.5 Kb Excel sheet\)](#)

[Section 6: The characteristics of visits made by overseas residents for the London 2012 Olympic/ Paralympic Games \(110.5 Kb Excel sheet\)](#)

[Section 7: The characteristics of visits made by overseas residents and UK residents in quarters 1 to 4 2012 \(1.02 Mb Excel sheet\)](#)

All tables which appeared in sections 1-5 last year have been retained in this edition. Section 6, relating to the Olympics/Paralympics, is included only in 2012. Section 7 is a set of tables providing a breakdown of key estimates by quarter. These tables are the same as those published in the Quarterly Overseas Travel and Tourism series under which provisional estimates for quarters 1, 2 and 3 were published previously.

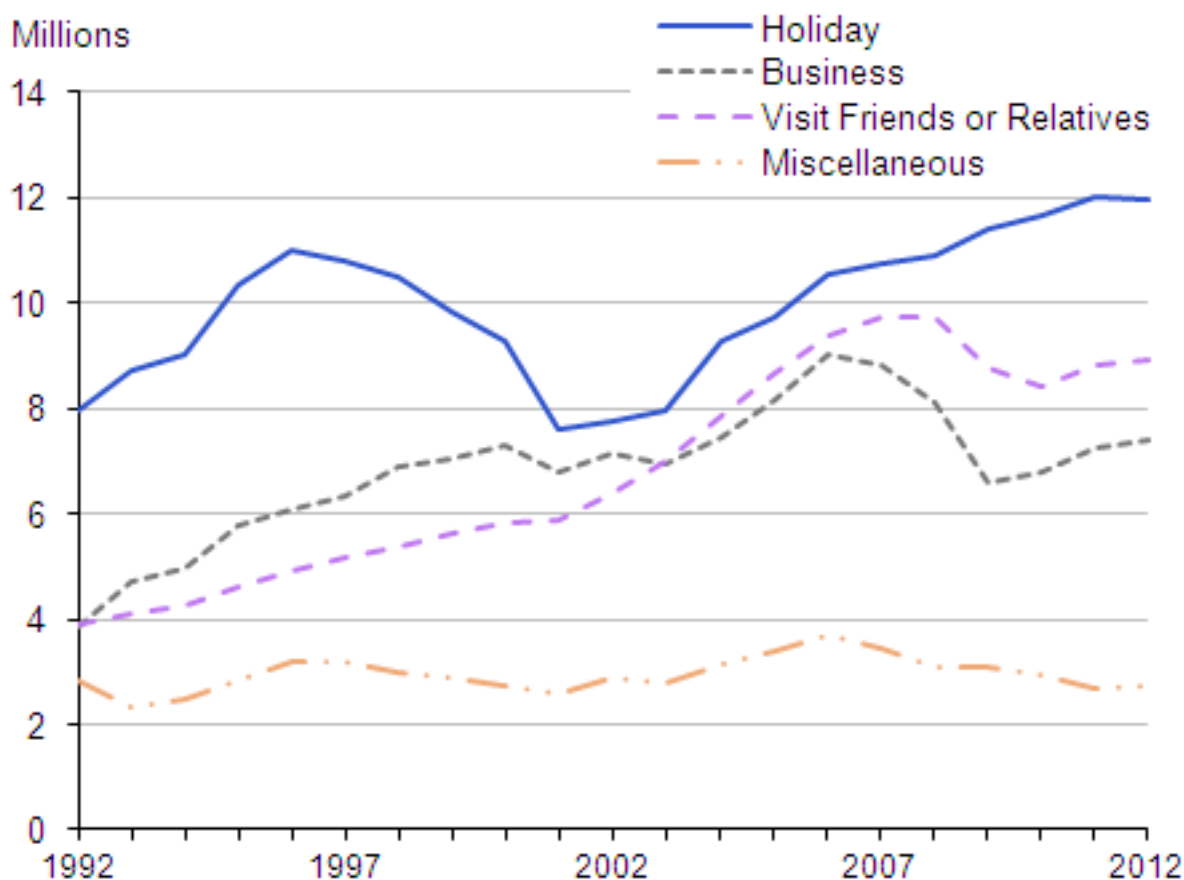
In addition, confidence intervals relating to a wide range of estimates in this report are also provided below in section 8.

[Section 8: Confidence intervals for 2012 estimates \(82 Kb Excel sheet\)](#)

Trends in visits to the UK

The number of visits to the UK rose by 0.9% in 2012, from 30.8 million in 2011 to 31.1 million. This was driven by an increase of 0.4 million visits from Europe and by 0.2 million more business visits and 0.1 million more visits to friends or relatives. Holiday visits failed to increase for the first time since 2002. ([Tables 1.01, 1.03 and 1.05 \(200 Kb Excel sheet\)](#))

Figure 1: Overseas residents visits by purpose, 1992 to 2012



Source: International Passenger Survey (IPS) - Office for National Statistics

Download chart

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(32.5 Kb)

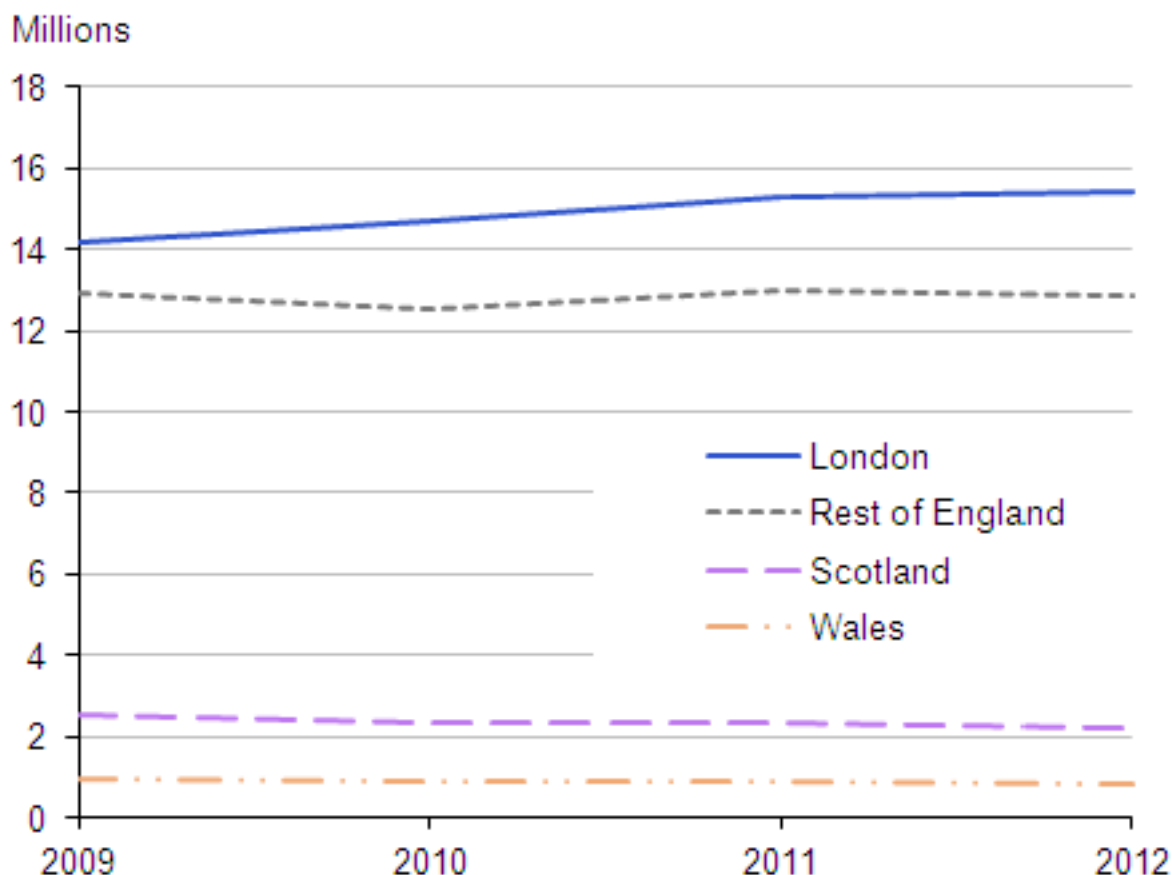
The estimated number of visits from certain countries rose between 2011 and 2012. These include some countries in Eastern Europe as well as Turkey, Switzerland and Belgium in Europe and China (including Taiwan) and United Arab Emirates (UAE) outside of Europe. ([Table 2.10 \(527 Kb Excel sheet\)](#)). However, in most cases the rise was either from a small base (such that the estimate is associated with relatively low robustness and therefore should be interpreted with caution) or represents a short term increase against a longer term decline in visits. Longer term, between 2008 and 2012, the number of visits from China has grown by an average of 12.2% per year and from Romania by an average of 11.8%. Those from Brazil have grown by an average of 9.8% and of the other 'BRIC' countries (Brazil, Russia, India, China) visits from Russia have grown by an average of 2.3% and from India have fallen by an average of 1.4%. Visits from South Africa have also fallen.

In 2012 the largest percentage fall in visits from countries which provide more than 10,000 visits a year occurred in relation to Greece which experienced continued austerity measures relating to the government debt crisis. Visits from Greece fell by 29.4% from 225,000 in 2011 to 159,000. Longer term, between 2008 and 2012, the largest average annual falls in visits to the UK have occurred in relation to residents of Slovakia, down an annual average of 17.1% (from 254,000 in 2008 to 120,000) and Czech Republic, down an annual average of 7.0% from 435,000 in 2008 to 325,000.

Among countries providing visitor base to the UK of 100,000 or more, visitors from UAE had the highest average spend per visit (£1,818) in 2012 followed by those from China (£1,615), Nigeria (£1,528), Hong Kong (£1,376) and Japan (£1,259). The highest spenders per day on visits to the UK are visitors from UAE (£161), Hong Kong (£140), Switzerland (£133) and Norway (£131). ([Table 2.13 \(527 Kb Excel sheet\)](#))

Earnings from visits to the UK increased by 3.6% (or a fall of 0.3% in constant-price terms) in 2012. This was accompanied by a fall of 2.1% in nights stayed in the UK (from 235 million to 230 million) as the average length of stay dropped from 7.6 nights to 7.4 nights. ([Table 1.01, 1.03 \(200 Kb Excel sheet\)](#) and [2.05 \(527 Kb Excel sheet\)](#))

London experienced a growth of 171,000 (1.1%) overnight visits from overseas in 2012. The rest of England, Scotland and Wales all experienced a fall. Earnings associated with overnight visits to London grew by £664 million (7.0%) whereas those for the rest of England and Scotland fell and for Wales grew by £18 million (5.6%). This pattern of change is not dissimilar to previous years: Between 2009 and 2011 the number of visits involving an overnight stay in London grew from 14.2 million to 15.3 million, whereas those to the rest of England, Scotland and Wales all showed no increase. ([Table 2.16 \(527 Kb Excel sheet\)](#))

Figure 2: Number of overnight visits to different parts of the UK, 2009 to 2012

Source: International Passenger Survey (IPS) - Office for National Statistics

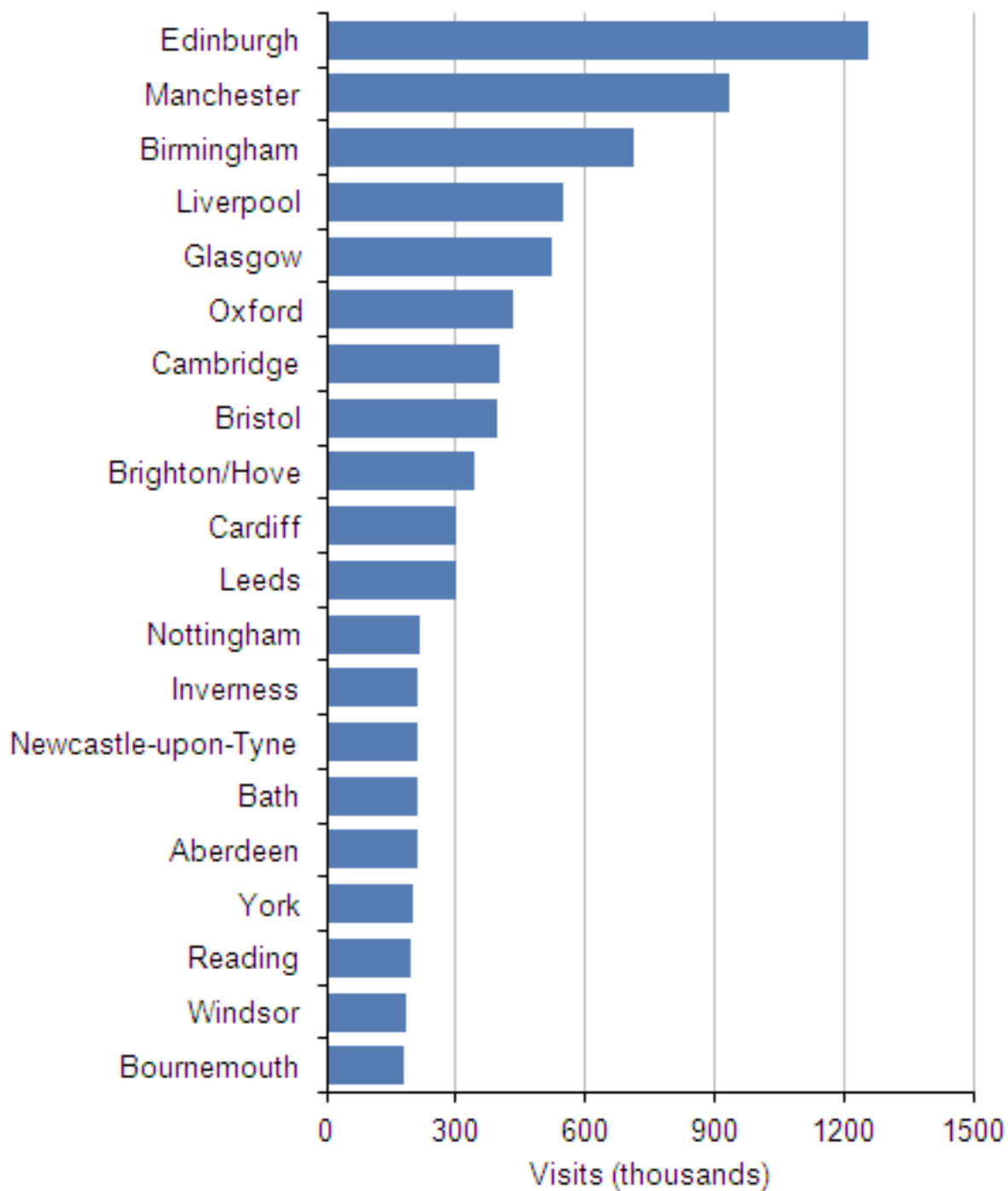
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(17 Kb)

Visit to individual cities showed general consistency from 2011, with the seven cities stayed in most by overseas residents remaining in unchanged order (by number of visits): London, Edinburgh, Manchester, Birmingham, Liverpool, Glasgow and Oxford. However, visits to Glasgow grew from 475,000 to 521,000, to Brighton/Hove from 304,000 to 345,000 and to Bournemouth from 129,000 to 178,000. ([Table 4.13 \(600 Kb Excel sheet\)](#)).

Figure 3: Top 20 UK towns (excluding London) visited for at least one night, 2012



Source: International Passenger Survey (IPS) - Office for National Statistics

Download chart

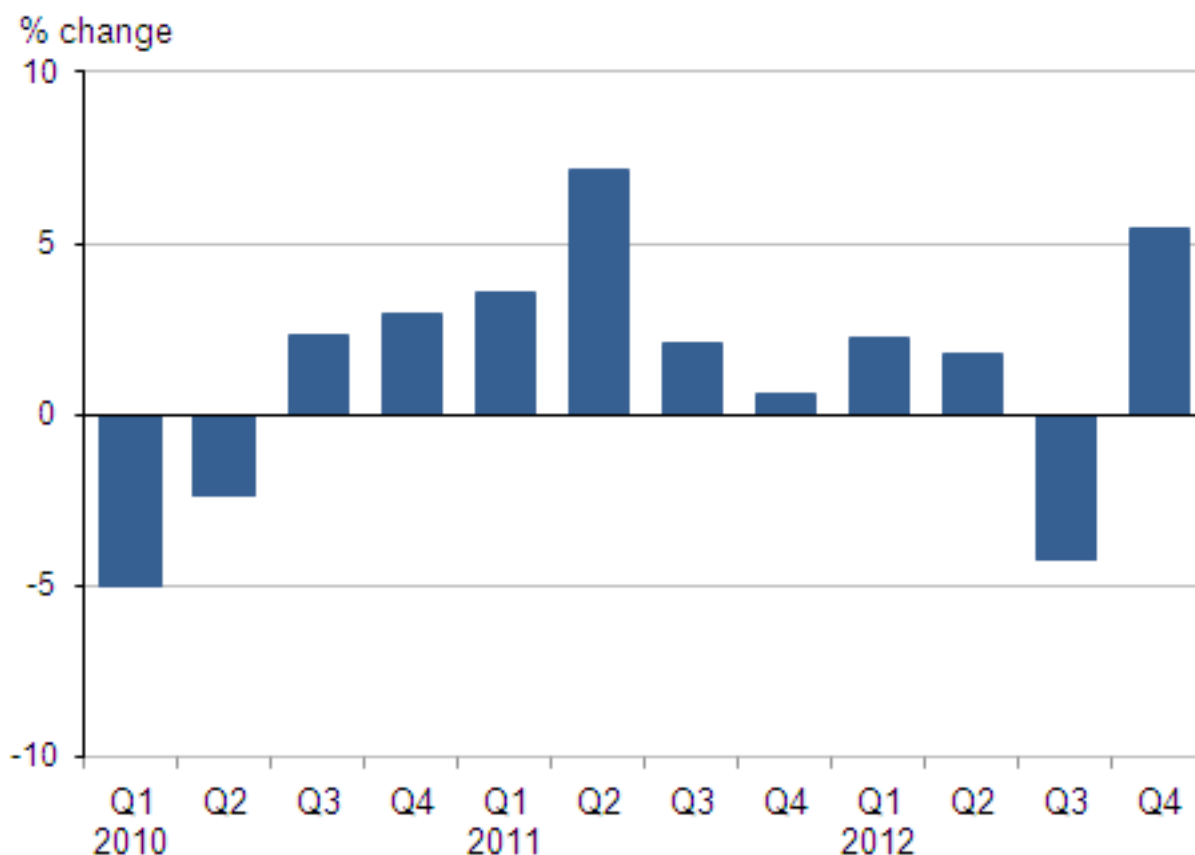
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These changes are reflected in increased estimated visits to areas of the UK (the counties/unitary authorities outside of London for which estimates of number of visits increased in 2012 include Greater Glasgow, East and West Sussex and Dorset). ([Table 4.12 and 4.13 \(600 Kb Excel sheet\)](#))

There is some evidence of a displacement of visits, away from quarter 3 (July to September) to other quarters in the year. Relative to the same periods in 2011, visits to the UK in quarter 1 2012 increased by 2.2%, in quarter 2 by 1.8% and quarter 4 by 5.4%, but fell by 4.2% in quarter 3. Quarter 3 was when the Olympic Games and Paralympics took place in the UK, but many additional factors such as the weather (the preceding quarter saw the [wettest April to June on record](#)) and currency exchange rates (which had worsened from the start of the year for people visiting the UK from the eurozone) must also be considered as potential impacting factors. ([Table 2.01 \(527 Kb Excel sheet\)](#))

Figure 4: Change from a year earlier in overseas residents visits to the UK, 2010 to 2012



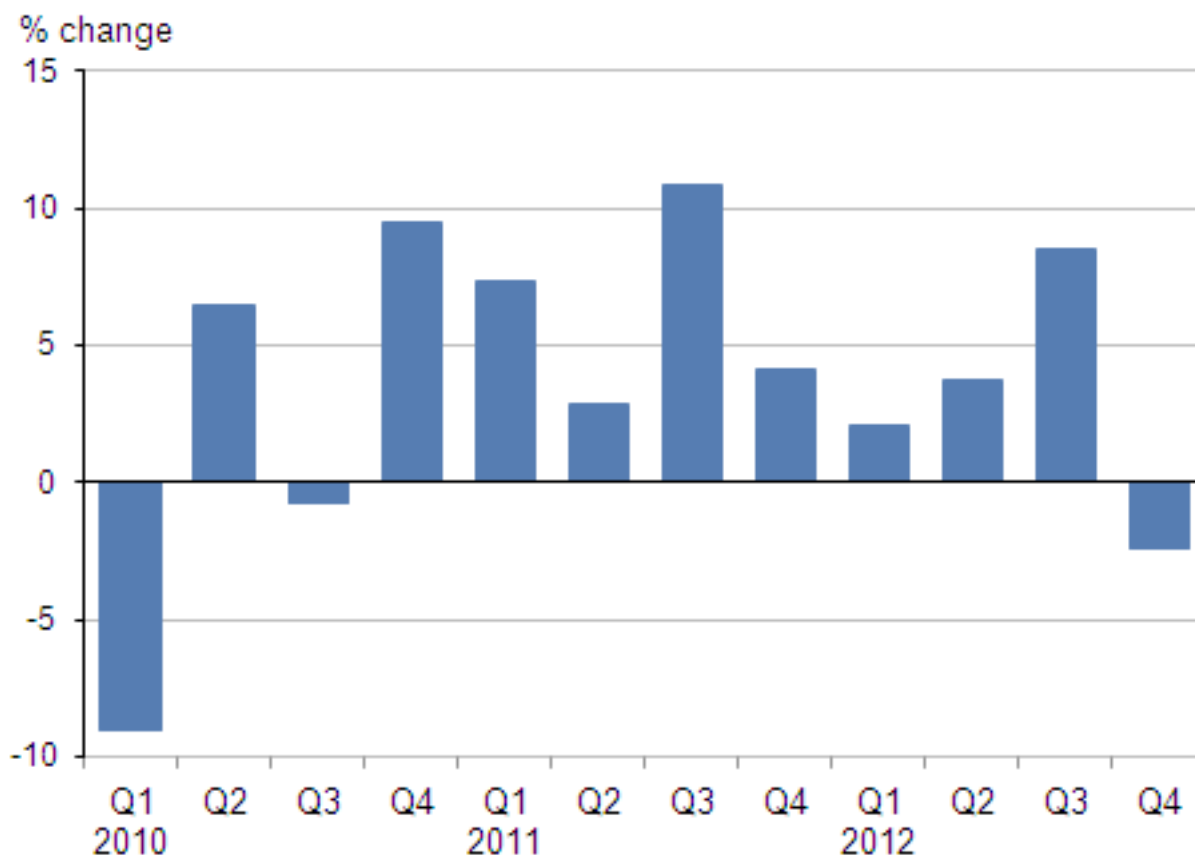
Source: International Passenger Survey (IPS) - Office for National Statistics

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Despite the fall in visits in quarter 3 2012, earnings to the UK in that quarter grew. This was driven in large part by high spending by visitors who came to the UK for the Olympics/Paralympics (see next section of the report).

Figure 5: Change from a year earlier in overseas residents spending on visits to the UK, 2010 to 2012



Source: International Passenger Survey (IPS) - Office for National Statistics

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(17.5 Kb)

Visits to the UK for the London 2012 Olympic Games and Paralympics

About the Games

The London 2012 Olympics took place from 27 July to 12 August (with a few events starting on 25 July), and the Paralympics from 29 August to 9 September.

Approximately 10 million tickets were reported as being made available for public purchase. This presented the possibility of a large number of visits to the UK by overseas residents during quarter 3 2012 to watch the Games, although the possibility of displacement of non-Olympics related visits

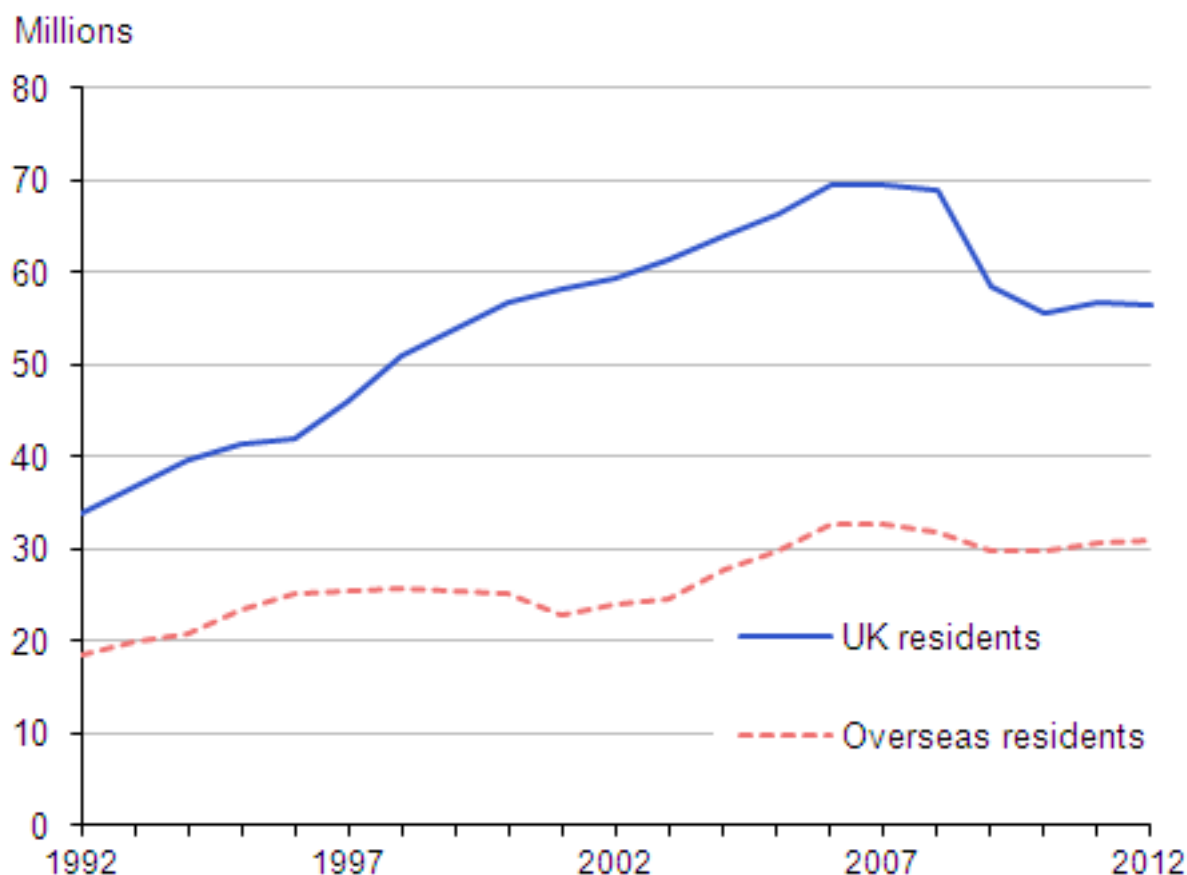
(to other time periods, other parts of the UK or other countries, or resulting in no travel at all) was an offsetting consideration. [VisitBritain](#) refers to statistics sourced from World Tourism Organization (UNWTO) which suggest that the experiences of other hosting countries in terms of attracting visits from overseas residents during Olympics years have been mixed, with Australia experiencing an increase in inbound tourism in 2000 (the year of the Sydney Olympics) and both Greece and China seeing a decrease in visits in their Olympics-hosting years of 2004 and 2008 respectively.

As mentioned earlier in this report, it is not possible to isolate the impact of London 2012 on travel and tourism. However, the report does include a number of estimates to help wider assessment. It may be helpful to readers to review articles published by ONS relating to [impact on various sectors of the economy \(229 Kb Pdf\)](#) and by [Department for Culture Media and Sport](#) assessing the impact and legacy of the Games.

Visits during the Olympics/Paralympics year

- As highlighted earlier in this report, there was a 0.9% increase in visits to the UK in 2012. This is balanced against a 0.5% fall in visits abroad by UK residents. Therefore the net impact of changes in overseas travel and tourism in 2012 was a positive movement for the UK in the ratio of 'inbound visits to outbound visits'.
- However, this positive movement in the inbound visits to outbound visits ratio was also observed in each year from 2009 to 2011.

Figure 6: Visits to and from the UK, 1992 to 2012



Source: International Passenger Survey (IPS) - Office for National Statistics

Download chart

[XLS](#) [XLS format](#)

(18.5 Kb)

The pattern of visits across the year showed some variation from previous years.

- Visits to the UK fell in quarter 3, the time of the Games (by 4.2% compared with 2011), but increased in each of quarters 1, 2 and 4. Meanwhile, visits abroad fell by a fairly consistent percentage in all quarters.
- This resulted in the net outflow of people being greater in quarter 3 2012 than in the same quarter in 2011. This compares with a lower net outflow of people in quarters 1, 2 and 4 than in 2011.
- Despite the fall in visits to the UK in quarter 3 2012, earnings in that quarter were 8.5% (or £509 million) higher than a year earlier. All spending on ticket sales is included in the quarter 3 estimate, but this will account for only a proportion of the £509 million. London Organising Committee of the Olympic and Paralympic Games (LOCOG) say that the Olympics and Paralympics generated around £580 million in total ticket sales, but the majority of this is likely to have been spent by UK residents (it can be seen below that an estimated 698,000 visits from overseas were related to the Olympics/Paralympics - an unknown proportion will have involved attendance at more than one event - whereas approximately 10 million tickets were made available).

Although some events took place in the UK regions, the vast majority took place in London (the Olympic Park being in East London, and other facilities in London such as Wimbledon, Wembley and Lords cricket ground were used) or in the South East of England (for example, Eaton Dorney in Buckinghamshire and Weymouth & Portland in Dorset). It was noted above that each of London and Dorset saw some growth in number of visits in 2012, and the estimate of overnight visits to Buckinghamshire also rose.

Visits to each of rest of England (excluding London), Scotland and Wales fell. This pattern (of London attracting increased visits but other regions not) is not dissimilar to that observed in recent years.

An estimated 698,000 overseas residents visited the UK primarily for the Games or attended a ticketed event

The reference tables in Section 6 of this report highlight that an estimated 471,000 overseas residents attended the UK primarily for an Olympics-related purpose in 2012 and a further 227,000 attended a ticketed event although their main reason for visit was not Olympics/Paralympics related.

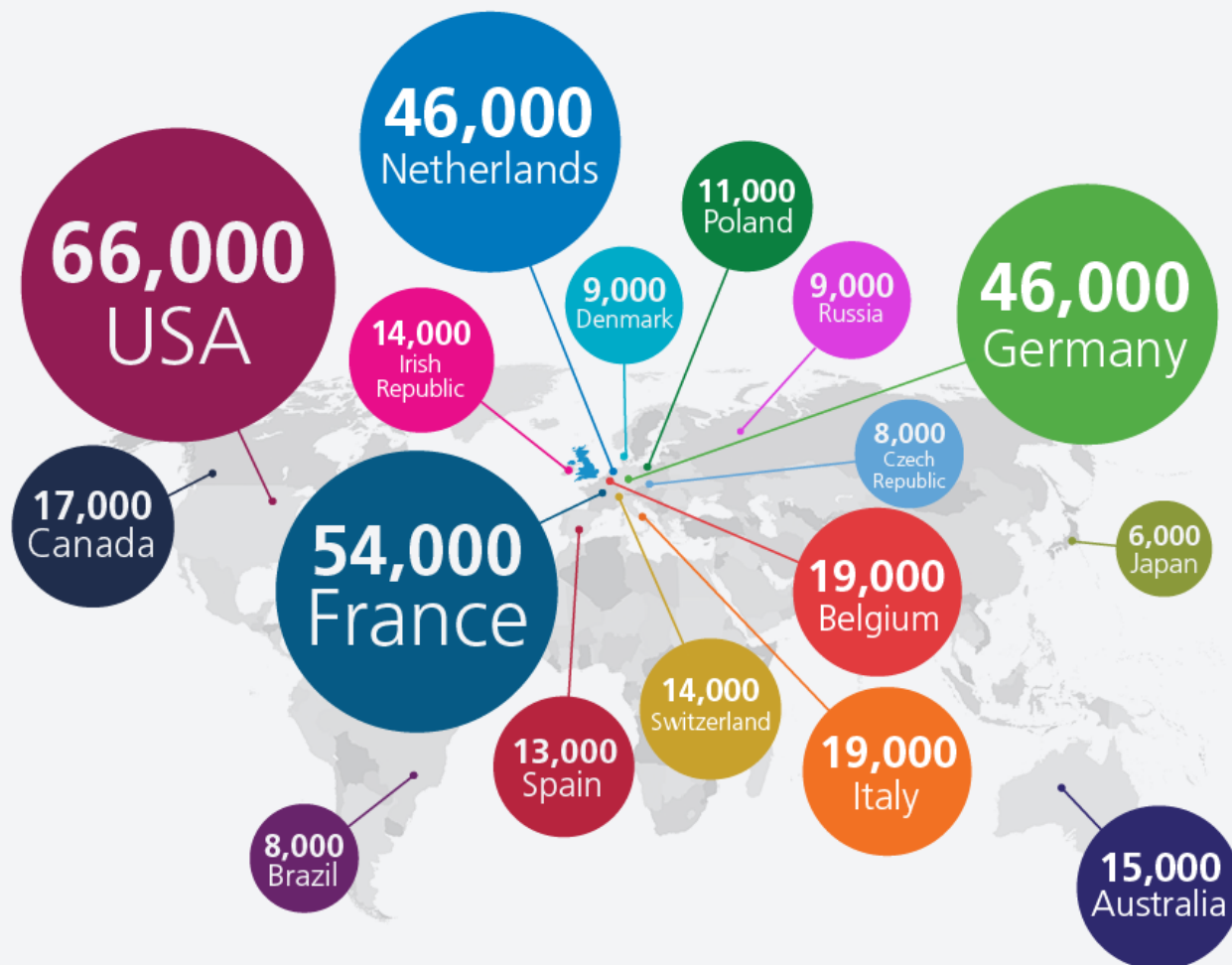
- [Table 6.01 \(110.5 Kb Excel sheet\)](#) highlights that the majority of these visitors came from Europe, but there were also 83,000 visits from North America primarily for the Games and 86,000 similar visits from the rest of the world.

- However, the single country from which the highest number of visits originated was USA (66,000 with main purpose being Games-related) followed by France (54,000), Netherlands and Germany (both 46,000) and Belgium and Italy (both 19,000). There were 15,000 from Australia and 8,000 from Brazil, which will host the 2016 Olympics.

Main source countries of visits to the UK for the Olympics 2012

Main source countries of visits to the UK for the Olympics 2012

How many people visited the UK from each country with main purpose being Olympics-related



Source: International Passenger Survey, ONS

The people visiting primarily for the Olympics/Paralympics (hereafter referred to as 'Olympics visits') were primarily male and aged 25-54.

- [Table 6.02 \(110.5 Kb Excel sheet\)](#) shows that 297,000 (63%) of the total 471,000 Olympics visits were made by men.
- 135,000 were made by 25-34 year olds and 109,000 by 35-44 year olds. 0-15 year olds made 22,000 such visits and 65+ year olds made 17,000 visits. This overall age profile of Olympics-visitors is quite similar to that of all visitors to the UK in 2012, except that 25-34 year olds account for 29% of the Olympics-visitors and only 22% of all visitors.
- Although the average length of stay was fairly consistent between sex and age groups (except for 0-15 year olds), spend on the visit varied quite considerably. Men spent an average of £1,784 compared with £1,159 among women, and 55-64 year olds spent an average £3,363 on the visit and 45-54 year olds £2,083, which compares with £1,019 among 16-24 year olds.

Nearly a half of Olympics visitors left the UK from Heathrow airport.

- [Table 6.03 \(110.5 Kb Excel sheet\)](#) shows that the majority (352,000) of Olympics visits were made by air. 206,000 used Heathrow for their departure. This was the airport chosen by many countries' Olympics committees, and Heathrow opened a special temporary terminal to handle departures by the 'Olympic family' (competitors and other people associated with the Olympics teams) at the end of the Olympic Games.
- Gatwick handled 59,000 departures of Olympics visitors and Stansted 54,000. Other airports sampled on IPS in the South East of England (namely Luton, London City and Southend) handled 24,000 departures of Olympics visitors between them.
- An estimated 42,000 Olympics visitors travelled via Eurostar, 38,000 on sea routes from Dover and 23,000 on Eurotunnel.

Although the total number of visits that involved an overnight stay in London fell in quarter 3, the majority of Olympics visits did involve a stay in the capital.

- [Table 6.04 \(110.5 Kb Excel sheet\)](#) shows that Olympics visitors stayed an estimated 4.0 million nights in the UK. The majority, 3.2 million of these, were spent in London whereas 0.7 million were spent in the rest of England, 47,000 in Scotland and 23,000 in Wales.
- Of the total £731 million spent in the UK on Olympics visits, £576 million were associated with stays in London and £84 million with day visits to the UK, £66 million with the rest of England, £3 million with Scotland and £3 million with Wales.

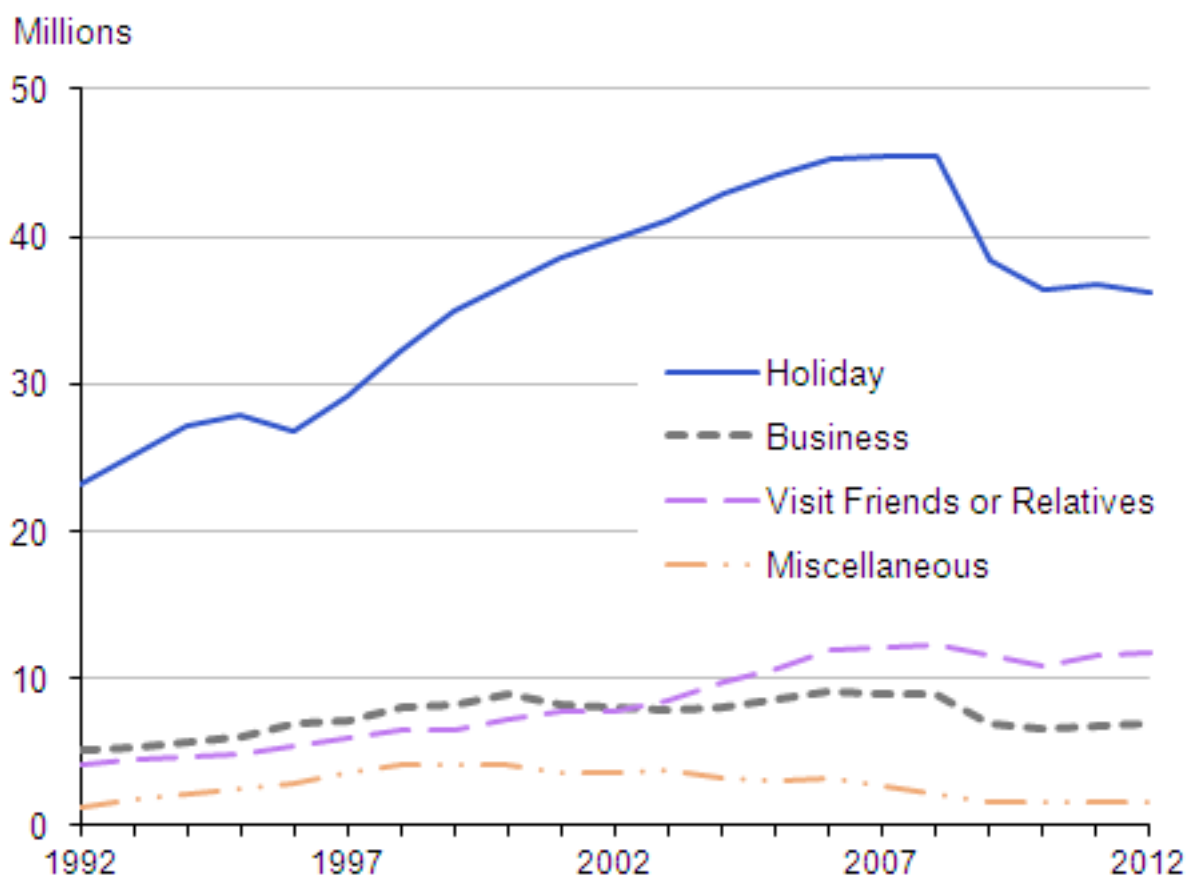
Trends in visits abroad by UK residents

The number of visits abroad by UK residents fell by 0.5% in 2012, from 56.8 million in 2011 to 56.5 million. ([Table 1.02 \(200 Kb Excel sheet\)](#)). There is no clear evidence that the fall is driven by people living in any particular part of the UK. ([Table 5.03 \(450.5 Kb Excel sheet\)](#))

UK residents cut back on longer haul trips to North America (a reduction of 7.5% from 3.7 million in 2011 to 3.4 million) and to other countries outside of Europe (a reduction of 2% from 9.1 million to 8.9 million). Visits to Europe increased by 0.3%, to 44.2 million. ([Table 1.06 \(200 Kb Excel sheet\)](#))

Holiday visits, which account for nearly two thirds of visits abroad, fell by 1.8% while both business visits and visits to friends or relatives grew. ([Table 1.04 \(200 Kb Excel sheet\)](#))

Figure 7: UK residents visits abroad by purpose, 1992 to 2012



Source: International Passenger Survey (IPS) - Office for National Statistics

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(18.5 Kb)

In 2011 the number of package holidays abroad rose, but in 2012 they slipped by 1.8%. Given the 1.8% fall in all holiday visits, package holidays' share of the holiday market remained unchanged. ([Table 3.03 \(436 Kb Excel sheet\)](#))

There was an increase in the number of visits to each of Spain (up 4.3% to 11.1 million), Belgium (up 14.4% to 1.7 million), Italy (up 12.7% to 2.6 million) and Norway (up 11.8% to 0.3 million) for the second consecutive year. Visits to Greece fell by 5.7% to 1.8 million following an increase in 2011. As has been noted several times in the past, Spain and France account for approximately a third

of visits abroad. However, the number of visits to France has been in decline and is now 2.1 million lower than in 2008 (8.8 million compared with 10.9 million). ([Table 3.10 \(436 Kb Excel sheet\)](#))

A number of factors impact overseas travel and tourism. This includes political and social factors. It is notable that the number of visits to Egypt, which has seen unrest, has fallen substantially since 2009, from 749,000 to 407,000. It appears that in 2012 some UK residents have turned to other countries in the area for trips. Morocco, Tunisia and other North Africa countries saw a growth of 121,000 visits from the UK. ([Table 3.10 \(436 Kb Excel sheet\)](#)). Readers may find reference to travel advice provided by the [UK Government](#) useful to aid interpretation of visit trends to certain countries.

Despite a 1.8% fall in visitor nights spent abroad by UK residents in 2012, spending on visits abroad rose by 2.4% in absolute terms, to £32.4 million. ([Table 1.02 \(200 Kb Excel sheet\)](#))

Background notes

1. Contact Details

General IPS queries and requests

For general questions about IPS and requests for ad hoc data analysis (a service governed by the ONS Income and Charging policy):

Tel: Data Advice Relations Team: +44 (0)1633 455678

Email: socialsurveys@ons.gsi.gov.uk

Other customer enquiries

Media enquiries Tel: +44 (0)845 601 3034

ONS Customer Contact Centre Tel: +44 (0)845 604 1858

Statistical contact

For information about the content of this publication:

Tel: +44 (0)1633 455277

Email: socialsurveys@ons.gsi.gov.uk

2. Details of the policy governing the release of new data are available by visiting www.statisticsauthority.gov.uk/assessment/code-of-practice/index.html or from the Media Relations Office email: media.relations@ons.gsi.gov.uk

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This document is also available on our website at www.ons.gov.uk.

Appendices

Appendix A: Definitions on which this report is based

1. The figures relate to the number of visits, not the number of visitors. Those entering or leaving the UK more than once in the same period are counted on each visit. The count of visits relates to UK residents returning to this country and to overseas residents leaving it.
2. Day trips are visits that do not involve an overnight stay. Day trips abroad made by UK residents, as well as day trips to the UK made by overseas residents, are included in the figures for visits and spending. Note 3 in sub-section Traveller Exclusions refers to overseas residents in transit through the UK.
3. An overseas visitor is a person who, being permanently resident in a country outside the UK, visits the UK for a period of less than 12 months. UK citizens resident overseas for 12 months or more coming home on leave are included in this category. Visits abroad are visits for a period of less than 12 months by people permanently resident in the UK (who may be of foreign nationality).
4. When a resident of the UK has visited more than one country, spending and stay for the entire visit are allocated to the country stayed in for the longest time.
5. Visits for miscellaneous purposes include those for study, to attend sporting events, for shopping, health, religious or other purposes, together with visits for more than one purpose when no one purpose predominates (for example visits both on business and on holiday). Overseas visitors staying overnight in the UK en route to other destinations are also included in the miscellaneous purposes category.
6. Estimates relating to tourist flows across the land border between the Irish Republic and Northern Ireland are, for convenience, included in the figures for sea. Where not shown separately, flows through the Channel Tunnel are also included under the figures for sea.
7. Estimates relating to tourist flows across the land border between the Irish Republic and Northern Ireland are excluded from the regional analysis tables (except the 'Total' section) as are all visits that did not include an overnight stay in the UK. Visits by overseas residents to Northern Ireland, although included in the 'total' column, are not separately analysed. More than one region can be visited by an individual while in the UK so the total of the visits to all the regions will be greater than the total number of visits to the UK as a whole.
8. Adjustments are made to the reported cost of an inclusive tour so that only the amount earned by the country of visit is included (for example accommodation costs and car hire). This estimate is then added to an individual's spending to give the total spending in the country of visit (see also note 10).

9. Length of stay for UK residents covers the time spent outside the UK, including the journey. For overseas residents it refers to the time spent within the UK.
10. Spending figures cover the same categories of traveller as the number of visits figures, except a) that the figures for overseas residents additionally include the spending of same day transit passengers and b) they also include foreign exchange earnings and expenditure due to travel between the Channel Islands and other (non-UK) countries.
11. Spending reported in this report and other ONS Overseas Travel and Tourism publications covers money spent in association with overseas travel and tourism, but excludes fares for travel to or from the UK. For any traveller on an inclusive tour, an estimate of the return fare is deducted from the total tour price. Inclusions and exclusions are driven by Balance of Payments definitions, and key specifics are listed in points 12-16 as follows:
12. Only money sourced outside the country of visit is included. Thus, any money earned and subsequently spent by an overseas resident on a visit to the UK is excluded
13. In addition to money spent during the visit, certain expenditure before or after the visit is included in spend estimates. Such expenditure includes items such as deposits, car hire, theatre tickets, short course fees, tickets for internal travel in the country of visit, travel insurance if bought prior to this particular visit.
14. Purchase for personal export of large items such as cars or boats are excluded from expenditure. However, if the car was bought abroad and not brought back to the UK, the spending would be included. Cost of any house purchase abroad is excluded. Any money spent abroad for the purpose of improving or renovating a property is included however, as is any expenditure abroad on legal fees to do with a house purchase.
15. Expenditure by UK residents on board UK-owned cruise ships is excluded, but expenditure on visits ashore during a cruise is included Any money spent abroad (for example. on medical treatment) which will be refunded through an insurance company inside the country of visit will be excluded. Private school fees are excluded.
16. An estimate for purchases by overseas visitors at airport duty-free shops is included in the figures for spending. Such purchases on British carriers are excluded.

Traveller Exclusions

The following groups are excluded from the tables in this publication:

1. Trippers who cross the Channel, North Sea or Irish Sea but do not alight from the boat (called stay-on-board).
2. Migrants and persons travelling to take up prearranged employment, together with military or diplomatic personnel, merchant seamen and airline personnel on duty.
3. Overseas residents passing through the UK en route to other destinations, but who do not stay overnight (often known as transit passengers). However, any spending by transit passengers while in the UK is included in the spending figures.

Geographical areas

The geographical areas used in this report are as follows.

1. North America: Canada (including Greenland and St. Pierre et Miquelon) and the USA (including Puerto Rico and US Virgin Islands).

2. Europe: All countries listed under EU25 plus other central and Eastern Europe, North Cyprus, Faroe Islands, Gibraltar, Iceland, Norway, Switzerland (including Liechtenstein), Turkey, the former USSR and the states of former Yugoslavia.
3. EU Europe: EU15: Austria, Belgium, Denmark, France (including Monaco), Finland, Germany, Greece, Irish Republic, Italy (including San Marino and Vatican City), Luxembourg, Netherlands, Portugal (including Azores and Madeira), Spain (including Canary Islands, Spanish North Africa, Balearic Islands and Andorra) and Sweden.
4. EU Europe: EU25: The above countries, with the addition of Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia, Slovenia, Malta, Cyprus. Only the south of Cyprus is a member of the EU, but the IPS is unable to separate North and South Cyprus for the period before May 2004, and so all of Cyprus is included in the EU25 section until May 2004. From May 2004, only southern Cyprus is included in the EU25 figures. EU Europe: EU27: As for EU25 plus Bulgaria and Romania.
5. North Africa: Algeria, Egypt, Libya, Morocco, Sudan and Tunisia.
6. Other Middle East: Bahrain, Iran, Iraq, Jordan, Kuwait, Lebanon, Oman, Qatar, Saudi Arabia, Syria, United Arab Emirates and the Yemen.
7. Central and South America: Argentina, Belize, Bolivia, British Antarctica, Brazil, Chile, Colombia, Costa Rica, Ecuador, El Salvador, the Falkland Islands, French Guiana, Guatemala, Guyana, Honduras, Mexico, Nicaragua, Panama (including Canal Zone), Paraguay, Peru, Surinam, Uruguay and Venezuela.
8. Caribbean: Antigua, Bahamas, Barbados, Bermuda, British Virgin Islands, Cayman Islands, Cuba, Dominica, the Dominican Republic, Grenada, Haiti, Jamaica, Martinique, Montserrat, St. Kitts-Nevis-Anguilla, St. Lucia, St. Vincent and the Grenadines, Trinidad and Tobago, Turks and the Caicos Islands.
9. Although the information in this publication is by the country groups described above, almost 200 different countries of residence or visit can be identified on the main IPS datasets.

Appendix B: Concepts used in this report

Key concepts and variables

Flow

Respondents in the IPS are mainly identified and analysed by their 'flow'. Flow is described as the direction of travel of the visitor combined with whether they are a UK resident or an overseas resident. There are, therefore, four main flows on the IPS:

- Overseas residents departing from the UK,
- UK residents departing from the UK,
- Overseas residents arriving in the UK,
- UK residents arriving in the UK.

Only data on overseas residents departing from the UK and UK residents arriving in the UK have been used in this publication. This is because the IPS interviews for these travellers take place at the end of their visits when factual information about visit duration and spending is available. This is

felt to be more complete and reliable than the information gathered at the beginning of a trip when intentions regarding duration and spending may not prove to be accurate.

Number of visits

The data in this report relate to the number of visits not the number of visitors. Those entering or leaving the UK more than once in the same period are counted on each visit.

Purpose of visit

The IPS records the many different reasons people have for making a visit. These are combined into four main analysis categories:

- Holiday,
- Business,
- Visiting friends or relatives (VFR),
- Miscellaneous.

The categories describe the main purpose of the visit and, where it is not possible to determine this, the respondents' reason for the visit is categorised as 'miscellaneous'. People migrating (to or from the UK) or travelling as crew of aircraft, ships or trains are excluded from analyses in this publication.

The IPS collects information on whether tourists travel independently or on some form of package trip. As well as providing data on all holiday visits, this report also provides information on those who are on package holidays, which are referred to as 'inclusive tours'. Such visits are defined as holiday visits on which accommodation was paid for as part of an inclusive tour or where fares and accommodation cannot be separated.

The business category includes conference and trade fair visits, and those who made their visits for study, medical treatment or shopping appear in the miscellaneous category. More detailed information on the main reason for visits (such as attending conferences or trade fairs) is available from the IPS datasets (see Appendix F).

Some analyses show data for 'leisure' and 'business' visits, where the 'leisure' category includes all visits for holidays, visits to friends or relatives, and visits for miscellaneous purposes.

Country of residence or visit

For overseas residents visiting the UK, this is the main country of residence of the visitor. For UK residents travelling abroad, it is the main country of visit.

Although the IPS collects information on all individual countries of the world, many countries outside of EU Europe are shown within groups rather than individually. It would not be practical to show all countries separately but also for many countries, sample sizes are too small to give accurate estimates.

On 1 May 2004, 10 new countries joined the EU and on 1 January 2007 two additional countries joined. In the tables in this report, figures are given for the original 15 member states (EU15), the 25 EU member states (EU25), and the 27 current EU member states (EU27). In years previous to 2004, EU Europe is defined as consisting of the countries which were EU members during the year in question. It should be noted that for the years before the reunification of Germany in 1991, data on the then East Germany are not included in the figures for Germany, and therefore are not included within the figures for EU Europe.

Appendix B shows how the countries of the world are grouped into the areas used in this report.

UK region of stay

The IPS records which towns overseas residents stayed in when they visited the UK. However, due to the very large number of towns in the UK it would not be meaningful to produce analyses of visits by the full range of towns. In this publication, visits information for overseas residents is therefore mainly shown at county or unitary authority, and main UK region levels although a table of the top 50 towns visited is also included.

In 2007 a more accurate approach to coding towns was employed in the survey, based on a more comprehensive coding frame of towns and boroughs. This may result in a slight discontinuity from previous years and care should therefore be exercised when comparing results with earlier years.

Care must be taken when using the regional information, as the numbers of visits to separate UK areas cannot simply be added together to form larger regions. This is because a person may stay in more than one area of the UK during a single visit. As a result, the numbers of visits to smaller areas do not sum to the figures given for larger regions in the regional tables in this publication.

For example, a person staying at least one night in each of London, Windsor and Aberdeen in a single visit to the UK would appear as one visit to London, one to Berkshire and one to Grampian. However, the same visitor would be recorded as a single visit in the England total and a visit in the Scotland total, and as just one visit in the UK total. Although visits cannot be summed across UK regions, the amount of spending and the number of nights stayed can. (See Appendix A, point 7 for an explanation regarding visits to Northern Ireland.)

UK region of residence

For UK residents, data are presented by the region of residence, that is London, the rest of England, Scotland and Wales.

Mode of transport

Until 1994 air and sea were the only two main modes of transport to and from the UK. The Channel Tunnel between the UK and France began operating towards the end of 1994. Information on passengers using the tunnel is available on the IPS from the fourth quarter of 1994. Journeys by sea and tunnel are further analysed to show whether a vehicle was taken on the trip and, if so, the type of vehicle that was used.

Age and sex

Respondents' age and sex are collected in the IPS interview. Questions on exact age are not asked on the IPS and instead respondents are classified into age groups as it is felt that some people may not give accurate answers, and age groups are normally sufficient for users' needs.

All travellers, including children under 16, are eligible to be interviewed on the IPS. If the sampled person is under 16, where possible the interview is carried out with the child after having first received permission from a parent, guardian or responsible adult travelling with them (for example, a school teacher if they are on a school trip). If the child is too young to complete the interview themselves, proxy information is collected from the parent, guardian or responsible adult, wherever possible.

Expenditure

Expenditure for both UK and overseas residents exclude amounts spent on fares to and from the UK.

Visits and expenditure information regarding travel to or from the Irish Republic for years up to and including 1998 are included in the figures for the EU but do not appear separately in the rows and columns of some tables. Consequently, rows and columns in the tables may not always sum to the figures shown for the whole EU.

Expenditure data relating to the Channel Islands are included within the figures for Europe but are not shown separately. This means that spending shown for the individual countries of Europe will not always sum to the figures shown for the whole of Europe.

Expenditure data of overseas visitors transiting the UK, but not staying overnight, are included within the figure shown for 'All purpose' of travel, but are not shown separately. This means that spending shown for overseas residents' visits by individual purpose of visit will not always sum to the figure shown for 'All purposes'.

Travellers to and from the Irish Republic

There is a major discontinuity in the time series shown in this publication between years up to and including 1998 and subsequent years. From the second quarter of 1999, the IPS began interviewing on air and sea routes between the UK and the Irish Republic. For the years up to and including 1998, estimates of visitor numbers, their spending and nights stayed on routes between the UK and the Irish Republic and their characteristics were based on data provided by the Central Statistical Office of the Irish Republic.

From 1999, and for subsequent years, this report uses IPS interview data. To enable 1999 data to be analysed, data for the first quarter of 1999 were constructed, based upon interviews conducted in the first quarter of 2000, but weighted to the traffic volumes of the first quarter of 1999.

Analysis of the interview data from 1999 onwards has shown that a large number of Irish visitors who would previously have been defined as tourists to the UK were transiting through the UK on their overseas visits. Also, the data for 1999 onwards showed that a number of European and Commonwealth visitors made combined visits to the UK and the Irish Republic; these visits were previously recorded as visits from residents of the Irish Republic.

These factors combined to reduce the number of overseas visitors to the UK from 1999 onwards, mainly the estimates of visitors from the Irish Republic, but they also increased the number of visitors from certain other countries, particularly Australia, New Zealand, Canada, Germany and the Netherlands.

The data from the IPS Irish interviews also affected estimates of spending and nights. These showed that the previous estimates of spending per visit of Irish visitors to the UK were overstated, while estimates of UK residents' spending per visit in the Irish Republic were previously understated.

The interview-based details of visitors from the Irish Republic have enabled more completed duration of stay and regional breakdowns to be produced from 1999 onwards. This has led to discontinuities between 1998 and 1999 in the duration of stay and regional profile from the IPS.

In summary, the major effect resulting from IPS interviewing on routes to and from the Irish Republic was to improve the quality and detail of estimates from 1999 onwards. The discontinuities from this change affected time series estimates of visitors to and from the Irish Republic, with some smaller effects for other countries.

Appendix C: The IPS-Methodology and coverage

Background

The International Passenger Survey (IPS) is a large multi-purpose survey that collects information from passengers as they enter or leave the UK. It is carried out by the Office for National Statistics (ONS) for a range of public and private sector organisations. In particular, the survey provides figures used for the travel account of the balance of payments, international migration statistics, and for informing decisions on tourism policy.

The data from the survey are widely used across and outside of government to provide detailed information on the numbers and types of people travelling to and from the UK. Results are published regularly by ONS on a monthly, quarterly and annual basis. More detailed analyses are possible through the Data, Advice and Relations Team (DART) in ONS, or by downloading the [Travelpac \(4.35 Mb ZIP\)](#) dataset from the ONS website.

Travellers passing through passport control are randomly selected for interview and all interviews are conducted on a voluntary and anonymous basis. Interviewing is carried out throughout the year. The overall response rate (complete and partial interviews) for the 2012 survey was 79%.

Since the IPS began in 1961, its coverage has been extended so that it includes all the main air, sea and tunnel ports or routes into and out of the UK. The only routes excluded from the survey are sea routes to and from the Channel Islands, the land border with the Irish Republic, and cruise ships travelling to and from the UK.

Approximately 95% of passengers entering and leaving the UK are covered by the survey. The remainder are either passengers travelling at night, when interviewing is suspended, or on those routes too small in volume or too expensive to be covered.

The IPS data are weighted to produce national estimates of all international travellers to and from the UK on a quarterly basis. Although some monthly data from the IPS are also published, a single quarter is the minimum period over which most detailed analyses of the data can be made. Annual national estimates are created by combining the four quarters of the year.

The calculation of the weights on the IPS takes into account its complex sample design and information provided from other sources on, among other things, the non-sampled routes and time periods. For example, the Central Statistics Office in the Irish Republic provides information on travellers crossing the land border with Northern Ireland.

Overview of the survey design for collecting Overseas Travel and Tourism information

The IPS is based on face-to-face interviews with a sample of passengers travelling via the principal airports, sea routes and the Channel Tunnel. The number of interviews conducted to produce overseas travel and tourism estimates in 2012 was 295,000, which represented about 0.2% of all travellers. This large sample size allows reliable estimates to be produced for various groups of passengers despite the low proportion of travellers interviewed.

The IPS sample is stratified to ensure it is representative by mode of travel (air, sea or tunnel), port or route, and time of day. The frequency of sampling within each stratum is varied according to the variability of tourist expenditure and the cost of interviewing. For example, where the expenditure quoted on a particular route varies greatly across respondents, a higher sampling frequency is used to enable a more satisfactory estimate to be produced. (For further details on the sample design, see the Sampling section).

Some questions on the survey are asked of all of the passengers interviewed, while others are restricted to certain specific sub-groups. Information on the spending and length of stay of UK residents abroad and overseas residents in the UK is only collected on the return leg of a visit. This is because actual spending and length of stay are required, and these may differ from the respondents' intentions when they start their visit. In 2012 the sample on which the estimates presented in this publication are based included, 45,000 interviews carried out with overseas residents departing from the UK and 59,000 with UK residents arriving back from abroad.

The details collected on the survey are used by ONS, along with other sources of information, to produce overall national estimates of the number and expenditure of different types of travellers. A complex weighting procedure is used to do this that takes into account various factors in order to improve the estimates. (For further details of the weighting procedure, see the Producing national estimates section).

The collection of the IPS data

The key to producing reliable results from the IPS lies initially in the way the data are collected. Great emphasis is therefore placed upon the IPS interviewers to ensure they are able to capture data efficiently and accurately.

Nationally, IPS data are collected by a team of over 200 interviewers who are recruited and trained specifically to work on the IPS. All IPS interviewing staff undergo an intensive initial training course and, once qualified, are regularly briefed and monitored by a support team of team leaders and

site managers. Some interviewing teams will cover a single large port, for example Heathrow, while others may cover several smaller ports which are generally in the same part of the UK. Interviews are carried out on all days of the year, apart from Christmas Eve, Christmas Day and Boxing Day.

Typically, an IPS shift will consist of a group of between five and eight interviewers led by a team leader. One of the team will act as a counter to ensure that people are correctly selected for interview according to the sampling intervals appropriate for that port. The team leader is responsible for the organisation and running of the shift and is available to offer advice to team members when required. Site managers ensure that data quality is to the acceptable standard.

Due to the layout and facilities at some seaports it is not always possible to interview passengers as they arrive. In such cases, IPS staff travel to seaports in France and Ireland to select their subject and then conduct interviews which take place either at the overseas ports of departure, or on board the vessels returning to the UK.

Almost all IPS interviews take place on a face-to-face basis with the responses being initially recorded on paper forms. Shortly after the interview has taken place, the data are transferred to a computer system in which electronic checks are made of the data being input. In recent years some 'self completion' questionnaires have been used at times where an interviewer has been unable to conduct an interview because of language difficulties.

The self-completion questionnaires are produced in 13 languages but they do not cover the complete range of questions asked in a full IPS interview. The forms are designed to be as simple and user friendly as possible and aim to capture the essential data items which will be needed to produce reliable estimates of tourism.

Once the interview information has been captured electronically, it is transmitted to ONS headquarters where a series of further quality and accuracy checks are made on the data before they will be ready for processing and the publication of analysis.

In recent years, collection of data has been made more difficult owing to the changes in both the way airports and seaports operate and through the differing behaviour patterns of travellers. Many airports now operate several gateways for clients and all these have to be covered by an interviewing team. Many passengers arriving want to use their mobile phones once they land. It is IPS policy not to intrude or interrupt when we want to interview such people and so these people although selected for inclusion in the IPS may not be interviewed.

Sampling

The IPS uses a multi-stage sample design. The sampling for air, sea and tunnel travel is carried out separately, although the underlying principle for each mode of travel is broadly similar. In the absence of a sampling frame of travellers, time periods/shifts or sea crossings are selected at the first stage (primary sampling unit), and travellers are then systematically chosen at fixed intervals from a random start within these shifts or crossings at the second stage. The details of the sampling scheme for each individual mode of travel are described below.

Air routes

For air routes, time periods are sampled. Shifts are selected for the first stage. These are done in such a way that the numbers of shifts are balanced between mornings and afternoons, and days of the week within any quarter. At the second stage, passengers are counted as they cross a predetermined line and every n th one is interviewed.

The sampling interval, n , differs between sites and involves a first stage sampling rate used to screen respondents for migration purposes and a second stage sampling rate used for overseas travel and tourism interviews. Departing passengers are sampled at a higher rate than arriving ones because the expenditure information for overseas residents visiting the UK is more variable than that for UK residents returning from visits abroad.

A small number of shifts every quarter are also conducted at other smaller international airports in the UK. However, the sample size is insufficient to provide accurate estimates for most of these airports individually. Those airports with less than about 250,000 passenger movements per quarter are usually excluded from the survey altogether on the grounds of cost effectiveness, but traffic at these sites is taken into account when producing national estimates.

Sea routes

Sea routes carrying 50,000 passengers a year or more are generally included in the IPS sample. At some seaports, passengers are sampled and interviewed on the quayside as they embark or disembark, while at others IPS interviewers travel on the boat itself with interviewing being carried out on board. The choice between interviewing on the quayside or on crossings is made on practical grounds such as cost, safety and permission.

Where interviewing is conducted on the quayside, the sample is designed to select shifts that are balanced across different days of the week and times of day within a quarter, with each individual shift covering several sailings. Where interviews are conducted on crossings, a predetermined number of return crossings are selected for each route, spread across time of day and day of week each quarter. As for air sampling, sea passengers are selected at fixed sampling intervals from a random start within each shift or crossing.

The IPS also samples long haul ships capable of carrying more than 200 passengers at the port in Southampton.

Tunnel routes

The method used for the tunnel routes is different for Eurostar passenger trains and for Eurotunnel vehicle shuttles.

The method for passenger trains is similar to that for air travel; time shifts are selected and then passengers are selected at fixed intervals within the time shift. Passengers are interviewed after crossing a predetermined line at Ebbsfleet, St. Pancras, and Ashford International stations on arrival or departure.

In contrast, for vehicle shuttles, crossings are randomly selected and interviewing takes place on board the shuttles themselves. Because of time constraints, only a certain number of interviews can

be carried out on any individual shuttle and the sampling interval used is therefore dependent on traffic volumes.

Producing national estimates

Once the information has been collected from respondents, the survey data are weighted to produce national estimates, which are then published on a monthly, quarterly and annual basis.

The basis of the weighting of IPS survey data is that the total set of respondents interviewed at a port or route is weighted up/calibrated to passenger traffic known to have passed through that port or route in the period in question. The known passenger traffic information is provided to the IPS team by CAA, Department for Transport, Eurostar, Eurotunnel, BAA and a number of airports themselves.

The weighting approach incorporates a number of stages which take account of all passengers selected for interview. Weighting is conducted for each port/route and direction of travel combination, employing the same principles at each one. The stages, listed in order of application, are as follows.

Stage 1

A **Design weight** is employed, to account for the probability of sampling this passenger using the first-stage sampling rate.

The calculation compares the number of shifts or crossings sampled (at each port/route and direction of travel combination) with the number of shifts or crossings that could have been sampled for that combination in the period. In addition it takes into account the first-stage sampling rate. For example, in a case where a contact was sampled at a port with the following details:

- 10 shifts were run in the period,
- 100 shifts could have been run in the period,
- The contact was the sample employing a first stage sampling rate of 20 (that is, every 20th passenger was selected).

The Design weight for this contact would be 200, calculated as $(100/10) \times 20$. As well as port/route and direction, this weight incorporates weekday or weekend, and am, pm or night as weighting strata.

Stage 2

A **Non-response weight** factor is employed to take account of contacts selected for interview but who were subsequently not interviewed, either because it was not possible to contact them or they refused to participate.

The weight is applied at each port/route and direction of travel combination and also incorporates weekday versus weekend as weighting strata. It involves uplifting 'complete' and 'minimums' cases by a factor calculated as:

- The sum of weights applied to all 'completes', 'minimums' and 'non-response' records,

- Divided by the sum of 'completes' and 'minimums' at that port/route and direction of travel combination.

Stage 3

A **second Design weight** is applied to account for the second-phase of the sample design and relates to the sub-sampling of non-migrants. The weight for this factor is simply equal to:

- The ratio second-stage sample interval: first-stage sample interval for non-migrants, and
- 1 for migrants.

Stage 4

A weight factor is applied for discarding minimum respondents. **Minimum** interviews are discarded in this step of the weighting, with other cases weighted up to compensate. The purpose of applying this weight is that it is possible that the profile of minimums might be skewed to certain nationalities or residents of certain countries (for example driven by language difficulties meaning that only minimal information is provided to the interviewer).

This weighting step works to the same principle as the non-response weight. It utilises port/route and direction of travel as weighting strata.

Stage 5

Weighting to the **sampling frame**. Here the population (that is, passenger traffic) or the ports and routes covered by the sampling frame are used to weight the data. The population excludes interlining passengers (those neither entering nor leaving the UK from this port, that is, simply changing international flights) and out-of-hours traffic (that is, arriving or departing outside the hours covered by the IPS interviewing at that port). The weight is applied at each port/route and direction of travel combination.

Stage 6

Weighting for frame **under coverage**. This extends the above population weighting to compensate for not covering certain ports and times of day (out-of-hours traffic) in the survey sample. The weight utilises port/route and direction of travel as weighting strata and also incorporates region of the world that traffic has come from/gone to. The weight reflects the fact that flights to and from some parts of the world are more likely than others to arrive, or take off at night, when no interviewing is conducted at airports.

Stage 7

Weighting for observed **imbalance**. This step is used to correct an observed imbalance between the number of non-migrants entering and leaving the UK. These are applied as a series of fixed factors, relating to direction of travel, port/route and country/residence.

It has been noted that during 2009 and 2010 there was an increase in the proportion of respondents in the IPS overseas travel and tourism sample who are starting their visit compared to the proportion

ending their visit. This proportion of the two types of traveller in the sample defines the estimates of travel and tourism.

There is no clear reason for this trend, ONS has taken steps to calibrate its overseas travel and tourism estimates with external data, notably estimates from surveying conducted at departure gates at main airports in the UK by the Civil Aviation Authority (CAA) and e-borders data. This work showed general consistency between the datasets with the result that the factors used in the imbalance weight have been retained. Further work to understand and react to imbalance will take place when more comprehensive e-borders data is available.

Stage 8

A **final weight** is applied, which combines each of the weighting stages listed above.

Imputation

Where the responses for key items of interest are missing from the survey data for an individual record the values are imputed. Imputation is applied to the following items:

- Length of stay,
- Cost of fare (expressed in terms of cost of the single fare for the respondent),
- Spend,
- Town of stay.

For each of length of stay, cost of fare and spend, a value is calculated for the survey record which had the information missing. The IPS employs a mean-value within class imputation procedure where the missing value is replaced with the average value for records with similar characteristics. The matching variables used for each of these items are:

- Length of stay: Country of visit/visiting from; Purpose of visit.
- Cost of fare: Port in UK travelling to/from; Overseas port travelled to/from; Month of travel; Operator.
- Spend: Country of visit/visiting from; Duration; Purpose of visit.

Where the respondent has travelled on a package holiday, the cost of the fare is imputed and then deducted from the total cost of the package, and the residual cost (after removal of a percentage to cover travel agent fees) is assigned to expenditure.

Overseas residents staying in the UK are asked about their total expenditure in the UK. This information is then imputed across the towns stayed in, proportionate to the length of stay in each one. It is recognised that people tend to spend more when they stay in London than in other towns in the UK and therefore an uplift index is calculated and applied to the spend allocated to London in cases where the respondent stayed in both London and other towns in the UK.

In cases where an overseas resident hasn't given details of all the towns in the UK they stayed in, an uplift is applied to towns stayed in by similar records, using the same principles as outlined above for the imputation of stay, fares and spend.

Seasonal adjustment

The number of travellers and their spending both have a clear seasonal pattern, with more visits and spending in the summer than in the winter. Statistical techniques are used by ONS with the package X-12-ARIMA to produce seasonally adjusted figures. These figures show visits and spending with an estimate for the seasonal component removed. They allow more meaningful comparisons to be made between months and quarters of the year and help to identify underlying trends.

More details on seasonal adjustment procedures can be obtained from the IPS Branch of ONS.

Constant prices

Usually, spending by overseas residents in the UK and UK residents abroad grows each year as the price of goods and services rise. Constant price figures are calculated by ONS to show real spending across years with the effects of price inflation removed.

For overseas residents' expenditure in the UK, an index is created by splitting spending into its component parts (accommodation, meals and so on) using past IPS data and uprating these components by their related retail price indices. The resulting index is then used to rebase the overseas figures back to 1995 prices.

For UK residents abroad, spending is split by country of visit. Consumer price indices for particular countries are used with currency conversion rates to produce an index of price rises. The index is then used to rebase UK residents' spending to 1995 prices.

Additional sources of data

The method above explains how the national estimates are produced based on the routes sampled on the IPS. Unfortunately, as the IPS does not cover all passenger routes, additional figures have to be obtained from other sources or estimates and added to the totals derived from the IPS. These additions are:

- UK residents on cruises departing from or arriving at UK shores,
- Channel Islands expenditure and receipts from tourism,
- Rail fares purchased by overseas visitors to the UK and UK visitors abroad before the start of their visit, and
- Estimates of travel across the land border between Northern Ireland and the Irish Republic, from the Irish Central Statistical Office.

Changes in methodology introduced in 2005

Due to a rapid growth in traffic, in 2005 two new residual airports, Liverpool and Prestwick were introduced into the IPS sample for the first time. The introduction of these two airports has some implications for the results of the IPS. The inclusion of these two ports means that there is more likelihood of picking up contacts that reside in, or have visited areas close to, these airports.

The introduction of the new airports caused the IPS research team to review the way that traffic from airports not sampled by the IPS is accounted for in the IPS processing systems. As a result,

the systems were modified slightly in order to prevent overestimates or underestimates of traffic occurring at a regional level.

The introduction of the new airports and the subsequent changes made to the processing systems causes a discontinuity in the IPS results. Any comparisons of IPS results for 2005 onwards with earlier years (and especially those of a UK regional nature) therefore should be made with care.

Changes in methodology, 2007

Imputing expenditure

The methods of computing expenditure (imputation) for cases where no expenditure information is given by the contact changed in 2007. The new method takes account of the duration of stay of the contact which had not been the case previously and means there may be a discontinuity in the expenditure series from 2006 to 2007. The new methodology compensates for possible overestimates of spending which may have arisen in the past due to the average daily spending being generally lower on longer trips than on shorter ones.

Imputing fares

The costs of a package trip normally include fares to and from the country of visit. For expenditure estimates the fares are deducted from the cost of a package in order to obtain the amount of spending on the visit. The manual method of looking up fares from brochures and from the web was replaced in 2007 by an automated system which uses fares data provided by the respondent.

Coding of UK towns

In 2007 a more comprehensive approach to coding UK towns was introduced. Interviewers were provided with a more detailed list of towns and boroughs than in the past, meaning that their recording of responses given by respondents was more accurate.

Changes in methodology, 2009

Aberdeen Airport was introduced to the sample, and as a result, the estimated number of visits to cities and regions in Scotland will have been impacted positively. Belfast International Airport was also introduced but visits to cities and regions in Northern Ireland are not reported in the IPS Overseas Travel and Tourism estimates due to inability to record details of visits made by crossing the Irish land border.

Prior to 2009, known passenger traffic passing through Belfast was allocated to airports in Great Britain. The allocation of this traffic to interviews conducted in Belfast in 2009 will have had some downward impact on estimates of visits to towns and regions in Great Britain. (Airports at Doncaster, Southampton and Bournemouth were added in 2008)

More broadly, the overall methodology of the IPS was changed in 2009, in terms of both sampling and data processing.

Sampling was revised to incorporate an increase in the number of shifts run at many ports outside of Heathrow and a decrease in the number of shifts run at Heathrow. This change was introduced following a [Port Survey Review \(65 Kb Pdf\)](#) in response to the recommendations put forward by the Inter-Departmental Task Force on Migration Statistics.

Further, the way that shifts are run was changed via the introduction of a system employing a primary sampling interval for screening migrants and a sub-sample interval for travel and tourism contacts. This approach didn't affect the profile of travel and tourism contacts but it did require a change in the way the data is processed.

The data processing involves weighting of all records and imputation of records with information missing at certain questions. The basic principles behind the processing were retained in 2009 but improvements were made in some aspects. This resulted in [some discontinuity \(35.2 Kb Pdf\)](#) with a downward impact of approx 2% in visits to the UK and 3% in visits overseas and a further value of less than 1% in earnings and expenditure.

There have been no changes in data collection methodology since 2009. However, the methodology used to estimate the number of UK residents departing from or arriving at UK ports on cruises was revised in 2010. The new methodology utilises new sources of data, including that published by DfT, IRN Research and the European Cruise Council. This represents an improvement in methodology and has the effect of increasing the estimated number of visits to 'rest of the world' by UK residents by approximately 175,000 compared with 2009.

Notes to tables and figures

The following conventions have been used in the tables:

0 denotes a figure of less than 0.5

. indicates that data are not available

The sum of spending across sub-categories of visit may not add to total spending. Spend per visit and spend per day by overseas visitors broken down by some categories of visit cannot be calculated by dividing spending by the number of visits. See Appendix B for details. In some cases, percentages in tables in this report from years prior to 2004 may differ by 1.0% from those published in previous years. This is because of changes in the method of rounding figures. The figures in this report are the most accurate.

Acknowledgements

The IPS is a large continuous survey and ONS would not be able to carry out the survey without the efforts of many different groups of people from a variety of organisations. In particular, ONS wishes to acknowledge the parts played by the following:

1. The interviewers for their role in collecting the information on which the results of the IPS are based.
2. The respondents for the information they have provided.

3. The operators and managers of seaports, airports and rail terminals who give IPS interviewers access to their facilities in order to interview passengers.
4. The companies and organisations that provide additional information and data which enable the IPS results to be produced.

Appendix D: IPS response rates

Sample surveys such as the IPS depend on achieving high levels of response from the public. Non-respondents often have different characteristics of travel and expenditure compared with those who do respond and this can lead to biases being introduced into the results.

The response rates for the main airports, sea routes and the Channel Tunnel are shown in **Table D.1** below. These response rates relate to complete and partial interviews. The overall response rate in 2012 was 79% of the sample. The overall response rates for sea and tunnel routes remained consistently higher than those at most of the airports. For more information about response rates contact socialsurveys@ons.gsi.gov.uk.

Table D.1, IPS response rates 2011 and 2012: by type of response and UK port

	Complete or partials %		Minimum response %		Total response %	
	2011	2012	2011	2012	2011	2012
Heathrow terminal 1	64	66	5	6	69	72
Heathrow terminal 3	74	75	5	4	79	79
Heathrow terminal 4	71	67	4	6	75	72
Heathrow terminal 5	72	67	4	6	76	73
Heathrow transits	71	72	5	5	76	77
Gatwick North	82	77	2	2	84	78
Gatwick South	83	77	1	2	84	79
Manchester terminal 1	84	85	1	2	85	86
Manchester terminal 2	91	89	2	1	93	90
Manchester terminal 3	85	83	2	1	87	84
Stansted	86	85	3	3	89	88
Other airports	82	83	1	2	83	85
Sea	88	89	1	1	89	89
Channel Tunnel	81	86	1	1	83	87

	Complete or partials %		Minimum response %		Total response %	
	2011	2012	2011	2012	2011	2012
Total	79	79	3	3	82	82

Table source: Office for National Statistics

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(20 Kb)

Appendix E: Accuracy of Overseas Travel and Tourism estimates

The estimates contained in this publication are subject to sampling errors that result because not every traveller to or from the UK is interviewed on the survey. Sampling errors are determined both by the sample design and by the sample size – generally speaking, the larger the sample supporting a particular estimate, the proportionately smaller is its sampling error.

Table A shows the 95% confidence intervals for the main 2012 estimates of the total number of visits, nights and expenditure, for both overseas residents visiting the UK and UK residents going abroad.

The method used to estimate confidence intervals on the IPS takes into account the main features of the sample design described in the sections on Sampling and Producing national estimates in Appendix C. The approach accounts for the two-stage sampling (individuals within shifts), the stratification used when drawing the sample of shifts, differential sampling and initial non-response weights and post stratification to traffic totals.

The 95% confidence intervals represent the interval into which there are 19 chances out of 20 that the true figure (had all travellers been surveyed) would fall. The 95% confidence intervals are given in relative (percentage) terms – the estimate plus or minus the percentage gives the appropriate interval for each estimate.

Further details on the confidence intervals of data from the IPS and their interpretation can be obtained from the IPS Branch of ONS.

Table A: IPS confidence intervals for 2012 estimates

	Estimate	Relative 95% Confidence Interval (+/- % the estimate)
Overseas visitors to the UK		
Number of visits (1000s)	31,084	2.2%
Number of visitor-nights (1000s)	230,191	2.7%
Total earnings (£ million)	18,640	2.8%
UK residents going abroad		
Number of visits (1000s)	56,538	1.2%
Number of visitor-nights (1000s)	584,162	1.7%
Total expenditure (£ million)	32,450	2.0%

Table source: Office for National Statistics

Download table

[XLS](#) [XLS format](#)
(31.5 Kb)

The tables linked below show the confidence intervals for 2012 estimates relating to various purposes for visit and region of the world, together with regions of the UK visited. Relative confidence intervals are also shown for estimates relating to individual country of visit to and from the UK.

[Section 8: Confidence intervals for 2012 estimates \(82 Kb Excel sheet\)](#)

Notes

1. Any differences in the 'Estimates' figures contained in the tables in Appendix E and those in the tables in the main body of this document are due to the tables in Appendix E being calculated purely from IPS sample, rather than processed data which includes estimates such as visits made across the Irish land border. The tables in Appendix E should be referenced only for the purpose of identifying confidence intervals.

Appendix F: Access to IPS data and analysis

IPS results published by ONS

In addition to Travel Trends, ONS also publishes monthly and quarterly results from the IPS that are available free of charge from the Office for National Statistics website. These, data tables from the IPS and other statistics relating to travel and tourism are available at the [Travel and Transport theme page](#) on the Office for National Statistics website.

The website also provides more information about the [International Passenger Survey methodology](#) including the current IPS questionnaire and interviewer instructions.

It should be noted that all IPS results published by ONS are subject to Crown Copyright. Reproduction of material is permitted under the terms of the Open Government Licence. Details of this are at the front of this report.

Accessing datasets

1. To enable easier examination of the IPS data, a simplified version of the IPS dataset called Travepac, comprising 14 of the most widely used variables, is available on the [Office for National Statistics website](#). Data are available online for each year from 1993 onwards, in both SPSS and Excel formats.
2. Larger IPS datasets are available through the Data Archive at Essex University. Contact details are as follows:

Telephone: +44 (0) 1206 872143

Web: [Data Archive Homepage](#)

Other analyses

General enquiries about the IPS or requests for ad-hoc analyses should be directed to:

Office for National Statistics,

Data Advice Relations Team,

Room 2201,

Government Buildings,

Cardiff Road,

Newport.

NP10 8XG

Telephone: +44 (0)1633 455678

E-mail: socialsurveys@ons.gsi.gov.uk