UK Inbound Considerers with Mobility Needs

Source: MMGY Study, VisitEngland sponsored questions

8 October 2025

Content



Survey background



UK Inbound Considerers' profile



Travel experience & barriers



Summary



Title: Wheelchair user and child on a beach looking out to sea; ©Brynn Hauxwell; Location: Yell, Shetland Islands, Scotland

Survey background

Survey background - detail

The survey on European Travellers With Mobility and Accessibility Needs was conducted by MMGY Travel Intelligence, part of the integrated marketing agency MMGY Global in partnership with the European Network for Accessible Tourism (ENAT) and the World Travel & Tourism Council (WTTC).

The online data collection took places between April and May 2025 with 3,473 adults (aged 18 and older).

Respondents included in the survey were:

- currently residing in **France, Germany, Italy, Spain and the United Kingdom**
- individuals with **mobility** impairments or long-term health conditions affecting their physical mobility or ability to carry out daily tasks (lasting at least 12 months), as well as their **travel companions and caregivers**
- leisure travellers, defined as those who **have taken an** international overnight leisure **trip in the past 3 years,** AND **intended to take at least one** international overnight leisure **trip during the next 2 years.**

This report is based on **UK Inbound Considerers**, defined as travellers with mobility needs, who are from France, Germany, Italy or Spain and were **considering** an overnight trip to the **UK** in the next 2 years.

This is an extract of topline insights from the full *Portrait of European Travellers with Mobility & Accessibility Needs*™ report, which provides a comprehensive look at the travel habits, challenges and expectations of European travellers with mobility and accessibility requirements. The detailed report is available for purchase from MMGY Travel Intelligence, for more information, contact Simon Moriarty (smoriarty@mmgyintel.com).

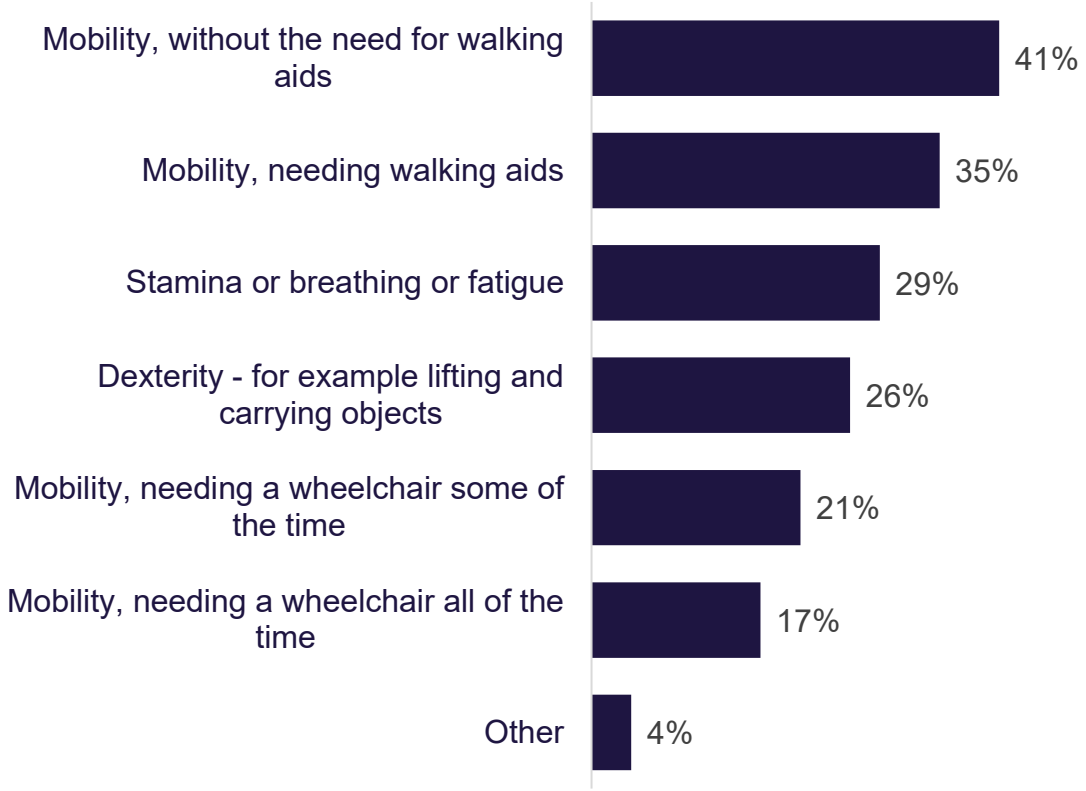


Title: Two women, one in a wheelchair and one sitting on a large willow sculpture in a cottage garden; ©VisitBritain/Nemorin/Tom Hare; Location: Stratford-upon-Avon, Warwickshire, England

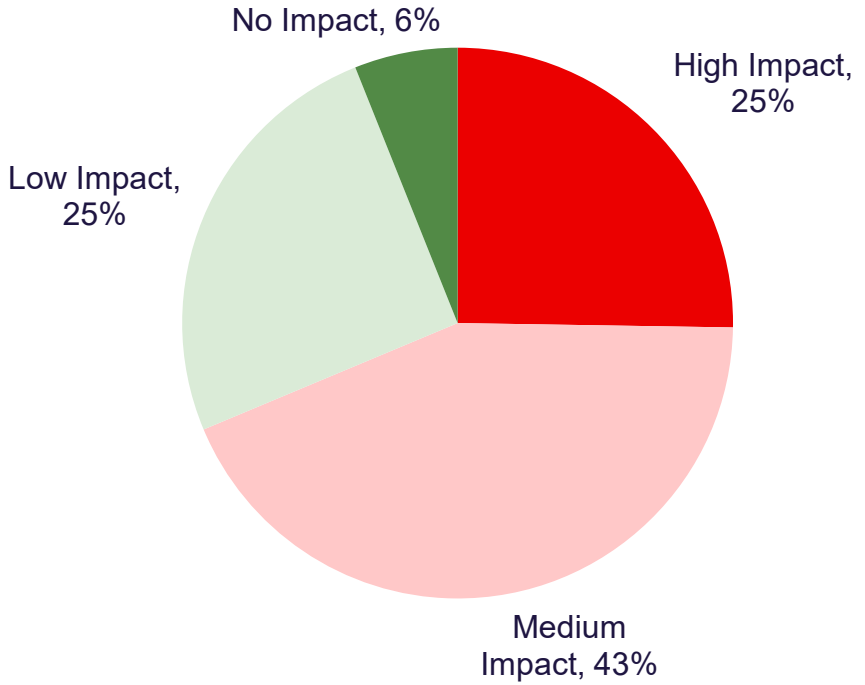
UK Inbound Considerers' profile

41% have a mobility condition not requiring walking aids, 35% require walking aids. 7 in 10 inbound travellers have a mobility condition with a high or medium impact on travel decisions.

Mobility conditions among UK Inbound Considerers



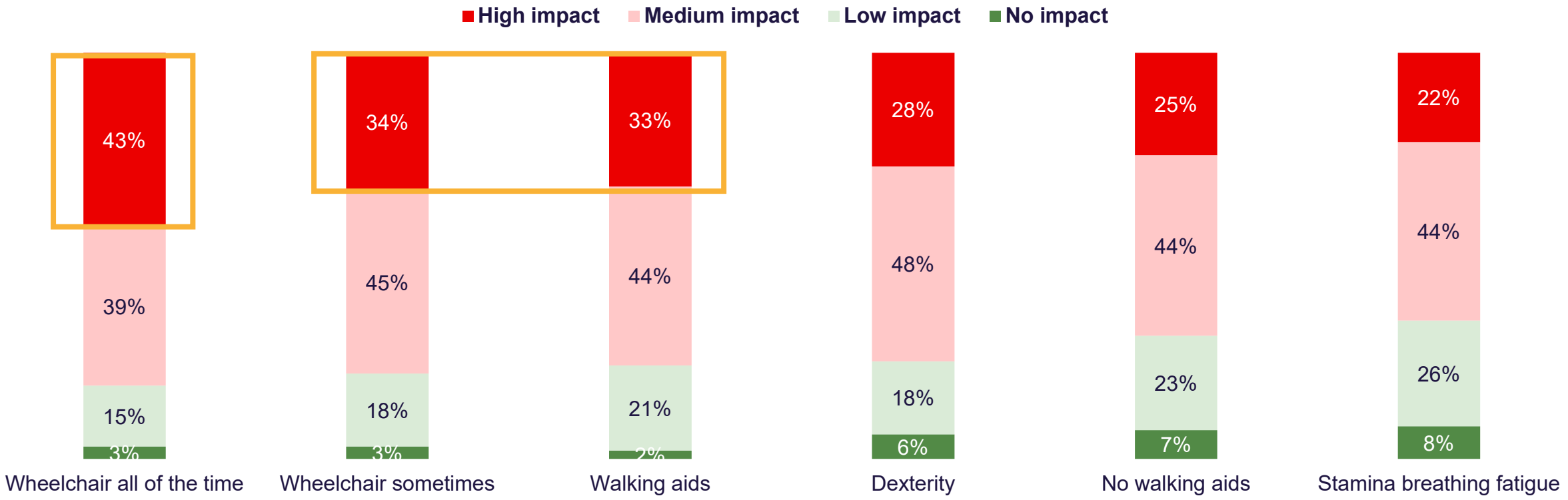
To what extent mobility conditions affect decisions for international travel



Base: Inbound Considerers of the UK (992)
Source: MMGY's 2025 Portrait of European Travellers with Mobility & Accessibility Needs ™

Conditions requiring a wheelchair or walking aids have a high impact on their travel choices.

To what extent mobility conditions affect decisions for international travel by the type of mobility condition



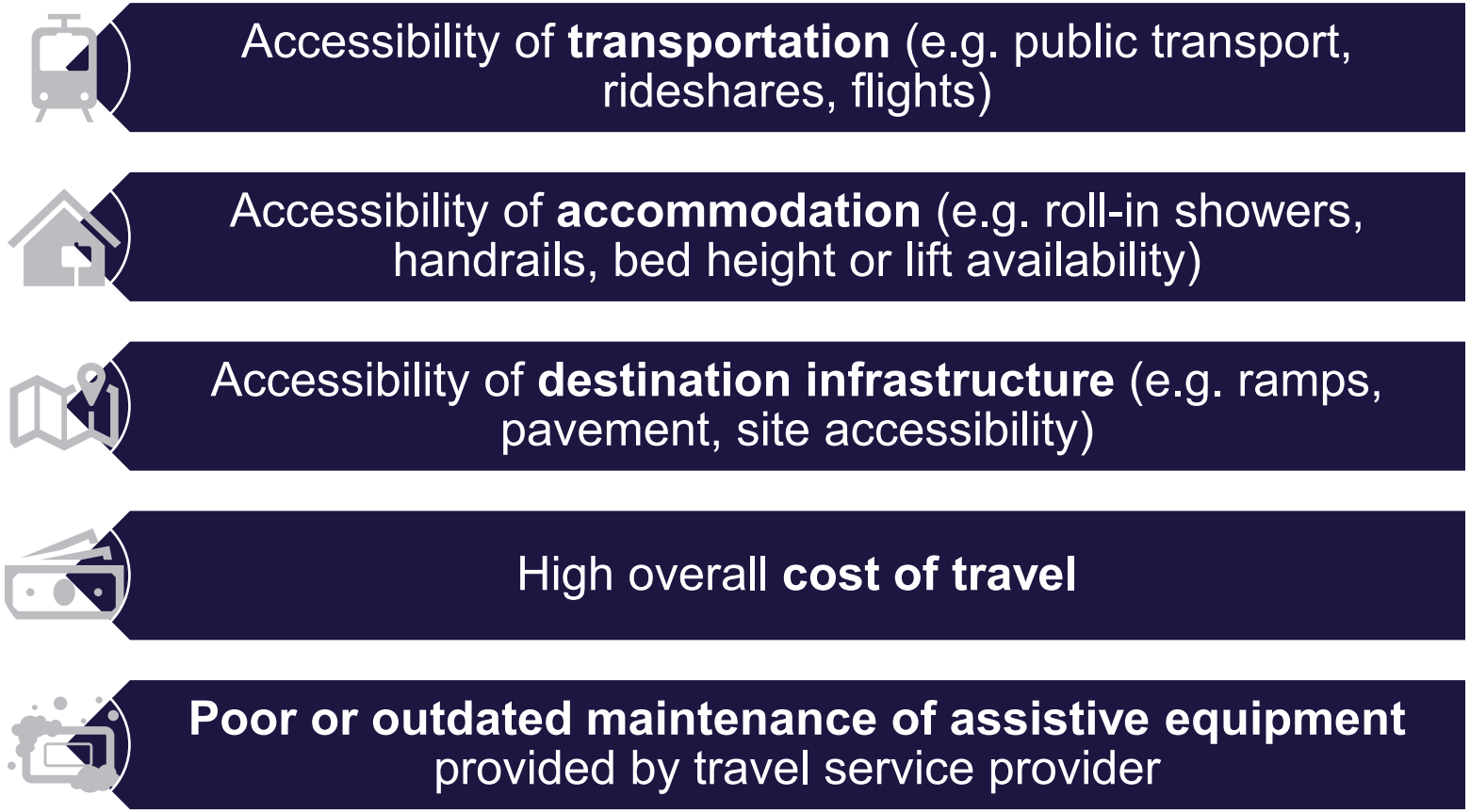
Base: Inbound Considerers of the UK (992)
Source: MMGY's 2025 Portrait of European Travellers with Mobility & Accessibility Needs ™



Travel experience & barriers

Title: Couple outside cafe in a village; ©VisitBritain/NYMNPA/Daniel Wildey; Location: Helmsley, North Yorkshire, England

Top 5 travel barriers experienced by UK Inbound Considerers over the past 3 years



Base: UK Inbound Considerers (992)
Source: MMGY's 2025 Portrait of European Travellers with Mobility & Accessibility Needs ™

Transportation

Transport remains one of the most critical pinch points in accessible travel, with over 8 in 10 respondents reporting challenges during their most recent trip.

Air travel, while most used, presents challenges, such as long waits for assistance, lack of staff training and incidents of damaged mobility equipment as persistent issues.

Public transport is equally problematic, with limited access to lifts and ramps, a shortage of accessible taxis, and poorly designed stations that offer little in the way of signage or support.



Actions (as suggested by MMGY): Improved boarding and disembarking procedures, enhanced staff assistance, and increased availability of accessible seating and space for mobility aids are a next step to better support these travellers.

Base: UK Inbound Considerers (992)
Source: MMGY's 2025 Portrait of European Travellers with Mobility & Accessibility Needs ™

Accommodation

Many properties omit basic details from their websites, such as step-free access points, lift availability, bathroom accessibility or even clear confirmation that an accessible room has been booked.

Most important in-room features are accessible bathrooms, wide doorways and availability of assistive devices.

Actions (as suggested by MMGY): Accommodation providers can deepen their understanding of accessibility requirements and prioritise transparent, detailed listings that allow all travellers to book with confidence.

Base: UK Inbound Considerers (992)
Source: MMGY's 2025 Portrait of European Travellers with Mobility & Accessibility Needs ™

Infrastructure

Despite a growing interest in global exploration, poor infrastructure remains a major deterrent for survey respondents. Many destinations lack features such as step-free paths, ramps, lifts and accessible toilets, making safe and independent travel difficult.



Actions (as suggested by MMGY): The research underscores that improving physical infrastructure is not merely a logistical upgrade but a foundational step towards creating truly inclusive, welcoming experiences.

Base: UK Inbound Considerers (992)
Source: MMGY's 2025 Portrait of European Travellers with Mobility & Accessibility Needs ™

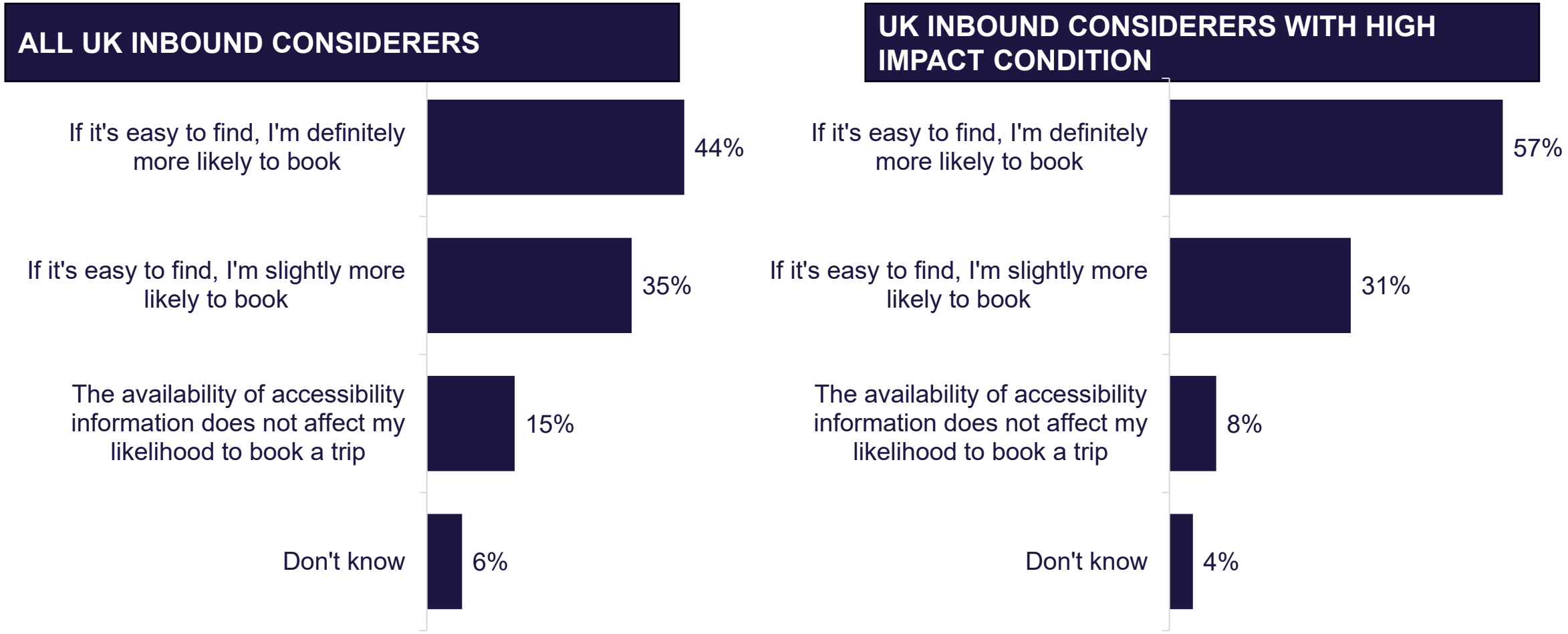
Cost of travel

The financial burden of accessible travel is a growing concern, 2 in 3 of UK Inbound Considerers spent between 10% and 30% of their travel budget on accessibility-related needs during their international overnight leisure trips in the past 12 months.

Actions (as suggested by MMGY): As the sector looks to remove friction from the travel experience, addressing these hidden costs must become part of a broader strategy to make travel not only accessible but genuinely affordable and of the same quality.

Base: UK Inbound Considerers (992)
Source: MMGY's 2025 Portrait of European Travellers with Mobility & Accessibility Needs ™

Availability of accessibility information has a significant impact on travel booking decisions, especially among those with high impact mobility needs.



Base: UK Inbound Considerers (992)
Source: MMGY's 2025 Portrait of European Travellers with Mobility & Accessibility Needs ™

75% of UK Inbound Considerers strongly agree that the UK is inclusive and accessible and 78% agree that the UK is welcoming.

Agreement with the United Kingdom being ‘inclusive and accessible for visitors like me’

75% UK Inbound **Considerers** strongly agree

80% UK Inbound **Considerers with a high impact condition** strongly agree

Agreement with the United Kingdom being ‘a welcoming place to visit’

78% UK Inbound **Considerers** strongly agree

84% UK Inbound **Considerers with a high impact condition** strongly agree

Base: UK Inbound Considerers (992) / UK Inbound Considerers with a high impact condition (250)
Source: MMGY’s 2025 Portrait of European Travellers with Mobility & Accessibility Needs ™



Title: Guard stands on a ramps and leans out of heritage train carriage greeting woman and man using a wheelchair; ©VisitBritain/NYMNPA/Peter Kindersley; Location: Pickering, North Yorkshire, England

Summary

Top 3 take-outs

1. **Availability** of detailed **information**, measurements and photos/videos/virtual tours are essential for travellers with mobility needs.

2. Top **transport** challenges are difficulty boarding/disembarking, extended wait time for mobility assistance at the airport causing missing a flight and inadequate assistance at the stations and airports.

3. To attract more visitors with mobility requirements, provide
   - accessible holiday **itineraries** considering a variety of cultural or historical interest,
   - accessibility **directory** for accommodation, restaurants, and
   - ensure sufficient **assistive equipment** is available and well maintained.

Base: UK Inbound Considerers (992)
Source: MMGY's 2025 Portrait of European Travellers with Mobility & Accessibility Needs ™

Thank you

For further questions, please contact:

Katerina Rysova

Katerina.Rysova@visitbritain.org

For further information about the survey and data, please contact:

Simon Moriarty

smoriarty@mmgyintel.com

VISIT BRITAIN

VisitEngland