TOURISM FOR ALL
Making Accessible Travel Better

A new opportunity for the UK Tourism Industry

Survey of the impact of coronavirus on disabled travellers and holidaymakers – June 2020

Synopsis

A survey of over 100 disabled travellers and holiday makers reveals some surprising insights into post coronavirus holiday and travel intentions and presents good news for the UK tourism and hospitality industry this summer.

Although fully aware of the significant issues of coronavirus and levels of cleanliness and social distancing, they are not the key concerns of these travellers and holiday makers! The survey shows that customer service, combined with staff training and awareness of disability and accessibility, is the key to unlocking this group's holiday plans and securing their holiday bookings, from daytrips through to overnight stays and full weekly holidays in the UK.

Main Findings

The main findings of the survey conducted among 100 plus disabled travellers and holidaymakers between 1st to 12th June 2020, include:-

- An active desire to take more holidays in the UK this year, upping the level of both weekly holidays, short breaks and day trips, linked to a belief they will be taking less foreign holidays in the next 12 months.
- A determination to travel when allowed and a willingness to travel for as long as it takes to get to their chosen UK holiday destination.
- A desire to return to hotels, guesthouses and other accommodation and a willingness to pay for the right accommodation.
- Good customer service and staff training are of greater importance than coronavirus measures and the key to securing this group's business.

Conclusion

The survey shows there is a desire from this group to return to holidays and breaks post lockdown. The UK is the favoured destination and the group sees an expansion in both daytrips and UK based holidays at the expense of holidays outside the UK. However, coronavirus measures on their own are not enough. Accessibility and customer service through trained staff are the key factors; as important, if not more so, than coronavirus measures in gaining and maintaining this group as a valuable, high spending part of the UK tourist economy.

Survey Details

Background / methodology

The survey was carried out from the 1st to the 12th June amongst active disabled travellers and holiday makers, who are either members or supporters of the charity Tourism for All, which supports and promotes accessible travel and tourism in the UK.

107 adults completed a detailed survey via a 57 question questionnaire that identified their holiday / break activity in the last twelve months and, crucially, obtained their thoughts, plans and intentions to take holidays and breaks in the 12 months following the current lockdown in the UK, allowing direct comparison of their past and future activity in the holiday / tourism sector both in the UK and abroad.

The survey panel was spread across the UK, including England, Scotland and Wales, together with a small component of overseas and expat travellers. The group all had a self-declared disability or health condition that impacted on their holiday and travel activities, but all undertook, or wished to undertake, travel and tourism activities. The age range, with the highest group in the age range 45-54 and a majority of 52% in the 45-69 age group, accurately reflected disability in the UK, where people acquire disabilities as they age.

Holidays and breaks taken in the UK in the 12 months pre lockdown

The group were asked *"How many holidays or breaks have you taken in the UK in the last 12 months before the current lockdown?"*

Three quarters (74%) of the respondents had taken from 1 to 5 or more holidays in the previous 12 months, with 50% taking one or two and 24% from 3 upwards.

Destinations visited were pretty evenly split between Cities / towns, Countryside / National Parks and the Seaside, with Cities / towns slightly ahead at 62% over 59% for Countryside / National parks and the Seaside. Historic houses / castles attracted 38% of the trips while theme parks, traditionally popular with a younger age group, accounted for just 11%, consistent with the more mature age range who completed the survey.

Day trips versus overnight stays – accessibility issues.
Interestingly amongst this group 'day trips' was split almost evenly between those who took none and this who took lots!

43% took day trips, with 31% enjoying 3, 4, 5 or even more, while 57% said they took no day trips at all. This split may well be a reflection of the increased time and problems of accessible travel all in one day, particularly in the provision of accessible toilets. It is known from previous surveys that good accessible toilets are often the deciding factor in visiting a location / destination for this group and destinations that do have good facilities are very popular with travellers with access needs. However, post lockdown there is a significant change in this group, as detailed below.

Those who undertook day trips spent money, with 70% spending over £50 per trip and 18% spending over £250 per trip (this may be linked to city centre trips including a meal and a show / concert - popular with both this age range and disability base).

Holidays and breaks in the UK with overnight stays

59 respondents of the survey took holidays of multiple nights with overnight stays. 30% of this group took one such holiday a year, but the majority - 69% - took between 2 and 5 such holidays, with 37% - the largest group - taking two such holidays a year.

For this group Hotels were the first choice of accommodation, with 57% indicating they had used them, followed by Self-catering at 43% and Guesthouses / B&Bs at 40%. This indicates that this group's access needs and customer service levels were being met by elements within these sectors, who were benefiting from their custom. All other categories were far below, with Cruising at 9% and Timeshares at 5% (the lowest).

They also clearly were happy to spend on such accommodation, with 41.8% happy to spend over £500 per holiday, rising to 67% when expanded to £251 – over £500.

The numbers drop when holiday time is expanded to beyond 7 nights. The traditional two week family holiday is not strong in this sector, possibly a reflection of the more mature age of the group. 58% of the total survey responded to the question of 'seven nights or more' holidays, but well over half of these responded with a negative for any holidays over 7 nights. Of the remaining 26 respondents who did take holidays of 7 nights or more, they were split 50/50 between one such holiday a year and two to five or more (the majority of this segment taking two 7 day plus holidays a year. This may reflect the trend in all holiday markets where a time and cash rich few (retired middle class) take multiple long period holidays.

Self-catering grew as a %age of these longer holidays, just edging out hotels at 56% compared to 50% as the leading accommodation, and again money was not an issue, with 50% of the group spending over £750 on their 7 night plus holidays.

Holidays outside the UK.

A much smaller group took their holidays outside the UK. 82 of 101 UK based respondents answered this question, but only a minority of this group (39%) travelled outside the UK, with 61% saying they have taken no holidays outside the UK in the last 12 months. Of the 'no external holiday' group disability / mobility / health was the main reason, followed by cost / finance and thirdly a preference for UK holidays.

However, the 39% who did holiday abroad were committed holiday makers, with Mainland Europe and the Mediterranean making up two thirds of all holiday destinations (possibly due to long haul destinations being more difficult for people with access needs)

Just over a third of this group took one foreign holiday a year, 25% two a year, with 28% taking from 3 to 5 plus holidays abroad. Again this reflects a mature population that includes retired time and cash rich members. For this group hotels accounted for 78% of holidays taken, with cruising the next most popular category but well down at only at 26%. As with UK holidays the group were happy to pay, with over 70% at the top end of the spending categories for both up to and over 7 nights away.

The effect of the coronavirus pandemic on future holidays.

Will you change your Holiday Plans?

The heart of the survey addressed issues related to holidays after the pandemic, in response to the question *"When you are able to take holidays and breaks in the UK again, how likely is it that you will change your holiday plans and the places you will travel to in the 12 months following the end of lockdown"?*

Here we see a direct reflection of the current pandemic, with 57% saying they are very likely or likely to change their holiday plans in the next twelve months, Note this group are not saying they will stop taking holidays per se and further questions reveal an intention to holiday more in the UK and take more day trips. Interestingly 18% are actually planning to continue with their holiday plans regardless, at a time when many disabled people are included in at risk and shielded groups. This is an indication that this group is composed of existing travellers who deal with significant issues of accessibility to achieve their holiday goals and are not easily dissuaded from their holiday plans.

Concern over coronavirus at 73% is easily and understandably the largest reason given for potential changes in travel and holidays, but finance and lack of choice are also marked at 37% each. When all percentages are added up, at 155% it is clear that for some multiple reasons are present beyond just coronavirus itself.

Confidence in the UK tourism sector - overall a cautious yes and a big positive for day trips

Confidence levels about UK holidays post restrictions are addressed, with 68% of respondents answering these questions. 44% of these are very or quite confident about taking a holiday, compared to just 26% who are quite nervous or very nervous. The remaining 30% are 'don't knows', but if that is split 50/50 as more information becomes available it indicates that about 60% of this group will be willing to take a UK holiday.

However, day trips post lockdown are becoming a lot more attractive for this group, with 57% saying they are likely or very likely to undertake a day trip, compared to only 20% who are unlikely to do so. This directly compares to 57% who said they took no daytrips pre lockdown and reflects a big U turn, possibly reflecting an increased desire to get out and enjoy oneself when allowed to do so.

Fewer holidays or breaks outside the UK?

A smaller, more dedicated and bigger spending holiday group also report similar feelings over coronavirus, with 68% planning fewer overseas holidays. Here a small 13% say they will continue as before.

More UK Holidays? Yes at the expense of foreign trips

This higher spending group, when asked if they would take more UK holidays, replied with an emphatic 'yes', with 64% of these key travellers saying they are likely or very likely to increase UK holidays compared with foreign holidays . With 'don't knows' at 20%, this represents 84% of a group of higher spending travellers wanting to increase UK holidays.

Where in the UK would you go?

Surprisingly, post lockdown Visiting Family and Friends at 50% is only secondary to visiting the Countryside / National Parks at 60%. The Seaside is third at 49% while Cities / towns, the number one choice pre lockdown, has fallen to fourth with 45%. This indicates there is a demand for travel post lockdown but open spaces rather than houses and towns will be the initial attraction for this group.

How many day trips and how many UK holidays? - More for both

Post lockdown just 10% of the survey said they won't take day trips - opinions have shifted from pre lockdown. Now 66% of this group are considering taking anything from 3 to 5 or more day trips, rising to 82% for two or more and a massive 90% of this population planning at least one day trip post lockdown. A true change in this group.

It's the same picture for longer overnight stay holidays up to seven days. Here 79% say that they would take at least one holiday in the next 12 months, with almost 20% indicating that they would take 3 to 4 holidays.

Where people would stay and what they would spend are remarkably similar to pre lockdown. Hotels are slightly up at 59%, a rise of 2%, and Guesthouses / B&Bs are down by 2% at 18%. The big gain is in Self-catering, up from 42.9% pre lockdown to 48% post lockdown. However, Timeshares and Cruising are down by 3% each.

The intention to holiday is clear but what are the real concerns that could stop this group travelling and holidaying?

At the core of the survey the real concerns this group had about taking a break or a holiday were summed up in two key questions they were asked:

- *"When restrictions are lifted and you are able to take holidays and breaks again, what concerns might you have over taking holidays and breaks in the UK "*

and

- *"What steps could destinations and businesses in the UK take to give you the confidence to visit them in the 12 months following the end of lockdown (please select all that apply)?"*

For each question they had a number of options they could mark and list other concerns and steps not listed. The questions were answered by 68% of the total survey, matching those who regularly take holidays.

On the questions about concerns it was expected that “Staying safe from coronavirus” would be the top concern. However, the key concern was NOT coronavirus (59% of respondents) but “Finding places to stay that meet my access requirements” at 71%, with a further 29% wanting “Up to date information about places to go and things to do near to where I am staying”. This clearly shows that the accessibility of accommodation and places and disability awareness are the key for customers in this sector. **It reflects the fact that staying safe from coronavirus is a ground rule for all businesses but is not the key determining factor for a holiday for this group.**

It was a similar surprising result for the steps destinations and businesses should take. Again, there was a significant response and, surprisingly, questions about cleaning regimes and social distancing do not appear in the top three answers.

The top three answers are all about staff training and accessibility. First, “Staff trained in coronavirus protection measures” at 68% and then, just 5% below in second, is “Staff training on welcoming customers with access requirements” and, in third, “A comprehensive accessibility guide”. All three answers are above answers about detailed information on the cleaning regime and procedures for social distancing (60%). Only a few points below those, at 57%, is they need for staff to know about accessibility in the area and other local businesses. This directly reflects a TFA survey of 2017 where staff training and accessibility issues were marked as the key concern for this group when on holiday.

And travel does not seem to be a significant issue!

The survey ended with a series of questions about travel intentions. When asked about their intentions to travel post lockdown the group gave a ‘wait and see’ response, with slightly more at 37% saying they are likely to change ways of travelling compared to 32% who say they are unlikely / very unlikely to change. The balance lies with the 31% who reported ‘don’t know’, reflecting the current travel uncertainties.

When asked which forms of transport they would a) reduce and b) avoid, they responded by saying all forms would be reduced, with car journeys the lowest fall at 35% and the rest between 43% and 56%, with no individual form of transport most identified at risk. A stronger response was evoked for transport to avoid, with only 7.5% of respondents avoiding car journeys but rising to 61% for buses and 60% for coaches, with trains, aeroplanes and ships all within the 50- 60% range.

However, on the key question “How much time would you be prepared to spend travelling to, and while you are on, a holiday or break?”, 53% of the survey, by far the biggest response, said they would travel “However long the journey takes”. This is a reflection of other sections of the survey, where the group is clear they will holiday if conditions on accessibility, customer service and coronavirus measures are enacted – in that order.

Conclusion

It is clear that there is a desire from this group to return to holidays / breaks post lockdown. The UK is the favoured destination and the group sees an expansion in both day trips and UK based holidays at the expense of holidays outside the UK.

However, accessibility and customer service are still the key items for this group, with a caveat that coronavirus measures are being dealt with and communicated by staff. Coronavirus measures on their own are not enough to bring this group back, but linked to knowledge and training on accessibility and disability they are willing to both come and spend money in UK destinations and accommodation this year as soon as restrictions are lifted.

S.W. Dunn – June 2020