

Inbound visitors to the UK with a health condition or impairment

Foresight – issue 171

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(updated August 2020 to incorporate revisions to official inbound tourism statistics)



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Introduction

VisitBritain sponsors a number of questions each year on the International Passenger Survey to gain a greater understanding of Britain's international visitors. This survey is conducted at dozens of ports of exit from the UK (air, sea and rail). In 2018 VisitBritain asked a question to provide information about visitors and travelling groups with a health condition or impairment.

Q: The UK is striving to offer an inclusive experience for all visitors. May I just check if any of these apply to you or any member(s) of your travelling group?

- Mobility impairment (wheelchair user)
- Mobility impairment (non-wheelchair user)
- I am blind/partially sighted
- I am deaf/partial hearing loss
- I have learning difficulties
- I have long-term illness

The question was answered by 88% of the survey respondents and throughout the analysis it is assumed that those responding to the question were representative of the entire visitor population. Respondents coded as "Don't Know" were assumed to be not disabled. In 2010 VisitBritain asked an identical question but directly to the respondent, without extending it to include any member of their travelling group. This analysis therefore includes an element of comparison between visitors with a health condition or impairment in 2010 and those visiting in 2018.

NB. This report was updated in August 2020 to incorporate revisions to historic International Passenger Survey data that took effect from May 2020.

Summary

- **Visits:** 759,000 trips or 1.9% of the total inbound overnight visits to the UK in 2018 were taken by those with an impairment or those travelling within a group where a member had an impairment.
- **Spend:** The total expenditure generated by those visits is estimated to be £552 million, or 2.1% of all inbound visitor spending in 2018.
- **Individual impairments:** health conditions or impairments most likely to be mentioned were those relating to mobility (but not requiring wheelchair use), mentioned by 27% of all visitors with an impairment. Deafness/partial hearing loss and having a long term illness were also prevalent impairments.
- **Age:** There is a clear relationship between the age of a visitor to the UK and the likelihood of them reporting a health condition or impairment. 60% of those visiting with an impairment were over 55 in age compared to 22% of all inbound visitors to the UK.
- **Average spend and trip length:** Those with a health condition and their travelling group are more likely to stay for longer and spend more than the UK inbound average (although spend per night is lower).
- **Top source markets:** USA is the biggest source market for this group of travellers; long haul markets Australia and Canada also feature in the top ten. The Irish Republic and Spain are the top markets for Europe.
- **8 year trend:** Inbound visits from those with a health condition or impairment have grown by +16% in volume and +42% in value over the last 8 years. Visitors with mobility impairments that require a wheelchair have seen the most significant growth across this time, up +136% since 2010.



Visitors to the UK with a health condition or impairment

2018 Overview

Trips to the UK by those with an impairment and their travelling companions

Of the 37.9 million inbound overnight visits taken in the UK in 2018, **759,000** or **1.9%** were taken by those who either have themselves or are accompanying someone with a health condition or impairment.

Inbound Visits to UK in 2018



582,000 or **1.4%** of visitors mentioned having an impairment themselves



22,000 or **4%** of those with an impairment reported having more than one condition on the list provided



413,000 were travelling within a group with one or more other members having an impairment

Spend in UK by those with an impairment and their travelling companions

The total expenditure generated by visits that were by someone with an impairment or travelling within a group where a member had an impairment is estimated to be **£552 million**, or **2.1%** of all inbound visitor spending in 2018.

Expenditure by inbound visits to UK in 2018



£449 million spent by inbound visitors with an impairment themselves



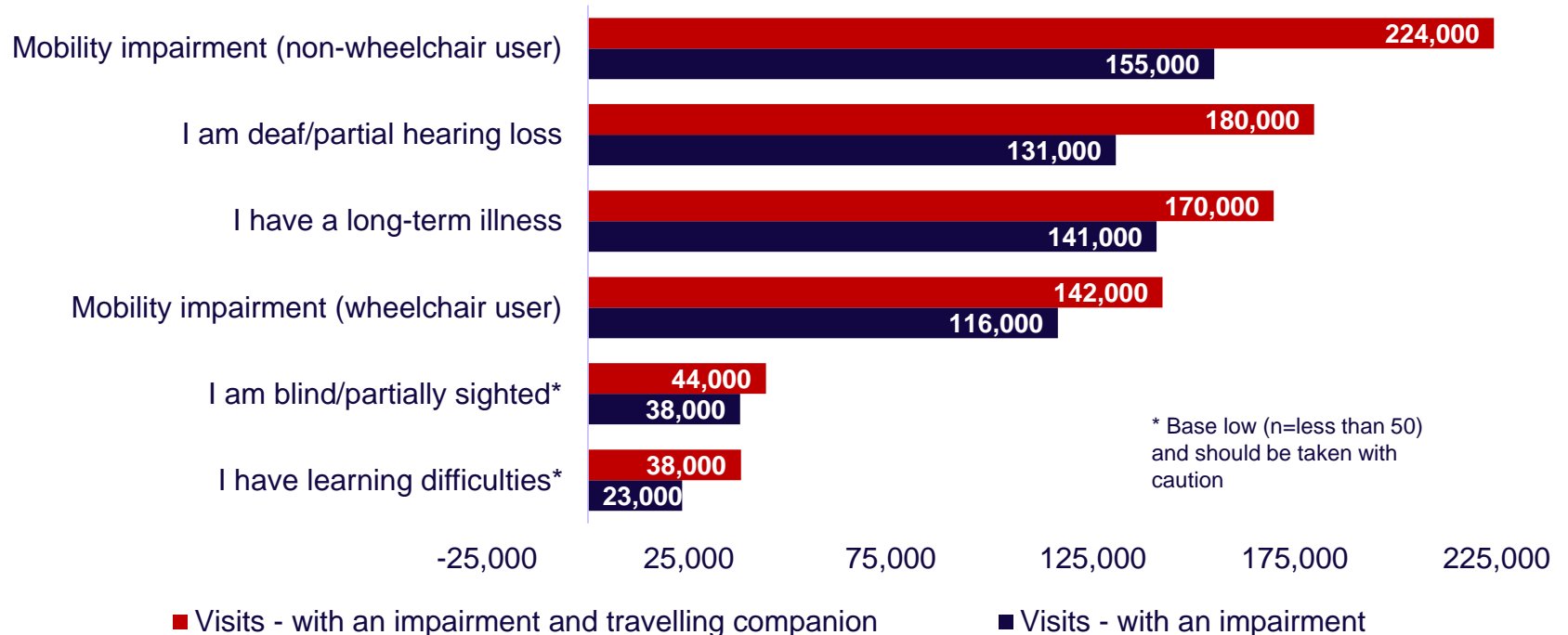
£281 million spent amongst those travelling in a group that included someone else with one or more impairment

Visits by specific health condition or impairment

In 2018 the health conditions or impairments most prevalent amongst international visitors to the UK were those relating to mobility (but not requiring wheelchair use), mentioned by 27% of all visitors with an impairment.

Deafness/partial hearing loss and long term illness were also prevalent amongst this audience.

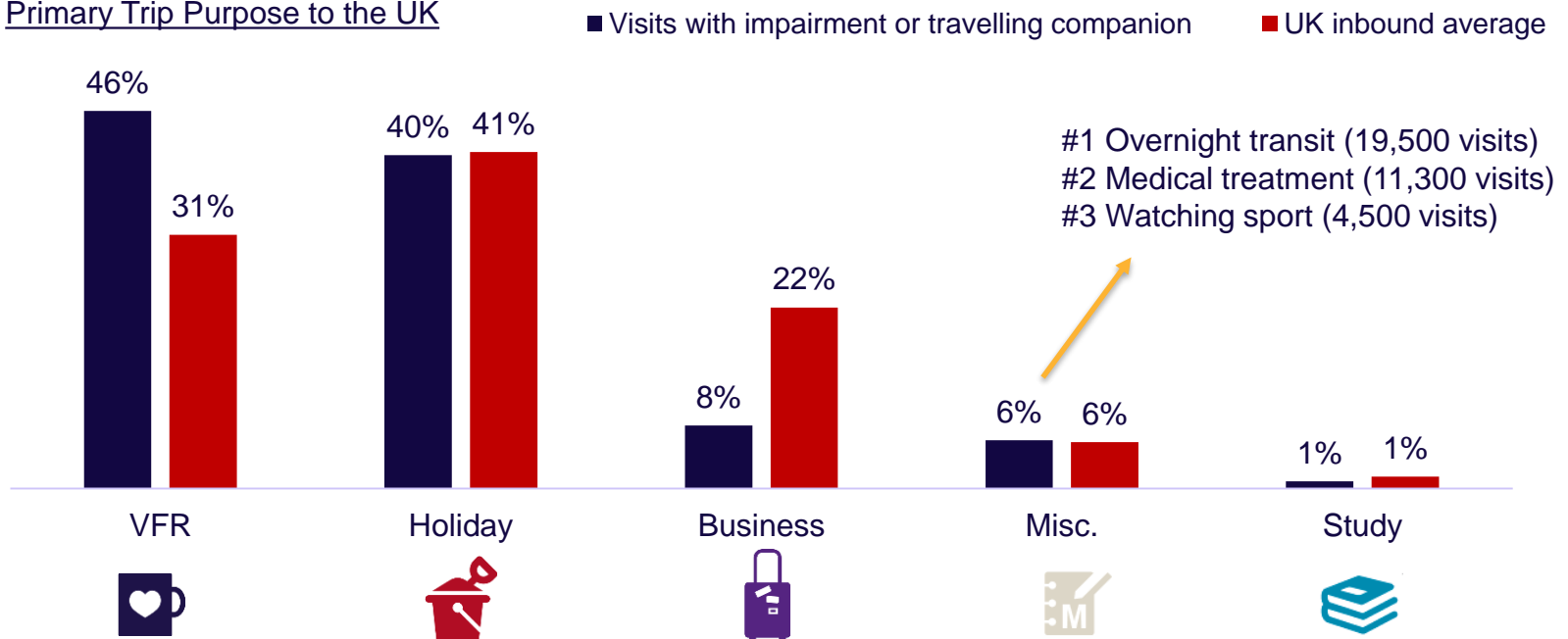
Visits by those with an impairment and their travelling companion



Visits by trip purpose

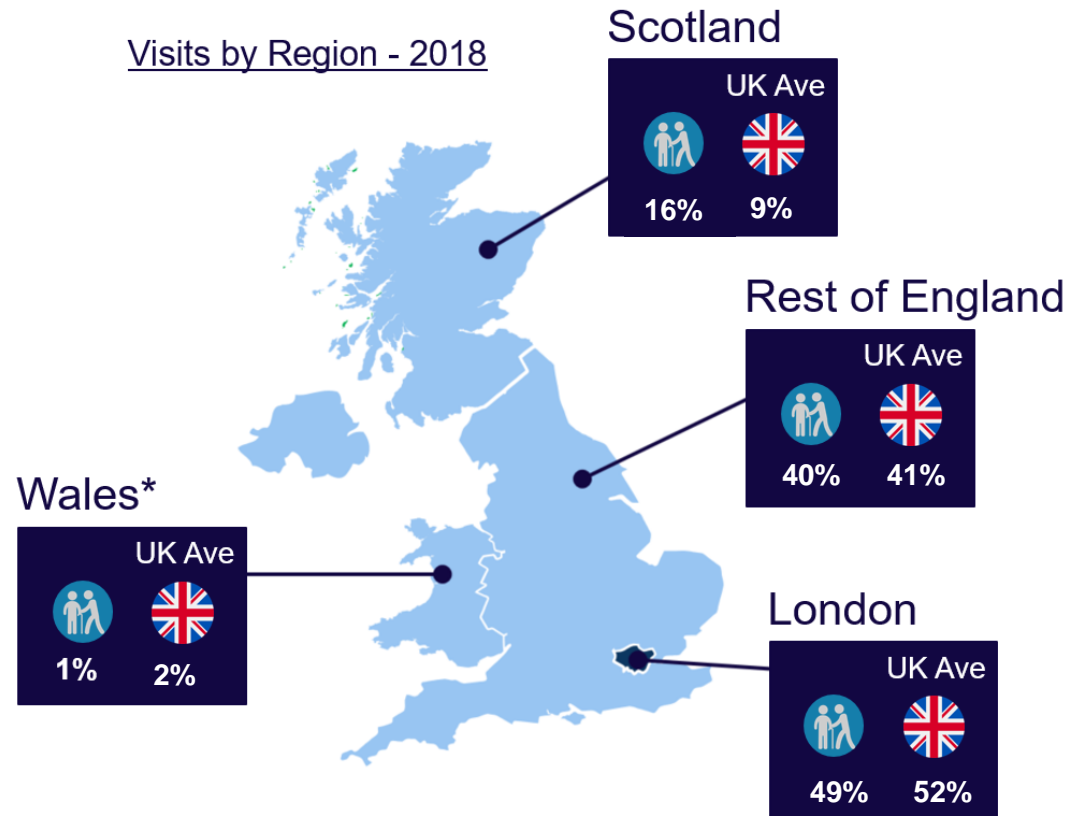
- 46% of visits by those with a health condition or impairment were to visit friends or relatives in 2018.
- For 40% of visits, holiday was the primary purpose, in line with the UK average, while only 8% came for a business trip, compared to over 1 in 5 on average.
- Despite this group only representing 2% of UK inbound visits, those with or travelling with someone with an impairment represented 15% of all UK inbound trips for medical treatment (NB low sample size).

Primary Trip Purpose to the UK



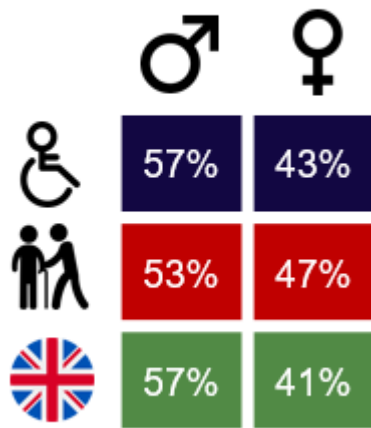
Visits by Region

- By region, London was the most visited area of the UK for those with a health condition and their travelling group, with 49% visiting the capital on their trip in 2018. They are slightly less likely to do so than the average UK inbound visitor.
- England (excluding London) was another popular area of the UK to visit with 40% of visits, in line with the UK average.
- Those with an impairment and their travelling group had a higher propensity to visit Scotland when compared to the average – 16% vs 9%.

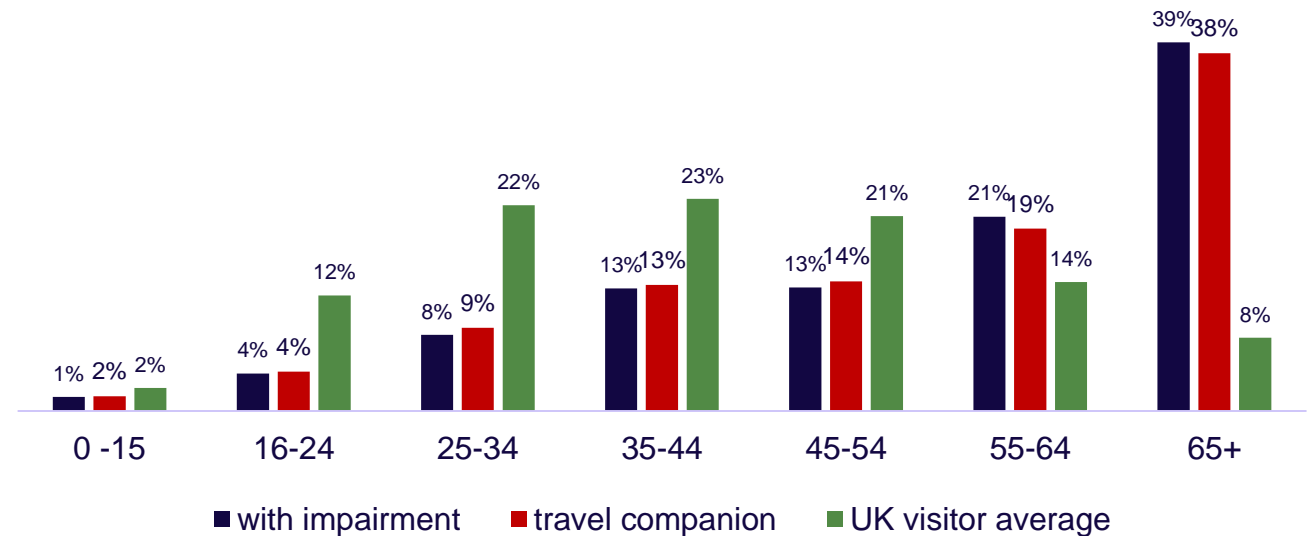


Visits by age and gender

Visits by gender



Visits by age



- There is a clear relationship between the age of a visitor to the UK and the likelihood of them reporting a health condition or impairment. 60% of those visiting with an impairment were over 55 in age compared to 22% of all inbound visitors. This difference becomes even more significant within the over 65 age bracket with 2 in 5 of those visiting with an impairment within this age band.
- By gender, visitors with impairments and their traveling companions are marginally more likely to be male – although less so than the average visitor to the UK.

Average trip length and spend

By those visiting with an impairment and their travelling companions

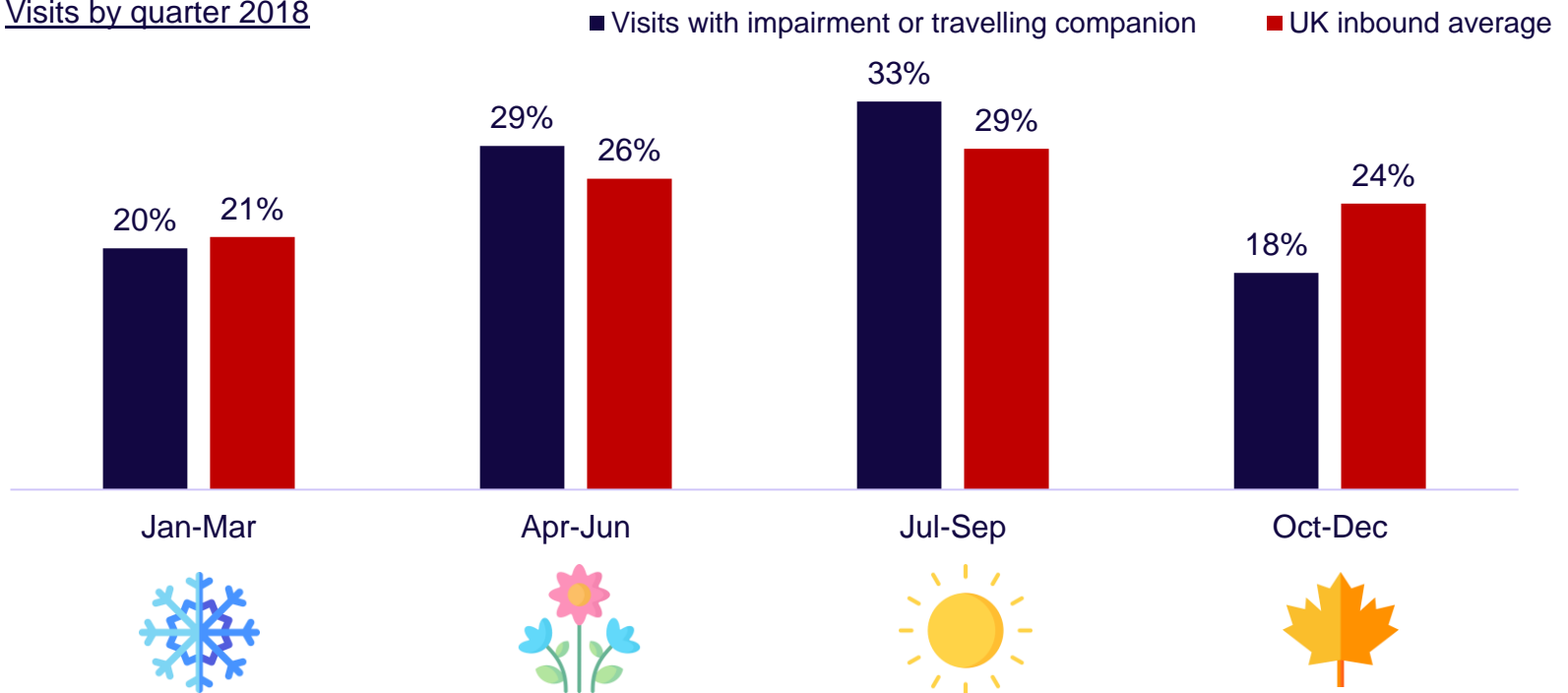


- Those visiting with an impairment or travelling within a group with members having an impairment spent significantly longer in the UK compared to the UK inbound average with 11 nights on average vs the UK average length of 7 nights.
- Spend amongst this audience is also significantly higher than the average visitor with an average spend of £727, £69 more than the average spend.
- Average spend per night is £25 lower than the average spend, driven by the large proportions of the visits for VFR purposes. VFR visitors spend an average of £32 per night in the UK, compared to £129 visiting primarily for holiday purposes.

Visits by season

- The most popular time of year to visit the UK amongst this audience is July to September with a third visiting during this period.
- The shoulder season of April to June is also a popular time to visit while the autumn and winter months underperform against the average UK visitor flow.

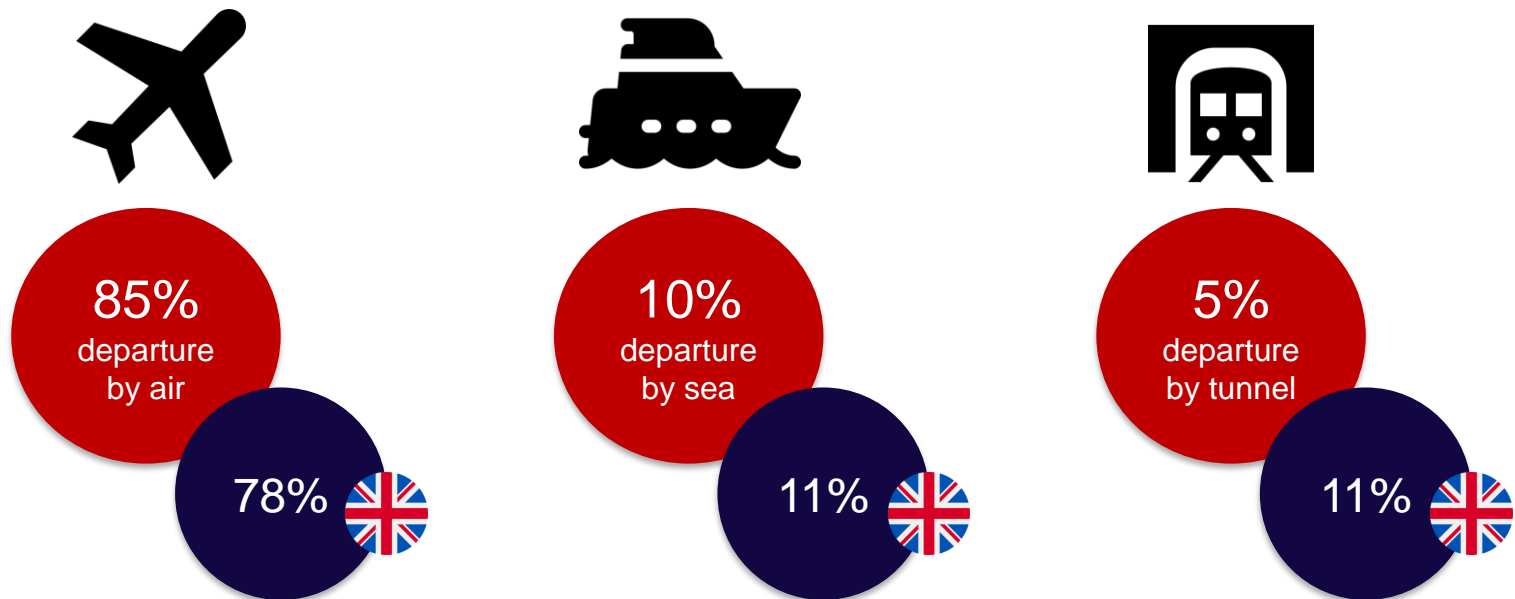
Visits by quarter 2018



Departing modes of transport

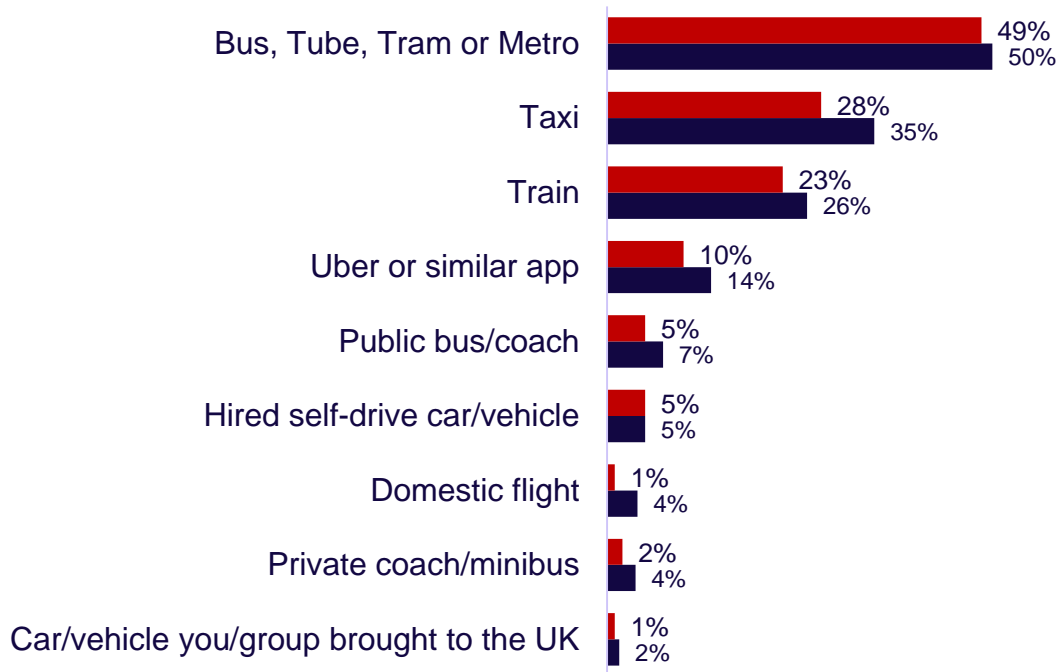
- 85% of visits to the UK made by those with an impairment or their travelling companion were made by plane; those with impairments and their travelling groups were more likely to use this mode of transport than the UK average visitor.
- 1 in 10 came to the UK across the sea i.e. by ferries.
- 1 in 20 come to the UK via the Channel Tunnel (either Eurostar, coach or private vehicle).

By those visiting with an impairment and their travelling companions



Internal modes of transport

By those visiting with an impairment and their travelling companions



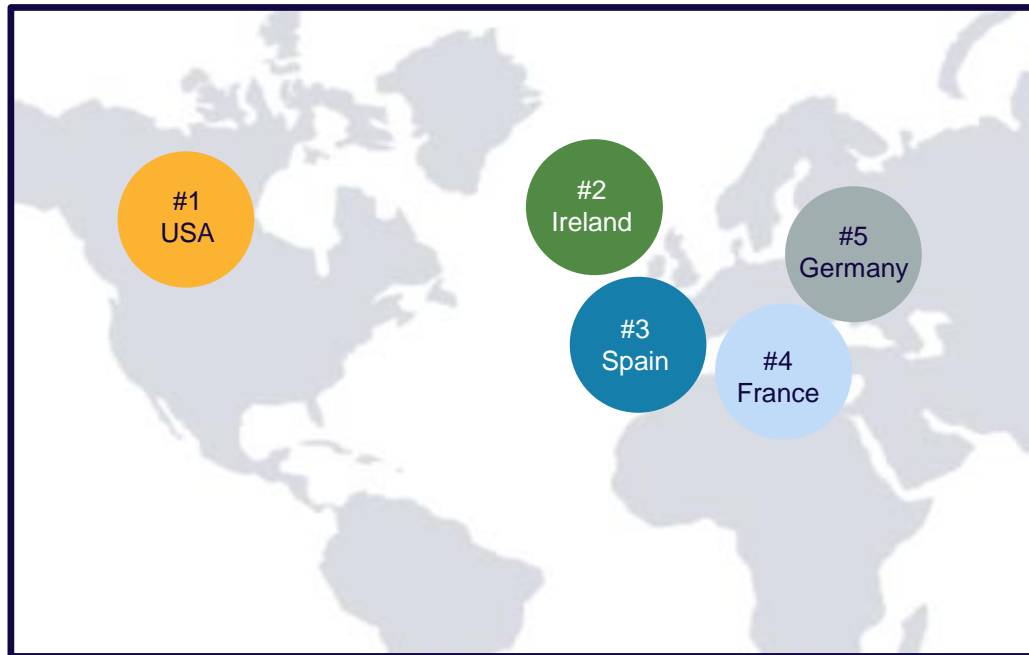
■ UK inbound average

■ Visits with impairment of travelling companion

- During their time in the UK in 2018, half of visitors with impairments and their travelling companion used a bus, tube, tram or metro to get around.
- Taxis were used by over 1 in 3, while 14% had used an Uber at some point in the trip.
- Trains were also a popular option with 26% using this form of transportation during their trip.

Top 10 source markets

Visits by those with an impairment and their travelling companions - 2018

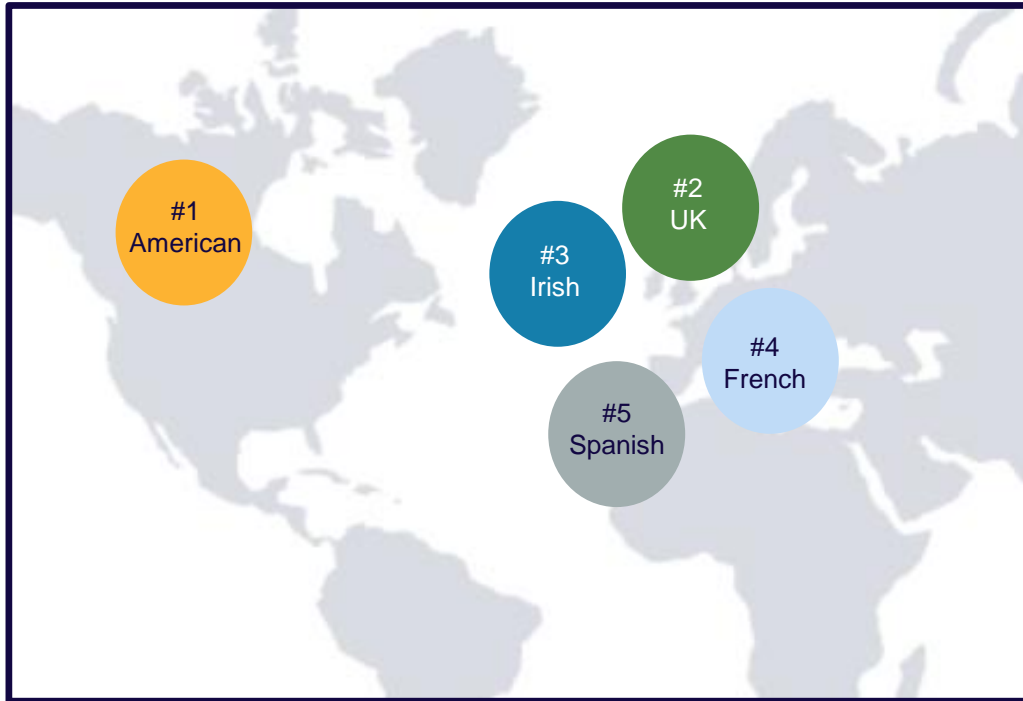


Rank	UK rank	Market	Visits in 2018
1	1	USA	117,000
2	4	Irish Republic	72,000
3	5	Spain	68,000
4	2	France	53,000
5	3	Germany	46,000
6	10	Australia	43,000
7	6	Italy	42,000
8	7	Netherlands	38,000
9	13	Canada	34,000
10	16	India	23,000

- The US is the largest source market for visitors with an impairment and their traveling companions while long haul markets Australia and Canada also feature high within the source market rankings. The lack of language barrier may be a driving factor for a UK visit amongst this audience.
- Spain is an important European market for travellers and their companions with accessibility needs, ranking 3rd compared to 5th in the UK rankings overall.

Top 10 nationalities

Visits by those with an impairment and their travelling companions - 2018



Rank	UK rank	Nationality	Visits in 2018
1	1	American	121,000
2	2	UK	114,000
3	5	Irish	67,000
4	3	French	41,000
5	7	Spanish	37,000
6	6	Italian	37,000
7	13	Australian	35,000
8	15	Canadian	35,000
9	8	Dutch	33,000
10	4	German	31,000

- Inbound visitors to the UK are defined as those who are resident overseas; however, the country of residence and nationality of visitors are not always the same.
- The largest group of inbound visitors reporting a health condition are American nationals representing 16% of those visiting with an impairment and their travelling companions. 15% of this group are UK nationals and are classed as expats visiting the UK.



Visitors to the UK with a health condition or impairment

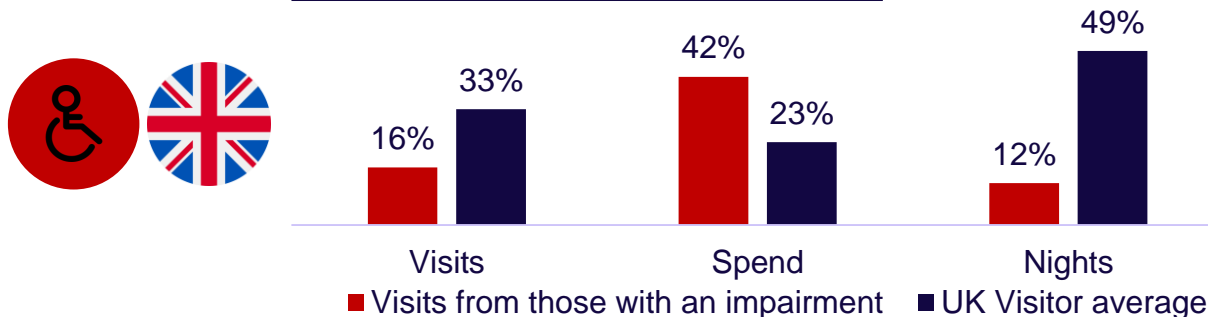
Trend - 2018 vs 2010

Trend – 2010 to 2018

Visits by those with an impairment

	Visits	Spend	Nights	Nights per visit	Spend per visit	Spend per night
2018	582,000	£448,582,000	6,871,000	11.8	£770	£65
2010	501,000	£316,674,000	6,145,000	12.3	£632	£52

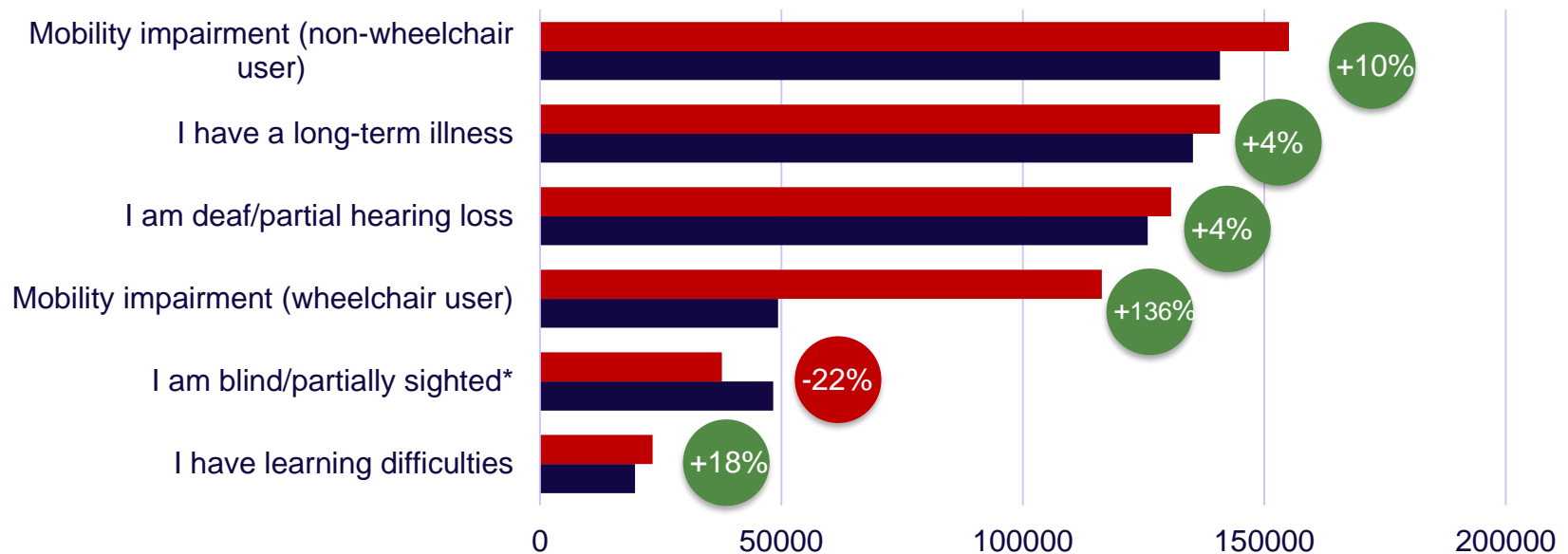
Growth recorded between 2010 and 2018



- Inbound visits from those with a health condition or impairment have grown by +16% from 2010 to 2018, a slower growth rate when compared to overall UK visitor growth across the same time period.
- Spend by inbound visitors with an impairment has grown +42% since 2010 vs +23% for all inbound UK spend.

Visits to UK over time – 2018 vs 2010

Visits to the UK from those with a health condition or impairment



- Looking specifically at stated health conditions, visitors with mobility impairments that require a wheelchair have seen the most significant growth across the last 8 years, up +136% to 116,000 visits in 2018.
- All other visits from those with a health condition or impairment grew from 2010-2018, apart from those with deafness or partial hearing loss which fell 22% to 38,000 visits.



Inbound visitors to the UK with a health condition or impairment

July 2020