

# Internal modes of transport

Foresight – issue 176

VisitBritain Research



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# 1. Introduction, executive summary & other resources

# Introduction

This edition of Foresight looks at what types of transport modes visitors from overseas used whilst they were in the UK in 2018. This analysis is based on a question VisitBritain added to the International Passenger Survey (IPS) questionnaire, carried out by the Office for National Statistics (ONS) during 2018:

***While in the UK, did you use any of the following types of transport?***

*Domestic flight; Bus, tube, tram or metro train; Train (outside town/city); Uber or other sharing app; Public bus/coach (outside town/city); Private coach/minibus; Hired self-drive car/vehicle; Other car/vehicle you/group brought to the UK\*; Ferry/boat; None of these*

\*most lorry drivers were not asked this question, and, as a consequence, are not taken into account in the results for 'Other car/vehicle you/group brought to the UK'. Visitors departing the UK by land from Northern Ireland to Republic of Ireland are not surveyed and are also therefore not included.

This report updates a previous Foresight report on this topic and provides further information on trends among some sub-groups of inbound visitors. As this is not a regular IPS question and there were some methodological changes between 2013, when we last added this question to the IPS, and 2018, we could not trend the data.

All spend figures are nominal and exclude the price of getting to the UK but include all types of expenses made during the visitors' stay, not just on internal modes of transport. Visitors who did not give a response to the transport mode questions were excluded from the base for propensity to use each transport mode.

Regional data for transport use only shows data for visits to a single nation or region where sample size is significant enough. For example, the sample size for Northern Ireland is too small, so data for Northern Ireland is included in the UK-level data but cannot be displayed individually.

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# Executive summary

About half of inbound visitors, 49%, take public transport within a city or town (bus, tube, tram or metro train) to explore their destination. This is the most popular transport type among the listed ways to get around the UK, followed by taxis (28%) and trains outside a town or city (23%). Uber and other sharing apps were used by 1-in-10 visitors. 1-in-20 hired a self-drive car or vehicle and a similar proportion hopped on a public bus or coach (outside town, city). Other means of transport – private coach/minibus, ferry/boat, domestic flight and car/ vehicle brought to the UK – were more rarely used.

Looking at the number of modes transport used on average by duration of trip, there seems to be a positive relationship between the duration of the visitor's stay and the average number of internal modes of transport used. Longer stays of over two weeks over-index on use of less popular transport types, such as hired self-drive car/vehicle, public bus/coach (out of town/city), ferry/boat and domestic flight. Student visitors stay longer and use more public coaches and trains than the average inbound visitor. Day trippers (those who do not stay overnight in the UK) over-index for private coach/minibus and visitors' own car/vehicle.

In general, there are few differences in transport use from one quarter and another. The mode of transport visitors use to get to/from the UK tends to have more of an impact on the modes of transport they use within the UK, as does journey purpose. For example, business visitors are the only group where public transport within a city/town is not the most popular mode; instead, it is taxis (37%). Visitors using the tunnel are more likely to use public transport within a city or town than other visitors. Visitors by sea are less likely to use the top four modes of transport, but they over-index on using their own car or vehicle in the UK.

The number of areas that visitors stayed in whilst in the UK has a positive relationship with internal transport use. Looking at visitors who visited only one area in the UK, taking the bus, tube, tram or metro train is more popular in the London area than in any other English regions or British nations, as are car sharing apps such as Uber. Visitors to Scotland and the North East over-indexed for domestic flight use. Visitors to Wales and the South West are more likely to use their own car to get around. These trends are confirmed when we look at visitors who stayed in two regions of the UK. For more on regional analysis, please refer to Section 3 of this report.

## Other resources

As part of the Discover England Fund, additional research has been completed to further understand the decision making and booking processes of international travellers. This include information on when transport tickets for trips to Britain may be booked. You can read [our report about the booking process \(in PDF\) on our website](#).

More information about selected markets is available on our market pages. You can consult [the full list of those markets on our website](#).



## 2. What types of transport inbound visitors use

# What types of transport inbound visitors use

Type of transport used in the UK	Visits (000s)	Visit shares
Bus, tube, tram or metro train	19,648	49%
Taxi	11,233	28%
Train (outside town/city)	9,135	23%
Uber or other sharing app	4,052	10%
Hired self-drive car/vehicle	2,127	5%
Public bus/coach (outside town/city)	1,984	5%
Private coach/minibus	887	2%
Ferry/boat	562	1%
Domestic flight	554	1%
Other car/vehicle you/group brought to the UK*	433	1%
None of these	10,948	27%

Once in the UK, some inbound visitors use different means of transport to go around. The most popular is public transport within a city or town: half of inbound visitors (about 20 million) took a bus, tube, tram or metro train to explore their destination.

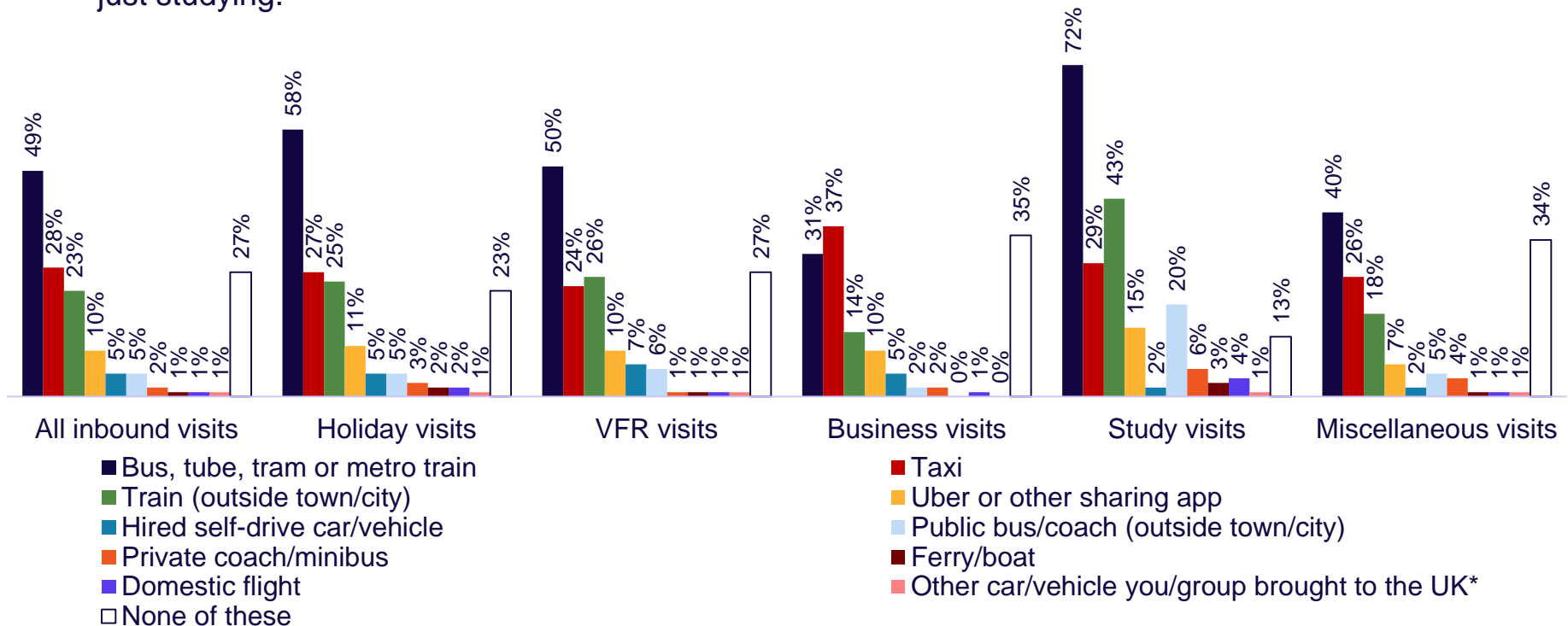
Taxis and trains (outside town or city) are also popular with around 1-in-4 inbound visitors jumping on one during their visit to the UK (over 11 and 9 million respectively).

Uber and other sharing apps were used in 1-in-10 visits (just over 4 million), 1-in-20 (around 2 million visits) would have included hiring a self-drive car or vehicle and a similar proportion hopped on a public bus or coach (outside town, city). Other means of transport – private coach/minibus, ferry/boat, domestic flight and car/vehicle brought to the UK – were more rarely used.



# Transport types used by trip purpose

Urban public transport (bus, tube, tram or metro train) was the most commonly used for visits to the UK for all journey purposes but business. Business visitors were most likely to take a taxi (about 37% of business visits). Trains, buses or coaches to get outside a town or city were also much more used by visitors in the UK for studying, hinting at those visitors doing more during their stay in the UK than just studying.

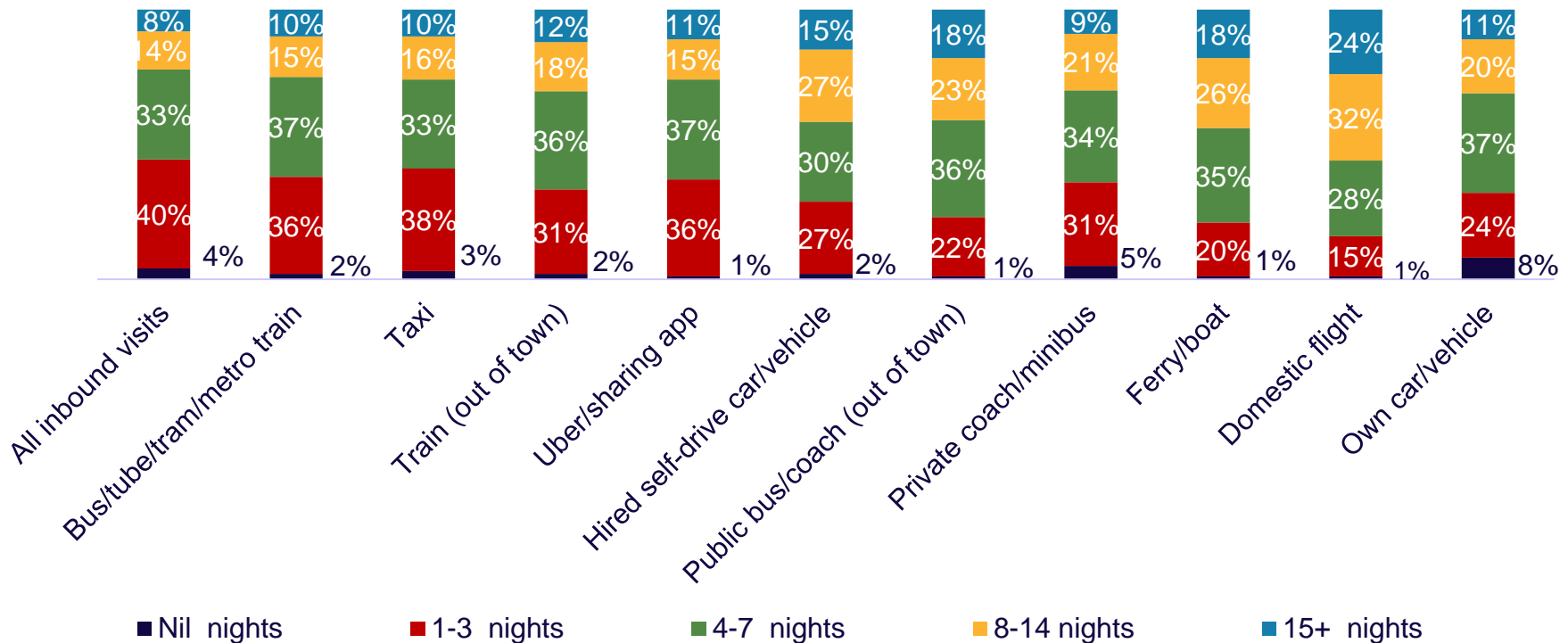


Source: International Passenger Survey by the ONS, 2018; Base excludes N/A: 33,081 respondents overall, 11,772 for Holiday, 9,684 for VFR, 7,185 for Business, 423 for Study and 1,963 for Miscellaneous

\*most lorry drivers were not asked this question, and, as a consequence, are not taken into account in the results for 'Other car/vehicle you/group brought to the UK'

# Impact of length of stay on transport used

Looking at the number of modes of transport used on average by how long visitors stay in the UK, the longer they stay, the more different types of transport they tend to use whilst in the UK on average. Longer stays of over two weeks over-index on use of hired self-drive car/vehicle, public bus/coach (out of town/city), ferry/boat and domestic flight, whilst day trippers over-index for private coach/minibus and visitors' own car/vehicle.



Source: International Passenger Survey by the ONS, 2018; Base excludes N/A: 15,216 respondents for public transport, 9,836 for taxi, 6,850 for train, 3,396 for Uber, 2,092 for hired vehicle, 1,528 for public bus/coach, 812 for private coach/minibus, 476 for ferry, 480 for domestic flight, 379 for own vehicle

# Impact of demographics on transport used

Those aged 16-34 years old are more likely than other groups to use Uber or other sharing apps, whilst children and older age groups are less likely to do so. However, only 3% of the 16-34 year-old age group hire a self-drive vehicle, compared to a 5% average, whilst this age group and women were more likely than average to use public buses/coaches.

Men, 0-15 and 55+ year-old visitors are also less likely than others to use cities' public transport options – bus, tube, tram or metro train. The youngest age group is less likely to hop on a taxi than average, but tend to explore on a private coach or minibus more than others – hinting at school trips. NB some of these differences will be due to different journey purpose patterns.

Type of transport used in the UK	All	Male	Female	0-15 yo	16-34 yo	35-54 yo	55+ yo
Bus, tube, tram or metro train	49%	45%	57%	45%	60%	48%	45%
Taxi	28%	29%	28%	19%	25%	33%	29%
Train (outside town/city)	23%	21%	26%	23%	28%	21%	22%
Uber or other sharing app	10%	10%	11%	5%	13%	10%	7%
Hired self-drive car/vehicle	5%	6%	5%	6%	3%	6%	8%
Public bus/coach (outside town/city)	5%	4%	6%	5%	7%	4%	5%
Private coach/minibus	2%	2%	3%	6%	2%	2%	3%
Ferry/boat	1%	1%	2%	2%	1%	1%	2%
Domestic flight	1%	1%	2%	1%	1%	2%	2%
Other car/vehicle you/group brought to the UK	1%	1%	1%	1%	1%	1%	2%
None of these	27%	29%	22%	37%	20%	25%	28%

Source: International Passenger Survey by the ONS, 2018; Base excludes N/A: 33,081 respondents for all, 19,317 for Male, 13,449 for Female, 706 for 0-15 years old (yo), 10,052 for 16-34 yo, 14,046 for 35-54 yo, 7,395 for 55+ yo

## Impact of seasonality on transport used

The mix of internal transport modes used by inbound visitors varies little across quarters of the year. Public transport within a city or town is slightly more popular between October and December, which is no surprise given the weather. This could also explain a slight peak in taxi use in January – March with up to 30% of inbound visits having included a taxi ride.

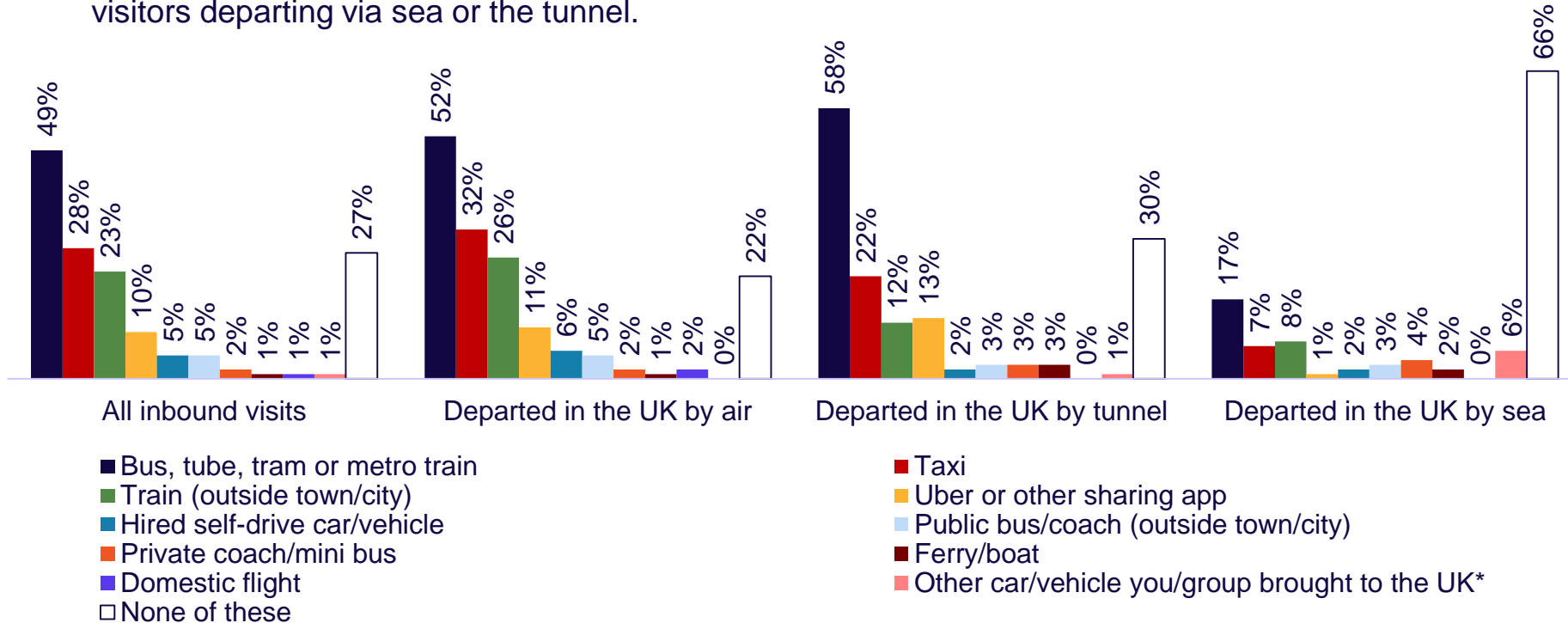
The summer months, however, seem to encourage people to explore further with 25% of visits including hopping on a train to get outside of a town or a city, vs 22% of visits between January and March, 22% of those in April – June and 23% of those in October – December.

Type of transport used in the UK	All	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec
Bus, tube, tram or metro train	49%	49%	48%	48%	51%
Taxi	28%	30%	27%	28%	28%
Train (outside town/city)	23%	22%	22%	25%	23%
Uber or other sharing app	10%	10%	9%	11%	11%
Hired self-drive car/vehicle	5%	4%	5%	6%	5%
Public bus/coach (outside town/city)	5%	6%	4%	5%	5%
Private coach/minibus	2%	2%	2%	2%	2%
Ferry/boat	1%	1%	2%	2%	1%
Domestic flight	1%	2%	1%	1%	1%
Other car/vehicle you/group brought to the UK	1%	1%	1%	1%	1%
None of these	27%	28%	29%	28%	25%

Source: International Passenger Survey by the ONS, 2018; Base excludes N/A: 33,081 respondents for All, 7,409 for Jan-Mar, 8,681 for Apr-Jun, 9,071 for Jul-Sep and 7,920 for Oct-Dec

# Influences of mode of transport to the UK

The way visitors depart from the UK tend to have more of an impact on the modes of transport they use in the UK. Overall, people departing through the tunnel use more public transport within a city or town than other visitors. Those departing by sea are less likely to use the top 4 modes of transport, but they over-index on using their own car or vehicle brought with them or their group to the UK. Exploring with a private coach or minibus and using a ferry or a boat were more common among visitors departing via sea or the tunnel.



Source: International Passenger Survey by the ONS, 2018; Base excludes N/A: 33,081 respondents for all, 27,532 for Air, 1,964 for Tunnel, 3,585 for Sea

\*most lorry drivers were not asked this question, and, as a consequence, are not taken into account in the results for 'Other car/vehicle you/group brought to the UK'

## Internal transport use – market differences (1/4)

Type of transport used in the UK	All	France	Germany	USA	GCC	India	Australia	China
Bus, tube, tram or metro train	49%	50%	47%	55%	37%	60%	60%	66%
Taxi	28%	21%	24%	39%	53%	37%	38%	32%
Train (outside town/city)	23%	16%	20%	27%	17%	21%	37%	29%
Uber or other sharing app	10%	8%	5%	19%	21%	14%	15%	15%
Hired self-drive car/vehicle	5%	4%	6%	7%	10%	3%	16%	3%
Public bus/coach (outside town/city)	5%	4%	4%	6%	2%	7%	9%	8%
Private coach/minibus	2%	2%	2%	4%	1%	5%	3%	6%
Ferry/boat	1%	1%	2%	2%	1%	2%	6%	2%
Domestic flight	1%	1%	<1%	3%	2%	3%	4%	4%
Other car/vehicle you/group brought to the UK*	1%	1%	2%	<1%	1%	1%	<1%	<1%
None of these	27%	30%	30%	17%	19%	20%	16%	14%

Source: International Passenger Survey by the ONS, 2018; Base excludes N/A: 33,081 respondents for all, 2,484 for France, 2,622 for Germany, 5,038 for USA, 1,225 for GCC (Gulf Cooperation Council, includes Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and UAE), 647 for India, 1,251 for Australia, 561 for China

\*most lorry drivers were not asked this question, and, as a consequence, are not taken into account in the results for 'Other car/vehicle you/group brought to the UK'

## Internal transport use – market differences (2/4)

**France** and **Germany** are the two main European inbound markets by volume and value. The profile of internal modes of transport they use whilst in the UK is quite similar. Visitors from both under-index on using trains to explore outside of a town/city, or taxis, with visitors from France being the less likely to do so of the two markets. Visitors from Germany were also less likely to use Uber or a similar app.

Visitors from **USA** have a higher propensity to use most transport modes whilst in the UK than the inbound average, except for a vehicle they brought to the UK which virtually none use. Over 1-in-2 visitors use public transport within a city about 2-in-5 taxis, just above 1-in-4 trains to get outside towns/cities and about 1-in-5 use Uber or another sharing app.

Visitors from the **Gulf** markets (GCC) have a more differentiated profile in terms of transport use whilst in the UK. It is the only market of all those presented here whose preferred mode of transport is the taxi, with over half using it. There were also twice as likely as the average inbound visitor to have used Uber or another sharing app (21% vs 10% respectively), and to hire a self-drive vehicle (10% vs 5%). Despite their propensity to stay in UK cities, they were significantly less likely than average to use public transport within a city.

Overall, Asia-Pacific markets, such as **Australia**, **India** and **China**, show some similar patterns in transport use in the UK. Over 3 in 5 visitors from each used public transport within cities in the UK, and all three are more likely than average to use taxis, Uber or similar apps, and domestic flights. However, only visitors from Australia and from China were more likely to hop on a train to go and explore the UK outside towns and cities. Australians were also three times more likely to hire a vehicle they could drive around the UK; Indians and Chinese were slightly less likely than the all-inbound average to have hired a vehicle though. Visitors from India and China were more likely to explore in a private coach or minibus (5% and 6% vs 2%, respectively). Australians were more likely than other markets shown here to have boarded a ferry or boat within the UK: 6% vs 1% across all inbound markets.

## Internal transport use – market differences (3/4)

Type of transport used in the UK	All	Spain	Italy	Netherlands	Nordics	Canada	Brazil	Japan	South Korea
Bus, tube, tram or metro train	49%	48%	51%	41%	53%	54%	73%	62%	62%
Taxi	28%	24%	25%	23%	35%	33%	27%	39%	15%
Train (outside town/city)	23%	28%	27%	17%	32%	37%	23%	18%	24%
Uber or other sharing app	10%	7%	8%	6%	8%	11%	32%	5%	11%
Hired self-drive car/vehicle	5%	5%	4%	4%	3%	11%	3%	4%	2%
Public bus/coach (outside town/city)	5%	5%	6%	3%	4%	9%	11%	4%	8%
Private coach/minibus	2%	1%	2%	3%	2%	4%	3%	2%	4%
Ferry/boat	1%	<1%	1%	2%	1%	3%	2%	<1%	4%
Domestic flight	1%	1%	1%	<1%	1%	4%	2%	1%	0%
Other car/vehicle you/group brought to the UK*	1%	<1%	<1%	4%	<1%	<1%	<1%	0%	0%
None of these	27%	31%	28%	32%	19%	17%	11%	13%	17%

Source: International Passenger Survey by the ONS, 2018; Base excludes N/A: 33,081 respondents for all, 1,623 for Spain, 1,095 for Italy, 1,743 for Netherlands, 2,010 for the Nordics (including Denmark, Finland, Iceland, Norway and Sweden), 872 for Canada, 295 for Brazil, 359 for Japan and 156 for South Korea; \*most lorry drivers were not asked this question, and, as a consequence, are not taken into account in the results for 'Other car/vehicle you/group brought to the UK'



## Internal transport use – market differences (4/4)

Visitors from **Netherlands** tend to use similar transport modes within the UK to those used by German visitors. However, there are less likely than them to use public transport within a town/city. Dutch visitors are also more likely than many markets to have brought their own car/vehicle to explore the UK. **Spain** and **Italy** show a similar pattern for use of internal transport modes compared to the average inbound visitor. However, they are more likely than average, and than France, Germany or Netherlands, to go outside of a town/city by train (Spain 28%, Italy 27%). Visitors from the **Nordics** over-index on the top 3 transport modes compared to all markets, and to the other European markets highlighted here. There were very few visitors from the Nordics coming to the UK with their own car though.

The other inbound markets presented here are all **long-haul markets**: as such, it is no surprise that virtually none of those visitors used their own car or vehicle brought to the UK whilst there.

**Canada** is slightly closer to Australia than the USA in terms of the transport visitors use whilst in the UK. Canadian visitors tend to use more public transport, taxis or trains outside cities/towns than the average. They are about as likely to use Uber or a similar app as to hire a self-drive vehicle: 1-in-10 do so whilst in the UK. They are also more likely than average to use a public bus or coach to explore outside a town/city. Overall, Canadians show a good propensity to explore further than the key cities.

**Brazil** shows some similarities with emerging Asian markets such as India and China. Their top mode of transport whilst in the UK is by far public transport within a city, with close to 3-in-4 visitors from Brazil hopping on a bus, tube, tram or metro train. Their use of taxis and trains outside town/city in close to the average, but they are about three times as likely as the average inbound visitor to use Uber or a similar service and twice as likely to hop a public bus or coach to go around the UK.

Travellers from **Japan** and **South Korea** only show limited similarities in transport use in the UK: 62% of visitors from both those Asian markets used urban public transport, and both showed little propensity to hire a vehicle or hop on a domestic flight. South Korean visitors were twice as likely as Japanese to use Uber or such apps and public bus/coaches (outside town/city). The former were also more likely to take a train out of the city or town, and slightly more to get on a private coach/ mini bus, or a ferry/boat. Some 39% of Japanese visitors used a taxi, compared to 15% of South Koreans.



### 3. Spotlight on rail travel

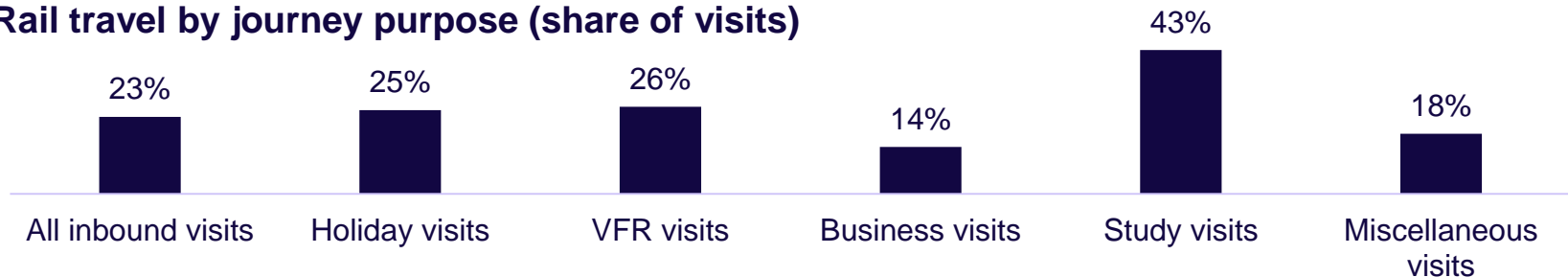
# Rail travel

In the last few years, about 7% of all inbound visits to the UK were by train (Eurostar). However, a larger proportion of inbound visits included a train journey in the UK. 9.1 million inbound visits included a train ride to go and explore outside a town or a city: 23% of inbound visits. This makes rail travel the third most used transport mode within the UK. Inbound study visits over-indexed with 43% including a train ride outside a town or a city.

Most inbound rail users also used some sort of urban public transport whilst in the UK (74%). Over a third of those visitors who used rail would also hop on a taxi and they also over-indexed on using Uber/another sharing app, a public bus/coach (outside town/city), a ferry/boat, or a domestic flight. Only 12% of those using rail travel did not take any other of those transport types during their UK visit.

Type of transport used in the UK alongside rail	Visit share using train outside town/city
Bus, tube, tram or metro train	74%
Taxi	37%
Uber or other sharing app	14%
Hired self-drive car/vehicle	4%
Public bus/coach (outside town/city)	10%
Private coach/minibus	2%
Ferry/boat	3%
Domestic flight	2%
Other car/vehicle you/group brought to the UK*	<1%
None of these	12%

## Rail travel by journey purpose (share of visits)



# Train (outside town/city)

Interestingly, those who used Eurostar services were less likely than the average inbound visitor to use train outside a town or a city whilst in the UK (12% vs 23%).

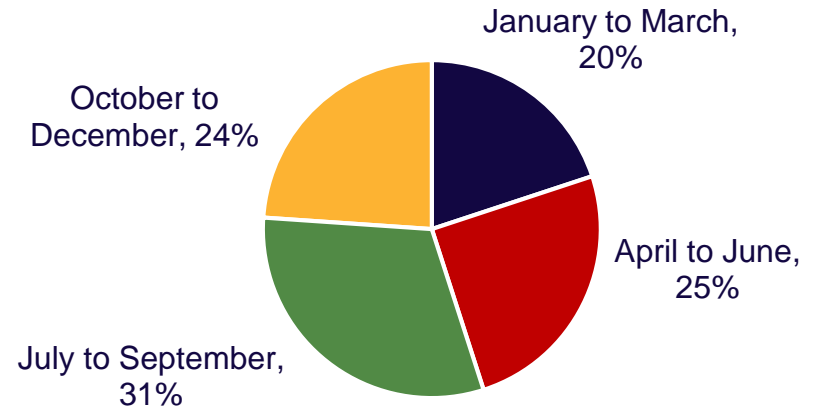
Overall, those using rail travel would stay slightly longer than the average inbound visitor: 31% stayed more than a week compared to 22% of all visits.

Women chose to hop on a train more than men: 26% vs 21%. 28% of 16-34 year-old visitors also used trains to go out of a city or town, more than the other age groups.

Visits made during the summer months saw a slight uptake on using trains compared to other quarters.

Looking at markets, USA, Spain, Germany, France and Italy comprised 40% of the volume of inbound visitors using trains. But it is more commonly used across long-distance visitor markets such as Argentina, New Zealand, Australia and Canada: between 36% and 38% of those visitors hopped on a train to go around. It is also quite popular across the Nordics.

## Seasonality by visits



Top 10 markets by volume	Visits (000)
USA	1,244
Spain	678
Germany	623
France	558
Italy	553
Irish Republic	520
Australia	385
Netherlands	328
Canada	311
China	251

Top 10 markets by propensity*	Share of visits
Argentina	38%
New Zealand	37%
Australia	37%
Canada	37%
Chile**	36%
Finland	35%
South Africa	34%
Norway	34%
Singapore	33%
Denmark	32%

Source: International Passenger Survey by the ONS, 2018; Base excludes N/A: 6,850 respondents;

\*Top 5 markets by propensity also excludes markets where sample size is under 30 respondents;

\*\*Low sample size, treat results with caution

## Rail travel – regional spread

This table looks at the share of visits by destination area mix that included at least one train journey outside a town or a city.

The more areas a visitor stayed in while in the UK, the more likely those visitors were to have hopped on a train. Those who stayed in three areas or more whilst they were in the UK were about twice as likely to have used trains to explore than the inbound average (46% vs 23% respectively).

Those who stayed only in London slightly over-indexed on rail use vs. anyone who stayed in just one area in the UK (24% vs 22% respectively); those who stayed in London and one other area in the UK over-indexed vs those who went to any two areas (54% vs 43% respectively).

Among those who stayed in only one area in the UK, hopping on a train to get out of a urban area was most common among those who stayed only in the North West, Yorkshire, or the South East (25% of each of those groups). Among those who stayed in two areas, those who stayed in London and another area were the most likely to do so (54%), followed by those who stayed in the North West and another area, as well as those who stayed in the East of England and another area (47% of each).

It was less likely for those who stayed in Scotland, North East, and West Midlands – on their own, or each with another area.

Use of rail travel, among visitors who stayed in:	Visit share
One area in the UK only	22%
Scotland only	17%
Wales only	20%
London only	24%
North East only	17%
North West only	25%
Yorkshire only	25%
West Midlands only	18%
East Midlands only	20%
East of England only	24%
South West only	20%
South East only	25%
Two areas in the UK (any)	43%
Scotland and 1 other	28%
Wales and 1 other	31%
London and 1 other	54%
North East and 1 other	31%
North West and 1 other	47%
Yorkshire and 1 other	39%
West Midlands and 1 other	27%
East Midlands and 1 other	36%
East of England only	47%
South West and 1 other	37%
South East and 1 other	36%
3+ areas in the UK (any)	46%
All UK inbound visits	23%

Source: International Passenger Survey by the ONS, 2018; Base excludes N/A; 33,081 respondents for all, 24,362 for all staying overnight in only one area only, 2,580 for all staying overnight in two regions, and 994 for all staying overnight in 3 or more regions; please note that respondents were asked separately what transport they used and where they stayed overnight in the UK – more on sample sizes in section 4 and how regional data work on slide 23.



## 4. Transport use within Britain: Regional analysis

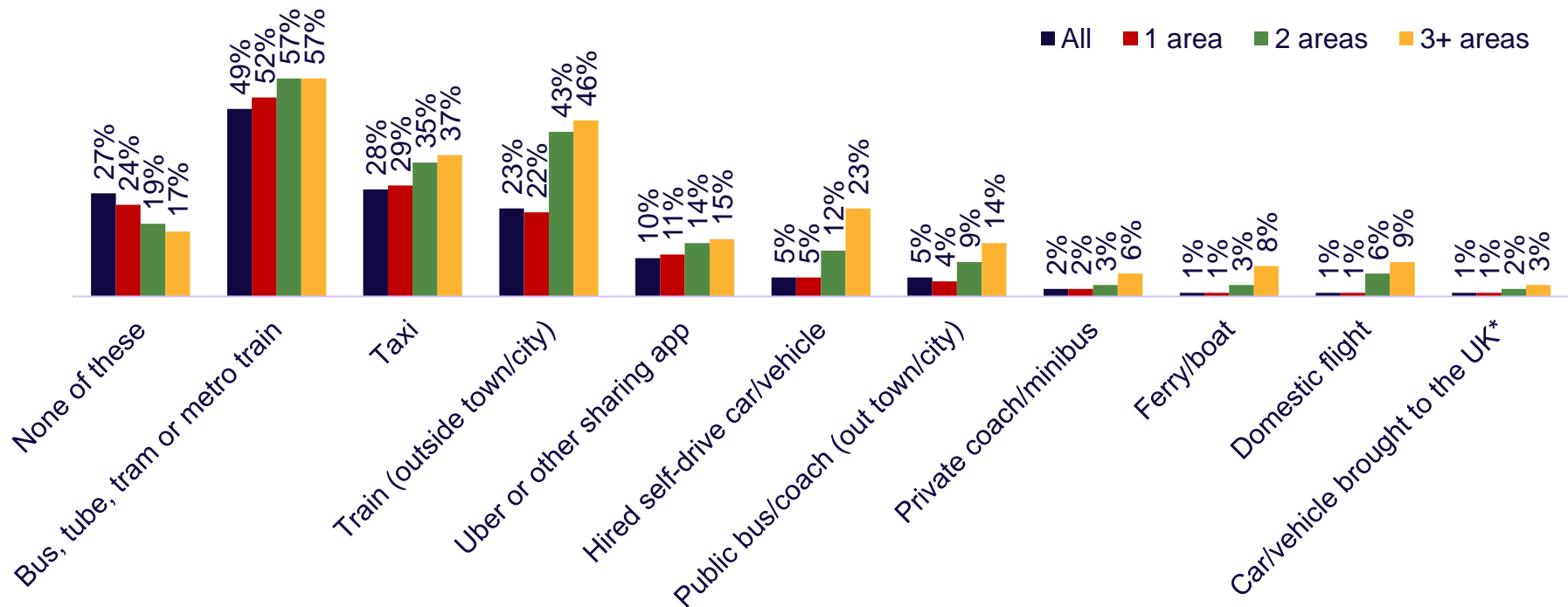
# Transport use within Britain: Regional analysis

How to understand these slides:

- While the International Passenger Survey asks where visitors stayed, and what modes of transport they used, the two questions are not linked; respondents are not asked in which region they used each mode of transport.
- The IPS specifically asks visitors to the UK where they stayed overnight. The regional data therefore does not include any areas visitors might have gone on day trips or whilst entering/exiting the UK. However, visitors can have answered about what modes of transport they used during their day trips. Visitors might also have used one of these modes of transport to get between the port of entry/exit and the region they were staying in.
- On slide 22 we have shown the transport use of visitors who stayed in one region/nation only. This gives us an understanding of what modes of transport were used within each region, with the above caveats of day trips and journeys to/from ports of entry/exit.
- Slides 23-35 show the transport use of visitors who stayed in two areas of the UK, with one summary slide and then slides focussing on each region/nation. Where sample size allows, we have also looked at particular region-pairs (e.g. those who stayed in South East and South West). We do not know whether modes of transport were used within, or between, each individual region/nation, or even on a day trip to another region/nation or in transit. However, the analysis gives us a more complete view of regional transport patterns than just looking at single-region visitors.

# Influence of number of regions/nations visited

There is a clear relationship between the number of regions visited whilst inbound visitors are in the UK and their propensity to use the internal modes of transport quoted below: the more regions they visited, the more likely they were to use at least one form of transport within the UK. This is true for all transport modes, but there is less difference between two and three or more regions for urban transport modes (public transport, taxi, or app services such as Uber). There is a big positive impact on use of trains, hired vehicle, public bus / coach, private coach / minibus, ferry/boat or domestic flights when several regions were visited.



Source: International Passenger Survey by the ONS, 2018; Base excludes N/A; 33,081 respondents for all, 24,362 for inbound visitors who stayed overnight in only one nation or one of the main UK regions, 2,580 for those stayed in two regions/nations, and 994 for those stayed in 3 or more regions/nations. \*most lorry drivers were not asked this question, and, as a consequence, are not taken into account in the results for 'Other car/vehicle you/group brought to the UK'



# Regional mix of internal transport modes amongst those staying in one region only

Looking at visitors who stayed in only one area, we can explore the differences in mode of transport used regionally. Obviously, taking the bus, tube, tram or metro train is more popular in the London area than in any other region, and so are Uber and other sharing apps. Scotland and the North East over-indexed for domestic flight use. Visitors using their own car to go around was more popular in Wales and the South West of England.

Only nation/region visited in the UK	Bus, tube, tram or metro train	Taxi	Train (outside town/city)	Uber or other sharing app	Hired self-drive car/vehicle	Public bus/coach (outside town/city)	Private coach/minibus	Ferry/boat	Domestic flight	Own car/vehicle	None of these
Scotland	42%	42%	17%	3%	11%	10%	3%	2%	4%	1%	19%
Wales	24%	19%	20%	2%	10%	6%	3%	2%	0%	5%	41%
London	71%	32%	24%	16%	2%	3%	2%	1%	0%	0%	11%
North East	31%	30%	17%	4%	8%	3%	0%	0%	4%	2%	41%
North West	31%	37%	25%	8%	8%	3%	2%	1%	2%	1%	29%
Yorkshire	26%	27%	25%	5%	10%	3%	1%	1%	1%	2%	36%
West Midlands	20%	26%	18%	7%	7%	4%	1%	0%	0%	2%	46%
East Midlands	29%	24%	20%	3%	9%	6%	1%	1%	0%	2%	40%
East of England	42%	22%	24%	4%	6%	5%	2%	0%	1%	2%	34%
South West	30%	18%	20%	4%	14%	8%	2%	1%	1%	4%	33%
South East	36%	26%	25%	6%	5%	5%	2%	2%	0%	2%	33%
All UK inbound visits	49%	28%	23%	10%	5%	5%	2%	1%	1%	1%	27%



Source: International Passenger Survey by the ONS, 2018; Base excludes N/A: 33,081 respondents for Total UK; regional data only includes visits to one area only: 1,532 for Scotland, 532 for Wales, 12,233 for London, 217 for North East, 1,809 for North West, 729 for Yorkshire, 991 for West Midlands, 470 for East Midlands, 795 for East of England, 1,510 for South West, 2,591 for South East  
 \*most lorry drivers were not asked this question, and, as a consequence, are not taken into account in the results for 'Other car/vehicle you/group brought to the UK'

# Regional mix of internal transport modes amongst those staying in two UK areas only

Inbound visitors who stayed in two regions in the UK tend to be more likely to use trains outside a town or city, to rent a self-drive car, or to hop on a domestic flight than the average inbound visitor to the UK. When those visitors visited Scotland and another area they were even more likely to take a domestic flight. Those who went to London and another area over indexed on using bus, tube, tram or train within a city or town.

Inbound visitors who visited two UK areas including...	Bus, tube, tram or metro train	Taxi	Train (outside town/city)	Uber or other sharing app	Hired self-drive car/vehicle	Public bus/coach (outside town/city)	Private coach/minibus	Ferry/boat	Domestic flight	Own car/vehicle	None of these
... Scotland	65%	45%	44%	12%	12%	11%	4%	6%	24%	0%	12%
... Wales	40%	29%	31%	11%	21%	9%	3%	1%	4%	5%	25%
... London	73%	44%	54%	20%	10%	11%	4%	3%	7%	1%	8%
... North West	46%	34%	47%	16%	11%	9%	4%	3%	3%	3%	21%
... North East	37%	30%	31%	10%	20%	7%	0%	7%	5%	3%	29%
... Yorkshire	43%	31%	39%	10%	18%	6%	1%	2%	2%	1%	28%
... West Midlands	33%	20%	27%	9%	15%	3%	2%	1%	0%	1%	40%
... East Midlands	44%	21%	36%	13%	13%	9%	1%	2%	0%	1%	30%
... East of England	58%	32%	47%	17%	13%	7%	1%	2%	2%	2%	20%
... South West	49%	27%	37%	7%	17%	6%	4%	3%	2%	5%	24%
... South East	55%	30%	36%	12%	10%	8%	3%	2%	2%	3%	22%
Any 2 UK areas	57%	35%	43%	14%	12%	9%	3%	3%	6%	2%	19%
All UK inbound visits	49%	28%	23%	10%	5%	5%	2%	1%	1%	1%	27%



Source: International Passenger Survey by the ONS, 2018; Base excludes N/A; 33,081 respondents for UK overall, 2,580 for inbound visitors who stayed overnight in two nations or main UK regions, 492 for those who visited two regions/nations including Scotland, 203 including London, 1,565 including London, 518 including North West, 94 including North East, 223 including Yorkshire, 282 including West Midlands, 163 including East Midlands, 277 including East of England, 513 including South West, and 779 including South East

# Internal transport modes between two regions: Scotland

Looking at inbound visitors who stayed in Scotland and another UK region or nation, there is a clear preference for hopping on a domestic flight, with about 1-in-4 visitors doing so. Close to two-in-three inbound visitors who stayed in two regions including Scotland visited London too. As a consequence, this group's pattern of transport use skewed the overall profile for transport use when visiting Scotland and another area in the UK. This explains why use of domestic flight, train, taxis and public transport over-index compared to the average inbound visitors to 2 UK nations or regions. However, people who only stayed in London and Scotland were not as likely as those who stayed in Scotland and another UK region to have rented a car or another vehicle, or to have gone around in a private coach or minibus. Overall, those visiting Scotland as part of a two-region trip were twice as likely to use a boat or ferry than two-region visitors who did not visit Scotland.

Type of transport used in...	UK overall	Any 2 UK nations/regions	2 areas including Scotland	Scotland & London	Scotland & North West
Bus, tube, tram or metro train	49%	57%	65%	75%	48%
Taxi	28%	35%	45%	50%	28%
Train (outside town/city)	23%	43%	44%	50%	46%
Uber or other sharing app	10%	14%	12%	15%	5%
Hired self-drive car/vehicle	5%	12%	12%	9%	17%
Public bus/coach (outside town/city)	5%	9%	12%	13%	6%
Private coach/minibus	2%	3%	4%	4%	7%
Ferry/boat	1%	3%	6%	5%	2%
Domestic flight	1%	6%	24%	30%	3%
Other car/vehicle brought to the UK	1%	2%	0%	0%	0%
None of these	27%	19%	12%	7%	16%



Source: International Passenger Survey by the ONS, 2018; Base excludes N/A; 33,081 respondents for UK overall, 2,580 for inbound visitors who stayed overnight in two nations or main UK regions, 492 for those who visited two regions/nations including Scotland, 296 for those visiting only Scotland and London, 64 for those visiting Scotland & the North West

# Internal transport modes between two regions: Wales

Looking at visitors who stayed in Wales and another area in the UK, they only over-indexed on hiring a vehicle and on travelling in their own vehicle compared to other visitors who stayed in two UK nations or regions. Only around 3-in-10 of those who stayed in Wales on a two-region trip visited Wales and London. Those who did over-index clearly on using metropolitan transport solutions such as bus, tube, tram or metro train, taxi or using a Uber-like service. The train journey between London and Wales can be a short journey so it is no surprise that people who visited only those two regions over-indexed on train use outside of town / city compared to the average for a two-region trip that includes Wales. The former were also more likely to hop on a public bus or coach than to hire a vehicle.

Type of transport used in...	UK overall	Any 2 UK nations/ regions	2 areas including Wales	Wales & London
Bus, tube, tram or metro train	49%	57%	40%	71%
Taxi	28%	35%	29%	43%
Train (outside town/city)	23%	43%	31%	43%
Uber or other sharing app	10%	14%	11%	15%
Hired self-drive car/vehicle	5%	12%	21%	18%
Public bus/coach (outside town/city)	5%	9%	9%	20%
Private coach/minibus	2%	3%	3%	6%
Ferry/boat	1%	3%	1%	1%
Domestic flight	1%	6%	4%	4%
Other car/vehicle brought to the UK	1%	2%	5%	1%
None of these	27%	19%	25%	9%



Source: International Passenger Survey by the ONS, 2018; Base excludes N/A; 33,081 respondents for UK overall, 2,580 for inbound visitors who stayed overnight in two nations or main UK regions, 203 for those who visited two regions/nations including Wales, 66 for those visiting only Wales and London

# Internal transport modes between two regions: London (1/2)

Type of transport used in...	UK overall	Any 2 nations/ regions	2 areas inc. London	London & Scotland	London & Wales	London & North West	London & Yorkshire	London & West Midlands	London & East of England	London & South West	London & South East
Bus, tube, tram or metro train	49%	57%	73%	75%	71%	63%	80%	54%	83%	77%	74%
Taxi	28%	35%	44%	50%	43%	42%	54%	28%	44%	45%	46%
Train (outside town/city)	23%	43%	54%	50%	43%	64%	67%	41%	68%	60%	47%
Uber or other sharing app	10%	14%	20%	15%	15%	26%	19%	13%	28%	15%	19%
Hired self-drive car/vehicle	5%	12%	10%	9%	18%	5%	9%	9%	5%	17%	10%
Public bus/coach (outside town/city)	5%	9%	11%	13%	20%	12%	11%	4%	10%	10%	13%
Private coach/minibus	2%	3%	4%	4%	6%	5%	4%	1%	1%	6%	4%
Ferry/boat	1%	3%	3%	5%	1%	3%	<1%	1%	2%	6%	2%
Domestic flight	1%	6%	7%	30%	4%	4%	7%	0%	2%	1%	<1%
Other car/vehicle brought to the UK	1%	2%	1%	<1%	1%	<1%	2%	0%	2%	4%	<1%
None of these	27%	19%	8%	7%	9%	8%	1%	29%	5%	5%	8%

Source: International Passenger Survey by the ONS, 2018; Base excludes N/A; 33,081 respondents for UK overall, 2,580 for inbound visitors who stayed overnight in two nations or main UK regions, 1,565 for those who visited two nations including London, and for London and Scotland 296, and Wales 66, and North West 199, and Yorkshire 56, and West Midlands 101, and East of England 149, and South West 217, and South East 392

# Internal transport modes between two regions: London (2/2)

Overall, inbound visitors who stayed in London and one other destination in the UK were more likely than other visitors on a dual-destination trip in the UK to have taken some form of metropolitan transport mode: public transport such as bus, tube, tram or metro train (73% vs 57%), taxis (44% vs 35%) or other car services such as Uber or other sharing apps (20% vs 14%). They were also more likely than the other dual-destination visitors to have taken a train outside a city or town (54% vs 43%). Differences are more minor for other transport use.

Looking at those who stayed in London and another specific area:

- Those who went to London and the West Midlands were the least likely to have used taxis, on par with the overall average use of taxis by all inbound visitors, no matter how many regions they visited. They were also the least likely to have used any of the proposed transport modes.
- Those who went to London and Wales were twice as likely to have hired a car or another vehicle than other inbound visitors who have been to London and another region.
- However, those who went to London and the South West were almost as likely to do so. Visitors were more likely to use a vehicle they brought to the UK with them when visiting London and the South West than any other London+ visitors.
- Those who have been to London and the East of England, London and Yorkshire, London and the North West or London and the South West were clearly most likely to use trains outside of town / city than any other London+ inbound visitors.
- Given the distance between London and Scotland, it is no surprise that this combination of destinations would see visitors most likely to have used a domestic flight than any other combinations including London (30% vs 7% on average).
- Ferry or boat rides were also more popular on dual trips to London and Scotland or London and the South West, which is no surprise as those areas are getaways to the Scilly islands or the Scottish isles respectively.



Source: International Passenger Survey by the ONS, 2018; Base excludes N/A; 33,081 respondents for UK overall, 2,580 for inbound visitors who stayed overnight in two nations or main UK regions, 1,565 for those who visited two regions including London, for London and Scotland 296, and Wales 66, and North West 199, and Yorkshire 56, and West Midlands 101, and East of England 149, and South West 217, and South East 392

# Internal transport modes between two regions: North West

Overall, visitors who stayed in the North West and one other region were more likely than other dual-destination trippers to hop on a train outside a town / city. They were also slightly more likely to have used Uber or another sharing app, or hopped on a public bus / coach outside town / city. However, there were half as likely to have hopped on a domestic flight than the average dual-destination UK-inbound visitor.

Transport uses varied quite a lot depending on what other area of the UK was visited with the North West. Those who visited NW and London comprised 2-in-5 of the North West+ visitors; **they were more likely to use metropolitan transport modes, taxis, Uber or similar, and trains, but less likely to use their own vehicle**, especially compared to those who visited the North West and Yorkshire (5% vs 25% respectively). Those who visited the North West and Scotland were less likely than others to use services like Uber.

Type of transport used in...	UK overall	Any 2 UK nations/ regions	2 areas inc. North West	North West & Scotland	North West & London	North West & Yorkshire
Bus, tube, tram or metro train	49%	57%	46%	48%	63%	29%
Taxi	28%	35%	34%	28%	42%	34%
Train (outside town/city)	23%	43%	47%	46%	64%	30%
Uber or other sharing app	10%	14%	16%	5%	26%	10%
Hired self-drive car/vehicle	5%	12%	11%	17%	5%	25%
Public bus/coach (outside town/city)	5%	9%	9%	6%	12%	3%
Private coach/minibus	2%	3%	4%	7%	5%	1%
Ferry/boat	1%	3%	3%	2%	3%	4%
Domestic flight	1%	6%	3%	3%	4%	0%
Other car/vehicle brought to the UK	1%	2%	3%	0%	<1%	0%
None of these	27%	19%	21%	16%	8%	29%



Source: International Passenger Survey by the ONS, 2018; Base excludes N/A; 33,081 respondents for UK overall, 2,580 for inbound visitors who stayed overnight in two nations or main UK regions, 518 for those who visited two regions including the North West, and for the North West and Scotland 64, and London 199, and Yorkshire 66

# Internal transport modes between two regions: North East

Visitors who stayed in the North East and one other region or nation in the UK were less likely to use the most common internal transport modes than the other dual-destination trippers. However, 1-in-5 of them hired a self-drive vehicle, more than the 12% across all dual-destination visitors. They were also twice as likely to hop on a ferry or a boat, and slightly more likely than the average dual-destination visitor to have used their own vehicle brought to the UK. Virtually none of them used a private coach or minibus. A higher than usual proportion of those who visited two UK areas including the North East did not use any of those transport modes (29% vs 19%), although this was about as many as the overall average inbound visitor.

Type of transport used in...	UK overall	Any 2 UK nations/regions	2 areas including N. East
Bus, tube, tram or metro train	49%	57%	37%
Taxi	28%	35%	30%
Train (outside town/city)	23%	43%	31%
Uber or other sharing app	10%	14%	10%
Hired self-drive car/vehicle	5%	12%	20%
Public bus/coach (outside town/city)	5%	9%	7%
Private coach/minibus	2%	3%	0%
Ferry/boat	1%	3%	7%
Domestic flight	1%	6%	5%
Other car/vehicle brought to the UK	1%	2%	3%
None of these	27%	19%	29%



Source: International Passenger Survey by the ONS, 2018; Base excludes N/A; 33,081 respondents for UK overall, 2,580 for inbound visitors who stayed overnight in two nations or main UK regions, 94 for those who visited two regions including the North East



# Internal transport modes between two regions: Yorkshire

Inbound visitors who stayed in Yorkshire and one other area in the UK were, in general, less likely than the average inbound dual-destination visitor to have use any of the proposed transport modes whilst in the UK. However, 18% of them hired a self-drive vehicle, more than the 12% across all dual-destination trippers. About a quarter of those who stayed in Yorkshire and one other region went to London, and about a similar share went to the North West. Most of those who visited Yorkshire and London used some form of transport, but about 3-in-10 of those who only went to the neighbouring regions Yorkshire and the North West during their stay in the UK did not use any of the proposed transport modes. The latter were also much more likely to hire a self-drive vehicle (25% vs 9%). Those who also visited London were overall more likely to hop on a domestic flight (7%) or use a train to get outside a city or town, taxis, public transport, or even a Uber or another sharing app transport service.

Type of transport used in...	UK overall	Any 2 UK nations/regions	2 areas including Yorkshire	Yorkshire & London	Yorkshire & North West
Bus, tube, tram or metro train	49%	57%	43%	80%	29%
Taxi	28%	35%	31%	54%	34%
Train (outside town/city)	23%	43%	39%	67%	30%
Uber or other sharing app	10%	14%	10%	19%	10%
Hired self-drive car/vehicle	5%	12%	18%	9%	25%
Public bus/coach (outside town/city)	5%	9%	6%	11%	3%
Private coach/minibus	2%	3%	1%	4%	1%
Ferry/boat	1%	3%	2%	<1%	4%
Domestic flight	1%	6%	2%	7%	0%
Other car/vehicle brought to the UK	1%	2%	1%	2%	0%
None of these	27%	19%	28%	1%	29%



Source: International Passenger Survey by the ONS, 2018; Base excludes N/A; 33,081 respondents for UK overall, 2,580 for inbound visitors who stayed overnight in two nations or main UK regions, 223 for those who visited two regions including Yorkshire, and for Yorkshire and London 56, and the North West 66

# Internal transport modes between two regions: West Midlands

A third of inbound visitors who stayed in the West Midlands and one other area of the UK also stayed in London. Those visitors were more likely than other dual-destination travellers staying in the West Midlands to use a bus, the tube, a tram or a metro train, a taxi, a Uber-like service, or a train (outside town / city). Apart from driving a hired car / vehicle, those visiting the West Midlands and another area were less likely to have used some sort of transport than the average dual-destination visitor. In fact, 2-in-5 of those visitors who went to the West Midlands and somewhere else in the UK did not use any of the listed transport modes.

Type of transport used in...	UK overall	Any 2 UK nations/ regions	2 areas inc. West Midlands	West Midlands & London
Bus, tube, tram or metro train	49%	57%	33%	54%
Taxi	28%	35%	20%	28%
Train (outside town/city)	23%	43%	27%	41%
Uber or other sharing app	10%	14%	9%	13%
Hired self-drive car/vehicle	5%	12%	15%	9%
Public bus/coach (outside town/city)	5%	9%	3%	4%
Private coach/minibus	2%	3%	2%	1%
Ferry/boat	1%	3%	1%	1%
Domestic flight	1%	6%	<1%	0%
Other car/vehicle brought to the UK	1%	2%	1%	0%
None of these	27%	19%	40%	29%



Source: International Passenger Survey by the ONS, 2018; Base excludes N/A; 33,081 respondents for UK overall, 2,580 for inbound visitors who stayed overnight in two nations or main UK regions, 282 for those who visited two regions including the West Midlands, and for the West Midlands and London 101

# Internal transport modes between two regions: East Midlands

Visitors who stayed in the East Midlands and one other area in the UK were about as likely as the average dual-destination visitor to use most transport modes, such as Uber (or another sharing app), hired self-drive vehicles, public buses or coaches (outside town / city), ferries or boats or another vehicle they might have brought to the UK with them. However, they were less likely than average to have used urban public transport such as bus, tube, tram or metro train. They were also less likely to hop on a taxi or a train (outside town / city). Virtually none of the visitors to the East Midlands and one other UK area took a domestic flight. 3-in-10 of those visitors did not use any of the proposed transport modes.

Type of transport used in...	UK overall	Any 2 UK nations/ regions	2 areas inc. East Midlands
Bus, tube, tram or metro train	49%	57%	44%
Taxi	28%	35%	21%
Train (outside town/city)	23%	43%	36%
Uber or other sharing app	10%	14%	13%
Hired self-drive car/vehicle	5%	12%	13%
Public bus/coach (outside town/city)	5%	9%	9%
Private coach/minibus	2%	3%	1%
Ferry/boat	1%	3%	2%
Domestic flight	1%	6%	0%
Other car/vehicle brought to the UK	1%	2%	1%
None of these	27%	19%	30%



Source: International Passenger Survey by the ONS, 2018; Base excludes N/A; 33,081 respondents for UK overall, 2,580 for inbound visitors who stayed overnight in two nations or main UK regions, 163 for those who visited two regions including the East Midlands

# Internal transport modes between two regions: East of England

Those who stayed in the East of England and another area in the UK had a very similar profile to the average inbound visitor who stayed in any two UK areas. However, they were less likely to have hopped on a domestic flight. Over half of those two-region visitors to the East of England went to London as the other visited area in the UK. Those visitors who both went to the East of England and London were most likely to use urban public transport as well as a train out of a town or city, most probably to get between London and the East of England, with 83% and 68% of those visitors doing so respectively. Those visitors who also went to London clearly skewed the average up for propensity to use those transport modes among all dual-destination visitors including a stay in the East of England.

Type of transport used in...	UK overall	Any 2 UK nations/ regions	2 areas inc. East of England	East of England & London
Bus, tube, tram or metro train	49%	57%	58%	83%
Taxi	28%	35%	32%	44%
Train (outside town/city)	23%	43%	47%	68%
Uber or other sharing app	10%	14%	17%	28%
Hired self-drive car/vehicle	5%	12%	13%	5%
Public bus/coach (outside town/city)	5%	9%	7%	10%
Private coach/minibus	2%	3%	1%	1%
Ferry/boat	1%	3%	2%	2%
Domestic flight	1%	6%	2%	2%
Other car/vehicle brought to the UK	1%	2%	2%	2%
None of these	27%	19%	20%	5%



Source: International Passenger Survey by the ONS, 2018; Base excludes N/A; 33,081 respondents for UK overall, 2,580 for inbound visitors who stayed overnight in two nations or main UK regions, 277 for those who visited two regions including the East of England, and for the East of England and London 149

# Internal transport modes between two regions: South West

Visitors who stayed in two areas in the UK including the South West were less likely to use most of these listed transport modes than the average dual-destination visitor. They were, however, more likely to hire a vehicle they could drive themselves, and about on par to hop on a private coach or minibus, or a ferry or boat. However, the profile of transport use changed quite a lot depending on the second region visited in addition to the South West. Those who visited SW and London represented 38% of the South West+ visitors, and those who stayed in the SW and in the South East represented an additional 34%. Overall, the former were much more likely than the latter to have used one of the proposed transport form at least.

Type of transport used in...	UK overall	Any 2 UK nations/ regions	2 areas inc. South West	South West & London	South West & South East
Bus, tube, tram or metro train	49%	57%	49%	77%	32%
Taxi	28%	35%	27%	45%	10%
Train (outside town/city)	23%	43%	37%	60%	23%
Uber or other sharing app	10%	14%	7%	15%	1%
Hired self-drive car/vehicle	5%	12%	17%	17%	10%
Public bus/coach (outside town/city)	5%	9%	6%	10%	2%
Private coach/minibus	2%	3%	4%	6%	4%
Ferry/boat	1%	3%	3%	6%	3%
Domestic flight	1%	6%	2%	1%	0%
Other car/vehicle brought to the UK	1%	2%	5%	4%	7%
None of these	27%	19%	24%	5%	39%



Source: International Passenger Survey by the ONS, 2018; Base excludes N/A; 33,081 respondents for UK overall, 2,580 for inbound visitors who stayed overnight in two nations or main UK regions, 513 for those who visited two regions including the South West, and for the South West and London 217, and the South East 157

# Internal transport modes between two regions: South East

The most common paired destination for those staying in the South East and one other region was London with 47% of South East+ visits. The duo South East and South West comprised an additional 20% of these visits. Overall, dual-destination visits including the South East have a similar transport use profile than the average dual-destination visitor. However, there were some differences looking at what other area was visited.

Visitors to the South East and London were over twice as likely to have taken some type of urban public transport, a taxi or a train outside the city or town than those who stayed in the South East and South West. Only 1% of the latter group used Uber-like services against about 1-in-5 visitors to London and the South East. Both groups were similarly likely to hire a vehicle to drive but those staying the South West and the South East were more likely to get around in a car they brought to the UK than those staying in London and the South East.

Type of transport used in...	UK overall	Any 2 UK nations/ regions	2 areas inc. South East	South East & London	South East & South West
Bus, tube, tram or metro train	49%	57%	55%	74%	32%
Taxi	28%	35%	30%	46%	10%
Train (outside town/city)	23%	43%	36%	47%	23%
Uber or other sharing app	10%	14%	12%	19%	1%
Hired self-drive car/vehicle	5%	12%	10%	10%	10%
Public bus/coach (outside town/city)	5%	9%	8%	13%	2%
Private coach/minibus	2%	3%	3%	4%	4%
Ferry/boat	1%	3%	2%	2%	3%
Domestic flight	1%	6%	2%	<1%	0%
Other car/vehicle brought to the UK	1%	2%	3%	<1%	7%
None of these	27%	19%	22%	8%	39%



Source: International Passenger Survey by the ONS, 2018; Base excludes N/A; 33,081 respondents for UK overall, 2,580 for inbound visitors who stayed overnight in two nations or main UK regions, 779 for those who visited two regions including the South East, and for the South East and London 392, and the South West 157



## 5. Summary per transport type

(Other than rail – covered in Section 3)

# Bus, tube, tram or metro train

Overall, taking the bus, tube, tram or metro is the most popular mode of transport for inbound visitors once they are in the UK: 49% of inbound visitors (19.6 million) use them. It is even more popular among student visitors (72%).

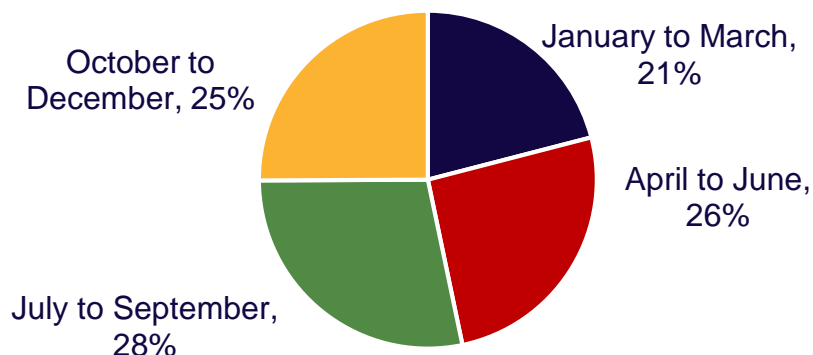
Unsurprisingly, this proportion is even higher among visitors who stayed in London, with 7-in-10 of those who only stayed in London using this mode. However, only about 2-in-10 visitors who stayed only in Wales or the West Midlands used such transport modes.

Women and 16-34 year-olds tend to use this mode of transport more than average.

Q3 (July to September) is the leading quarter for visits that include use of urban public transport (28%), followed by the shoulder seasons (about a quarter each). Only about 1-in-5 visits in the winter months (January to March) included use of one of those transport modes.

In volume, the USA and some main EU markets dominate the top 5 markets for using a bus, tube, tram or metro whilst in the UK: USA, France, Germany, Spain and Italy. Emerging markets have a higher propensity to use these modes of transport, with Argentina, Brazil, Thailand, Indonesia\* and Chile\* more likely to do so.

Seasonality by visits



Top 5 markets by volume	Visits (000)
USA	2,499
France	1,799
Germany	1,477
Spain	1,166
Italy	1,070

Top 5 markets by propensity	Share of visits
Argentina	77%
Brazil	73%
Thailand	72%
Indonesia*	71%
Chile*	69%



# Taxi

Overall, 28% of inbound visits included a taxi ride – that is to say 11.2 million inbound visits. Taxis are the most popular mode of transport used by business visitors (37%).

Taking a cab was the most popular among visitors who only stayed in Scotland (42% using one at least), followed by those who only visited the North West, London or the North East (with 30% or more including a taxi ride).

Looking at dual-destination visitors, those who stopped in Scotland and/or London over-indexed on likelihood to ride a cab.

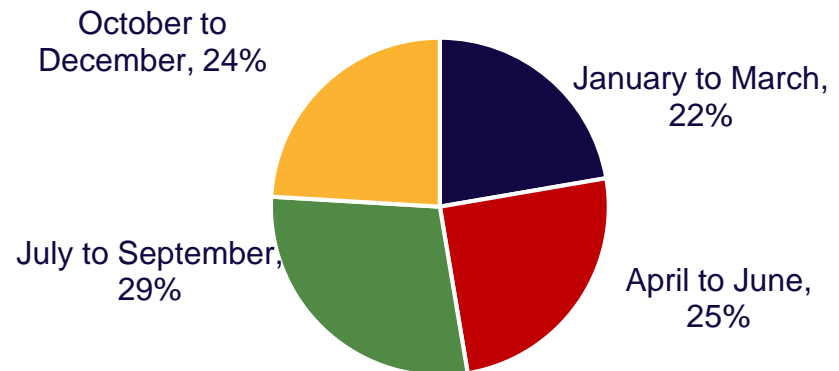
Looking at demographics, hopping on a cab is slightly less popular among the 0-15 year-old age group with only 19% of those visitors using them whilst in the UK.

Use of taxis follows a similar pattern than overall visits for seasonality.

Top visitor markets using taxis are again the same as the top visitors to the UK by volume. The top five markets comprise 42% of all inbound visitors using a taxi.

However, Gulf markets have a higher propensity to use taxis than other markets.

## Seasonality by visits



Top 5 markets by volume	Visits (000)
USA	1,798
Irish Republic	771
France	759
Germany	747
Spain	596

Top 5 markets by propensity	Share of visits
Kuwait	66%
Qatar	56%
Oman*	56%
Bahrain*	54%
Saudi Arabia	53%

# Uber or other sharing app

Uber and other car sharing apps were used during 4.1 million inbound visits to the UK, 10% of all inbound visits.

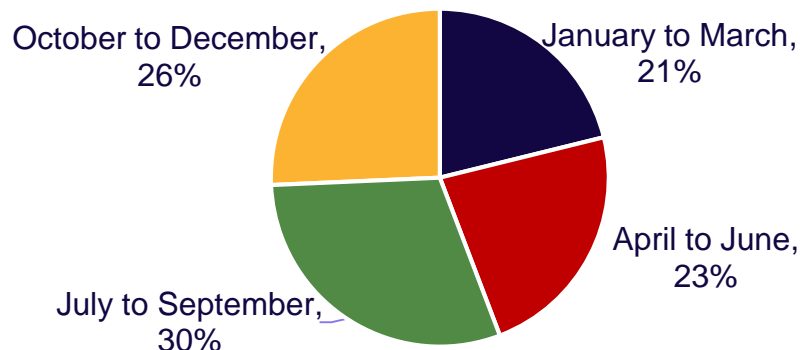
This share was highest among those staying only in London (16%), but much lower at 2% among those who visited only Wales and 3% of those who stayed in Scotland only. Those who stayed in two areas including the South West were less than half as likely than the average dual-destination visitor (7% vs 14% respectively).

This transport mode is less popular for the 0-15 year-olds and the 55+ year-old age groups.

Looking at seasonality, volume of users under index in the spring (April to June): 23% of visitors using Uber or other sharing apps visited during that time, compared to 26% of all visits during those months.

The USA and the main European markets listed here comprise 41% of inbound visitors using this mode. However, Gulf markets make up most of the top 5 by likelihood to use this sort of transport services: 2- to 3-in-10 visitors from Brazil, Saudi Arabia, Hong Kong, Kuwait and Bahrain\* used this transport option during their UK visit.

Seasonality by visits



Top 5 markets by volume	Visits (000)
USA	883
France	276
Italy	169
Spain	165
Germany	164

Top 5 markets by propensity	Share of visits
Brazil	32%
Saudi Arabia	26%
Hong Kong	23%
Kuwait	22%
Bahrain*	21%

# Hired self-drive car/vehicle

In 2018, 2.1 million inbound visits included hiring a self-drive car or other vehicle. This represented about 5% of visitors.

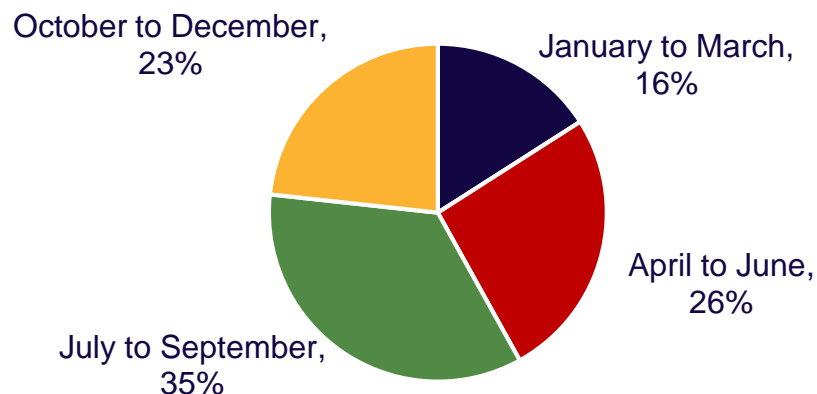
Hiring a vehicle was even more popular among inbound visitors visiting friends or relatives in the UK: 7% of them did so on average. However, it is more uncommon for student visitors or those visiting for miscellaneous purposes to do so. The 16-34 year-old group was also less likely to have access to a hired vehicle (3%).

With access to a good public transport network, visitors who only stayed in London were less likely to hire a vehicle – only 2%. However, 14% of those who stayed exclusively in the South West did hire a vehicle to explore more freely. It was also more popular among those staying only in Scotland, Yorkshire, or Wales. 23% of those who visited 3+ areas in the UK hired a vehicle.

Over a third of visits that included hiring a self-drive vehicle happened during the summer months, whilst only 16% were in Jan – March.

Australia ranks 3<sup>rd</sup> in volume of self-drive vehicle users, and 4<sup>th</sup> by propensity to hire a car whilst in the UK, the only market in both top 5 rankings.

Seasonality by visits



Top 5 markets by volume	Visits (000)
USA	334
Germany	179
Australia	167
Irish Republic	151
France	147

Top 5 markets by propensity	Share of visits
Qatar	21%
New Zealand	20%
Bahrain*	18%
Australia	16%
Hong Kong	12%

## Public bus/coach (outside town/city)

Close to 2.0 million inbound visitors said their visit to the UK included a journey in a public bus or coach outside a city or town. It represents 5% of all inbound visits, but 20% of all inbound study visits.

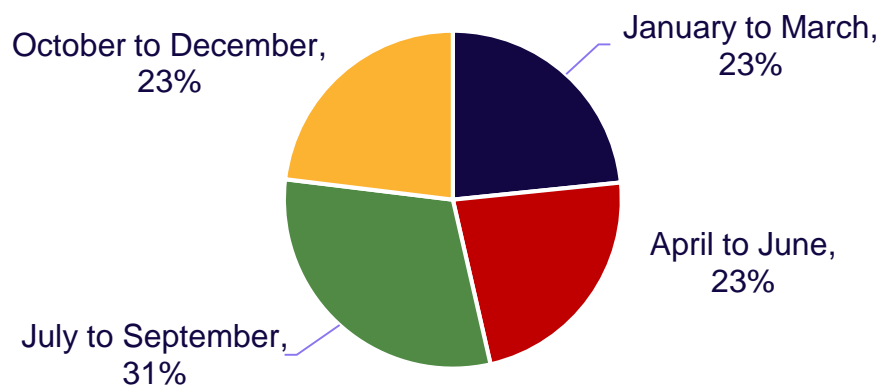
This popularity among study visitors might also explain why this transport mode also slightly over-indexes among 16-34 year-old inbound visitors (7% of them). Looking at demographics, public coaches or buses outside towns and cities were also slightly more popular amongst women than men (6% vs 4%).

10% of all inbound visitors who remained in Scotland during their stay in the UK used them, and 8% of those who stayed only in the South West.

There were slightly more visits including this mode of transport in the summer than in the other quarters.

The European inbound markets shown here and the USA comprised a large share of the volume of inbound visitors using this mode (39%). They are also quite popular around some long-haul markets: Brazil, Israel, South Africa and Canada.

Seasonality by visits



Top 5 markets by volume	Visits (000)
USA	272
France	135
Italy	134
Spain	120
Germany	116

Top 5 markets by propensity	Share of visits
Slovakia*	14%
Brazil	11%
Israel	10%
South Africa	10%
Canada	9%

# Private coach/minibus

2% of inbound visitors (887,000) used a private coach or minibus to go around the UK.

It was slightly more popular among holiday visitors and those coming to the UK for miscellaneous purposes (3% and 4% respectively). It was even more popular among student visitors (6%).

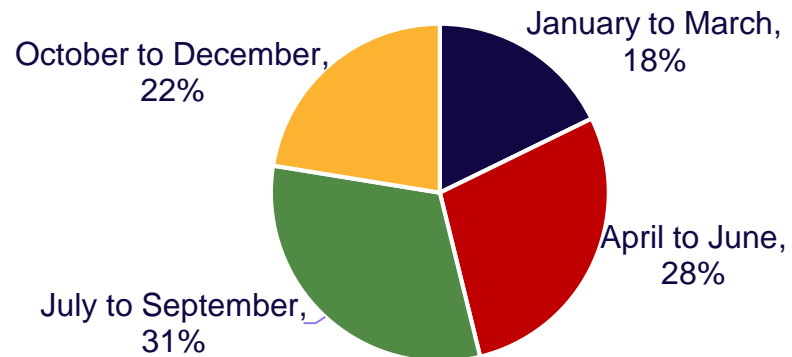
Those departing the UK by sea over-indexed on the overall average. It was also most popular for those who only stayed in Scotland and Wales (3% each)

Looking at those visitors who chose to travel within the UK in a private coach or minibus, most of their visits to the UK were made in summer (3-in-10), closely followed by April-June (28%).

There were only 22% visiting between October and December, and even fewer in the first quarter of the year (18%).

The top 5 markets by volume (USA, France, the Netherlands, China and Germany) comprised 44% of inbound visits using this type of transport. However, China was the only market making it into the top 5 by volume and by propensity for using this transport mode. More visitors whose trip to the UK was a package also used a private coach or minibus to explore (9%).

Seasonality by visits



Top 5 markets by volume	Visits (000)
USA	162
France	70
Netherlands	56
China	52
Germany	49

Top 5 markets by propensity	Share of visits
Malaysia	6%
China	6%
Taiwan*	5%
India	5%
Malta*	5%

Source: International Passenger Survey by the ONS, 2018; Base excludes N/A: 812 respondents

\*Low sample size, treat results with caution

# Ferry/boat

Only 1% of inbound visitors used a boat or a ferry as a means of transport *during* their stay in the UK, though this still represented 562,000 inbound visitors.

Waterway travels were slightly more popular within holiday (2%) and student visits (3%).

The younger (0-15 years old) and the older age group (55+ years old) were also a little more likely to use such modes of transport.

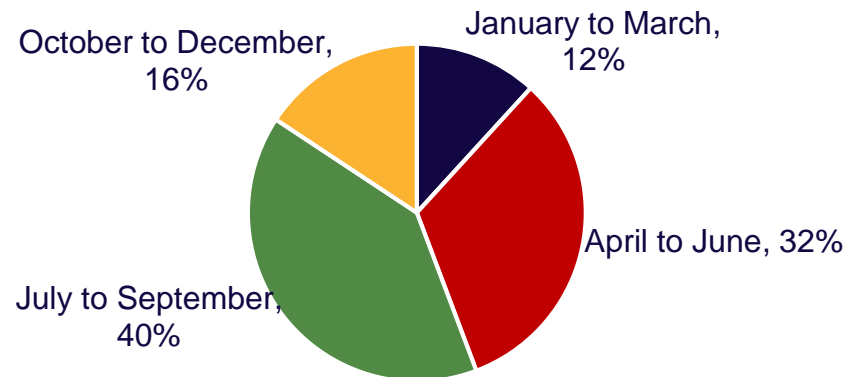
Visitors using ferries and boats in the UK were more likely than average to stay longer. 26% spent 8-14 nights, and 18% spent 15 nights or more.

Looking at where those ferry or boat trip were made, there are some differences. Those staying only in Scotland, in Wales, or in the South East used them more than the all-inbound average visitors.

With some ferry and boat services interrupted in the colder months, it is no surprise than almost 3-in-4 visits including a boat or ferry trip happen between April and September.

The top 5 markets by volume represented about half of visitors using this type of transport.

## Seasonality by visits



Top 5 markets by volume	Visits (000)
USA	92
Australia	59
Germany	48
Netherlands	39
France	38

Top 5 markets by propensity*	Share of visits
Luxembourg**	6%
Australia	6%
New Zealand	5%
Argentina	5%
South Korea	4%

Source: International Passenger Survey by the ONS, 2018; Base excludes N/A: 476 respondents;

\*Top 5 markets by propensity also exclude markets where sample size is under 30 respondents;

\*\*Low sample size, treat results with caution

# Domestic flight

1% of inbound visitors to the UK took a domestic flight during their visit: this translated to 554,000 inbound visits in 2018.

Looking at demographics, the propensity to take a flight within the UK was similar by age and gender.

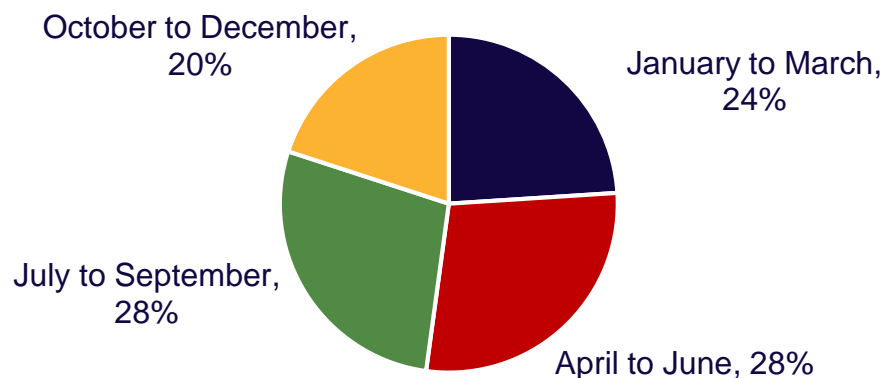
Students tend to stay longer in the UK on average. Up to 4% of them took a domestic flight.

Looking at inbound visitors who hopped on a flight to explore the UK, 24% of them spent over 2 weeks there, and 32% stayed between 8 and 14 nights. This over-indexes on the average length of stay for all inbound visitors. Most of those getting onto a domestic flight are visiting in spring and summer (56%).

Looking at regional differences, 4% of those who only stayed in the North East and of those who only stayed in Scotland had taken a domestic flight. Those who visited Scotland and one other area over-indexed on domestic flight use.

The top 4 markets by both propensity and volume are long-haul markets.

## Seasonality by visits



Top 5 markets by volume	Visits (000)
USA	119
Australia	47
Canada*	30
China*	30
France*	23

Top 5 markets by propensity	Share of visits
Chile*	8%
Singapore	7%
Taiwan*	6%
Thailand	6%
Iceland	5%

# Other car/vehicle that was brought to the UK\*

About 433,000 inbound visits involved using a car or vehicle that the visitor or their group brought to the UK, representing about 1% of inbound visits.

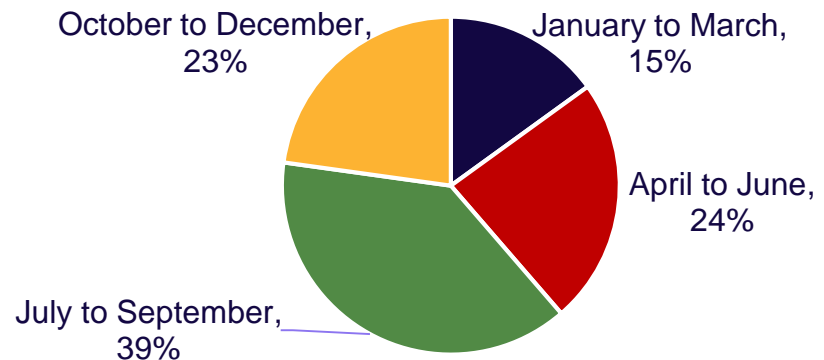
Business visitors were less likely than other visitors to have used this mode of transport whilst in the UK.

Close to 2-in-5 visits that included a car to get around happened in the summer.

This transport mode was particularly popular among those staying in Wales only or the South West only (5% and 4% respectively).

Visitors aged 55+ were also slightly more likely to use their own vehicle around in the UK. And those departing by sea also over-indexed on this too, especially as ferries offer more routes where travellers can bring their vehicle to the UK. This may also explain the top 5 markets by volume and propensity, all European markets. Those coming and using their vehicle to the UK were more likely to come for a nil-night visit than any other internal modes of transport, and half stayed 1 to 7 nights.

Seasonality by visits



Top 5 markets by volume	Visits (000)
Irish Republic	107
Netherlands	76
Germany	66
France	43
Belgium**	22

Top 5 markets by propensity	Share of visits
Netherlands	4%
Irish Republic	4%
Russia	2%
Germany	2%
Belgium	2%

Source: International Passenger Survey by the ONS, 2018; Base excludes N/A: 379 respondents

\*most lorry drivers were not asked this question, and, as a consequence, are not taken into account in the results for 'Other car/vehicle you/group brought to the UK'; \*\*Low sample size, treat results with caution





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