Staycations and Accessible Tourism in the UK in 2021

TFA Mini Survey on Staycations taken by Disabled holidaymakers in 2021

Synopsis

A mini survey of disabled travellers and holiday makers shows an overall positive response to staycations in 2021 with a welcome return to holidaying in the UK.

The survey shows that this group are positive towards staycations in the UK and have significantly increased their UK holiday time in 2021 compared to the previous year, despite the ongoing concerns over COVID. Accessibility is still the key for this group but there is indications that progress is being made in the industry; and where it is successfully enacted, accessibility can be the key to securing the business of this growing sector. There is also evidence that post pandemic the UK will still be a significant destination for this group in terms of holidays and travel.

Main Findings

The main findings of the survey conducted among 52 disabled travellers and holidaymakers in November & December 2021, include:-

- 79% of respondents had taken a staycation in the UK in 2021
- Just under a half 49% and taken between three or five staycations in the year.
- All parts of the UK were travelled to, from cities to coasts with a significant return to staying in hotels and eating out.
- Car travel (own or taxi) were the most popular methods of travel growing from a strong position in 2020 with rail travel being the largest loser in terms of customer usage.
- Accessibility is key to the enjoyment of a holiday and although overall respondents were positive in this area there is still more work to be done.
- Good customer service has a significant impact on the enjoyment of a holiday and the desire to return to a given destination.

Conclusion

Despite natural concerns over coronavirus and barriers of accessibility this group have positively embraced the concept of staycation and have appreciated strongly where venues, accommodation and the industry in general have set out to provide good service and help. Issues associated with accessibility in our industry are still a reality for this group but evidence of real progress particularly in customer service is seen in this survey. The Survey shows that whilst recognising the issues associated with accessible travel this group wish to explore and travel UK destinations. Businesses that are accessible and respond to this groups needs will attract both new visitors each year as well as encouraging existing customers to return gaining both praise and income from a domestic sector worth £14.8 billion per year.

Survey Details

Background/ Methodology/ Respondent profiles
The survey was carried out in November and December 2021 amongst 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.

52 adults took part in a mini survey on staycations that they had undertaken in 2021 and the opportunities and challenges they encountered in doing so. This included destinations, accommodation, food and drink establishments and transport as well as their experiences and opinions of how accessible and helpful the UK tourist industry was during a time of continued pandemic.

The survey panel was made up of Tourism For All members and supporters across the UK as well as 5 overseas countries. 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 group represented a wide range of visible and hidden disabilities with the largest group 44% declaring mobility impairment as their main disability, whilst hidden and cognitive impairments at 34% were the second largest group. This wide range of disabilities was reflected also in the age range, of the mini survey with an even split across the key age bands with 30%, at 34yrs or younger, 40%, 35-64yrs and 30%, 65 yrs +. It is noted that this age range is more evenly spread than previous surveys where the 65yr plus category has traditionally been the largest reported. As regards gender there were slightly more female than male respondents reflecting the overall UK population profile.

Staycations in the UK in 2021. It's a big YES from this group

The group were asked *"How many staycations (holidays or breaks in the UK lasting at least one night) have you taken this year (since the beginning of January 2021)? "*

A highly significant 79% of respondents had taken a staycation in the UK in 2021. This a great increase from a survey undertaken a year earlier when less than a half of all respondents had taken a holiday in 2020 after the first lockdown. Better still in 2020 60% of those holidaymakers had taken a day trip only. This year all the respondents who had taken a holiday had stayed away a minimum of one night and up to seven nights or more.

The survey revealed that only 21% of respondents had not taken a staycation. 30% had taken one or two trips whilst just under a half at 49% and taken between three or five staycations in the year. With almost 80% of disabled travellers represented in the survey taking at least one staycation and almost a half taking three or more, it is encouraging to see that despite Covid-19 related challenges and restrictions those with a disability were still engaging with the visitor economy during last year and is a positive indication of a willingness of this group to holiday and travel within the UK. It clearly shows that people wish to return to a normality of life, as would be expected, but more importantly have the trust and faith in the tourist industry in the UK to provide them with safe and appropriate accommodation and destinations.

For just a day or a longer stay? What a difference a year makes!
The previous survey post lock down revealed that 66% of all respondents took only a day trip with only 34% staying overnight for one night or more. A year later confidence in this group has rocketed. Now just under half at 49% stayed for a minimum of one to three nights. Whilst a further 26% stayed four to six and the remaining 25% where seven nights or more, a full traditional holiday. This directly reflects that both Covid measures and accessibility issues are being increasingly addressed by sectors of the UK tourism industry and this is gaining them long stay customers from a group that has £14.8 billion spending power in our economy.

Destinations and Attractions

Destinations - We are everywhere!
As in previous surveys respondents travelled to all areas of the UK with no one area standing out head and shoulders above another, however in terms of types of destinations there was some real changes .

The first 2020 post lockdown survey showed that travellers indicated that countryside and national parks would be their first choice with cities/ towns, previously their first choice, falling to fourth place. That's now changed with towns being the first choice, but with a caveat - it's small towns and even villages that are heading the list at 32% of the survey. When you add in the 21% who also listed cities and large towns, over half the survey are choosing buildings over the countryside and the seaside. This may not be surprising as it is where hotels, accommodation and food establishments are. Countryside and national parks at 28% were, as an individual sector, in second place after small towns and villages and the seaside then at 19%. This survey however is much more even in terms of where people are going and is another indicator that normality may well be coming back for this sectors holiday destinations.

Castles and historic houses bounce back. It's when you dig down into the detail of where people went that some surprises do arise. The post lockdown survey a year before had only 4% of its group going to castles or historic houses. A year later the situation has dramatically changed with this sector the largest single attraction visited at 24%. The countryside still has its attractions though as parks and gardens were the next biggest section visited at 20% with country parks third at 14%. Other outdoor attractions such as wildlife park, zoos and farms added another 13%, giving a total of 46% of visitors going to an outdoor venue of some sort. Galleries and museums along with theatres and concerts are just 9% percent each. This may be a reflection of the fact they are indoor with limited numbers allowed or specific time visits at the time the survey was undertaken.

The overall change in behaviour and a positive attitude towards attractions is perhaps best exemplified in the fact that only 7% of respondents said they had visited no attraction at all on their staycation.

And Mode of transport? Signs of a change driven by the pandemic?
The Survey reveals a significant change in transport use compared to the previous survey taken a year earlier.

In 2020, just after the first lockdown, travel by car was the most expected form of transport and in the post lockdown survey of 2020 44% of respondents had indeed travelled by car, but unexpectedly other forms of transport had significant numbers using them, particularly train travel at 25%.

The 2021 survey reveals a significant difference. Car usage has risen a full 10 points to 55% with a further 14% using a taxi. This growth has come at the expense of public transport with now only 12% using a train a 50% drop in a year and only 5% using a bus compared to 13% in the last survey. However there is one indicator of hope for the industry in that 7% of people used a coach for their staycation in this survey compared to 0% in 2020. This is perhaps a reflection of greater availability of coach holidays in 2021 but it could be an indicator of the first green shoots of a bounce back for the coach holiday in the UK.

Travel by rail – a significant fall in usage.
However, it is rail transport that in this survey was revealed to be the biggest loser in the year. Here there is a significant shift and maybe an indicator that for longer journeys, of which a holiday is often one, rail travel in a pandemic (as well as accessibility issues) has fallen from favour. Whether this is long term or just a pandemic blip remains to be seen.

Accommodation and Food & Drink Establishments

Accommodation is important and people are happy to pay for it.
When it comes to where people stayed hotels were by far the most popular type of accommodation with over half of all respondents (52%) staying in a hotel. Price did not seem to be an issue for this group with mid-range hotels being the most popular at 22% of the entire survey followed by almost equal numbers staying in budget hotels (16%) and luxury hotels (14%). Self-catering at 16% was the choice for a significant minority followed by holiday camps and parks at 14%. For this mini survey camping, caravans and B&B's were of low significance, perhaps reflecting a mix of coronavirus impact and the desire to return to traditional holiday accommodation.

Eating out? Yes we are and enjoying it! 98% of the survey were happy to use a food/drink establishment during their most recent staycation with only 2% saying they had not. This is a sign of confidence in the sector with the virtual removal of the sandwiches and flask of tea in the car option. Cafes were the most popular sector of this market at 41% closely followed by restaurants at 34%. Pubs and bars were less popular at 14% and 9% each, but this may be a reflection of accessibility needs for this group as well as the benefits of more formal sit-down dining.

Accessibility

A key and fundamental part of this survey explored issues regarding accessibility, an issue that is at the very centre of a successful holiday for this group of travellers. To this end the survey explored holiday makers opinions and views regarding accessibility issues, covering **Attractions, Accommodation, Food/Drink Establishments and Transport.** For each category respondents were asked how good accessibility was in three categories; **Good** where 'all my needs were met'. **Acceptable** where 'most of my needs were met, although there was some issues' and **Poor** where 'many of my needs were not met'.

Good. In each of the four categories Good, where all customers' needs were met, was a minimum of 50% for attractions and food and drink rising to 54% for accommodation and 73% for transport. It should be noted that in the transport section this high percentage should not be a surprise as cars were by far the overriding choice of transport and one where access issues had been, by and large, dealt with by the holiday maker themselves.
However, for the other three sectors a level of response at this median level on a key area for this group is a potential issue.

Acceptable. This is where the next category of acceptable only (where most of the needs were met but there were still some issues), becomes highly important.
For attractions 46% of respondents place them in this category just 4% below those who said they were good. For food and drink establishments the acceptable level is 42%. 8% below good. It is, however, in accommodation where some distance appears between acceptable and good. Here acceptable level was at 39% 15% below the 54% who said they were good

Poor. However, there is a silver lining for these sectors. The number of survey respondents who said Poor - where many of their needs were NOT met **was consistently low** ranging from just 3% in transport and 4% in attractions to 7% and 8% in accommodation and food respectively. This clearly reflects that for this key group something is being done to help them with access and it is recognised. However it raises the question is it enough?

We are doing well on accessibility, but we could be doing more, much more.

It is in this key area of accessibility that the survey still raises some challenges for the industry. Most sectors would normally wish to have a good rating/response at a higher level than the 50% to 54% recorded in this survey for accommodation, attractions and food establishments and this reflects ongoing issues for disabled and access need customers in the service they receive.

It is also interesting to note that in Transport, where those who access needs have taken it into their own hands with their own vehicle, it may well be a strong indicator that public transport still has a way to go to meet the needs of our accessibility needs population and this view is reflective of opinions in many other surveys on travel. It also raises questions of what people with accessible needs do if they cannot afford to have their own transport.

Progress is being made.
However, it should be noted that the Tourism and Travel sectors have progressed and is continuing to progress over time. If we add together both Good and Acceptable percentage levels the figures become reassuringly high. But it must be noted within the acceptable level there were still some issues which the sector needs to address and not necessarily by just infrastructure and building changes. Training, staff awareness and good customer service all help towards a greater understanding of and better service to this significant market and this is reflected in real customer experiences.

Real customer experiences - good outweighs bad and provides some great insights into this sector.
As well as scoring accessibility in good average and poor respondents were also asked to describe particularly good experiences and particularly disappointing experiences. Some disappointing experiences were recorded, mainly in just two categories - categories that frequently come up in any survey - poor accessibility particularly for wheelchair users and the old perennial issue of accessible toilets. Some of these complaints in this survey we're related to Covid regulations; for instance

disabled toilets closed (or used by everyone while other toilets were closed under …. social distancing. And Barriers that meant the ramped access was 'exit only' (or entrance only),

‘My situation was handled differently, which I was so, so pleased with’.
However in this survey, negative complaints were far outweighed by positive statements about the service received, staff attitude and these were in direct contrast to the fewer negative comments about how accessible places were. For each sector positive comments outweighed negative comments for all relevant topics and the positive comments were in in many cases glowing, reflecting both ease of access caring staff and good customer service.

‘Fantastic place, very friendly staff and food to die for’
‘Very accessible easy to get around!’
‘Brilliant access on the three main trails’
‘Multiple access routes; clear guides’
‘The staff are very polite and helpful.’
‘Very accessible and easy to navigate around the hotel’
‘Excellent at catering for our needs. You know what you are going to get ,,,,Hence we keep going back.’
‘The staff was friendly, and the food was good. I could pick where I wanted to sit, and when I changed my mind a few times there wasn't any problem at all.’

How great customer service can change your world.
One individual comment sums up how being accessible and having good customer service can directly affect a person…and change their whole world.

‘I paid to feed the giraffes their leaves at Cotswold Wildlife Park. Since I have anxiety, I informed them of this, and so my carer was allowed to come into the enclosure with me and stand with me to feed the giraffes. This is usually only for the paid participant, but my situation was handled differently, which I was so, so pleased with.

Such effusive comments about an individual business or establishment was not uncommon and a number of UK attractions, accommodation and food and drink establishments were individually named and praised, Which shows that when good service is given it is noted and praised.

Holidays abroad and Staycation costs

So was your staycation a substitute for the foreign holiday you wanted and exactly how expensive was it?
The survey asked respondents whether they take holidays abroad. Recognising the impact of the pandemic this was not a straightforward ‘yes / no’ question, with 41%

saying such foreign holidays were ‘usual in most years, but not since the start of the pandemic’. and a further 15% saying yes to holidays abroad and that they had already taken one in 2022. This would give a total of 56% who are taking holidays abroad or would if the situation improved. However this leaves a significant minority at 44% who rarely took a foreign holiday or simply said no such holiday since the very start of the pandemic.
This highly significant minority with a disability and or access issues choose to holiday in the UK where there may well be greater control of their transport and access needs and there clearly is an opportunity within the UK industry to serve these people who already have a propensity to holiday at home.

So was that staycation in 2021 a substitute for a foreign holiday or not? The survey was remarkably even handed on this subject with 52% saying yes it was a substitute for holiday abroad, but closely matched by the 48% for whom a UK holiday was their priority. Again, this indicates that even in a normal year a holiday abroad is not essential for the vast majority of this group and that UK holidays are indeed welcome and appreciated.
And with lots of talk about UK holidays going up in price in the last year, travellers were first asked if it costs more to take a staycation than to go on a foreign holiday. Clearly it was not for the largest majority (74%) where their staycation was cheaper than a foreign holiday.
However on the question of rising prices and if their 2021 staycation was more expensive than previous domestic holidays taken the survey was pretty much split with 52% saying it was more expensive whilst 48% were quite happy that the cost was the same as previous holidays in the UK

Forward plans

The final section of the survey focussed on intentions for future staycations and whether any such trips had been booked.

Staycation next year? It’s a Yes, but a qualified Yes
When asked the question if they would take a staycation next year it was a yes with 56% of a survey saying they definitely or probably would take a holiday in the UK. A further third thought it was possible they would, leaving only 7% saying it was a definite no.
When the same group were asked exactly when they would book their staycation, 60% said they would be booking, with 24% having already booked or due to book in the next month and 36% we're going book in the next few months. COVID raises it’s head for the other 40% who said they would wait and see how the situation develops. It is likely that this is the group who would seek to go abroad if the situation improved. However, this admittedly small group would indicate that six out of 10 holidays plan to be taken in the UK next year and are happy to do so.
Individual comments covered the entire spectrum from positives such as ‘*Already have 3 x two week staycations booked’.* through to a negative ‘*Too much of a rip-off’* although with the latter it is not known whether this applies to UK holidays or all holidays!

Same again or try somewhere new?
Here our survey of accessible need travellers and holiday makers seem to be in line with the overall population in being split between those who want to return to the

same place and those who want to go to try new fields and new areas to explore within the UK. Just over half of the respondents at 54% said they would definitely or probably return to the same area of the UK whereas 46% said it was only possible or no they would not. Linked to this, a return to the same accommodation had slightly lower figures in that 46% said they definitely or probably would and for the other 54% it was a possible or a no, possibly a sign of the levels of accessibility found within an individual hotel or accommodation.

Interestingly the reason for wanting to change was often listed as a positive in the comments such as '*trying new areas of the UK for us* and *we will choose different places as we like to explore',* with a caveat '*however we will go back to Yorkshire as so many places to visit'.*

It appears that despite the restrictions COVID may well have given this group there is a strong desire and interest both to try new things in the UK and return to areas and places that they clearly enjoy.

Conclusion

A further year into the pandemic has shown that despite both concerns over coronavirus and barriers of accessibility this group have positively embraced the concept of staycation and have appreciated strongly where venues accommodations and the industry in general have set out to provide good service and help. By no means are issues associated with accessibility in our industry a thing of the past but evidence of real progress particularly in customer service is seen in this survey. Survey shows that whilst recognising the issues associated with accessible travel this group wish to explore and travel and UK destinations and accommodation that are accessible will attract both new visitors each year as well as encouraging those to return to a place they like and love.

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