

Current Issues Note 32

**International tourism in London 2010:
Results for London from the International
Passenger Survey 2010**

By **Simon Kyte**



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International tourism in London 2010 : Introduction

The Office for National Statistics has released 'Travel Trends' outlining results from the International Passenger Survey 2010. This summary document presents a brief analysis of volume and value statistics from this latest annual release on international tourism data for London covering 2010. Any enquiries regarding the data should be directed to Simon Kyte (simon.kyte@london.gov.uk).

Table 1.1 : Summary table of 2010 London and 'Rest of UK' tourism data

	London		Rest of UK	
	Level	% change on 2009	Level	% change on 2009
International visits (thousands)	14,706	+3.5	15,097	-3.7
International spend (£ millions)	8,741	+6.1	8,158	-2.3
Domestic overnight visits (thousands)	11,580	+7.3	107,854	-6.4
Domestic overnight spend (£ millions)	2,515	+12.8	18,320	-6.8
Total visits – excluding day visits (thousands)	26,286	+5.1	122,951	-6.1
Total spend – excluding day visitors (£ millions)	11,256	+7.5	26,478	-5.5

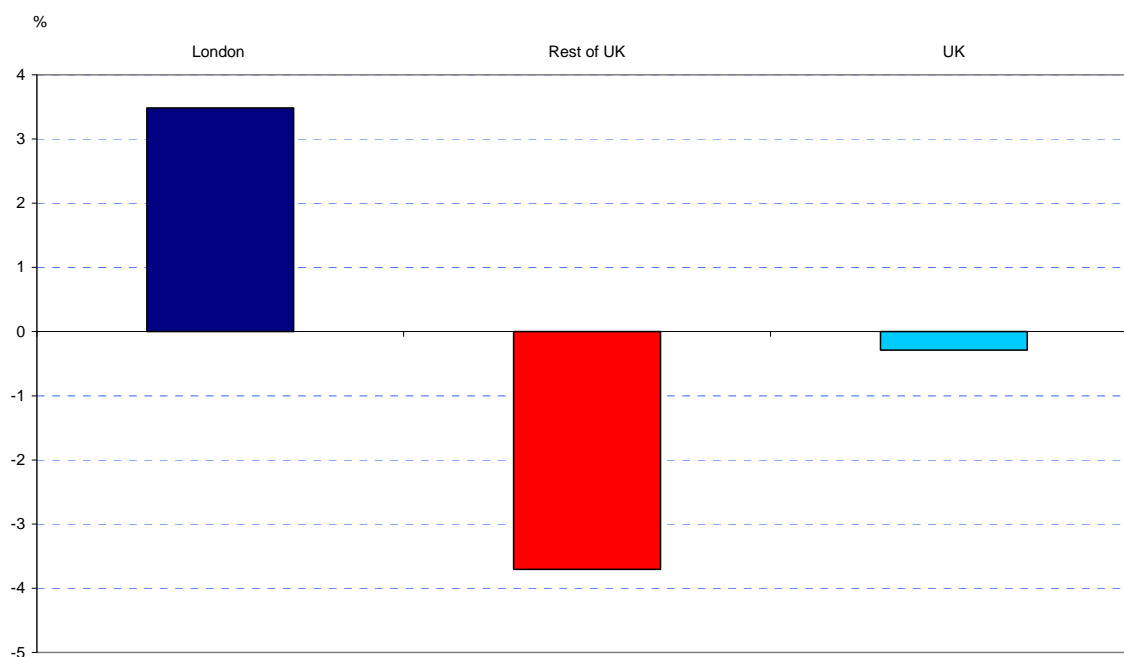
Source: International Passenger Survey and UK Travel Survey¹, ONS

¹ Results from the UK Travel Survey (UKTS) 2010 covering domestic overnight visitors and spend became available in June 2011. They are presented in the table for completeness only. The table excludes day visitor numbers – see *Current Issues Note 29 - Estimating the contribution of leisure day visitors to London's tourism industry* (March 2011).

1. Volume

London has performed well in terms of international visitor numbers in 2010. Visitor volumes in London rose whilst they fell in the remainder of England, in Wales and in Scotland. Total annual visits to London were up on 2009 by 3.5 per cent to 14.706 million. That compares with a 0.3 per cent fall across the UK as a whole to 29.803 million as shown in Figure 1.1 below. When London is stripped out of the UK figures, the national situation is worse, falling by 3.7 per cent.

Figure 1.1 : Percentage change in all international visitors (2010 compared to 2009)

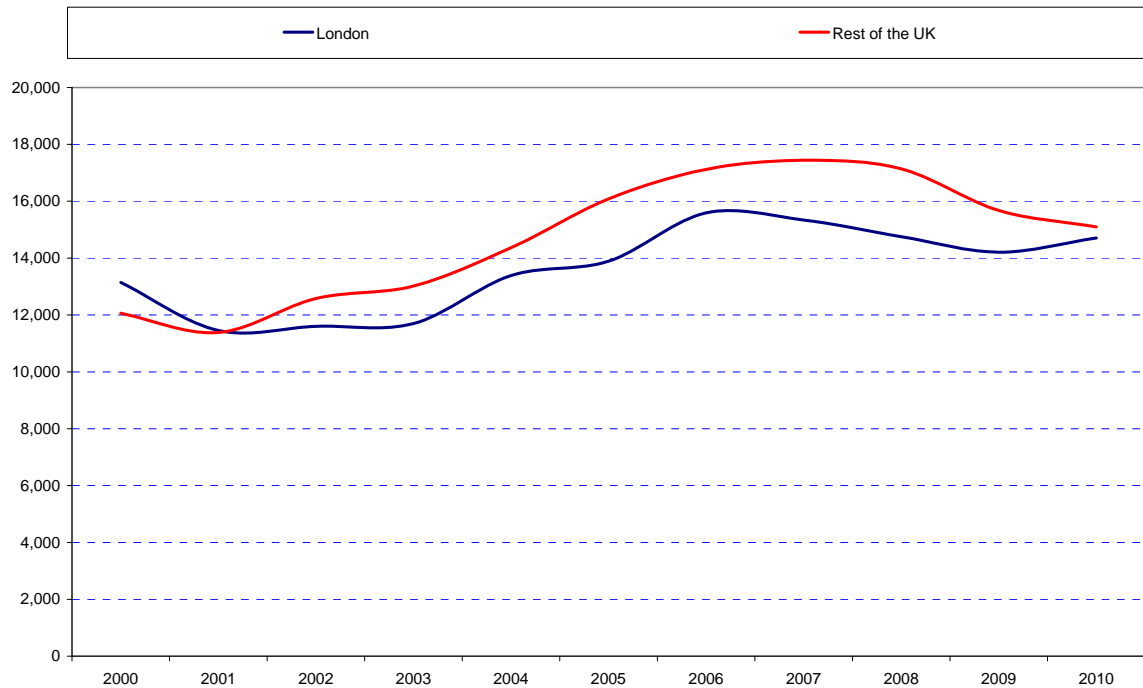


Source: International Passenger Survey, ONS

Put into the longer term context, this suggests that the number of international tourists visiting London has recovered somewhat in 2010 following successive falls in international tourist numbers since 2006. The 'rest of the UK' is yet to show any clear signs of recovery as shown in Figure 1.2.

“Visitor volumes in London rose whilst they fell in the remainder of England, in Wales and in Scotland.”

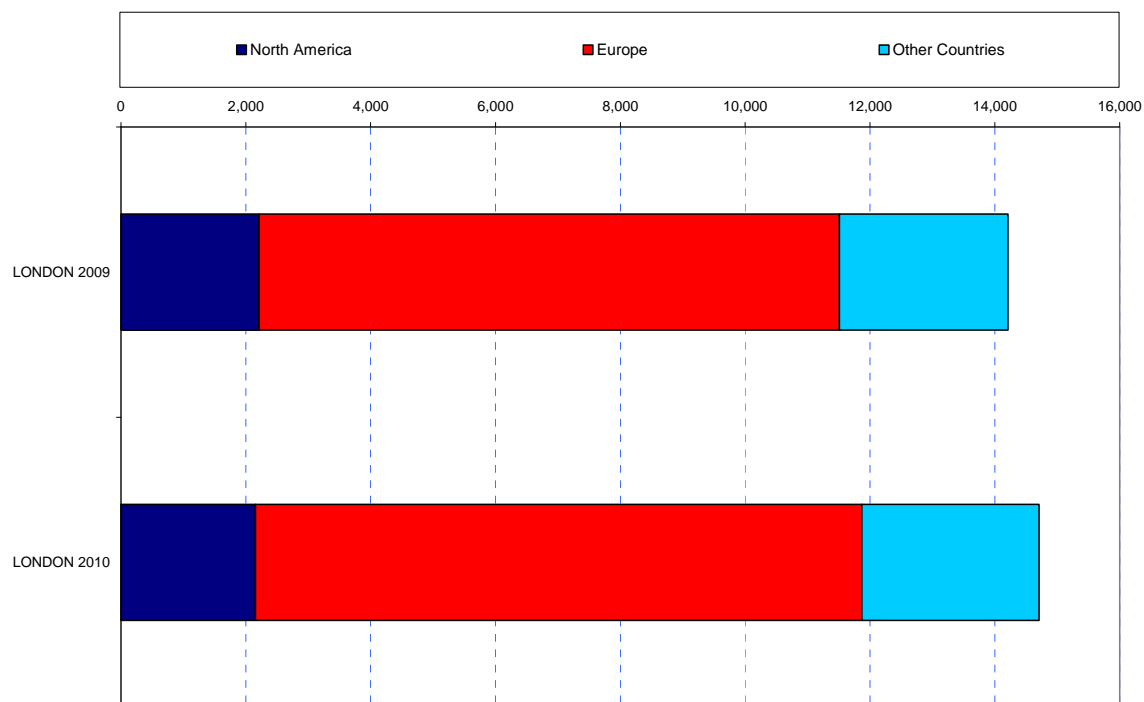
Figure 1.2 : All international tourists to London and the rest of the UK since 2000 (Thousands)



Source: International Passenger Survey, ONS

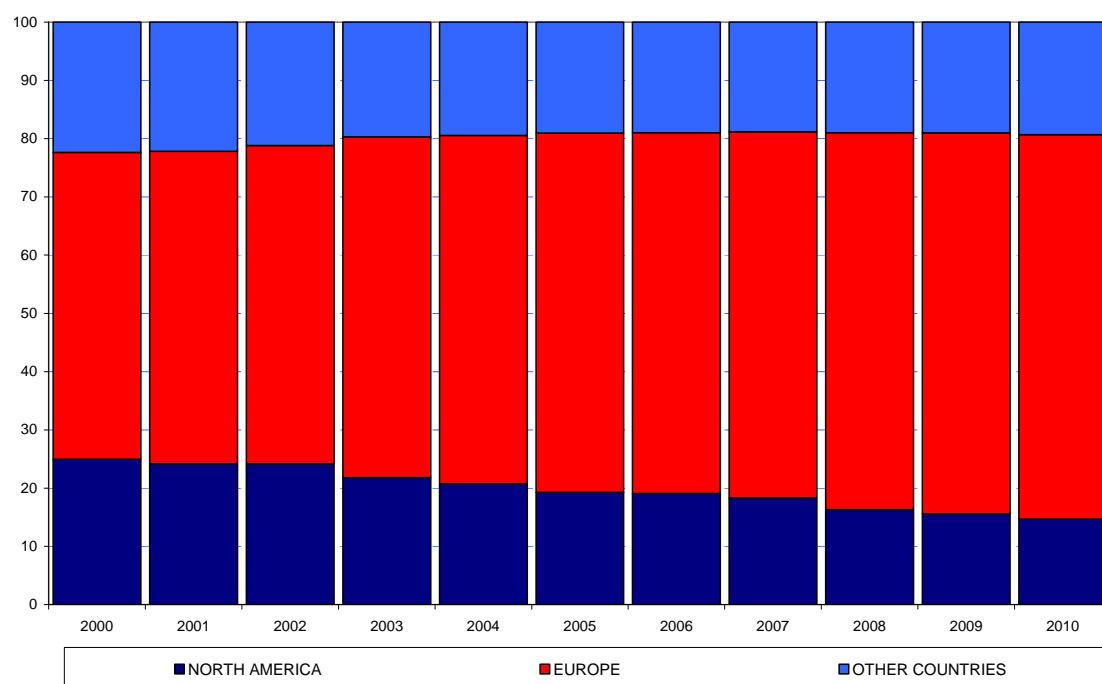
North American visits account for 15 per cent of London's total international visits (down from 16 per cent in 2009) whilst European visitors account for 66 per cent (up from 65 per cent in 2009). Within Europe, the EU member states account for 90 per cent of visitors and 85 per cent of spend in London. Other countries account for 19 per cent of the capital's international visits as shown in Figure 1.3A. Figure 1.3B shows percentage shares rather than actual numbers and demonstrates longer term trends within London's international visitor origin countries.

Figure 1.3A : Overseas visits to London by global region of origin in 2009 and 2010 (Thousands)



Source: International Passenger Survey, ONS

Figure 1.3B : Share of London's overseas visits by global region of origin since 2000 (Percentage shares)

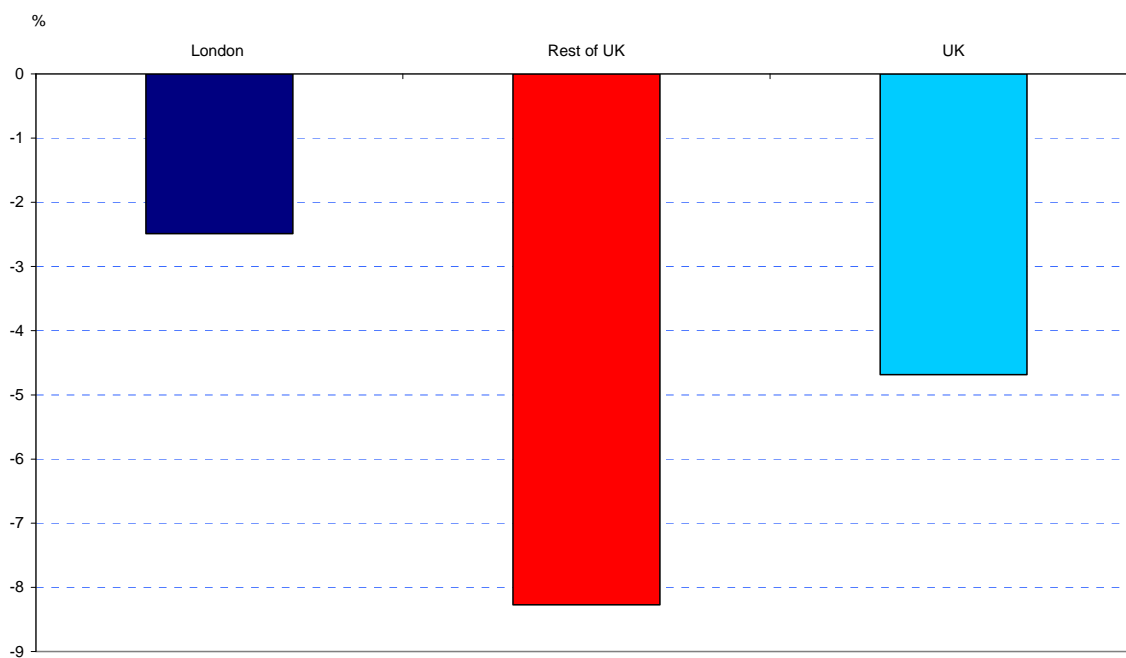


Source: International Passenger Survey, ONS

North American visitor volumes

As part of these ongoing trends, visitors from North America continued to fall both in London and elsewhere but the falls were actually steeper beyond the capital. In 2010 North American visitors to London fell by 2.5 per cent to 2.155 million. That fall compares with a 4.7 per cent fall across the UK as a whole and an 8.3 per cent fall in the UK excluding London (i.e. 'rest of the UK') as shown in Figure 1.4.

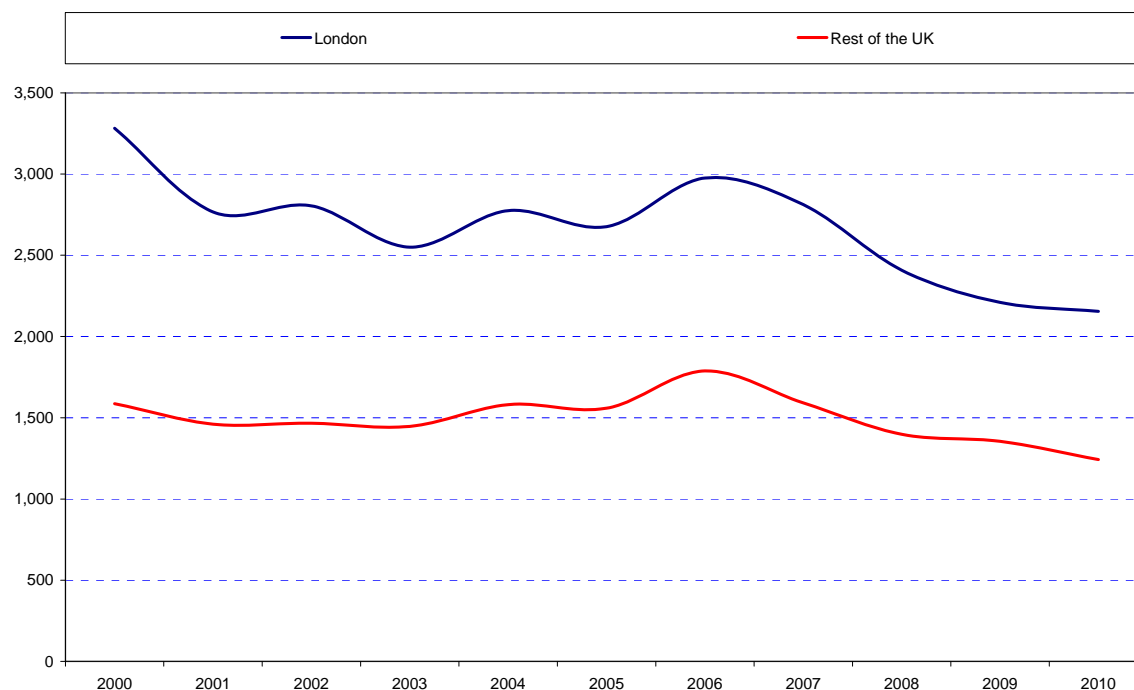
Figure 1.4 : Percentage change in North American visitors (2010 compared to 2009)



Source: International Passenger Survey, ONS

However, the number of North American visitors to London per year has now fallen by 34 per cent since 2000 – compared to a 22 per cent fall for the 'rest of the UK' as shown in Figure 1.5.

Figure 1.5 : North American tourists to London and the rest of the UK since 2000 (Thousands)

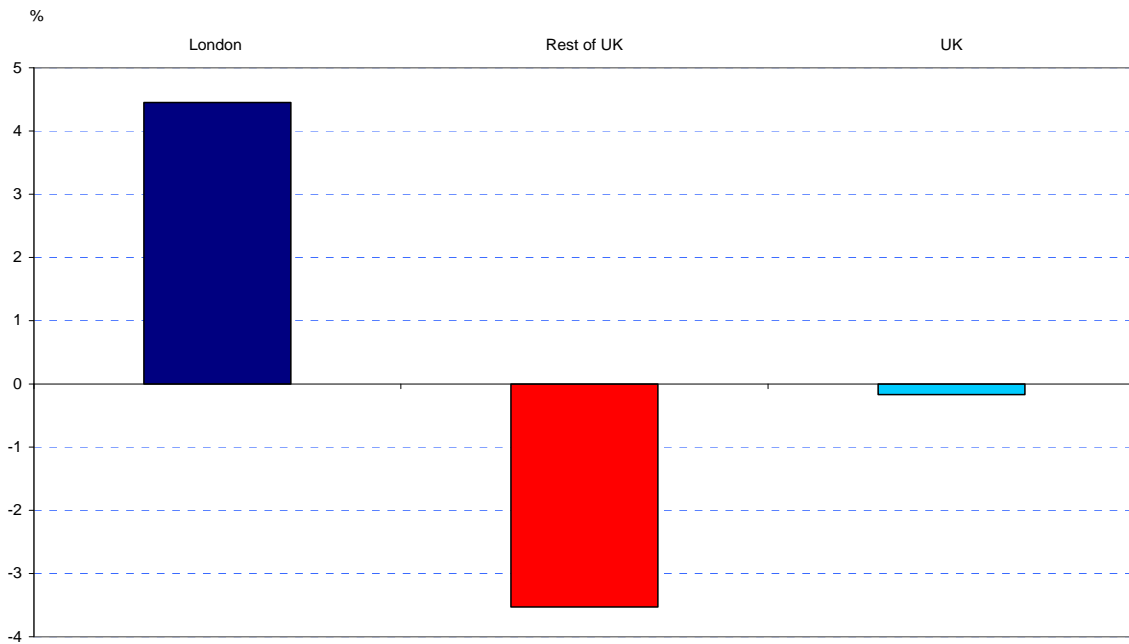


Source: International Passenger Survey, ONS

European visitor volumes

In contrast to the patterns exhibited by North American tourists, visitor numbers from Europe rose in London by 4.5 per cent to 9.713 million. On the face of it there was only a small decrease nationally of 0.2 per cent but once London is stripped out from the UK data there was actually a 3.5 per cent fall as shown in Figure 1.6.

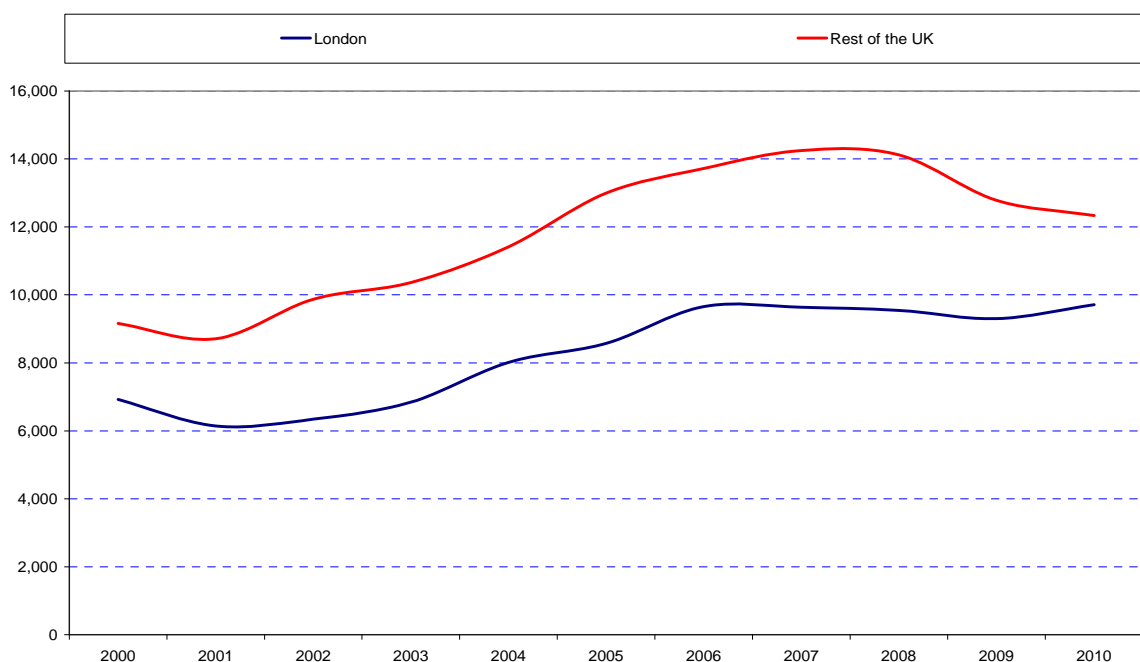
Figure 1.6 : Percentage change in European visitors (2010 compared to 2009)



Source: International Passenger Survey, ONS

Tourist visits from Europe have risen 40 per cent in London and 35 per cent in the 'rest of the UK' since 2000, although the 'rest of the UK' is still at levels seen in the mid-2000s having fallen from a 2007 peak as shown in Figure 1.7. Visitor numbers to the capital from Europe were 9.713 million in 2010.

Figure 1.7 : European tourists to London and the rest of the UK since 2000 (Thousands)



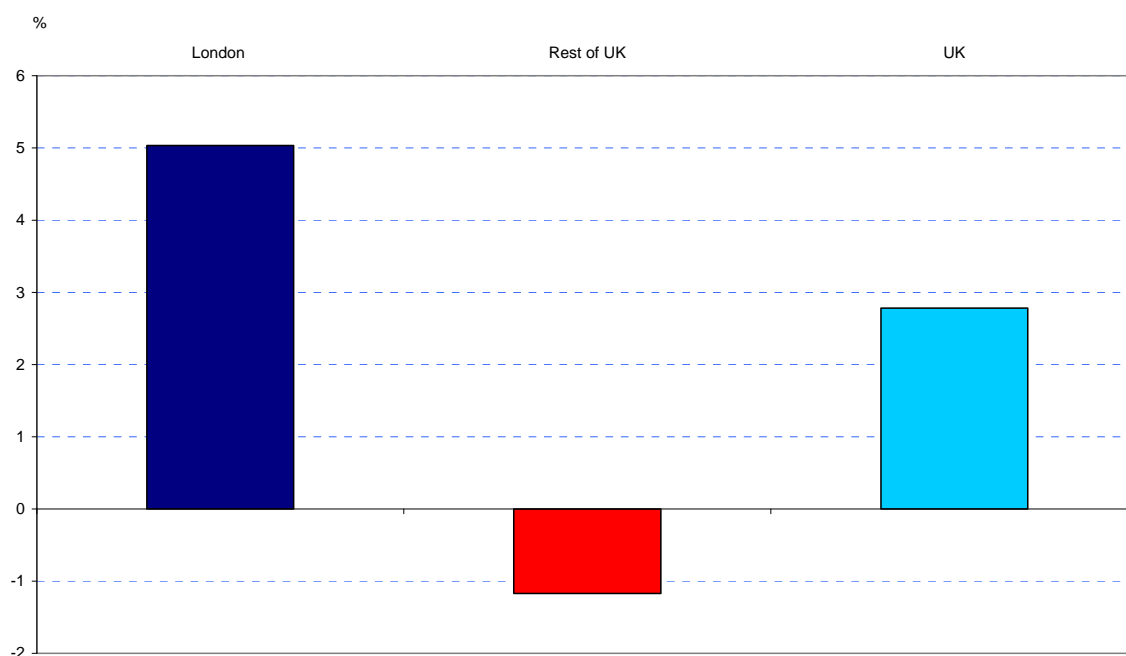
Source: International Passenger Survey, ONS

Visitors volumes from other countries

'Other countries' here is defined as all countries outside Europe and North America.

Visitors from other countries rose in London by 5.0 per cent to 2.838 million (although as a percentage share of all London's international tourists they have hardly changed over the past seven years). For the UK as a whole, visits from 'other countries' rose by 2.8 per cent but once London is stripped out, visitors to the 'rest of the UK' actually fell by 1.2 per cent as shown in Figure 1.8.

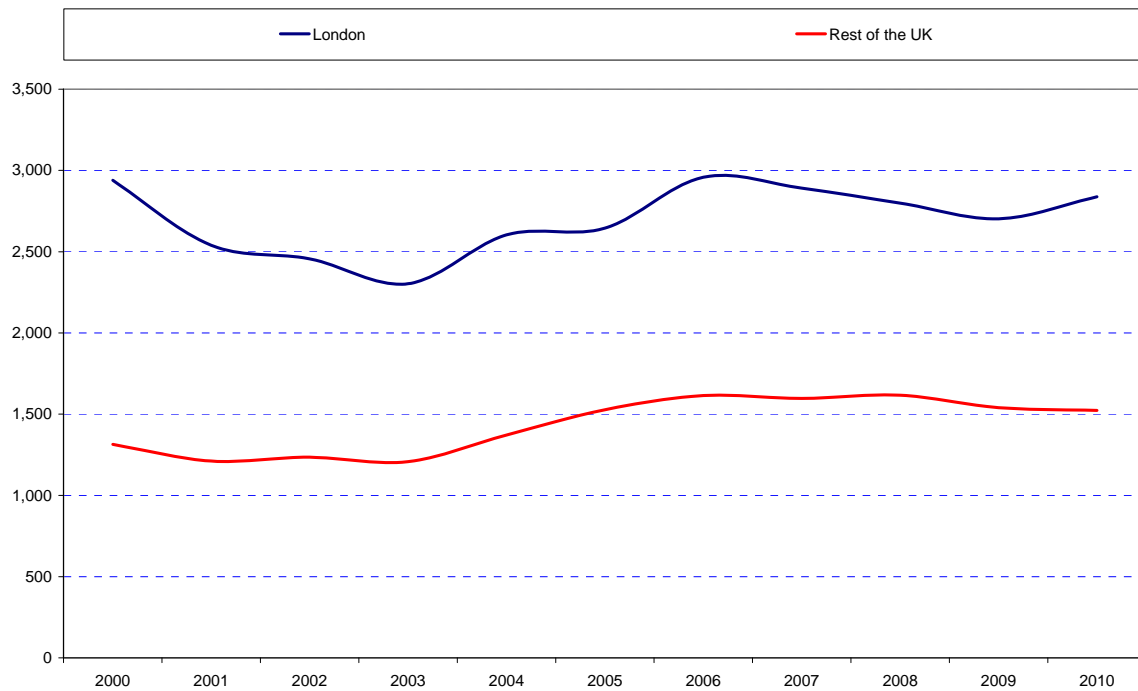
Figure 1.8 : Percentage change in visitors from 'other countries' (2010 compared to 2009)



Source: International Passenger Survey, ONS

In spite of volume growth in 2010 in the capital, visitors to London from 'other countries' were still some 4.1 per cent beneath their 2006 level as shown in Figure 1.9.

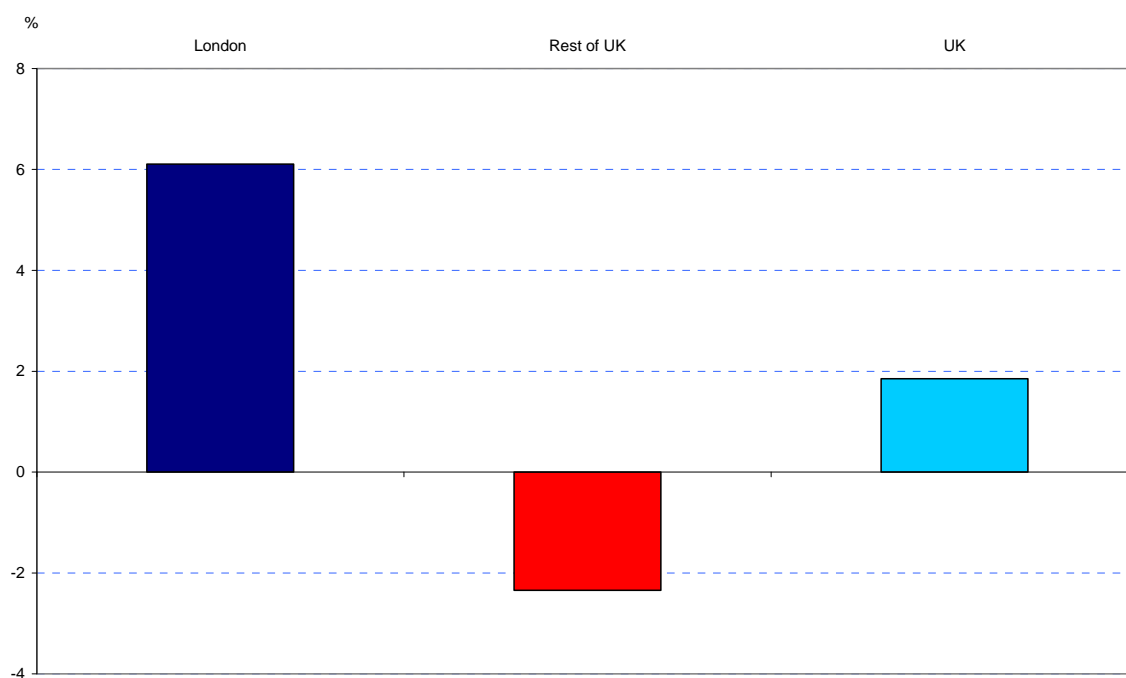
Figure 1.9 : International tourists from other countries to London and the rest of the UK since 2000 (Thousands)



Source: International Passenger Survey, ONS

2. Value

Overall total international visitor spend in the capital increased by 6.1 per cent on its 2009 level to £8.741 billion. This compares with only a 1.9 per cent increase in the comparable figure for the UK as a whole to £16.899 billion. However, when London is stripped out from the UK data, 'the rest of the UK' actually experienced a fall of 2.3 per cent as shown in Figure 2.1.

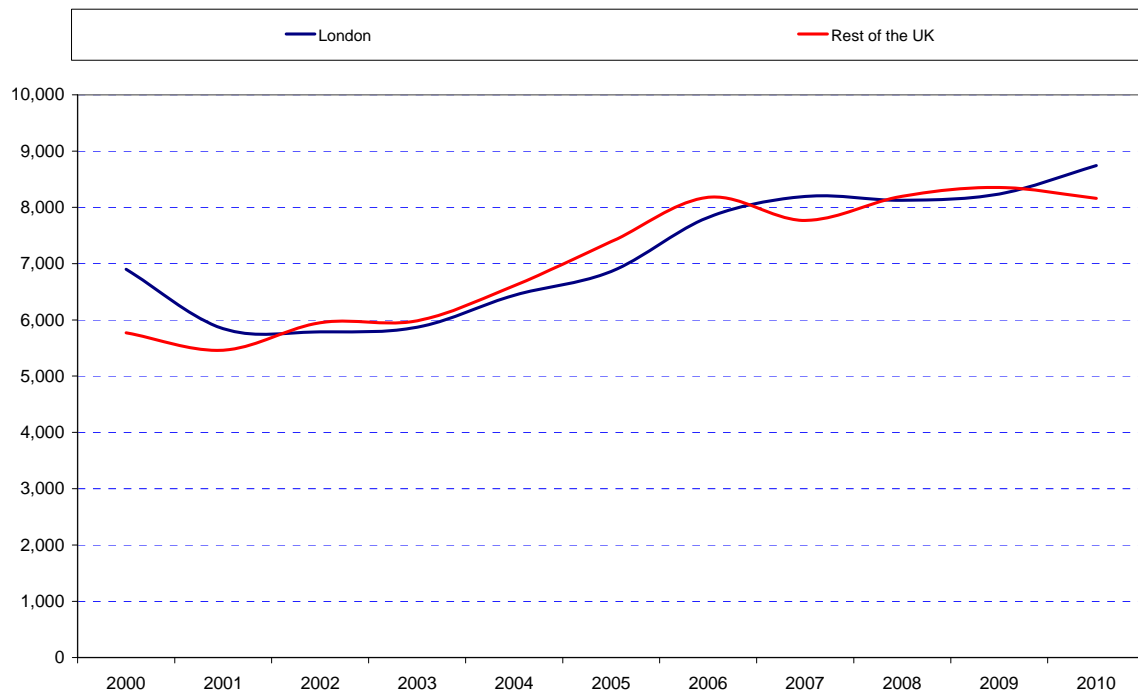
Figure 2.1 : Percentage change in international spend (2010 compared to 2009)

Source: International Passenger Survey, ONS

“In 2010 London received more international tourist spend than the remainder of the UK regions put together.”

Figure 2.2 shows that total international tourist spend in the capital increased in 2010 following very little net growth in spend between 2007 and 2009. In 2010 London received more international tourist spend than the remainder of the UK regions put together.

Figure 2.2 : Total international tourist spend in London and 'the rest of the UK' since 2000 (£ millions)

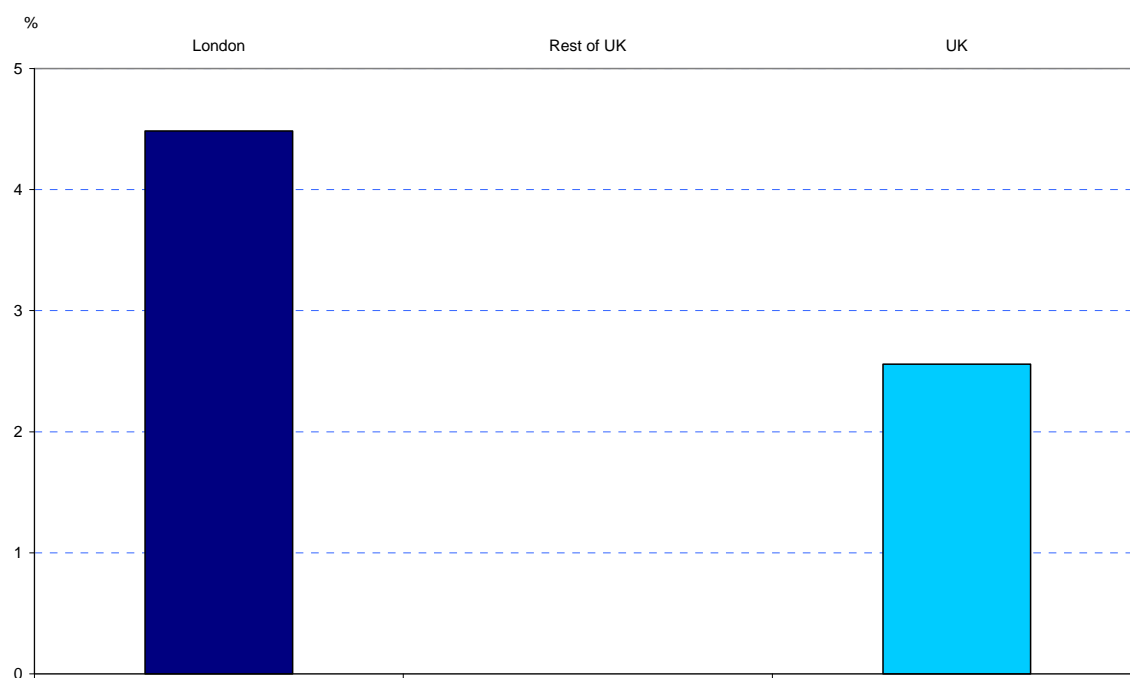


Source: International Passenger Survey, ONS

North American visitor spend

In spite of the fall in North American visitors to London in 2010, spend for North American tourists actually increased by 4.5 per cent to £1.538 billion. Comparable figures for the UK as a whole show an increase in spend of 2.6 per cent to £2.647 billion. However, when London is stripped out from the UK figure, North American tourist spend in the 'rest of the UK' remained completely unchanged at £1.109 billion as shown in Figure 2.3 below.

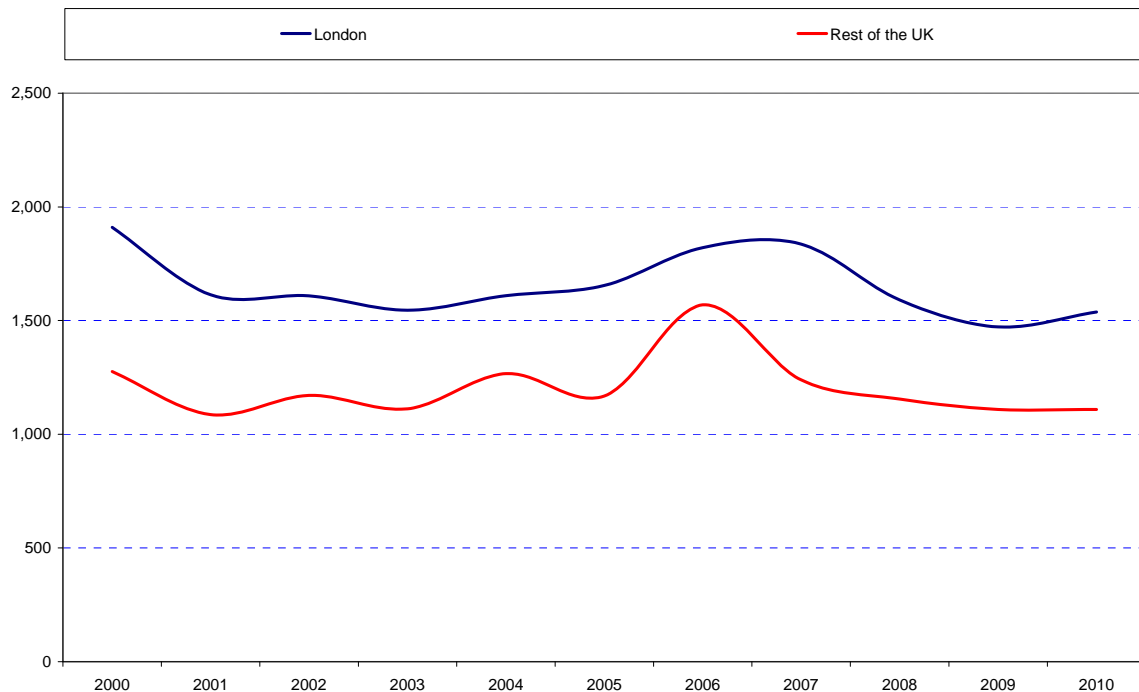
Figure 2.3 : Percentage change in North American tourist spend (2010 compared to 2009)



Source: International Passenger Survey, ONS

Figure 2.4 shows that the decline in North American visitor spend which occurred in recent years in the capital was reversed slightly in 2010. Across the 'rest of the UK' the decline in spend was halted in 2010.

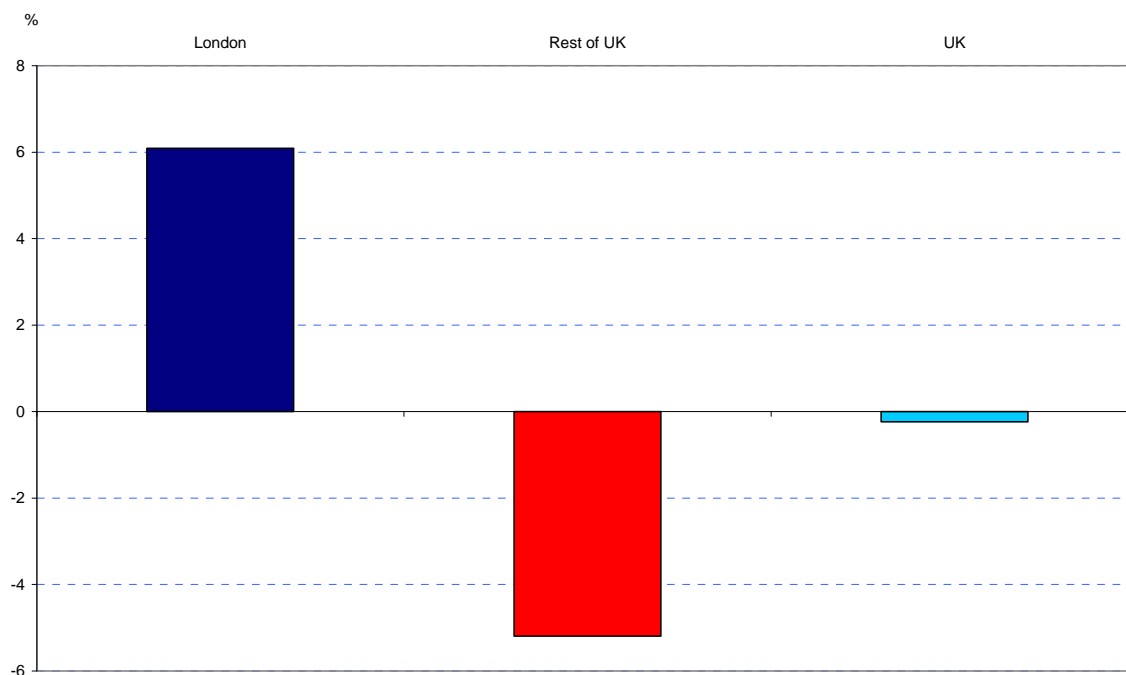
Figure 2.4 : North American international tourist spend in London and 'the rest of the UK' since 2000 (£ millions)



Source: International Passenger Survey, ONS

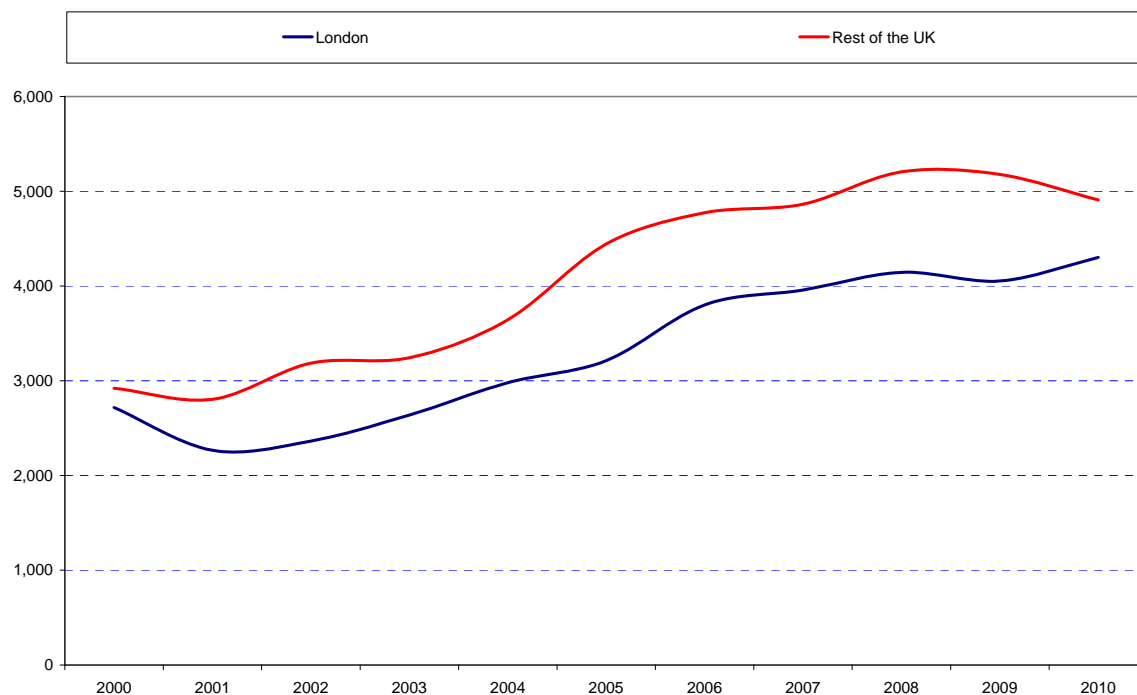
European visitor spend

Figure 2.5 shows that there has been strong growth since 2009 in European tourist expenditure in London. Spend rose by 6.1% to £4.301 billion. There was a decline of 0.2 per cent in European spend in the UK. This decline is more severe once London's growth in spend is stripped out: spend in 'the rest of the UK' actually fell by 5.2 per cent to £4.908 billion.

Figure 2.5 : Percentage change in European tourist spend (2010 compared to 2009)

Source: International Passenger Survey, ONS

Figure 2.6 shows that European visitor spend in the capital increased strongly in 2010 when compared with recent years. In contrast, the decline in spend since the 2008 peak has continued unabated in 'the rest of the UK'.

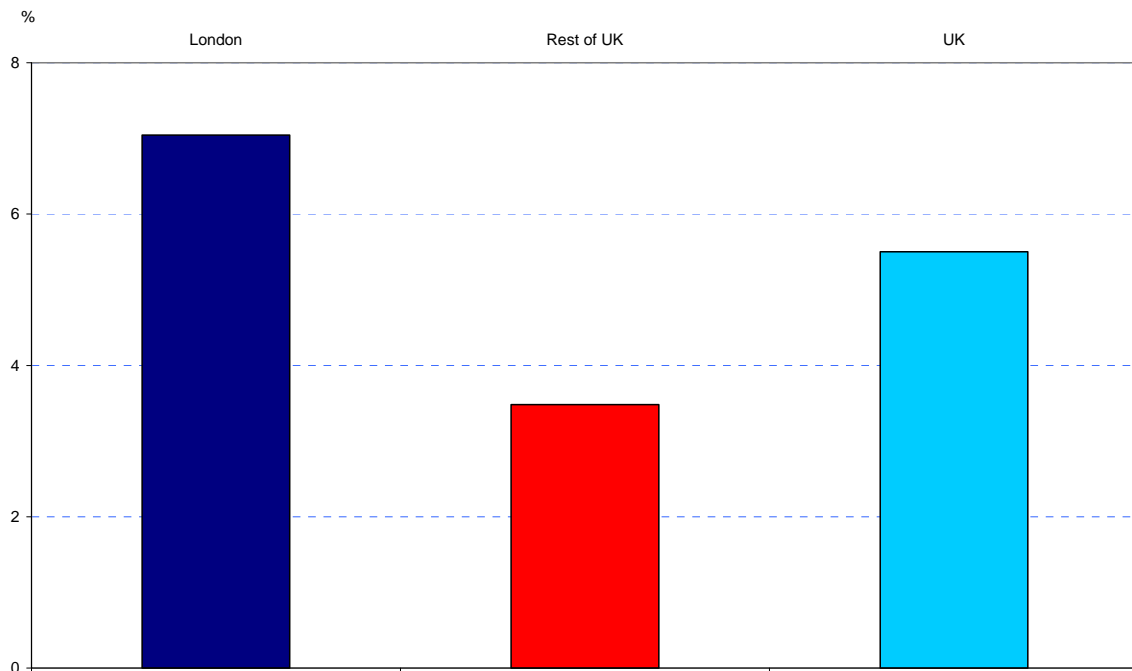
Figure 2.6 : European tourist spend in London and 'the rest of the UK' since 2000 (£ millions)

Source: International Passenger Survey, ONS

Visitor spend from other countries

For visitors from 'other countries', spend in London increased by 7.0 per cent to £2.903 billion. Across the UK as a whole there was also an increase of 5.5 per cent to £5.043 billion. This means that there was 3.5 per cent growth in spend from these countries in the 'rest of the UK'.

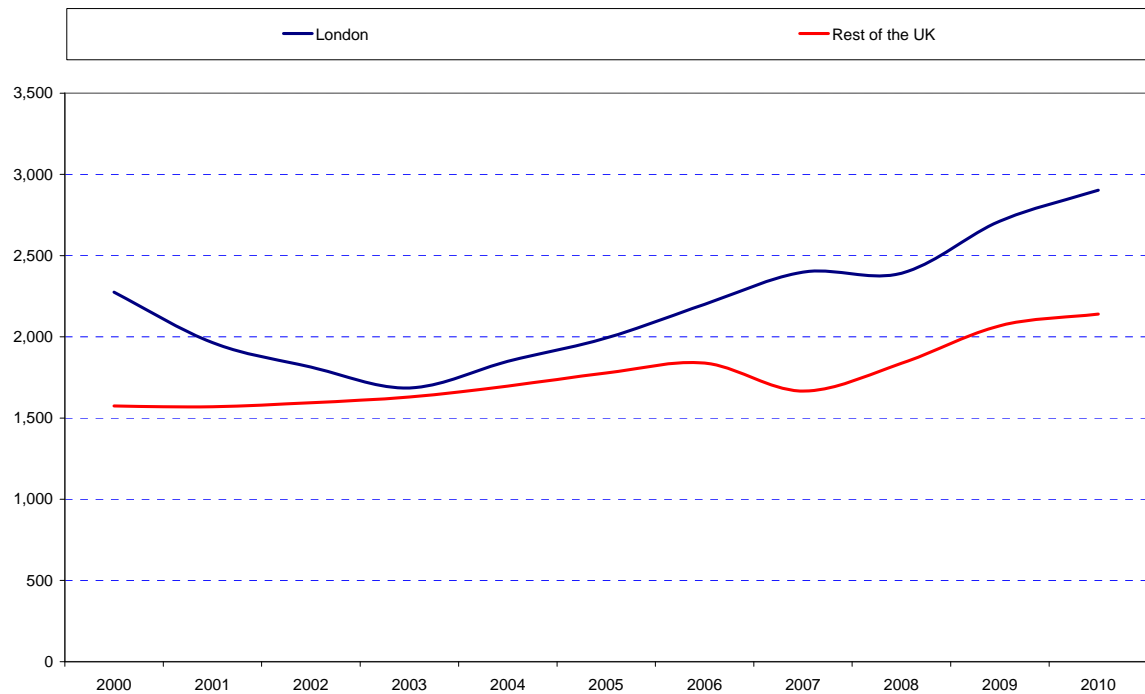
Figure 2.7 : Percentage change in other countries' tourist spend (2010 compared to 2009)



Source: International Passenger Survey, ONS

Figure 2.8 shows that spend from 'other countries' has continued to rise in the capital in spite of the numbers of visitors from those countries having been relatively flat in recent years. Obviously, the aggregate grouping, 'other countries', masks conflicting trends within that.

Figure 2.8 : Tourist spend from 'other countries' in London and 'the rest of the UK' since 2000 (£ millions)



Source: International Passenger Survey, ONS

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