

Article

Travel trends: 2013

Estimates of international travel and tourism visits of less than 12 months duration in 2013. Includes the associated earnings and expenditure involved, with the exchange of approximately £50 billion of trade between the UK and the rest of the world. Results taken from the International Passenger Survey (IPS) show that 2013 saw the highest number of visits to the UK by overseas residents and the highest recorded spending since the IPS began in 1961.



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Release date:
8 May 2014

Next release:
To be announced

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1. Travel trends 2013: Key findings

Correction notice to be published: 18 June 2015, 3.30pm This republication of Travel Trends 2013 contains revised estimates following updates made to Q3 and Q4, 2013 data within the 2014 Overseas Travel and Tourism data processing.

Correction notice to be published: 20 May 2015, 9.30am During the processing of the 2014 Overseas Travel and Tourism data, factors were updated as part of the annual revisions to the data. We identified that, for consistency, these updated factors should be applied to the 2013 Q3 and Q4 data. These data revisions affect the estimates for 2013 (annual) and Q3 and Q4 published in Travel Trends, 2013.

Trends in visits to the UK by overseas residents

- Overseas residents made 32.7 million visits to the UK in 2013, a 5.2% increase compared with 2012.
- Earnings from visits to the UK rose by £2.6 billion (14.0%) compared to 2012 to reach a record level of spending in the UK of £21.3 billion.
- The number of nights spent in the UK also grew 6.6% in 2013 to a total of 245.5 million overnight stays.
- Visits from North America continued to show a decline, 1.0% down on 2012, however spending from the region increased by 2.2%. Visits from Europe and 'Other Countries' showed increases of 4.7% and 12.1% respectively and spending from these regions also grew by 9.8% and 27.4%.
- Holidays remain the main reason for visits to the UK accounting for 12.7 million visits, a rise of 5.9% on 2012. Business visits and visits to friends and family continued to show growth, up 6.4% and 4.1% respectively.
- Overseas residents made 16.8 million overnight visits to London in 2013, an increase of 1.4 million (8.7%) from 2012, and spent an estimated £11.5 billion on visits to the Capital.
- Overnight visits to the rest of England grew by 5.2% to 13.5 million while visits to Scotland and Wales both showed increases after falls in 2012, Scottish visits up 8.8% and Welsh 1.8%.

Trends in visits abroad by UK residents

- UK residents made 2.2% more visits abroad than in 2012 and spent £2.1 billion (6.3%) more during these visits. The number of nights spent abroad also increased in 2013 up 3.5% to 604.9 million nights.
- Holiday visits abroad grew by 2.7% as did visits abroad to friends or family, up 4.4%, however business visits fell by 3.0%. The picture for expenditure was the same with spending on holidays and visits to friends and family rising 7.2% and 10.5% respectively, while expenditure on business visits abroad fell 3.9%.
- Visits to North America remained similar to 2012, while visits to Europe and 'Other Countries' continued to rise, increasing by 2.5% and 1.8% respectively in 2013.
- Spain continues to be the top destination for UK residents visiting abroad, accounting for 11.6 million visits, an increase of 4.6% on 2012. In 2013 visits to France continued the fall seen since 2009. Visits to Morocco and Tunisia continue to grow in 2013, both increasing by 26.9% and 15.7% respectively. At the same time visits to Egypt continue to decrease, showing a fall of 3.1% in 2013, following the trend of recent years.
- The average length of stay on visits abroad remained broadly constant in 2013 at 10.5 nights, however average spending on these visits increased by 4.2% from £573 in 2012 to £597 in 2013.

2. 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. The International Passenger Survey (IPS) has been providing the source data for travel and tourism since 1961.

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 \(350.4 Kb Pdf\)](#). They are final estimates for 2013, 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 2013) 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, 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](#).

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.

Strengths and limitations of the travel and tourism data, sourced from the IPS, can be found in the '[IPS User Guide Vol 1: Background And Methodology](#)' (423 Kb Pdf).

3. About the estimates

Correction notice to be published: 18 June 2015, 3.30pm This republication of Travel Trends 2013 contains revised estimates following updates made to Q3 and Q4, 2013 data within the 2014 Overseas Travel and Tourism data processing.

Correction notice to be published: 20 May 2015, 9.30am During the processing of the 2014 Overseas Travel and Tourism data, factors were updated as part of the annual revisions to the data. We identified that, for consistency, these updated factors should be applied to the 2013 Q3 and Q4 data. These data revisions affect the estimates for 2013 (annual) and Q3 and Q4 published in Travel Trends, 2013. The sample profile and responses are calibrated to international passenger traffic for the reporting period.

- Estimates are based on interviews conducted when passengers end their visit. Therefore any visits commencing in the reported year but not completed until later are not included in estimates for the reported year.
- Spending associated with visits includes anything spent before, during and after the trip.
- Parts of the report refer to countries visited abroad. It should be noted that if a UK resident visited more than one country on a trip abroad, the country recorded as visited in this publication is the country that was visited for the longest period.
- Following Croatia joining the European Union on 1st July 2013, the categories representing 'Europe' and the 'European Union' have been updated to incorporate Croatia as a member of the European Union and to clarify the membership of the different groupings. Please see 'Background Notes: Geographical areas' for more information.

4. 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 six sections, containing information on:

[Section 1: The long-term trends in tourism to and from the UK from 1980 to 2013 \(191.5 Kb Excel sheet\)](#)

[Section 2: The trends in travel and tourism to the UK over the last five years \(2009 to 2013\) \(527 Kb Excel sheet\)](#)

[Section 3: The trends in overseas travel and tourism by UK residents over the last five years \(2009 to 2013\) \(430.5 Kb Excel sheet\)](#)

[Section 4: The characteristics of visits made by overseas residents to the UK in 2013 \(601 Kb Excel sheet\)](#)

[Section 5: The characteristics of overseas visits made by UK residents in 2013 \(451 Kb Excel sheet\)](#)

[Section 6: The characteristics of visits made by overseas residents and UK residents in quarters 1 to 4 2013 \(1.03 Mb Excel sheet\)](#)

All tables which appeared in sections 1-5 last year have been retained in this edition. Section 6 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 7.

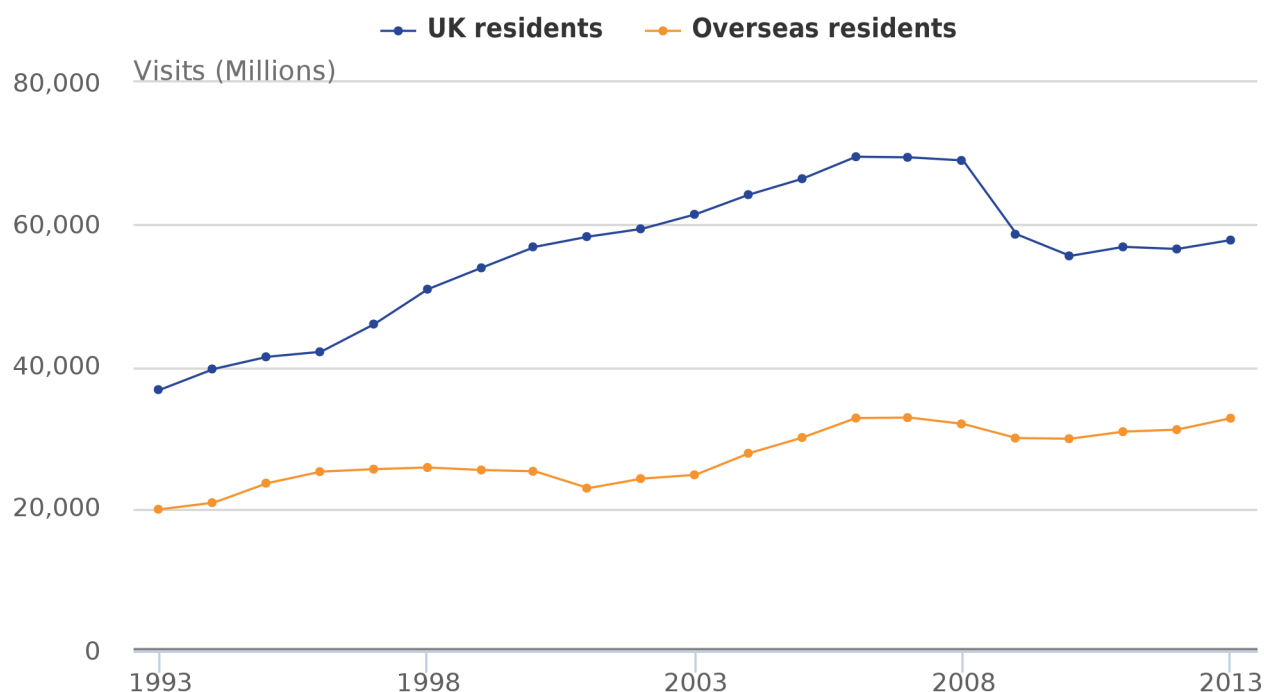
5. Commentary: Travel trends 2013

Increase in international visits in 2013

The number of visits to and from the UK grew in 2013 (Figure 1). Visits to the UK from overseas residents rose by 5.6% from 31.1 million in 2012 to 32.8 million in 2013 and UK residents' visits abroad increased by 3.5% from 56.5 million in 2012 to 58.5 million in 2013.

The 32,813,000 visits from foreign residents is a record high for the UK the previous highest number of visits was recorded in 2007 (32,778,000 visits). The 58.5 million visits abroad by UK residents is a return to the level of visits abroad recorded in 2009 (58.6 million visits) this increase follows a fall in the number of visits abroad between 2010 and 2012.

Figure 1: Visits to and from the UK, 1993 to 2013

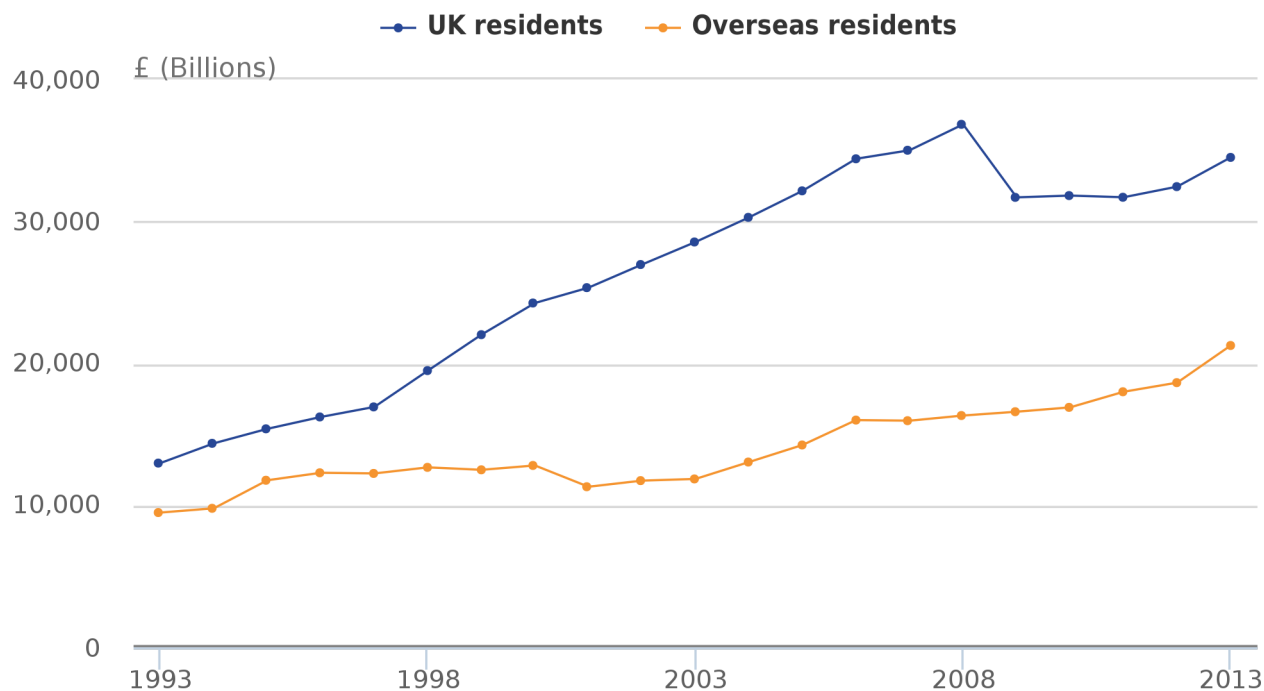


Source: International Passenger Survey (IPS) - Office for National Statistics

Travel and tourism spending rises in 2013

Spending in 2013 for foreign residents' visits to the UK increased (12.7%), from £18.6 billion in 2012 to £21.0 billion in 2013 (Figure 2). This represents the highest recorded spending by the International Passenger Survey in the UK by overseas residents. UK residents spending abroad also showed an increase of 7.6% from £32.5 billion in 2012 to £34.9 billion in 2013. This represents a return to the levels of spending seen up to 2008 after which spending began to fall.

Figure 2: Spending on visits to and from the UK, 1993 to 2013



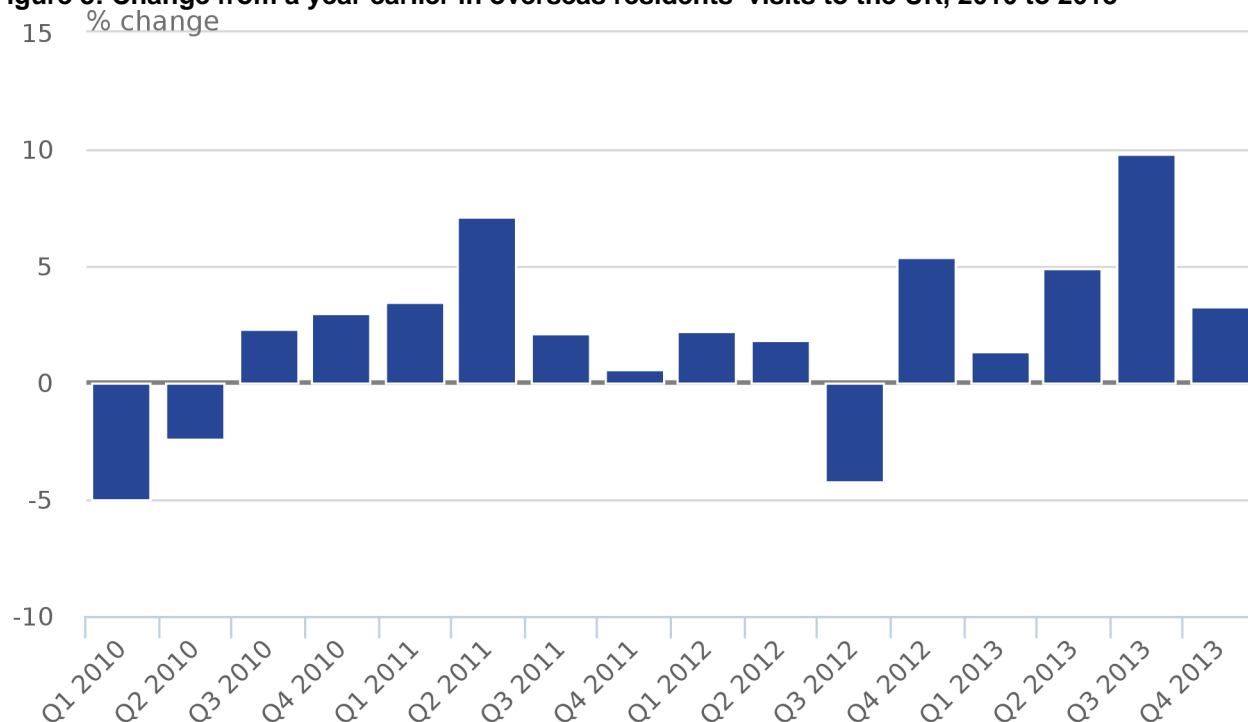
Source: International Passenger Survey (IPS) - Office for National Statistics

6. Commentary: Overseas residents' visits to the UK

Visits rose in every quarter of 2013

The number of visits to the UK by foreign residents rose in every quarter of 2013, when compared with the previous year. The largest increase was in quarter 3 with visits growing from 8.8 million in 2012 to 9.8 million in 2013, an increase of 11.3%. However this increase reflects the drop in visitor numbers seen during quarter 3 in 2012 when visits fell by 4.2%.

Figure 3: Change from a year earlier in overseas residents' visits to the UK, 2010 to 2013



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

Record number of holiday visits to the UK in 2013

Holiday visits remain the primary reason for overseas residents' visits to the UK. The number of holiday visits made to the UK in 2013 was 12.7 million, the highest number recorded by the survey and an increase of 6.4% compared with 2012. Visits to the UK for other purposes also grew during 2013 with visits to friends and relatives remaining the second most common reason increasing by 4.2% in 2013 to a total of 9.3 million visits. Business visits continued to show a recovery following a sharp decline in 2009, with a total of 7.9 million visits in 2013, up 7.0% compared to 7.4 million in 2012.

Figure 4: Overseas residents' visits by purpose, 1993 to 2013

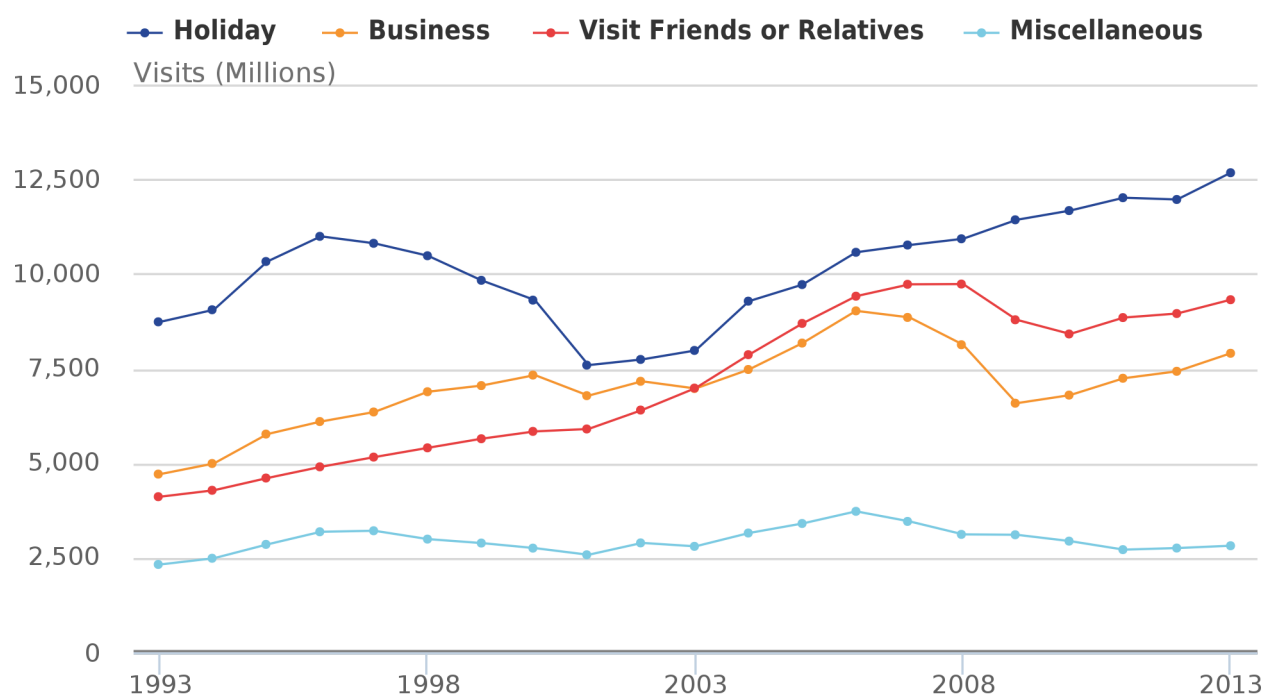
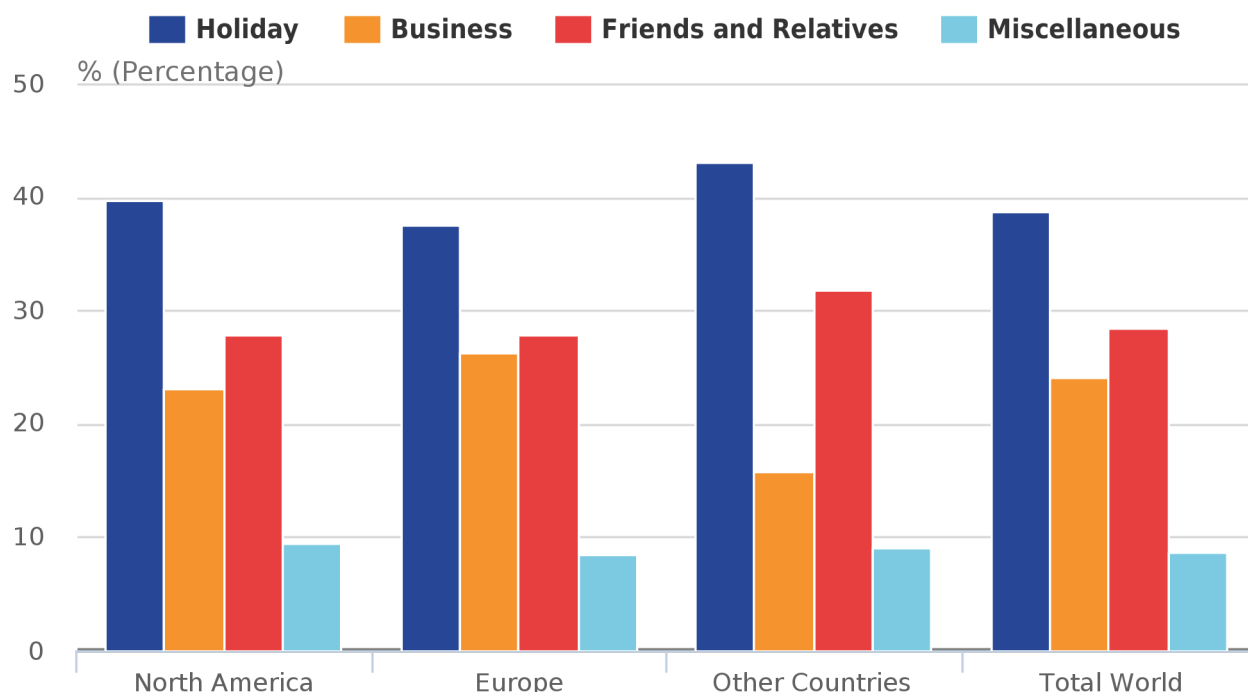


Figure 5 shows that visiting the UK for a holiday was the most popular reason for visit for visitors from all regions of the world. Similar proportions of visitors from both Europe and North America visited the UK for business reasons (26.2% and 23.0% respectively) as visited friends and family (27.8% and 27.8%). However visitors from 'Other Countries' were twice as likely to be visiting their friends and family (31.9%) than be visiting the UK for business reasons (15.8%).

Figure 5: Proportion of overseas residents' visits to the UK by purpose and region of residence, 2013



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

Average length of stay remains stable

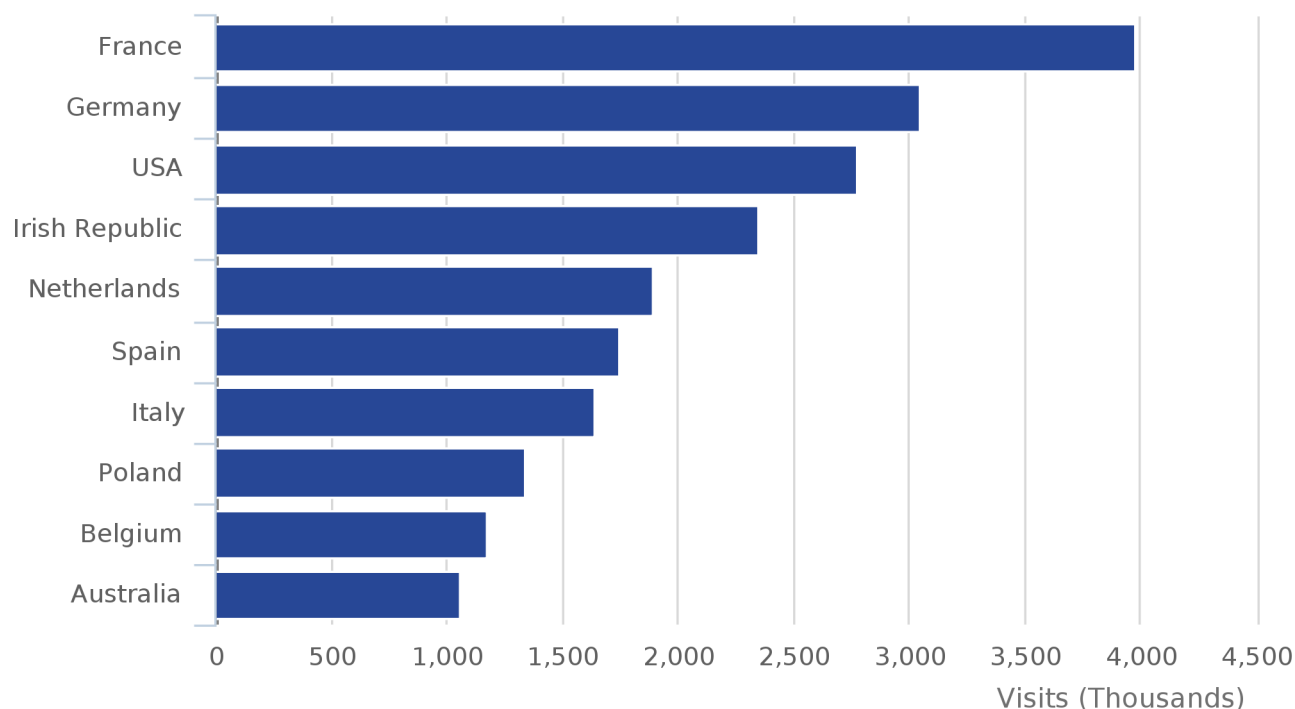
The average length of stay in the UK has remained fairly constant at around eight nights between 2009 and 2013. As may be expected, the number of nights stayed in the UK varies with residents from different regions of the world, with those travelling the furthest staying the longest. Visitors from Europe stayed an average of 5.9 nights in the UK, those from North America stayed 8.3 nights, and visitors from 'Other Countries' stayed an average of 14.2 nights.

Business trips tended to be of shorter length; an average of 4.2 nights in 2013. Holiday visits averaged 6.2 nights, with longer visits reserved for visits to friends or relatives which have been, an average of over 10 nights every year since 2009.

Visits made by residents of different countries

In 2013 residents from France made the most visits to the UK, as has been the case since 2008. Visits from France increased again during 2013 growing by 3.8% to a total of 3.9 million visits. German residents remained the second most popular visitor to the UK, increasing by 6.6% in 2013 to 3.2 million. Residents from the USA were the third most popular visitors to the UK, despite the number visiting falling by 1.7% compared with 2012.

Figure 6: Top 10 countries visiting the UK for at least one night, 2013



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

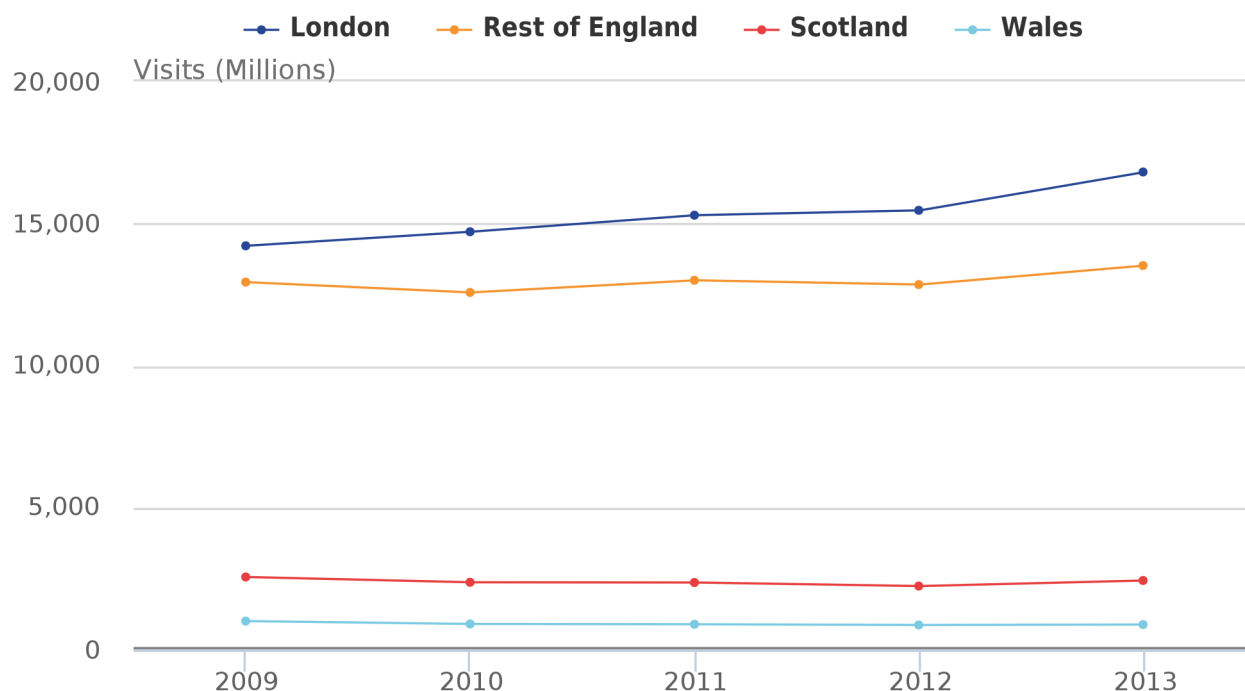
With the exception of Poland and the Irish Republic, holiday was the most popular reason for visiting the UK for residents from the top 10 visiting countries. Among visitors from the Irish Republic 40.2% of visits were to visit friends and family compared with only 24.8% visiting for a holiday. Visitors from Poland were more likely to be visiting the UK for business reasons (42.3%) or to visit friends and family (39.5%) than for a holiday (13.6%).

Of the top 10 countries, Italian residents were most likely to be visiting for holidays with 49.0% of trips made for this reason, while Australian visitors were the least likely to be visiting on business (only 6.8% of visits).

Visits to different parts of the UK in 2013

All areas of the UK experienced growth in visits from overseas residents during 2013 compared to 2012. This was primarily due to the rise in visits from European residents which saw an increase of 7.1% and 9.5% for England and Scotland respectively, however the increase in visits to Wales was caused by an increase in visits by North American residents, up 18.6% compared to 2012.

Figure 7: Number of overnight visits to different parts of the UK, 2009 to 2013

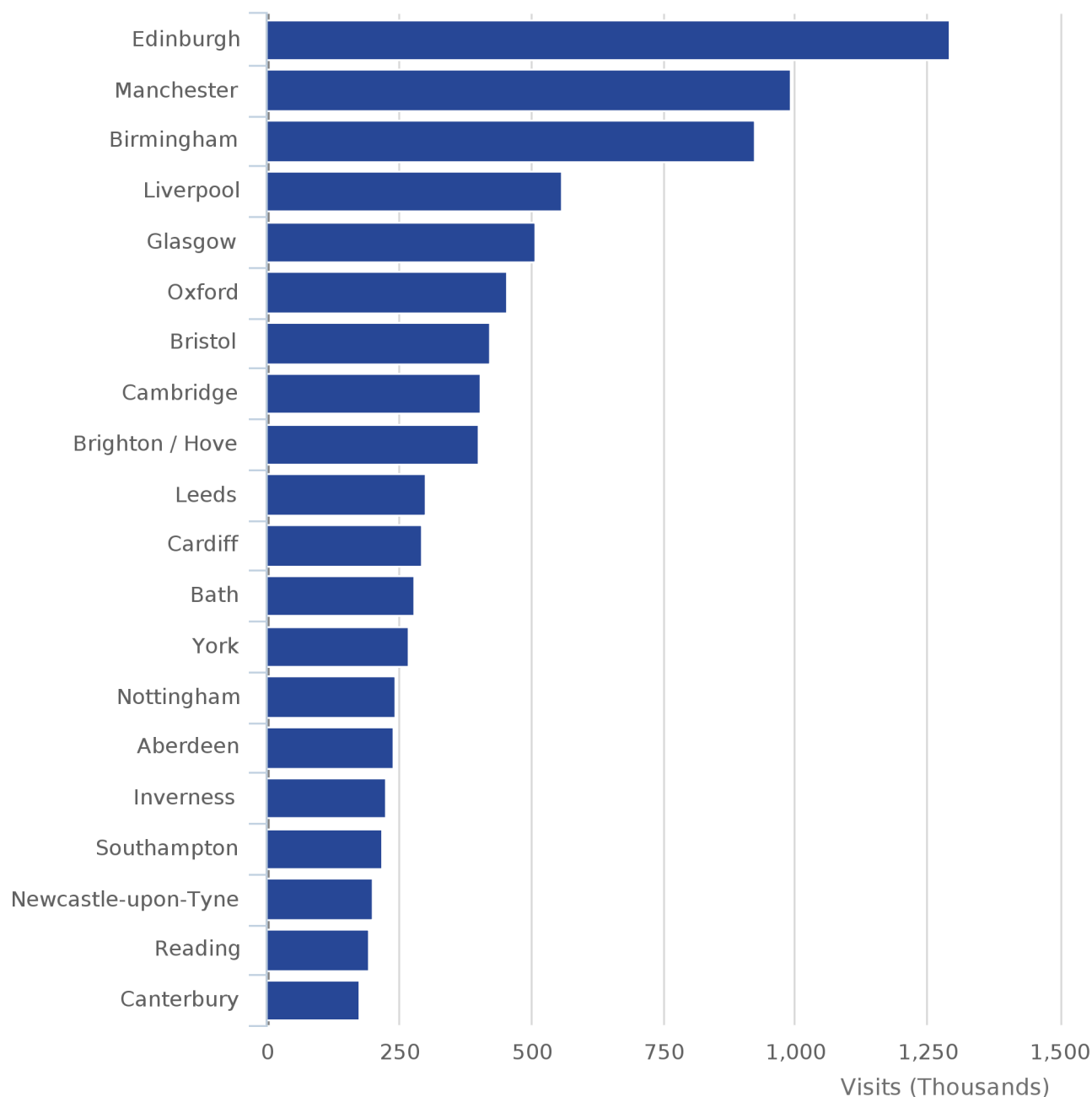


Source: International Passenger Survey (IPS) - Office for National Statistics

London experienced a growth of 1.3 million (8.6%) overnight visits from overseas residents in 2013. Holiday visits accounted for a large proportion of the increase (64.4%) while business visits and visits to friends and family also grew. Overnight visits to the rest of England also saw an increase, with the increase in business visits accounting for 46.9% of the growth. Visits to Scotland and Wales also grew in 2013 with visits to friends and family accounting for 55.0% of the rise in visits to Scotland and holiday and business visits accounting for the growth in visits to Wales during 2013.

Visits to individual cities showed general consensus with 2012, with the most popular seven cities stayed in by overseas residents remaining unchanged (by number of visits): London, Edinburgh, Manchester, Birmingham, Liverpool, Glasgow and Oxford. Visits to Birmingham showed the largest increase in number of visits in 2013, growing from 713,000 visits in 2012 to 941,000. Visits to Bristol (from 395,000 to 428,000 visits) and Brighton /Hove (from 345,000 to 409,000 visits) also grew in 2013 moving them above Cambridge in terms of popularity. Excluding London the top 20 most visited destinations are shown below (Figure 8).

Figure 8: Top 20 UK towns (excluding London) visited for at least one night, 2013



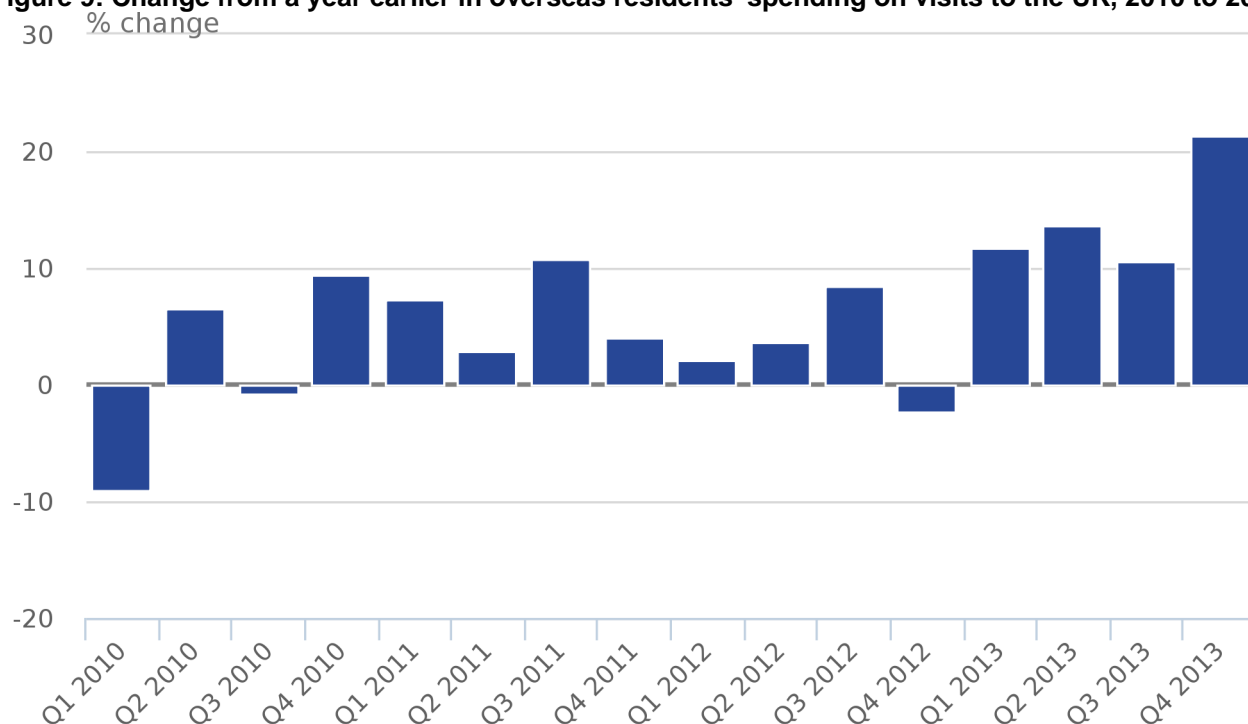
Source: International Passenger Survey (IPS) - Office for National Statistics

7. Commentary: Overseas residents' spending on visits to the UK

Overseas residents' spending shows strong growth in 2013

Spending by overseas residents' in the UK rose in every quarter of 2013. The largest increase was in quarter 4 growing from £4.3 billion in 2012 to £4.9 billion in 2013 an increase of 15.0%, this partly reflects the fall in quarter 4 last year, when spending dropped by 2.4%. The other quarters of 2013 also showed strong growth compared to 2012 all increasing by over 10% when compared to the same quarters in 2012.

Figure 9: Change from a year earlier in overseas residents' spending on visits to the UK, 2010 to 2013

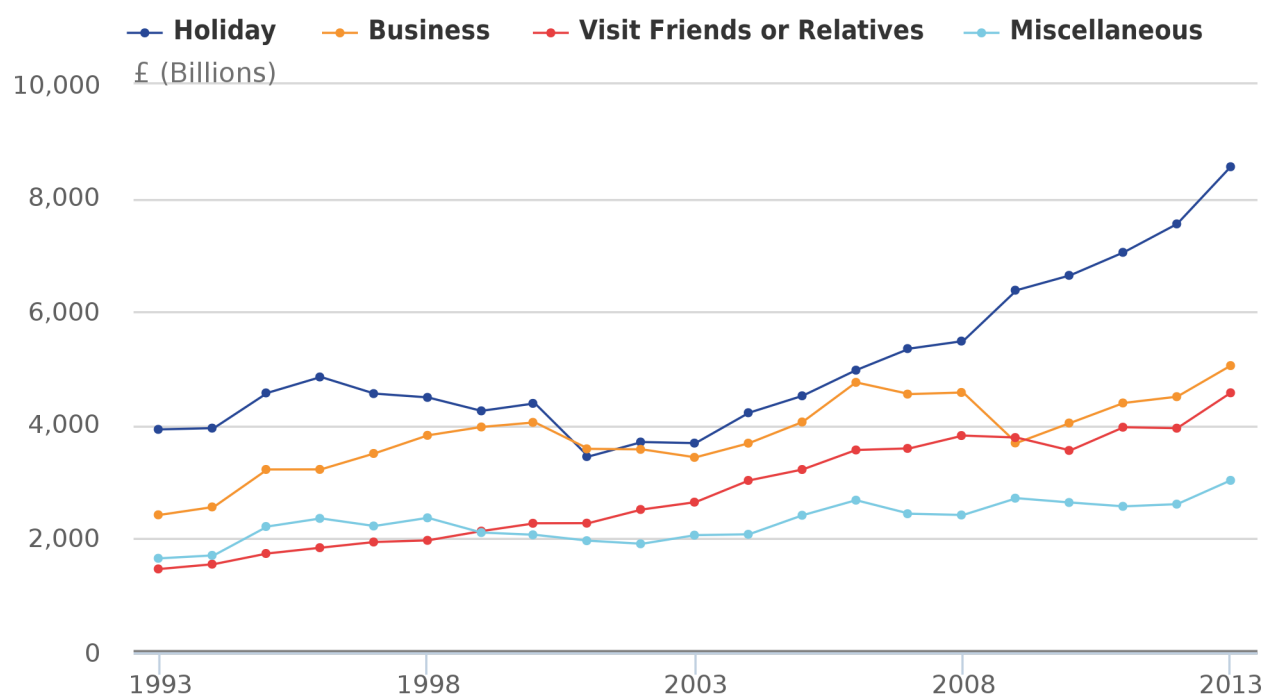


Source: International Passenger Survey (IPS) - Office for National Statistics

Spending in the UK rises across all reasons for visit

2013 saw spending during visits to the UK rise for all main purposes of visit. Spending for overseas residents' visiting for holidays rose 12.0% from £7.5 million in 2012 to £8.4 million in 2013, the highest figure on record. Spending on business visits continued to recover following a dip in 2009 with spending up from £4.5 million in 2012 to £5.0 million in 2013, a rise of 11.4%. Spending by overseas residents visiting friends and family saw the biggest rise in 2013 growing 14.6% to a figure of £4.5 million. Spending on miscellaneous reasons for visits also saw an increase from £2.6 million in 2012 to £2.9 million in 2013

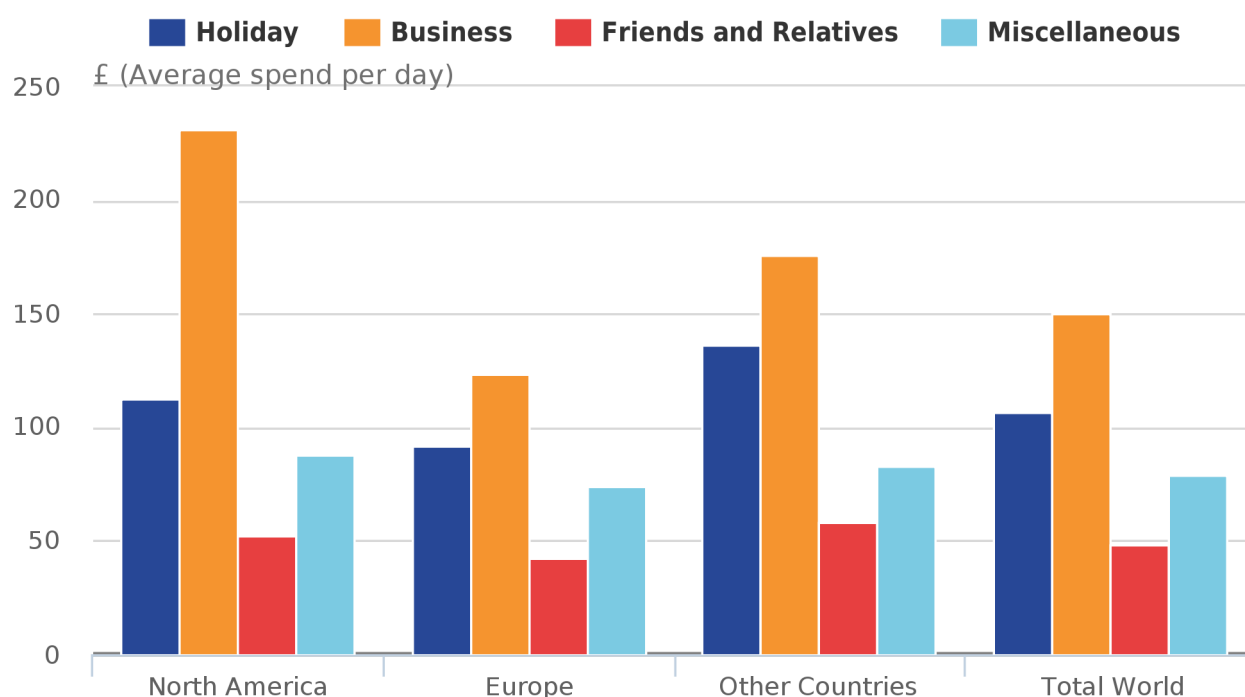
Figure 10: Overseas residents' spending on visits to the UK by purpose, 1993 to 2013



Average spending per day is highest for North American residents

Average spend per day for all visits continued to rise in 2013 and now stands at £85 up from £80 in 2012. Residents from North America continue to have the highest average spend per day (£105) while European residents spend the least (£75). Business trips continue to generate the most income per day, an average of £149, and visits to friends and family generate the least income per day, an average of only £48. The profile of average spending per day is similar across residents from all regions of the world with the exception of North American residents where average daily spend on business trips is double that spent on holiday trips (£231 and £112 respectively).

Figure 11: Average daily spend by overseas residents on visits to the UK, by purpose and region of residence, 2013

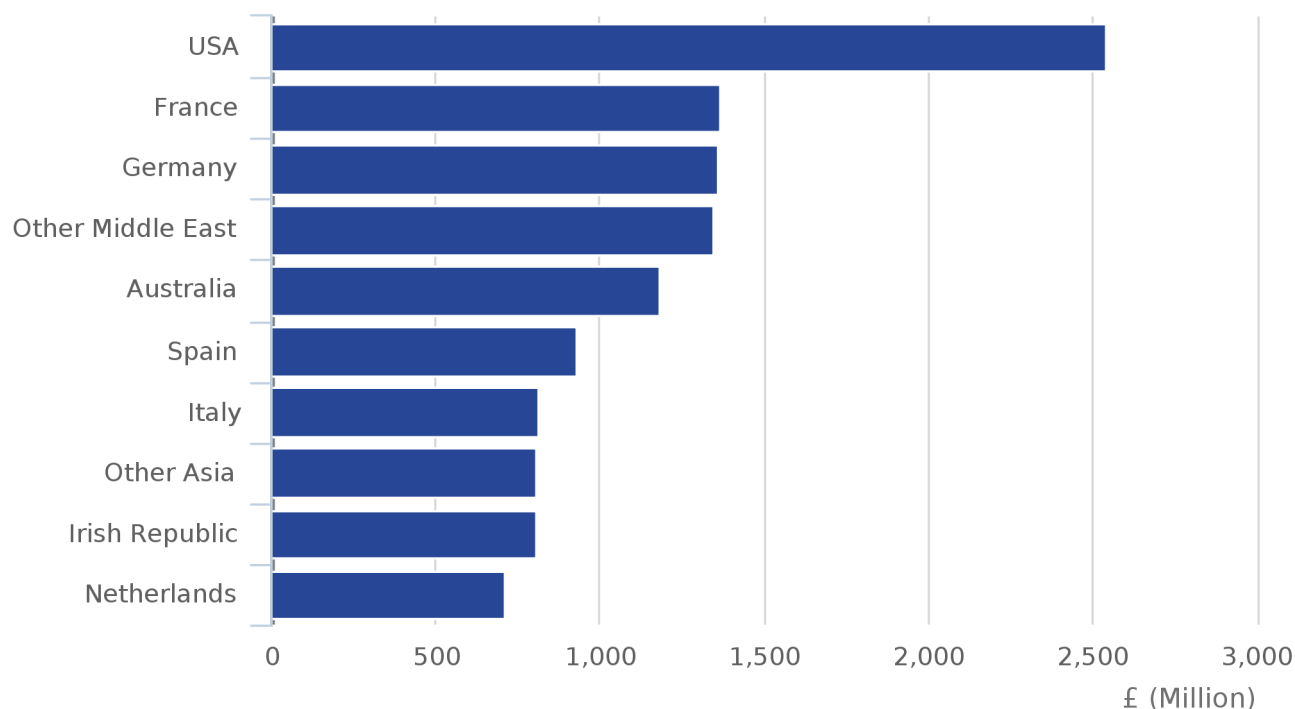


Source: International Passenger Survey (IPS) - Office for National Statistics

Residents of the USA are highest spenders in the UK

Residents of the USA continue to be the highest spenders during trips to the UK, contributing £2.5 billion to the UK economy in 2013 which was a rise of 4.6% compared to £2.4 billion in 2012. German residents were the next highest spenders, moving above French residents who had been the second highest spenders in 2012. This change was due to a dip in French spending which fell by 10.8% from £1.5 billion in 2012 to £1.4 billion in 2013. Conversely German residents spending grew by 15.1% to £1.4 billion in 2013. Residents from both 'Other Asia' and 'Other Middle East' countries appear in the top 10 list of highest spending countries (Figure 12) despite not appearing in the top 10 list of visitors, both regions have seen large increases in spending in 2013, growing by 36.0% and 39.3% respectively.

Figure 12: Top 10 spending countries during visits to the UK for at least one night, 2013

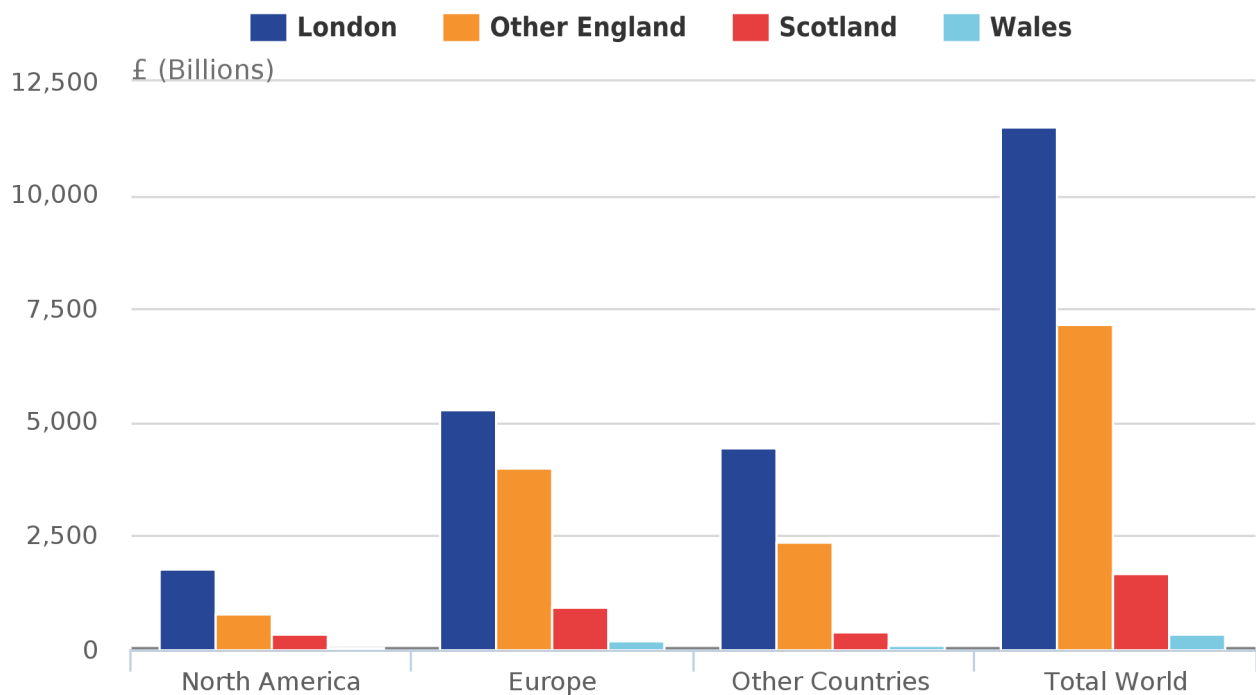


Source: International Passenger Survey (IPS) - Office for National Statistics

Spending rises during visits to England, Scotland and Wales

Spending by overseas residents in London reached the highest level on record during 2013, with total spending up 11.7% to a total of £11.3 billion. The main drivers behind this increase were a growth in spending on holiday visits which increased by £700 million (14.9%) in 2013. Spending in London by residents from 'Other Countries' also increased in 2013, growing by £698m (20.1%). Spending in the rest of England also increased (15.4%) from £6.2 billion in 2012 to £7.1 billion in 2013. Visitors to Scotland spent £1.7 billion in 2013 an increase of 19.9% compared with 2012. Spending in Wales grew by 2.0% in 2013 with an increase of £7 million compared with 2012, spending in Wales by residents of North America increased to £58 million (up 41.5%) but spending by European residents was down £10 million in 2013.

Figure 13: Spending in the UK by region visited and region of residence, 2013



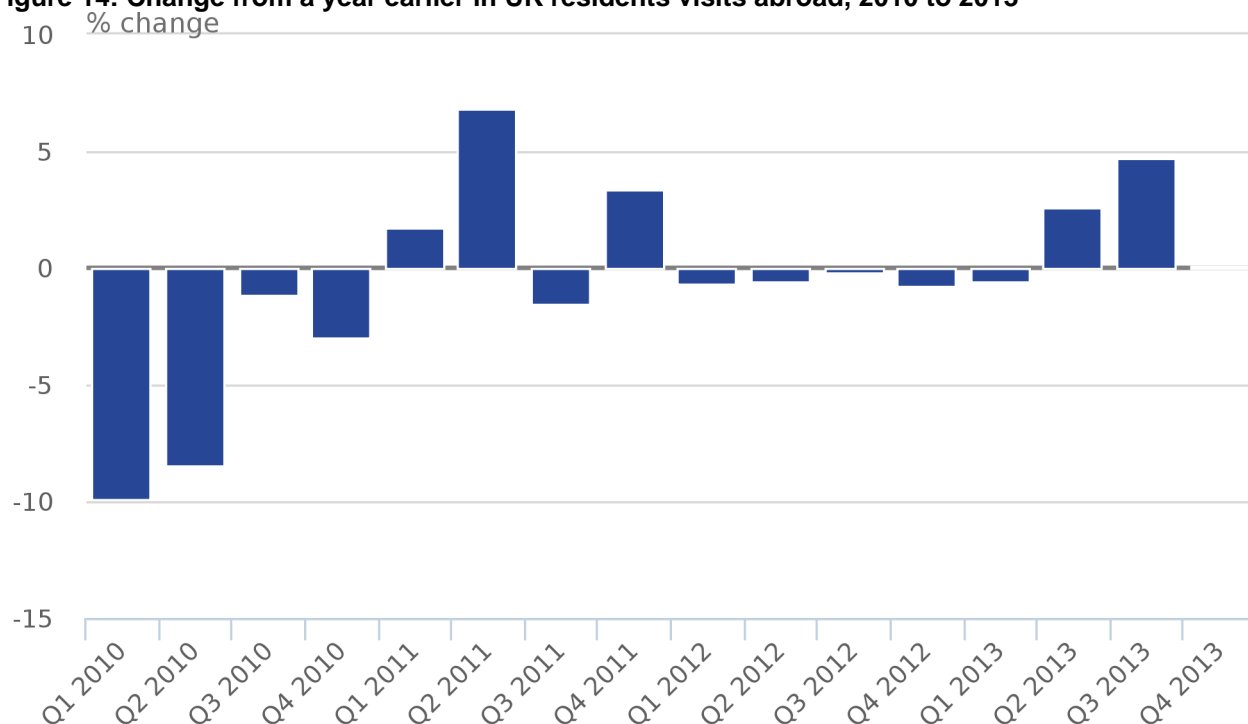
Source: International Passenger Survey (IPS) - Office for National Statistics

8. Commentary: UK residents' visits abroad

Visits abroad rose in most quarters of 2013

Since 2010 there has been little growth in the number of UK residents travelling abroad (with the exception of a small rise in 2011). However, 2013 showed an increase in the number of visits abroad, with numbers increasing by 3.5% to 58.5 million visits. Despite a small decrease in the number of visits abroad in quarter 1 (-0.6%) the remaining quarters of 2013 all showed growth, with quarter 3 showing the strongest increase up 5.9% from 19.2 million visits abroad in 2012 to 20.4 million in 2013.

Figure 14: Change from a year earlier in UK residents visits abroad, 2010 to 2013

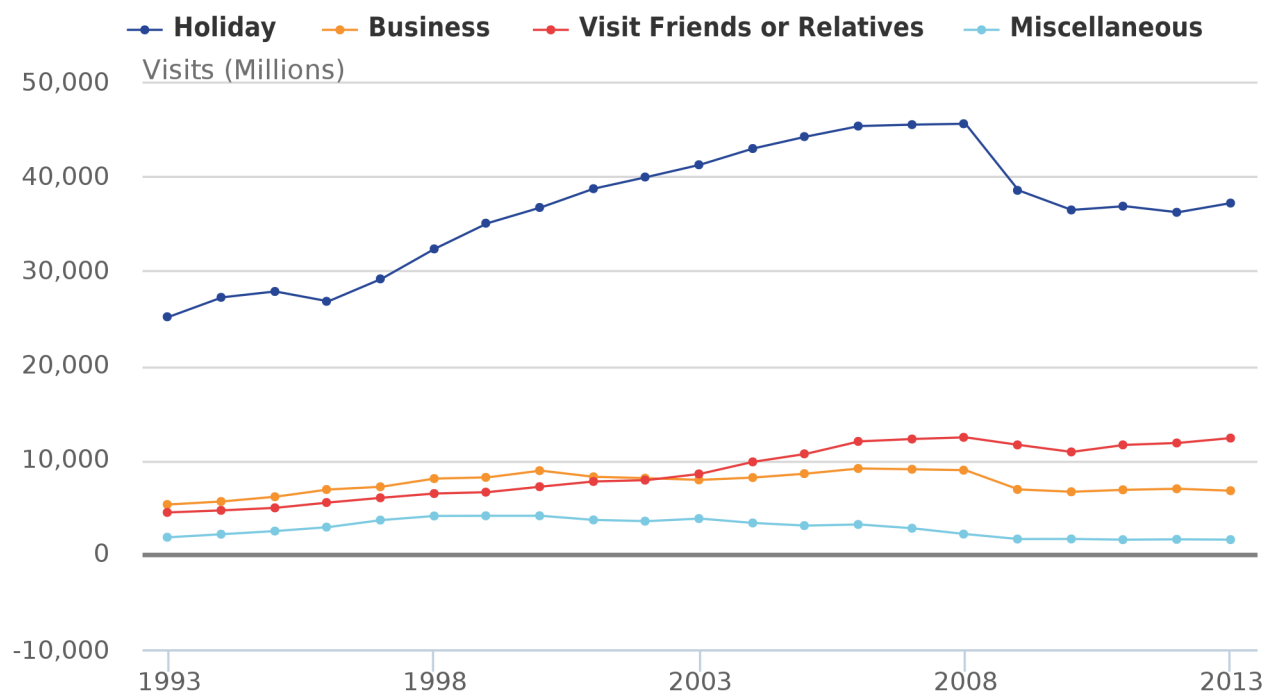


Source: International Passenger Survey (IPS) - Office for National Statistics

Holidays remain the most popular reason for visits abroad in 2013

Following a sharp decline in 2009 and a period of negligible growth between 2010 and 2012, 2013 saw an increase of 4.0% in the number of holiday visits growing from 36.2 million in 2012 to 37.6 million in 2013. Business visits continue to show a general decline, despite growth in 2011 and 2012, falling 1.9% in 2013 to 6.8 million visits which is a level far lower than that recorded prior to 2009. Visits to friends and family continue to grow and remain the second most popular reason for visits abroad. The number of visits recorded in 2013 for the purpose of visiting friends and family was the highest recorded by the International Passenger Survey, with 12.5 million visits in 2013.

Figure 15: UK residents' visits abroad by purpose, 1993-2013



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

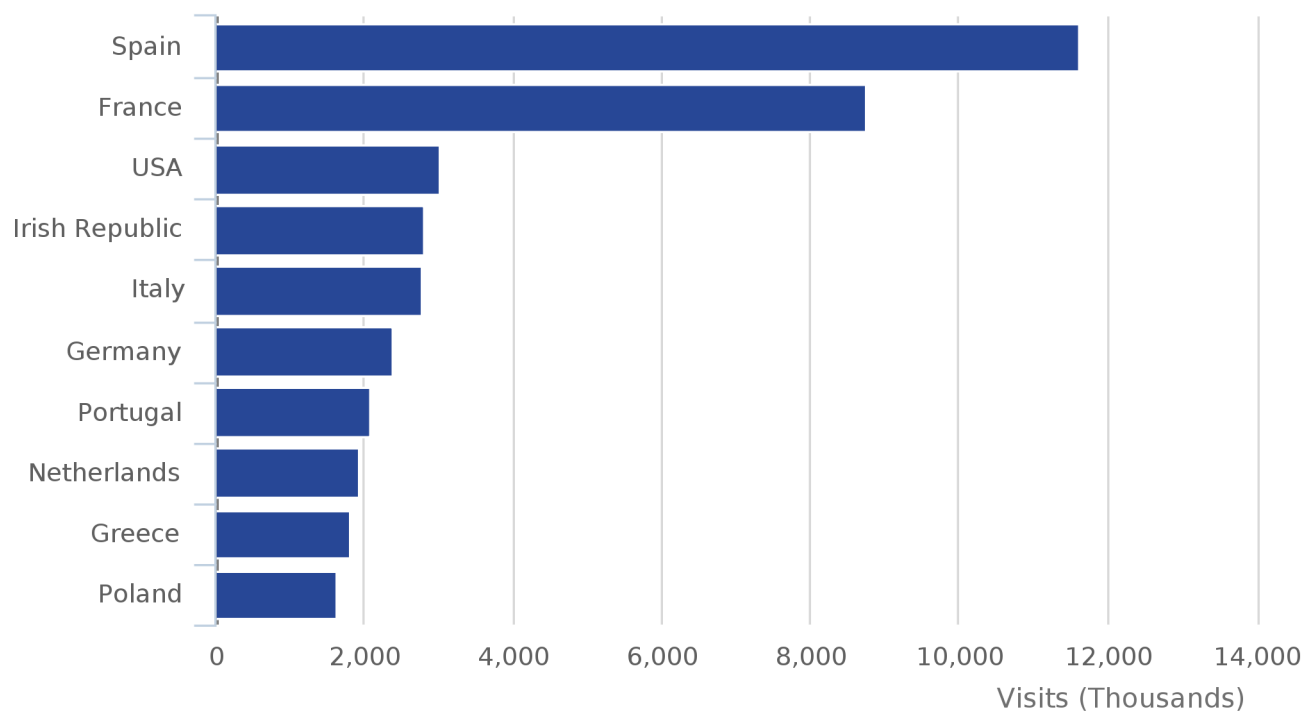
Average number of nights spent abroad remains stable

The overall average number of nights spent abroad has remained stable throughout 2009 to 2013 at around 10.5 nights. In 2013, the number of nights spent in Europe (8.0) and 'Other Countries' (21.1) has remained similar since 2009. However the average number of nights spent in North America saw a small rise from 14.0 nights in 2012 to 14.6 nights in 2013. As would be expected, the further people travelled abroad, the longer they stayed for example, UK residents who visited Australia had stayed for an average of 40.1 nights.

Spain remains the most popular destination for UK residents

The most visited countries by UK residents in 2013 were Spain (11.7m visits) and France (8.9m visits) (Figure 16). Visits to Spain increased by 5.8% in 2013 and now accounts for 20.1% of all trips abroad. Poland appears on the top 10 list of destinations for the first time in 2013 with 1.7 million visits.

Figure 16: Top 10 countries visited by UK residents for at least one night, 2013

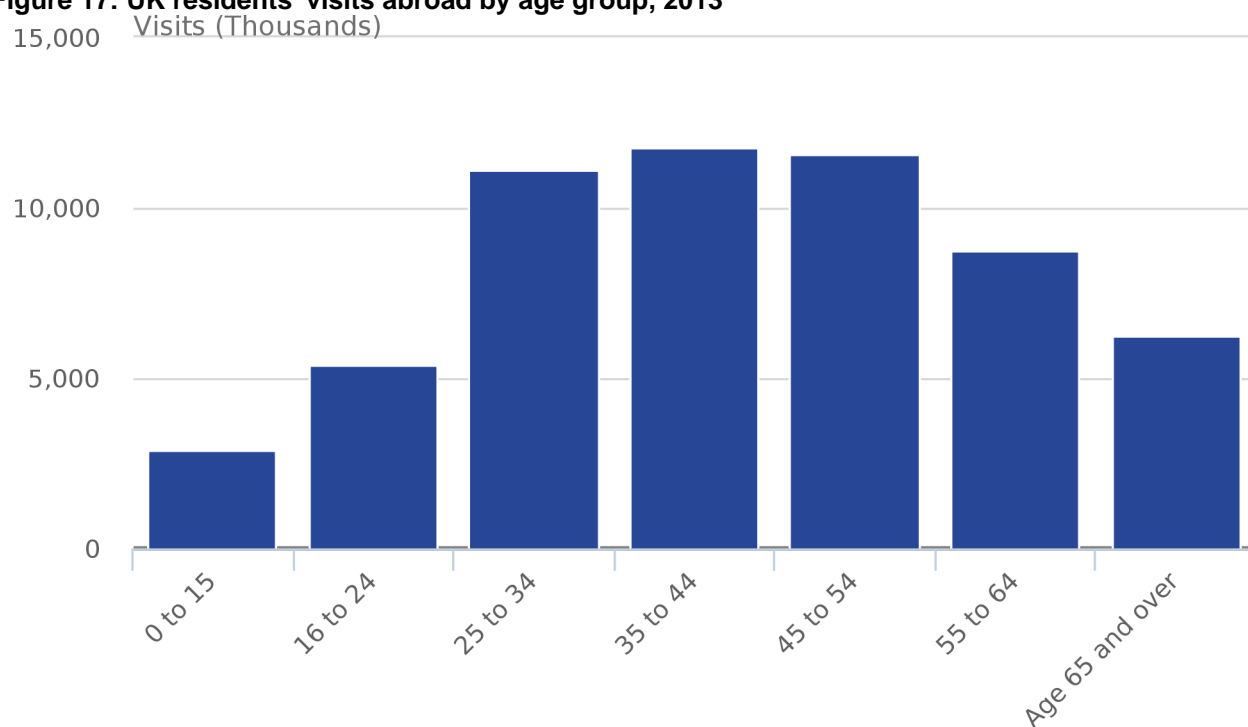


Source: International Passenger Survey (IPS) - Office for National Statistics

Visits by age group

In 2013 the largest proportion of all visits abroad by UK residents were made by people aged 35 to 44 (20.4%), slightly more than visits made by UK travellers in the 25 to 34 and 45 to 54 age groups (19.2% and 20.1% respectively).

Figure 17: UK residents' visits abroad by age group, 2013



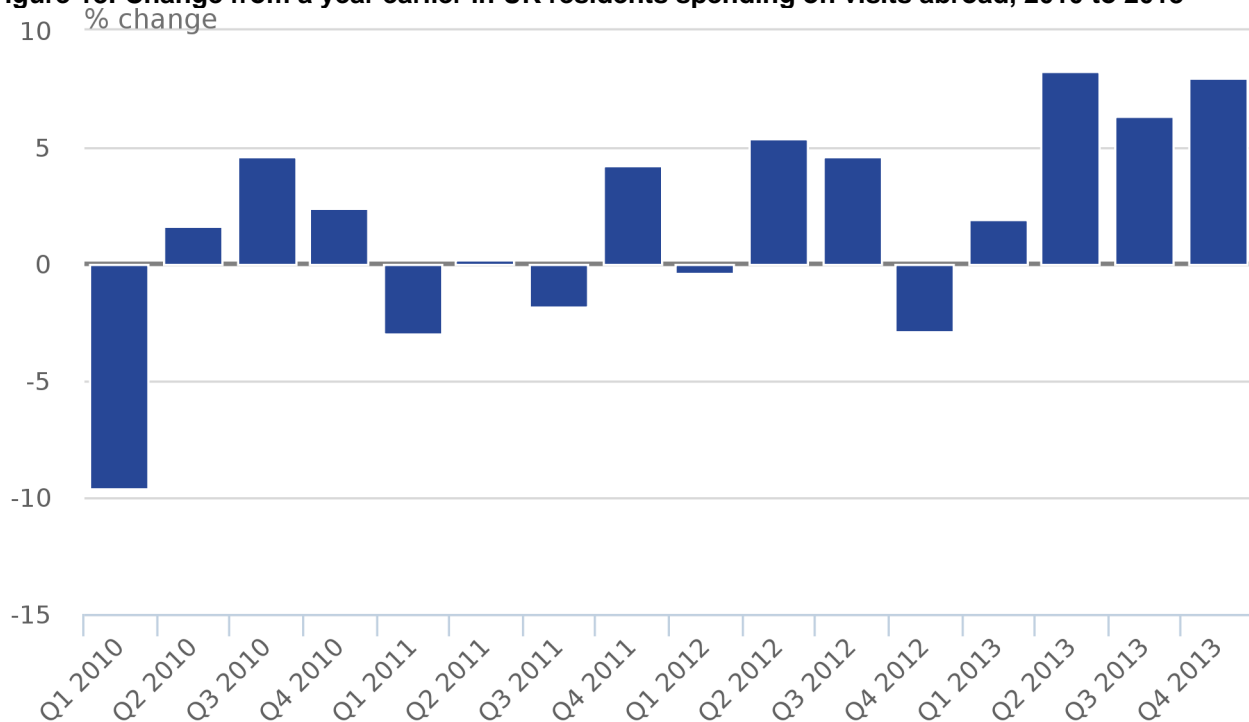
Source: International Passenger Survey (IPS) - Office for National Statistics

9. Commentary: UK residents' spending on visits abroad

UK residents' spending abroad grows in each quarter of 2013

Spending by UK residents' abroad grew in every quarter of 2013. The largest growth was in quarter 4 where spending rose by 12.2% increasing from £6.2 billion in 2012 to £6.9 billion. Quarters 2 and 3 also saw strong growth during 2013 both up 8.3% and 7.4% respectively. There was also an increase in spending in quarter 1, this was the first time that spending has increased in quarter 1 since the decrease in spending began in quarter 4 of 2008.

Figure 18: Change from a year earlier in UK residents spending on visits abroad, 2010 to 2013

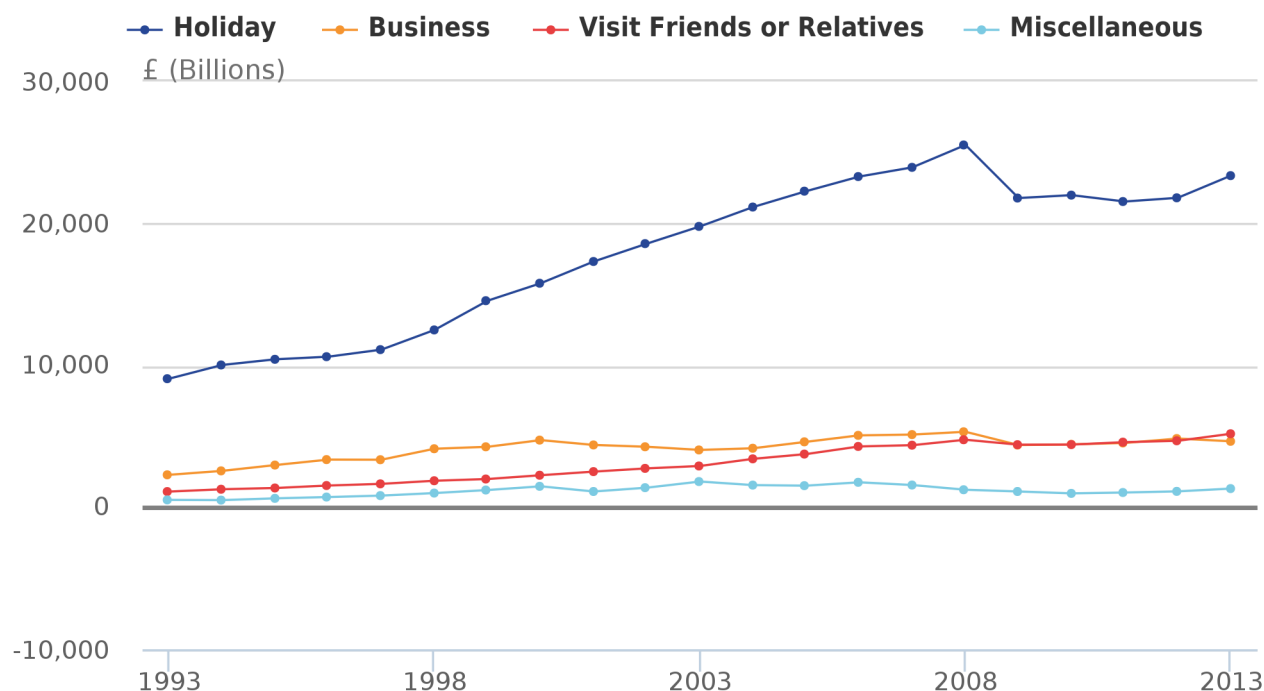


Source: International Passenger Survey (IPS) - Office for National Statistics

Fall in spending on foreign business trips

Spending by UK residents on all main purposes for visits grew in 2013 with the exception of business trips. Spending on business trips had been showing a recovery after a significant drop in 2009 and had seen growth in the past 4 years. However there was a decrease in spending on business trips in 2013 (-3%) down from £4.8 billion in 2012 to £4.7 billion in 2013. Spending on holidays abroad grew in 2013 after a reduction in 2012, rising 8.4% to reach £23.6 billion. Spending on visits to friends or relatives also showed a strong increase up from £4.7 billion in 2012 to £5.2 billion in 2013 a rise of 11.8%. Visits abroad for miscellaneous reasons also saw spending grow by 18.8%

Figure 19: UK residents' spending on visits abroad by purpose, 1993 - 2013



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

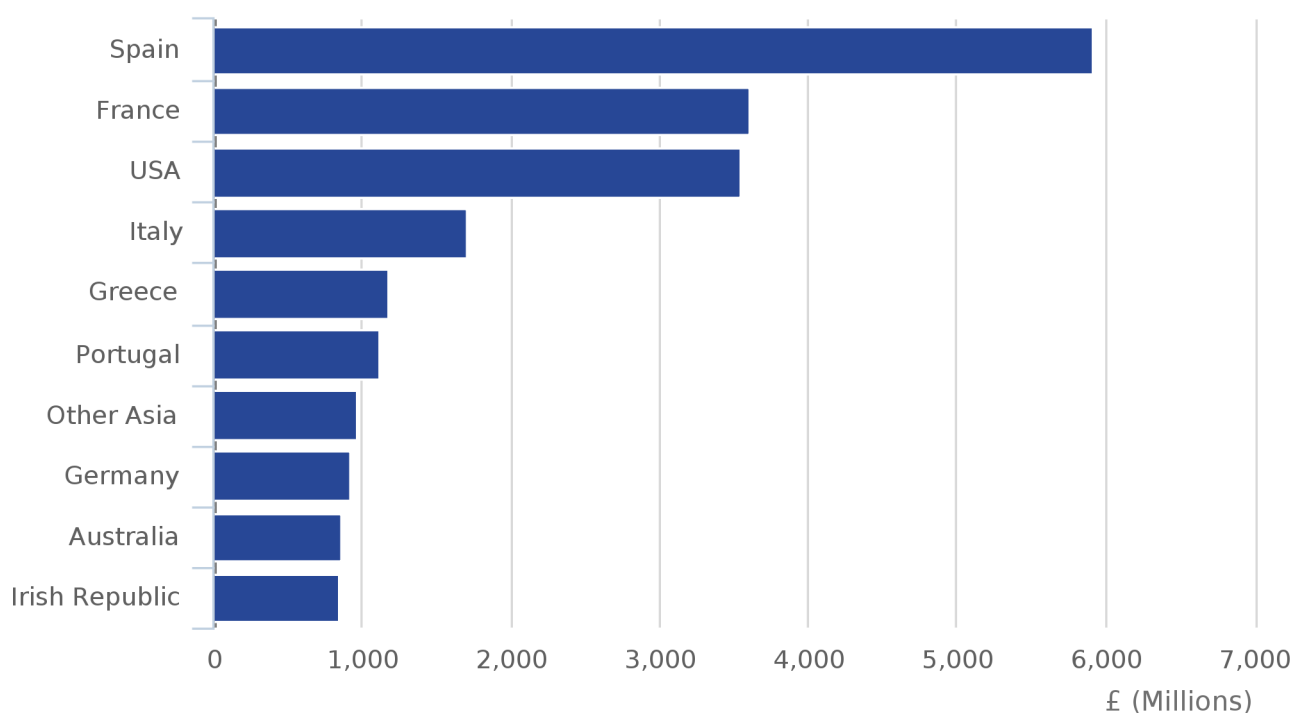
Average spend per day on foreign visits rises in 2013

Average spend per day on all visits abroad continued to rise in 2013 and now stands at £57 up £2 from the £55 per day average of 2012. UK residents continue to spend most on average per day during business trips (£116) while the least is spent visiting friends or relatives (£28). Average spend per day continues to be highest for trips to North America despite a small drop in the average from £80 in 2012 to £79 in 2013.

UK residents expenditure in Spain remains highest

Total UK residents expenditure is highest in Spain, with total spending rising again in 2013 by 12.9% to a total of £6.0 billion, this now accounts for 17.1% of all spending by UK residents on visits abroad. Spending during visits to France was the next highest total expenditure, with UK residents spending £3.6 billion in 2013, a rise of 5.3%. Figure 20 shows the top 10 countries in terms of spending abroad by UK residents, the top 9 countries remain the same as in 2012, however Australia enters the top 10 in 2013 with spending during visits rising 34.7%.

Figure 20: Top 10 countries by expenditure of UK residents whilst visiting abroad for at least one night, 2013



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

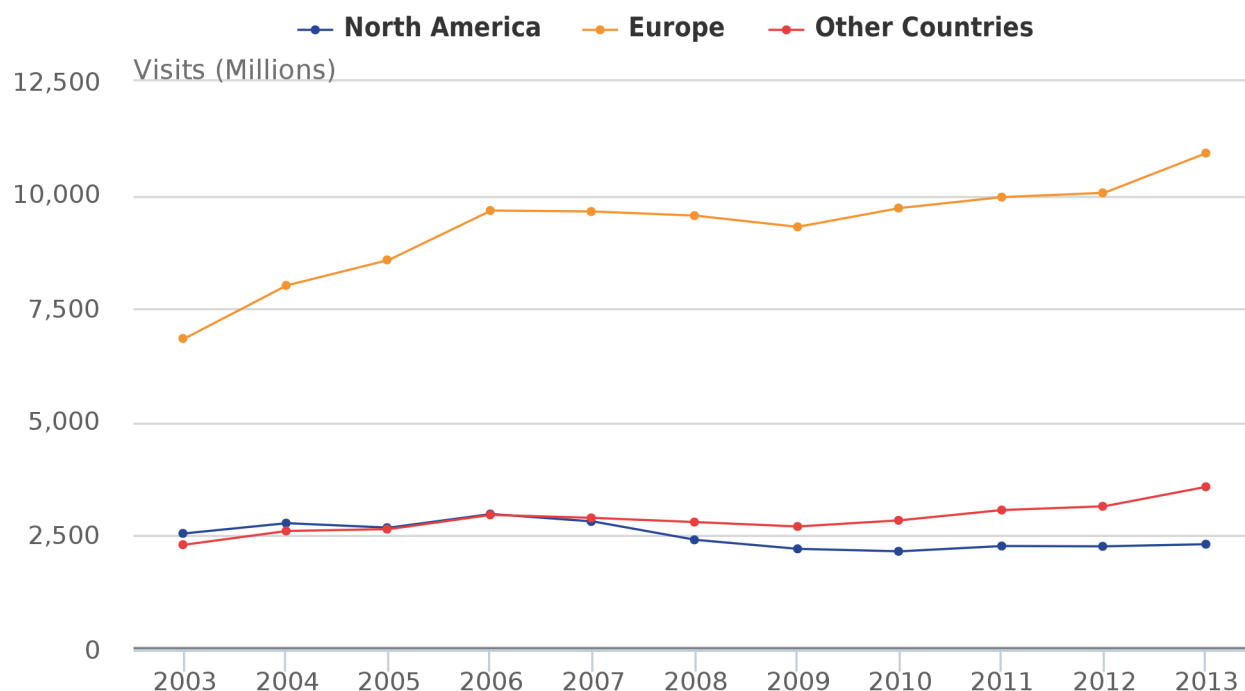
10. Commentary: Visits to and spending in London by overseas residents reach record levels in 2013

Visits to London reach historical high

Visits to London reached the highest level on record during 2013, with a total of 16.8 million visits, an increase of 8.6% compared with 2012. Despite a drop in visits during 2008 and 2009 visits to the Capital have increased by 5.1 million since 2003 (43.5%).

During the 10 years, 2003 - 2013 visits to London by European residents' have risen by 60.4% from 6.8 million to 11.0 million. Visits from residents of 'Other Countries' have also seen growth of 51.2% since 2003 from 2.3 million to 3.5 million visits. Reflecting the overall fall in the number of visits to the UK by residents of North America, there has been a 8.8% fall in their number of visits to London between 2003 and 2013, from 2.6 million to 2.3 million.

Figure 21: Overseas residents' visits to London by region of residence, 2003 - 2013



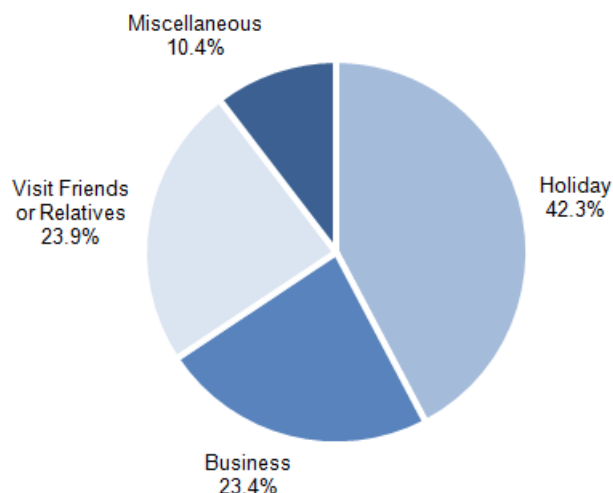
Source: International Passenger Survey (IPS) - Office for National Statistics

Holidays remain main reason for visiting London

During 2013 holiday trips remained the primary reason for visits to London by overseas residents. The 8.5 million holiday visits in 2013 accounted for 50.6% of all visits to London. The number of visits to visit friends or relatives also grew by 6.9% in 2013 compared to 2012 and has remained the second most popular reason for visit over the last ten years. Business visits also saw an increase in 2013 rising to 3.2 million visits after visits remained unchanged during 2012.

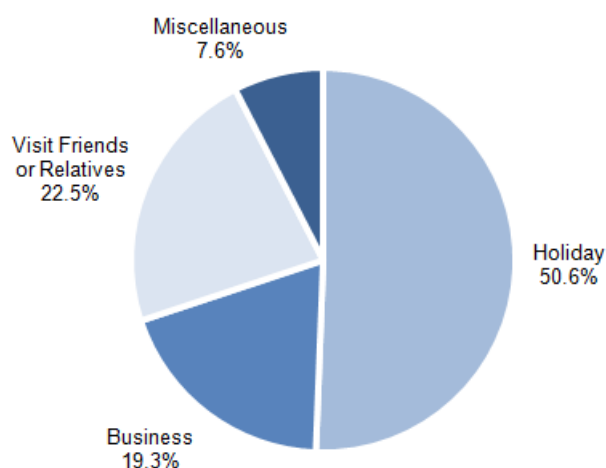
Over the last 10 years visits to London for holidays have grown by 71.9% from 4.9 million visits in 2003 to 8.5 million in 2013. The other main reasons for visit have also shown growth during this period with business visits, visits to friends or relatives and miscellaneous trips increasing by 18.5%, 34.8% and 4.4% respectively. Although the total numbers of overseas residents' visiting London for these purposes have increased over the last 10 years, the proportional share of visits for each of these purposes has reduced because the number of holiday visits has increased at a greater rate. (Figures 22 and 23).

Figure 22: Overseas residents' visits to London by purpose, 2003



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

Figure 23: Overseas residents' visits to London by purpose, 2013



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

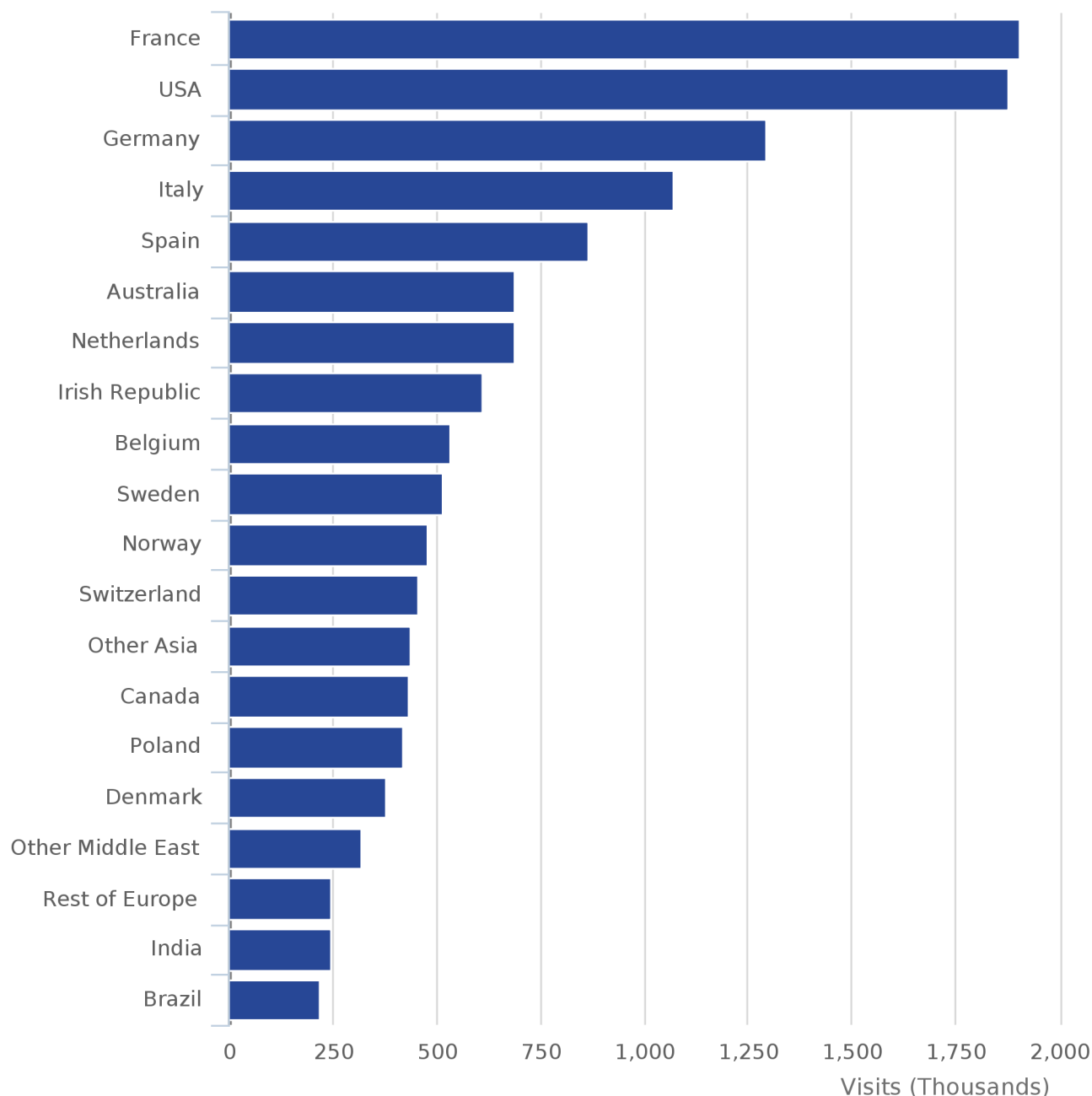
Residents of the USA make most visits to London

In 2013 residents of the USA made the most visits to London (1,884,000 visits) followed by French residents (1,873,000 visits). Holidays were the main reason for visit for residents of both countries, accounting for 45.2% of all visits to London made by residents of the USA and 56.2% of visits by residents of France.

Of the top 20 visiting countries (Figure 24), Norway has seen the largest increase in 2013 compared with 2012 with the number of visits rising by 22.8% to 487,000 visits, this appears to have been driven by an increase in holiday visits to London, which grew by 43.3% between 2012 and 2013.

There have been large increases in visitor numbers from 'Other Asian', and 'Other Central and South American' countries. Visits from residents of 'Other Asian' countries have grown by 83.5% since 2009 whilst visitor numbers from 'Other Central and South American' countries have more than doubled since 2009, again an increase in holiday visits to London account for the growth in visits.

Figure 24: Top 20 countries visiting London for at least one night, 2013



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

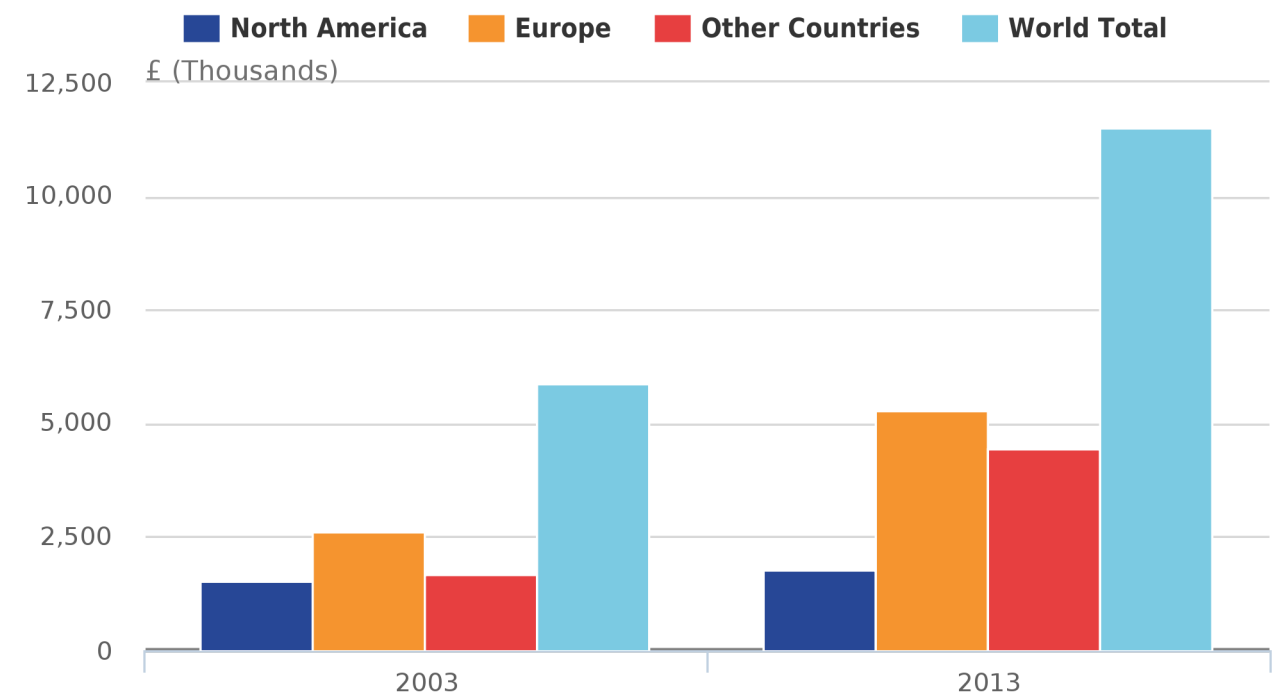
Spending in London is highest on record during 2013

Expenditure in London reached a record high in 2013 with a total of £11.3 billion being spent by overseas residents visiting the city. Spending in London during 2013 accounted for 53.6% of all expenditure in the UK by overseas residents

As the largest group of visitors to the UK, European residents have been historically the largest contributors to expenditure by overseas residents and again in 2013 were the highest spenders in London contributing 47.0% (£5.3 billion) to the overall total. Residents of 'Other Countries' are the next highest spenders contributing 37.0% (£4.2 billion) to all expenditure in London. Figure 25 shows that 10 years ago the contributions of North American

and residents of 'Other Countries' to the total expenditure in London were broadly similar. However during the last 10 years spending by North American residents has remained constant whilst spending by 'Other Countries' has doubled.

Figure 25: Overseas residents' spending in London by region of residence, 2003 and 2013



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

Spending on holiday visits to London increases as business spend falls

Changes in the proportions of expenditure associated with purpose of visit between 2003 and 2013 reflect the larger growth in holiday visits to London, compared to other visits. Consequently figures 26 and 27 below, show that holiday and business trips had a far more equal share of total expenditure in London in 2003, 36.3% and 31.0% respectively. Spending on holiday visits in 2013 accounts for 47.9% of all expenditure in London while spending on business visits fell to 26.0% of the total. The proportion of overall expenditure related to visits to friends and family has remained similar across the decade (17.2% in 2003 and 15.7% in 2013).

Figure 26: Overseas residents' spending in London by purpose, 2003

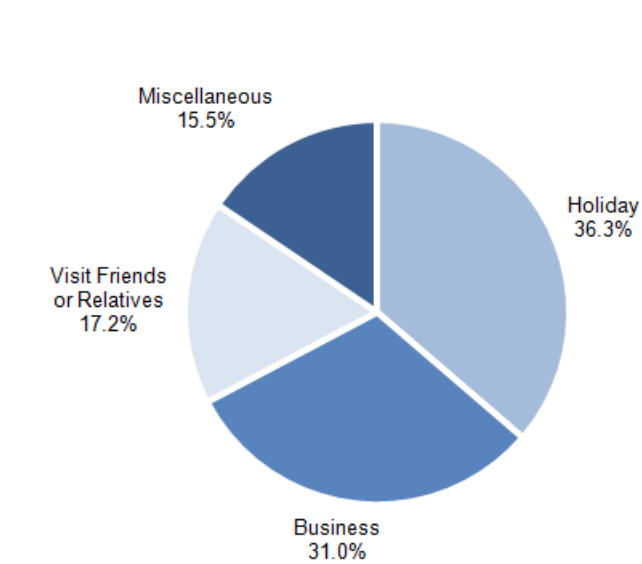
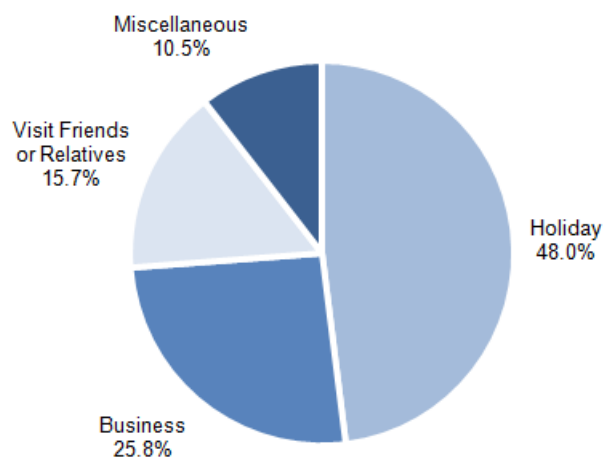


Figure 27: Overseas residents' spending in London by purpose, 2013



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

Residents of the USA spend most in London

In 2013 residents of the USA contributed most to overall expenditure in London (£1.5 billion) showing a 2.6% increase on 2012. Spending in London by residents of the USA, was split predominantly between business and holiday trips, 41.1% and 37.0%.

The second highest spend in London was recorded for visitors from 'Other Middle East' countries. However, visitors from 'Other Middle East' countries accounted for the eighteenth highest number of visitors to the Capital, therefore the average spend per visit was higher for residents from these countries than countries more likely to visit London. Residents of 'Other Middle Eastern' countries spent a total of £888 million in London during 2013, with spending during holiday trips accounting for 65.6% of total spending.

Other countries and regions who reported large expenditure despite having smaller visitor numbers were Other Asia and the United Arab Emirates spending £411 million and £359 million respectively, again spending on holiday trips was the main reason for expenditure.

11. Appendix A: Definitions

1. The figures relate to the number of completed visits, not the number of visitors. Anyone entering or leaving more than once in the same period is counted on each visit. The count of visits relates to UK residents returning to this country and to overseas residents leaving it.
2. **Day-visits** (that is trips that do not involve an overnight stay) abroad by UK residents as well as day trips to the UK by overseas residents are included in the figures for visits and expenditure. Note 3 in sub-section Traveller Exclusions refers to overseas residents in transit through the UK. Please note day visits to or from the Irish Republic across the land border are excluded, although they are included in total visits.
3. An **overseas visitor** means a person who, being permanently resident in a country outside the United Kingdom, 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 the entire visit, expenditure and stay 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 for other purposes; together with visits for more than one purpose when none 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 miscellaneous purposes.
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 (for example accommodation costs, car hire, etc.) is included. 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 cover the time spent, including the journey outside the UK, whilst for overseas residents it refers to the time spent within the UK.
10. **Earnings and expenditure** figures cover the same categories of travellers as do the number of visits, except that in addition the earnings figures include the expenditure by same day transit passengers, and the foreign exchange earnings and expenditure due to travel relating to the Channel Islands and other (non-UK) countries. They exclude payments for air, sea and rail travel to and from the UK.
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

1. **North America:** Canada (including Greenland and St Pierre at Miquelon), USA (including Puerto Rico and US Virgin Islands).
2. **Europe:** All countries listed within the European Union (see below for listing) plus the following central and eastern European countries; North Cyprus; Gibraltar; Iceland (including Faroe Islands); Norway; Switzerland (including Liechtenstein); Turkey; the former USSR; and the states of former Yugoslavia.
3. **EU15:** All countries that joined the European Union before January 1st 2004; 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; the Balearic Islands and Andorra); and Sweden. Note that the UK is among the 15 countries that formed the European Union prior to January 2004, but due to the nature of the data displayed in the IPS reference tables data for the UK is excluded.
4. **European Union:** All countries that are current members of the European Union; Austria, Belgium, Bulgaria, Croatia*, Cyprus**, Czech Republic, Denmark, Estonia, France (including Monaco), Finland, Germany, Greece, Hungary, Irish Republic, Italy (including San Marino and Vatican City), Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal (including Azores and Madeira), Romania, Spain (including Canary Islands, the Balearic Islands and Andorra), Slovakia, Slovenia and Sweden. Note that the UK is a member of the European Union but due to the nature of the data displayed in the IPS reference tables data for the UK is excluded.
5. **Other European Union:** All countries that joined the European Union from 1st January 2004 onwards; Bulgaria, Croatia*, Cyprus**, Czech republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Romania, Slovakia and Slovenia.
6. **North Africa:** Algeria, Libya, Morocco and Sudan.
7. **Other Middle East:** Bahrain; Iran; Iraq; Jordan; Kuwait; Lebanon; Oman; Qatar; Saudi Arabia; Syria; and the Yemen.
8. **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; Nicaragua; Panama (including Canal Zone); Paraguay; Peru; Surinam; Uruguay; and Venezuela.
9. **Other Caribbean:** Antigua; Bahamas; Bermuda; British Virgin Islands; Cayman Islands; Cuba; Dominica; the Dominican Republic; Grenada; Haiti; Martinique; Montserrat; St Kitts-Nevis-Anguilla; St. Lucia; St. Vincent and the Grenadines; Trinidad and Tobago; Turks and the Caicos Islands.

* Croatia joined the European Union on 1st July 2013 and data relating to Croatia collected from that date onwards has been included in the 'European Union', 'Other EU' and 'Europe' categories. Data relating to Croatia collected prior to 1st July 2013 is included in the 'Europe' category only.

** 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 European Union section until May 2004. From May 2004, only southern Cyprus is included in the European Union figures.

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.

12. 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 (Holiday/pleasure, to play amateur sport, cruise),
- Business,
- Visiting friends or relatives,
- 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. 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.

People migrating (to or from the UK) or travelling as crew of aircrafts, ships or trains are excluded from analysis in this publication.

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.

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 at least one night 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 level, 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.

13. 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 \(4.41 Mb ZIP\)](#) 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 2013 survey was 80%.

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 provisional 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 2013 was 296,000, 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 and the [IPS Overseas Travel and Tourism User Guide \(Volume 1\): Background and Methodology \(423 Kb Pdf\)](#)).

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 2013 the sample on which the estimates presented in this publication are based included, 49,000 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. Interviews are carried out on all days of the year, apart from Christmas Eve, Christmas Day and Boxing Day.

Almost all IPS interviews take place on a face-to-face basis with the responses being initially recorded on paper forms. In recent years 'self completion' questionnaires have been used at times where an interviewer has been unable to conduct an interview because of language difficulties.

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.

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 and the data is then transmitted to ONS headquarters where a series of further quality and accuracy checks are made on the data before processing and analysis.

More information about the collection of IPS data can be found in the [IPS Overseas Travel and Tourism User Guide \(Volume 1\): Background and Methodology \(423 Kb Pdf\)](#).

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. More information about the IPS sample design can be found in the [IPS Overseas Travel and Tourism User Guide \(Volume 1\): Background and Methodology \(423 Kb Pdf\)](#).

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 person 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 those arriving 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 sample also includes long haul ships capable of carrying more than 200 passengers arriving and leaving from 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 and quarterly basis as provisional estimates and final estimates published annually.

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. More information about the work undertaken to explore the [imbalance \(32 Kb Pdf\)](#) and planned future work can be found on the ONS website.

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.

14. 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 air, sea and the Channel Tunnel samples are shown in **Table D.1** below. These response rates relate to complete and partial interviews. The overall response rate in 2013 was 80%. Information about the construction of the IPS overseas Travel and Tourism response rates can be found in the [IPS Overseas Travel and Tourism User Guide \(Volume 1\): Background and Methodology \(423 Kb Pdf\)](#). For information about the 2013 response rates contact socialsurveys@ons.gsi.gov.uk.

Table D.1: IPS response rates for 2013 and 2012 estimates: % of complete and partial responses

IPS Response Rates for 2013 and 2012 estimates: % Of complete or partial responses

		2012 Q1	2013 Q1	2012 Q2	2013 Q2	2012 Q3	2013 Q3	2012 Q4	2013 Q4	2012	2013
Total IPS Response Rate	Arrivals	77.8	78.4	78.6	78.1	79.1	76.1	77.5	81.5	78.3	78.3
	Departures	79.3	81.6	80.8	82.6	81.4	81.2	78.2	82.6	80.0	82.0
	Total	78.6	80.2	79.8	80.6	80.4	78.9	77.9	82.1	79.3	80.4
IPS Response Rate (Air)	Arrivals	77.3	77.2	76.6	76.2	77.1	74.4	76.5	80.4	76.8	76.8
	Departures	78.9	81.0	79.4	81.4	79.9	80.1	77.1	81.4	78.9	81.0
	Total	78.2	79.4	78.2	79.1	78.7	77.6	76.9	81.0	78.0	79.1
IPS Response Rate (Sea)	Arrivals	80.2	90.6	90.6	93.1	90.7	89.2	87.7	92.0	88.4	91.1
	Departures	83.0	90.8	89.1	92.1	90.8	88.6	89.8	92.2	88.7	90.6
	Total	81.8	90.7	89.8	92.5	90.7	88.9	88.9	92.1	88.6	90.8
IPS Response Rate (Tunnel)	Arrivals	81.4	82.0	89.4	84.4	88.6	81.0	79.4	85.7	84.7	83.3
	Departures	80.4	83.6	93.5	89.3	92.9	86.7	82.6	91.7	87.3	88.1
	Total	80.9	82.7	91.3	86.8	90.7	83.7	81.0	88.7	86.0	85.6

Source: Office for National Statistics

15. Appendix E: Accuracy of overseas travel and tourism estimates

1. Annual figures shown in this publication are final estimates, previous estimates provided in the monthly and quarterly publications are provisional and subject to revision in light of additional passenger data obtained at the end of each year.

IPS estimates are revised in line with the IPS revisions policy. The revisions policy is available in the [IPS Quality and Methodology Information \(331.7 Kb Pdf\)](#) paper to assist users in the understanding of the cycle and frequency of data revisions. Users of this report are strongly advised to read this policy before using this data for research or policy related purposes.

Planned revisions usually arise from either the receipt of revised passenger traffic data or the correction of errors to existing data identified later in the annual processing cycle. Those of significant magnitude will be highlighted and explained.

Revisions to published quarterly IPS estimates can be expected in the publication of the annual overseas travel and tourism report (Travel Trends).

All other revisions will be regarded as unplanned and will be dealt with by non-standard releases. All revisions will be released in compliance with the same principles as other new information. Please refer to the [ONS guide to statistical revisions](#).

2. The main series are seasonally adjusted. This aids interpretation by identifying seasonal patterns and calendar effects and removing them from the unadjusted data. The resulting figures give a more accurate indication of underlying movements in the series.

3. The estimates produced from the IPS 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. The survey sample size is approximately 70,000 per quarter.

Table A shows the 95% confidence intervals for the 2013 estimates of the total number of visits, nights and expenditure for both overseas residents visiting the UK and UK residents going abroad. These represent the interval into which there are 19 chances out of 20 that the true figure (had all travellers been surveyed) would lie.

If, for example, the relative 95% confidence interval relating to an estimate of 10,000 was 5.0% there would be 19 chances out of 20 that the true figure (if all travellers had been surveyed) would lie in the range 9,500 to 10,500.

Table 5: IPS confidence intervals for 2013 estimates

IPS Confidence intervals for 2013 estimates

	Estimate	Relative 95% Confidence Interval (+/- % the estimate)
Overseas visitors to the UK		
Number of visits (1000s)	32,692	2.0%
Number of visitor-nights (1000s)	245,477	2.7%
Total earnings (£ million)	21,258	2.8%
UK residents going abroad		
Number of visits (1000s)	57,792	1.2%
Number of visitor-nights (1000s)	604,890	1.9%
Total expenditure (£ million)	34,510	1.8%

Source: Office for National Statistics

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.

Further guidance for readers is provided about the quality of [Overseas Travel & Tourism estimates \(404.8 Kb Pdf\)](#).

One indication of the reliability of the key indicators in this release can be obtained by monitoring the size of revisions. The [monthly statistical bulletin](#) provides information about the size and pattern of revisions to the quarterly IPS data which have occurred over the last five years to the following key seasonally adjusted estimates:

- The number of visits by overseas residents to the UK (GMAT)
- The number of visits abroad by UK residents (GMAX)
- Earnings made from overseas residents in the UK (GMAZ) and
- Expenditure abroad by UK residents (GMBB)

Additional spreadsheets giving details of how the revisions have effected the provisional monthly and quarterly estimates are available in the data section of the quarterly publication.

[RFT, Q3 2013 Revisions to provisional estimates \(54 Kb Excel sheet\)](#)

16. Appendix F: Special events

Statistical series are affected by special events. However, as explained in ONS's special events policy, it is not possible to make an estimate of the effect of particular events only on the basis of information collected in those series. However, ONS publishes a [special events calendar](#) which may help the reader put some context on reported estimates.

There were a number of special events in 2012. The Diamond Jubilee celebrations saw changes to the normal pattern of Bank holidays in May and June, and an additional day's holiday in June; all of these changes affected estimates for quarter 2 of 2012, and an [article](#) gave more information on how estimates were compiled over this period. The Olympics took place from 27 July to 12 August 2012 (with a few events starting on 25 July), and Paralympics from 29 August to 9 September. The direct effect of the Olympics and Paralympics were reflected in the estimates for the months of quarter 3 of 2012. More details of how certain series were expected to be affected were given in an [Information Note](#). A [detailed article \(229 Kb Pdf\)](#) describing possible effects on GDP and comparing with earlier Olympic Games was published by ONS on 25 October. Wider effects, for example the presence of the Olympics influencing the number of non-Olympic tourist visits, may of course have affected any of the summer months.

The result of these special events in 2012 has been to introduce additional uncertainty in the interpretation of movements between Q2 and Q3 and between Q3 and Q4. Users should therefore consider all information available when interpreting the statistics.

17. Appendix G: Access to IPS data and analysis

IPS results published by ONS

In addition to Travel Trends, ONS also publishes provisional 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 [Travelpac \(4.41 Mb ZIP\)](#), 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

18. 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