Inbound visitors to the UK with a health condition or impairment

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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)  - I am deaf/partial hearing loss
- Mobility impairment (non-wheelchair user) - I have learning difficulties
- I am blind/partially sighted   - 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 (Don’t knows excluded).

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.
Summary

**Visits:** 711,000 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 £483 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 29% 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. 65% of those visiting with an impairment were over 55 in age compared to 21% 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 highly. Spain is the top market for Europe.

**8 year trend:** Inbound visits from those with a health condition or impairment have grown by +7% in volume and +25% 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 +123% 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, **711,000** 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**

- **543,000** or **1.4%** of visitors mentioned having an impairment themselves
- **19,500** or **4%** of those with an impairment reported having more than one condition on the list provided
- **396,000** 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 £483 million, or 2.1% of all inbound visitor spending in 2018.

Expenditure by inbound visits to UK in 2018

- **£393 million** spent by inbound visitors with an impairment themselves
- **£243 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 29% 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 companions - 2018

<table>
<thead>
<tr>
<th>Impairment</th>
<th>Visits - with an impairment</th>
<th>Visits - with an impairment and travelling companions</th>
<th>% of total visits with impairment/travel companion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobility impairment (non-wheelchair user)</td>
<td>143,000</td>
<td>205,700</td>
<td>29%</td>
</tr>
<tr>
<td>I am deaf/ partial hearing loss</td>
<td>123,000</td>
<td>169,400</td>
<td>24%</td>
</tr>
<tr>
<td>I have long-term illness</td>
<td>133,000</td>
<td>161,300</td>
<td>23%</td>
</tr>
<tr>
<td>Mobility impairment (wheelchair user)</td>
<td>109,000</td>
<td>133,700</td>
<td>23%</td>
</tr>
<tr>
<td>I am blind/ partially sighted</td>
<td><em>40,700</em></td>
<td><em>109,000</em></td>
<td>6%</td>
</tr>
<tr>
<td>I have learning difficulties</td>
<td><em>35,000</em></td>
<td><em>40,700</em></td>
<td>5%</td>
</tr>
</tbody>
</table>

*Base low (n < 50) and should be taken with caution*
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 7% came for a business trip, compared to over 1 in 5 on average. Despite this group only representing 1.9% 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 UK in 2018

- **Visit with impairment or travelling companion**
- **UK Inbound average**

- **VFR**
  - 46%
  - 31%

- **Holiday**
  - 40%
  - 40%

- **Business**
  - 7%

- **Misc.**
  - 5%

- **Study**
  - 1%

#1 Overnight transit (16,100 visits)*
#2 Medical treatment (9,300 visits)*
#3 Watching sport (4,200 visits)*

* Base low (n = less than 30) and should be taken with caution
By region, London was the most visited area of the UK for those with a health condition and their travelling group, with 46% visiting the capital on their trip in 2018. They are, however, less likely to do so than the UK inbound average with 1 in 2 international travellers visiting London. England (excluding London) was another popular area of the UK to visit with 41% of visits, on par with the UK average.

Those with an impairment and their travelling group had a higher propensity to visit Scotland when compared to the average with 17% visiting.

Numbers add up to more than 100% as some visitors go to more than one nation/region. Numbers for each nation/region refer to where visitors stay overnight. *Base low (n = less than 50) and should be taken with caution.
Visits by age and gender

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. 65% of those visiting with an impairment were over 55 in age compared to 21% of all inbound visitors. This difference becomes even more significant within the over 65 age bracket with almost half 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 £679, £75 more than the average spend.

Average spend per night is £23 lower than the average spend, driven by the large proportions of the visits for VFR purposes. VFR visitors spend an average of £34 per night in the UK, compared to £120 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

- **Jan-Mar**: 19% (Visits with Impairment or travelling companion), 21% (UK Visitor Average)
- **Apr-Jun**: 29% (Visits with Impairment or travelling companion), 27% (UK Visitor Average)
- **Jul-Sep**: 33% (Visits with Impairment or travelling companion), 28% (UK Visitor Average)
- **Oct-Dec**: 18% (Visits with Impairment or travelling companion), 24% (UK Visitor Average)
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.

Less than 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

- 85% departure by Air
- 77% of UK departure
- 10% departure by Sea
- 13% of UK departure
- 5% departure by tunnel
- 11% of UK departure
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 1 in 3, while 13% had used an Uber at some point in the trip.

Trains were also a popular option with 27% using this form of transportation during their trip.
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 2nd compared to 5th in the UK rankings overall.

“UK Rank” shows this market’s rank for total visits to the UK
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 UK nationals, with 15% of this group classed as expats visiting the UK.

“UK Rank” shows each nationality’s rank for total visits to 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

<table>
<thead>
<tr>
<th></th>
<th>Visits</th>
<th>Spend</th>
<th>Nights</th>
<th>Nights per visit</th>
<th>Spend per visit</th>
<th>Spend per night</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>543,216</td>
<td>£392,622,746</td>
<td>6,376,584</td>
<td>11.7</td>
<td>£723</td>
<td>£62</td>
</tr>
<tr>
<td>2010</td>
<td>506,005</td>
<td>£313,806,065</td>
<td>6,138,414</td>
<td>12.1</td>
<td>£620</td>
<td>£51</td>
</tr>
</tbody>
</table>

Inbound visits from those with a health condition or impairment have grown by +7% in the last 8 years, 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 +25% since 2010 vs +35% for all inbound UK spend.

Source: IPS Ad hoc question 2010; 2018. NB: excludes travelling companions as this was an additional dimension added to the Ad hoc IPS question in 2018.
Visits to the UK from those with a health condition or impairment

<table>
<thead>
<tr>
<th>Health Condition</th>
<th>2010</th>
<th>2018</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobility impairment (non-wheelchair user)</td>
<td>100,000</td>
<td>110,000</td>
<td>+123%</td>
</tr>
<tr>
<td>I have long-term illness</td>
<td>120,000</td>
<td>118,000</td>
<td>-2%</td>
</tr>
<tr>
<td>I am deaf/ partial hearing loss</td>
<td>125,000</td>
<td>110,000</td>
<td>-14%</td>
</tr>
<tr>
<td>Mobility impairment (wheelchair user)</td>
<td>50,000</td>
<td>110,000</td>
<td>+123%</td>
</tr>
<tr>
<td>I am blind/ partially sighted*</td>
<td>70,000</td>
<td>49,000</td>
<td>-29%</td>
</tr>
<tr>
<td>I have learning difficulties*</td>
<td>30,000</td>
<td>31,000</td>
<td>+1%</td>
</tr>
</tbody>
</table>

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 +123% to 110,000 visits in 2018. Visitors with deafness or partial hearing loss fell 14% to 123,000 and into 3rd most prevalent health condition mentioned amongst this traveller group in 2018.

Source: IPS Ad hoc question 2010; 2018. NB: excludes travelling companions as this was an additional dimension added to the Ad hoc IPS question in 2018.

*Sample low (under n=30) and should be taken with caution.
Inbound visitors to the UK with a health condition or impairment
October 2019