

Inbound visitors to the UK with a health condition or impairment

Source: International Passenger Survey 2023

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Woman sitting in a wheelchair cycle outside wooden hut, Devon, England.
©VisitBritain/AccessOutdoorGuide



Background

Background, question text

This report is based on questions VisitBritain sponsored in 2023 on the International Passenger Survey run by the Office for National Statistics.

Every year, VisitBritain sponsors a number of questions to gain a better understanding of specific areas of Britain inbound visits. This survey is conducted at dozens of ports of exit from the UK (air, sea and tunnel).

In 2023, VisitBritain asked questions focussed on inbound **‘visits with impairments’ (= visits by those with a long-term health condition or an impairment, or, by those accompanying someone with a long-term health condition or an impairment on a UK inbound visit, i.e. where there was an impairment present in the travel group)**

Similar questions were asked in 2018 enabling us to compare changes over time. Report based on 2018 data is available on our [website](#).

The UK is striving to offer an inclusive experience for all visitors. May I just check if...

Q1 You [or any of your travelling party] have any health conditions, illnesses or impairments lasting or expected to last for 12 months or more?

1. Yes
2. No
3. Don't know
4. Prefer not to say

Q2 Does your [or any of your travelling party's] condition or illness/do any of your conditions, illnesses or impairments reduce your[IF DV14 =1 OR 2;/their] ability to carry out day-to-day activities?

1. Yes, a lot
2. Yes, a little
3. Not at all

Q3 Do any of these conditions, illnesses or impairments affect you [or any of your travelling party] in any of the following areas?

1. Vision (for example blindness or partial sight)
2. Hearing (for example deafness or partial hearing)
3. Mobility (for example walking short distances or climbing stairs)
4. Dexterity (for example lifting and carrying objects, using a keyboard)
5. Learning or understanding or concentrating
6. Memory
7. Mental health
8. Stamina or breathing fatigue
9. Socially or behaviourally (for example associated with autism, attention deficit disorder or Asperger's syndrome)
10. Other (please specify)
11. None of the above (DNRO)
12. Refusal (DNRO)



Executive summary

Wheelchair user, arms outstretched, watching the sunrise, Fetlar, Shetland Islands, Scotland,
©VisitBritain/Brynn Hauxwell

Summary

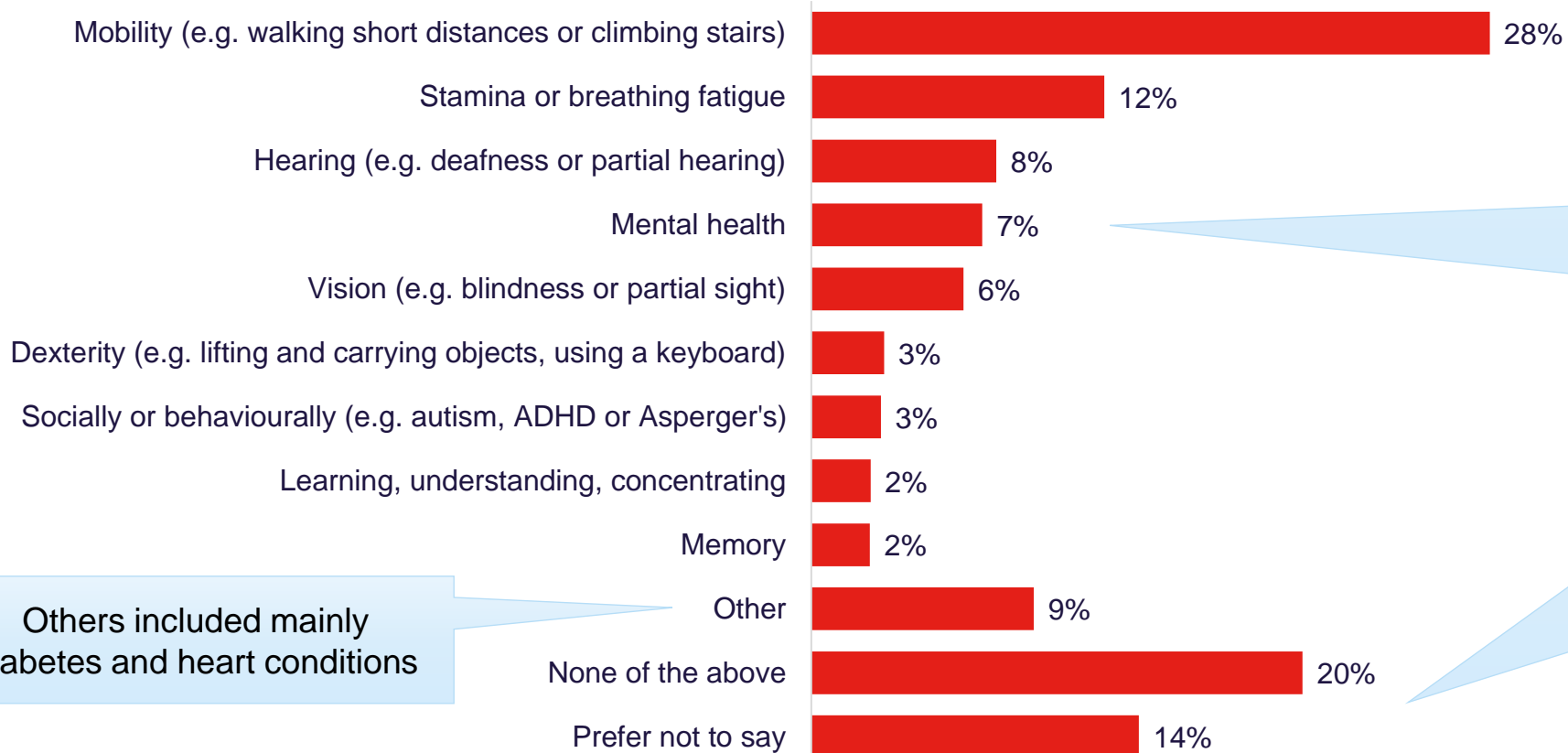
- Most common condition present on an inbound visit is related mobility (wheelchair and non-wheelchair) and stamina. For 2 in 3 inbound visits, health conditions or impairments have impact on day-to-day activities.
- Of the 38.0 million inbound visits that the UK received in 2023, volume of **visits with impairments represented 1.9% share**, with spend representing 2.0% and nights volume 3.0% share.
- In 2023, the number of visits with impairments **is 5% below the level in 2018 (slightly less of a decline than total inbound visits)**.
- When compared to total inbound visits, visits with impairments **lasted longer on average and the average spend per visit was higher**, while average spend per night was smaller.
- Smaller average spend per night is due to visits with impairments being more likely, than all inbound visits, to be **visiting friends or relatives**, which tend to be longer and cost less.
- Comparing the 2023 data to 2018, visits by this group of visitors were longer on average in 2023, however, when taking inflation into account, average spend per night and per visit were lower.
- There is a **good seasonal spread** for visits with impairments, across the first three quarters, with slightly fewer trips in the fourth quarter.
- Inbound visits with impairments are **less likely to include air travel**, compared to all inbound visits. Instead, these visitors are more likely than average to choose sea transport.
- Accommodation used most by this group is a hotel or a guest house (same as for total inbound visits). Visits with impairments are more likely to include **'free guest' accommodation (VFR)**.
- Inbound visits with impairments included visitors who **felt welcome to a greater degree** than average.



Profile of visitors with impairments

The most common condition present on an inbound visit is related mobility (wheelchair and non-wheelchair) and stamina.

TYPE OF HEALTH CONDITIONS OR IMPAIRMENTS [BASE: INBOUND VISITS WITH IMPAIRMENTS]



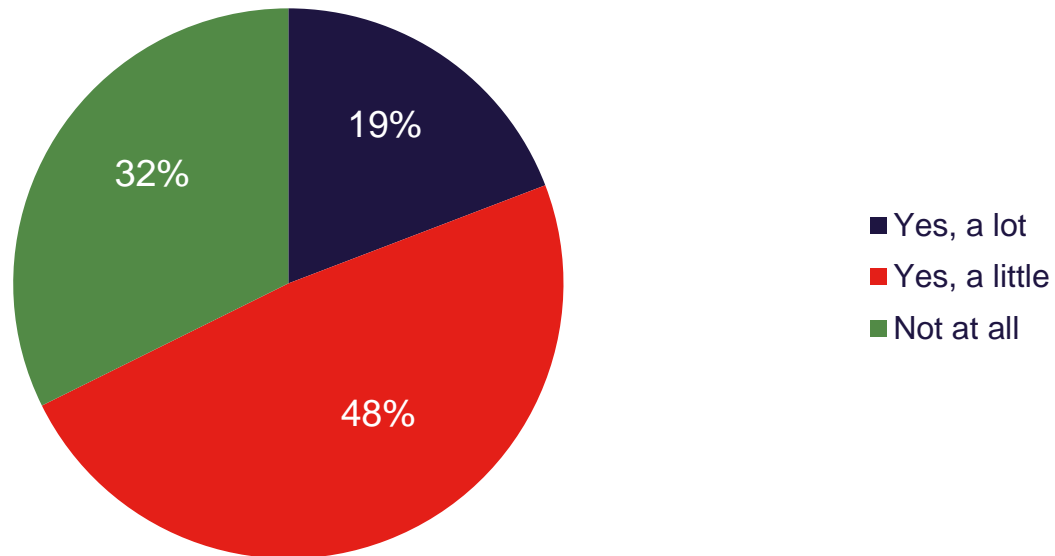
Others included mainly diabetes and heart conditions

Comparing to Great Britain statistics, the proportion of mental health is visibly smaller for inbound visits, as this topic is not as openly talked about in some other countries.

At the same time, a fairly large proportion of inbound respondents didn't provide details as to what health condition or impairments affect them or those who they were on a trip with.

For 2 in 3 inbound visits, these conditions have a degree of impact on day-to-day activities.

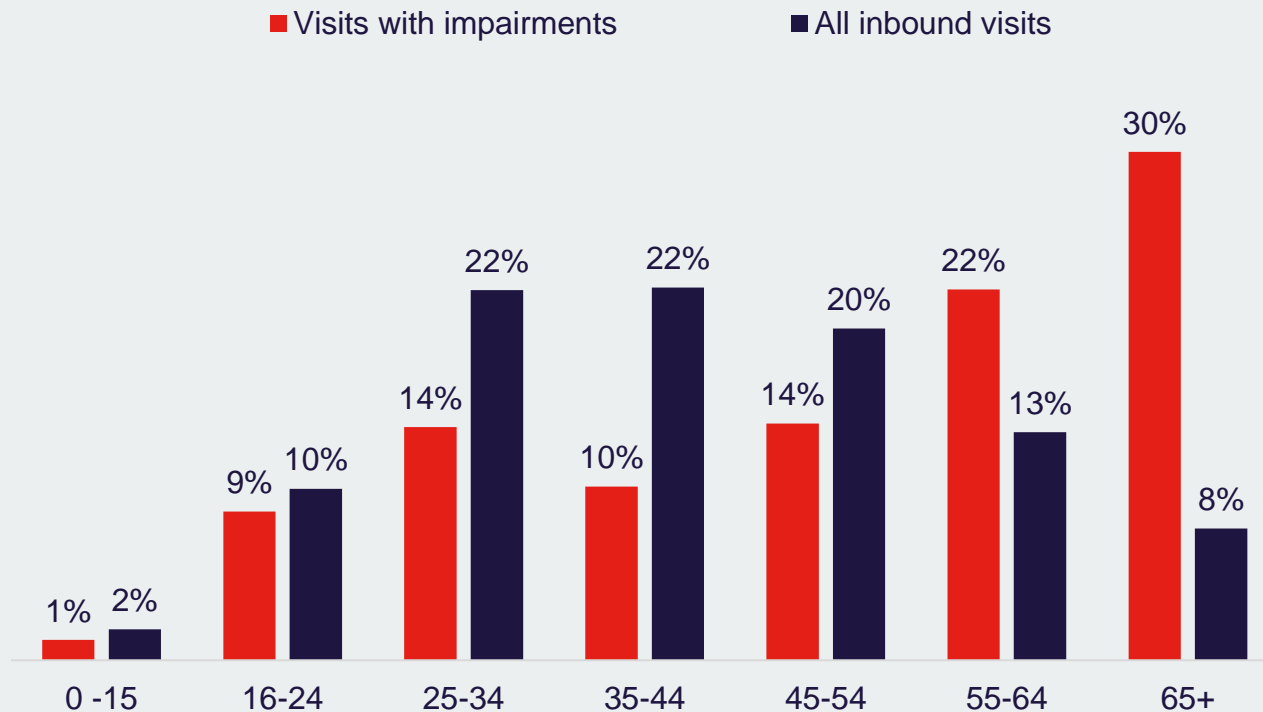
IMPACT ON ABILITY TO CARRY OUT DAY TO DAY ACTIVITIES [BASE: INBOUND VISITS WITH IMPAIRMENTS]



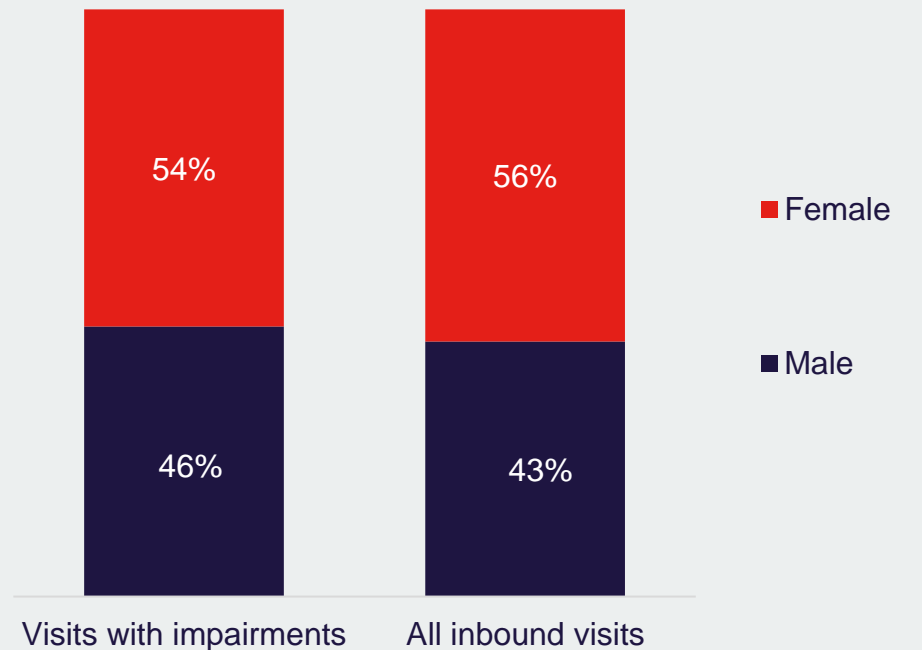
68%
Of visits where health condition or impairment impacts little or a lot on reduced ability to carry out day to day activities

52% of inbound visits with impairments were taken by those 55 years old or older. Gender profile was similar to all inbound visits.

AGE GROUP [BASE: INBOUND VISITS WITH IMPAIRMENTS]



GENDER [BASE: INBOUND VISITS WITH IMPAIRMENTS]



USA was the top inbound market for visits with impairments, in line with overall dominance of this inbound market.

INBOUND VISITS VOLUME

Visits with impairments, Rank	All inbound trips, Rank	Market	Visits in 2023 ['000]
1	1	USA	104
2 *	2	France	92
3	4	Ireland	78
4 *	5	Spain	46
5 *	3	Germany	45

INBOUND VISITS VALUE

Visits with impairments, Rank	All inbound trips, Rank	Market	Spend in 2023 [£m]
1	1	USA	167
2 *	4	Australia	46
3 *	3	France	43
4	5	Ireland	28
5 *	6	Netherlands	25



Top level statistics

Of the 38.0 million inbound visits that the UK received in 2023, volume of visits with impairments represented 1.9% share, with spend representing 2% and nights volume 3%.



724 thousand visits,
representing **1.9%** of
all inbound visitors



£624 million total
spend by this group,
representing **2.0%** of
all inbound spend



8.8 million nights,
representing **3.0%** of
all inbound nights

The number of visits with impairments decreased by 5% (less of a decline than for all inbound visits), while spend declined more than all inbound visits (in real terms).

Visits with impairments	Visits	Spend	Nights
2018	759 thousand (1.9% of all visits)	£552 million (2.1% of all visits)	8.3 million (2.9% of all visits)
2023	724 thousand (1.9% of all visits)	£624 million (2.0% of all visits)	8.8 million (3.0% of all visits)
% change (nominal, for spend)	-5% (-6% for all inbound visits)	+13% (+17% for all inbound visits)	+6% (+1% for all inbound visits)
% change (adjusted for inflation)		-8% (-5% for all inbound visits)	

When compared to total inbound visits, visits with impairments lasted longer on average and the average spend per visit was higher, while spend per night was lower ... at the 'all visit purpose' level.

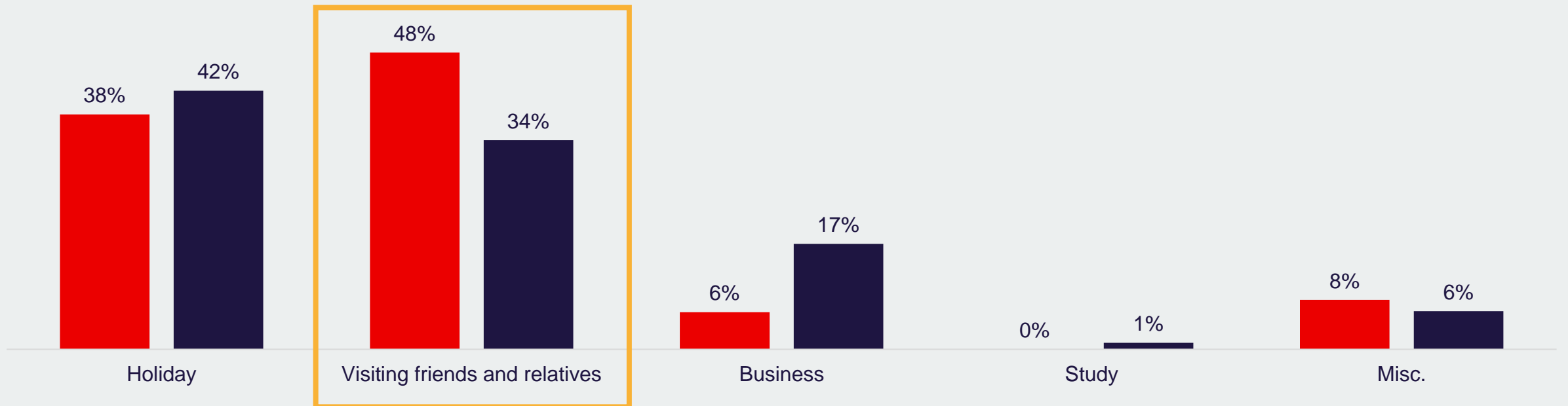
ANY VISIT PURPOSE (HOLIDAYS, VISITING FRIENDS AND RELATIVES, BUSINESS, STUDY, MISCELLANEOUS)

Visits with impairments:	12.2 nights per visit	£863 spend per visit	£71 spend per night
All inbound visits:	7.7 nights per visit	£819 spend per visit	£106 spend per night

However, visits with impairments are more likely than the total inbound visits to be visiting friends or relatives, ...

INBOUND VISIT PURPOSE [BASE: INBOUND VISITS WITH IMPAIRMENTS]

■ Visits with impairments ■ All inbound visits



...which tend to be longer and cost less than holidays...

INBOUND VISITS WITH IMPAIRMENTS BY PURPOSE

	AVERAGE NIGHTS PER VISIT	AVERAGE SPEND PER VISIT	AVERAGE SPEND PER NIGHT
Any visit purpose:	12.2	£863	£71
Holiday:	9.1	£942	£104
Visiting friends and relatives:	15.5	£614	£40

Comparing the 2023 data to 2018, visits by this group of visitors were longer on average in 2023, however, when taking inflation into account, average spend per night and per visit were lower.

Visits with impairments	Nights per visit	Spend per visit	Spend per night
2018	11.0	£727	£66
2023	12.2	£863	£71
% change (nominal, for spend)	+11% (+7% for all inbound visits)	+19% (+24% for all inbound visits)	+8% (+17% for all inbound visits)
% change (adjusted for inflation)		-4% (+1% for all inbound visits)	-13% (-5% for all inbound visits)

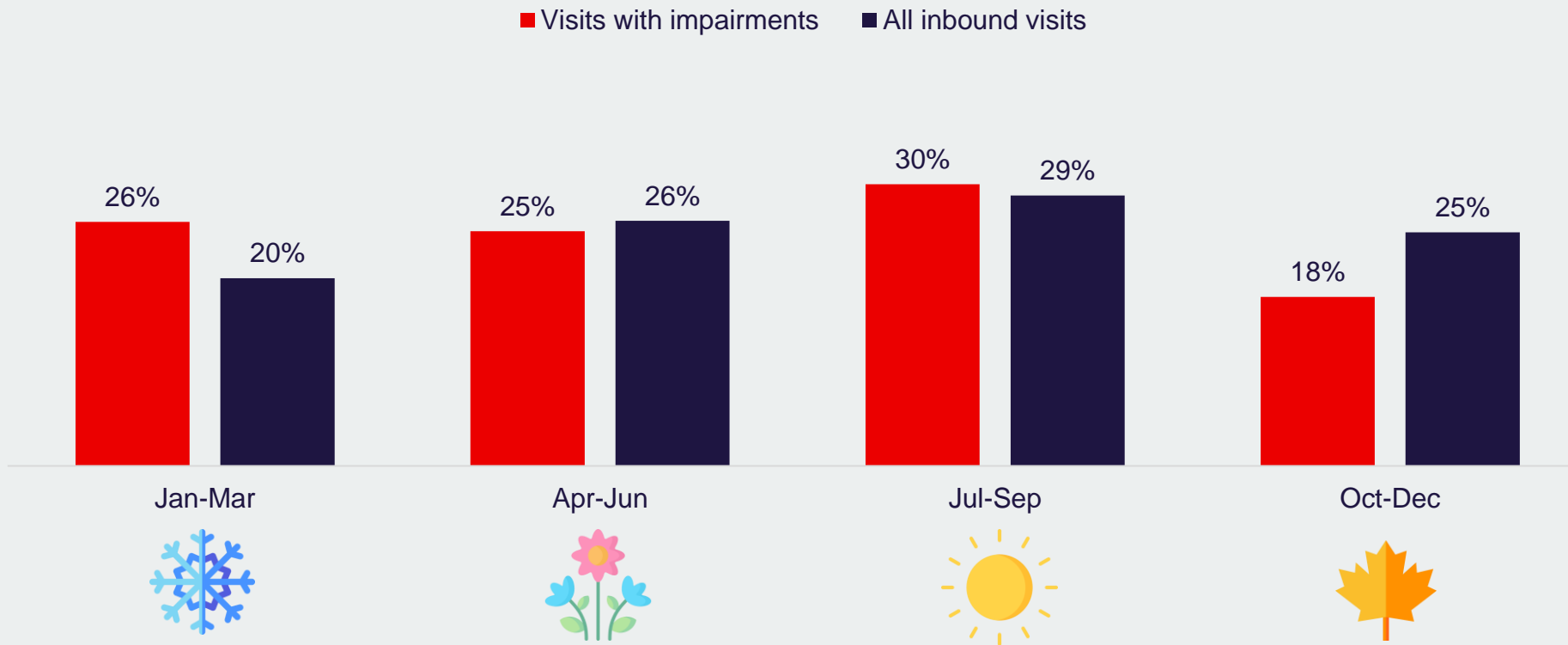


Visit characteristics

A man, with young boy and girl, on a sailing boat, Falmouth, Cornwall, England, @VisitBritain/Mylor Sailing and Powerboat School

There is a good seasonal spread for visits with impairments, across the first three quarters, with slightly fewer trips in the fourth quarter.

SEASONAL DISTRIBUTION OF INBOUND VISITS IN 2023 [BASE: INBOUND VISITS WITH IMPAIRMENTS]



In 2018, visits with impairments showed more of a peak over Q2 and Q3 and fewer trips in Q1.

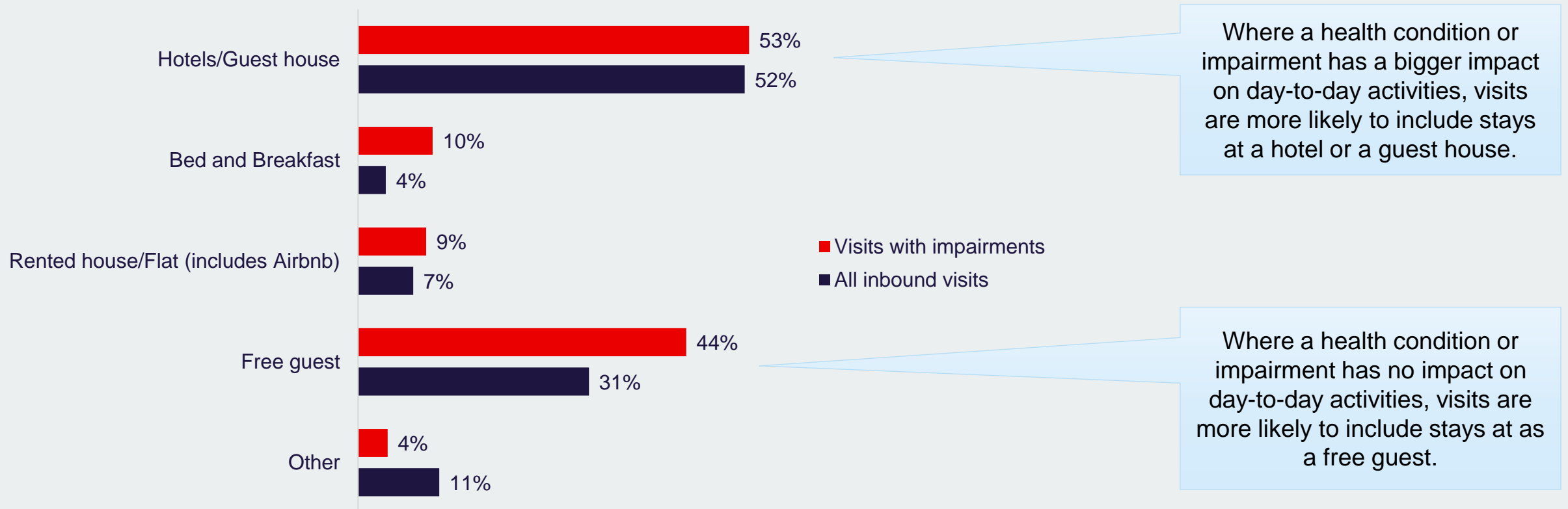
Inbound visits with impairments are less likely to include air travel, compared to all inbound visits. Instead, these visitors are more likely than average to choose sea transport.

MODE OF TRANSPORT [BASE: INBOUND VISITS WITH IMPAIRMENTS]

	DEPARTURE BY AIR	DEPARTURE BY SEA	DEPARTURE BY TUNNEL
Visits with impairments:	74%	15%	10%
All inbound visits:	81%	9%	10%

Accommodation used most by this group is a hotel or a guest house (same as for total inbound visits). Visits with impairments are more likely to include 'free guest' accommodation.

ACCOMMODATION TYPE [BASE: INBOUND VISITS WITH IMPAIRMENTS]

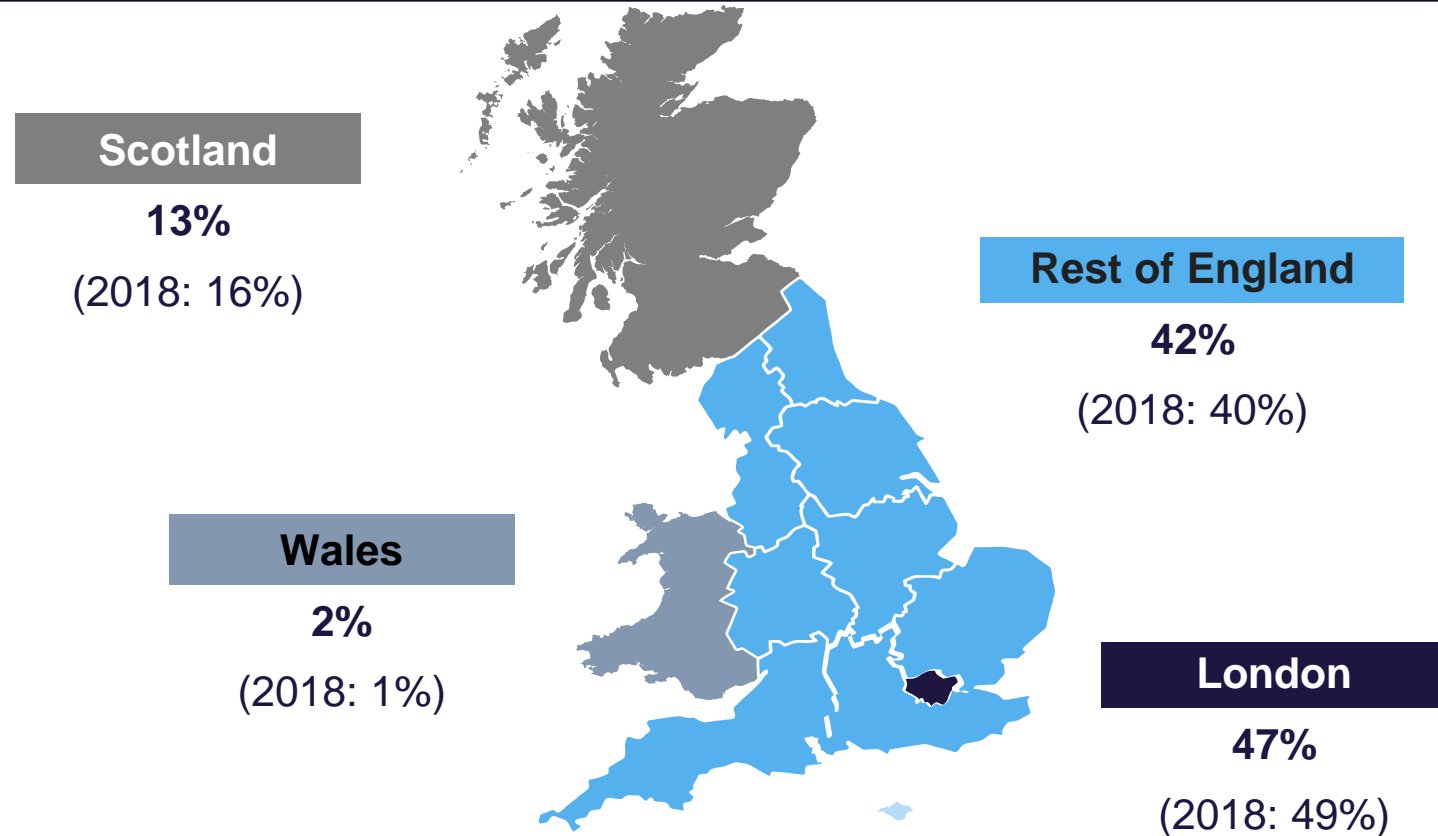


NOTE: Above %s show shares of inbound visits which included each type of listed accommodation type. For trips with multiple accommodation places, the above %s count only if they stayed in the places, regardless how many nights of their full visit they stayed in each accommodation type.

Source: International Passenger Survey, 2023.

Visits with impairments were mostly divided between London and Rest of England, with slightly more visits to the Rest of England compared to 2018.

REGIONAL SPREAD OF VISITS WITH IMPAIRMENTS, INCLUDING ALL REGIONS STAYED IN



NOTE: Above %s show shares of inbound visits which included each area. For trips with multiple areas visited, the above %s count only if they stayed in the area, regardless how many nights of their full visit they stayed in each area.

Source: International Passenger Survey, 2023.

Inbound visits with impairments included visitors who felt welcome in the UK to a greater degree than average.

SHARE OF VISITS WHERE VISITORS FELT WELCOME [BASE: INBOUND VISITS WITH IMPAIRMENTS]

	VERY WELCOME	QUITE WELCOME	VERY / QUITE WELCOME
Visits with impairments:	75%	19%	94%
All inbound visits:	65%	28%	93%

Thank you.

For further information, please contact
research@visitbritain.org

