



MAKING TOURISM MORE ACCESSIBLE: SCOTTISH HOUSEHOLDS LIVING WITH HEALTH CONDITIONS AND IMPAIRMENTS HIGHLIGHT THE COMMERCIAL OPPORTUNITY IF SCOTTISH TOURISM CAN OVERCOME SOME KEY BARRIERS

56° DEGREE INSIGHT
Scotland's Viewpoint is a regular survey of 1,000+ Scots - statistically representative of the Scottish population and undertaken by 56 Degree Insight. It is conducted online over a two-day period on a quarterly basis. The results displayed here are taken from the 1st wave of 2024, with fieldwork taking place from 27-29 January. Some 1,006 Scots were interviewed. For further information visit: www.56DegreeInsight.com



Last week, VisitScotland reminded us that one in five people across the UK live with a disability or impairment and contribute to a collective spending power of £249 billion per year. The purpose was to remind Scottish tourism businesses of the importance of finding ways to make their businesses as accessible as possible.

But what do we know about this large segment of the population in Scotland - what are the barriers they face when it comes to taking holidays, what are their concerns, and how can Scotland's tourism industry better address these concerns?

In late January, 56 Degree Insight worked with Dr Carol Sargent from Sargent Group Consulting to design some key questions and incorporated them in our quarterly representative survey of 1,000+ Scots - Scotland's Viewpoint.

Key findings to emerge are summarised below and illustrate the potential for the Scottish tourism industry if some of the barriers highlighted can be overcome.

TWO FAMILIES IN FIVE ARE LIVING WITH HEALTH CONDITIONS / IMPAIRMENTS - AND THREE QUARTERS ARE LESS LIKELY TO TAKE HOLIDAYS

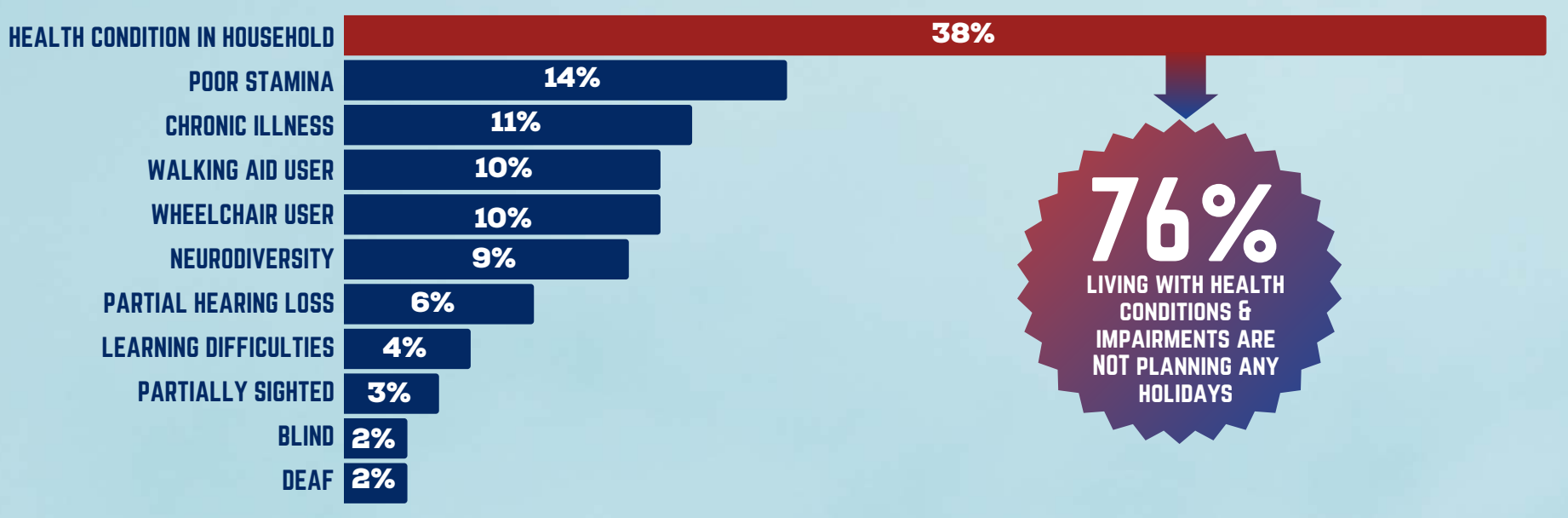
One million Scottish households have someone living with some form of impairment or health condition (38%).

We estimate that Scottish households spend ~£5K a year on recreation, culture, restaurants and hotels. And data from the Office for National Statistics would suggest that the untapped consumer spending power for households with health conditions/impairments is **£4.6 billion a year**.

This illustrates the opportunity if the tourism industry is geared up to reflect their needs. **Three quarters (76%)** of these households told us they are less likely to take holidays together.

The major issue in this group is mobility, with poor stamina the most reported, with chronic illnesses a close second.

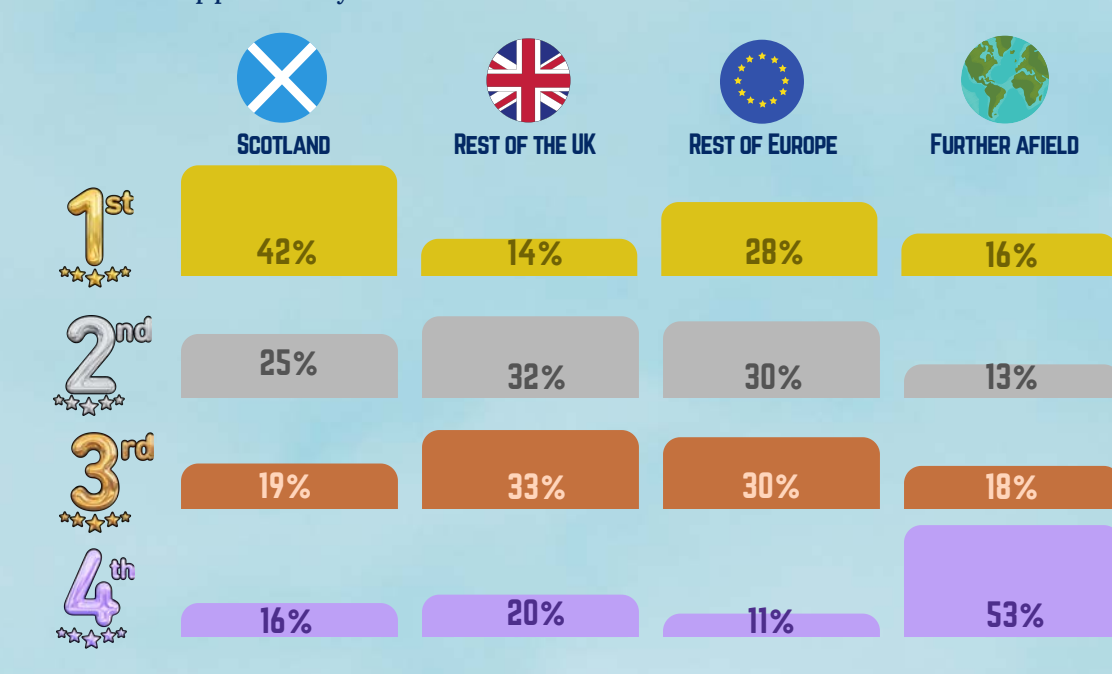
Interestingly, the health conditions and impairments were very consistent across ALL age groups.



76%
LIVING WITH HEALTH CONDITIONS & IMPAIRMENTS ARE NOT PLANNING ANY HOLIDAYS

SCOTLAND IS THE PREFERRED DESTINATION

When those with impairments and health conditions were asked to rank their preferred destinations to visit on holiday, the potential for the Scottish tourism industry is clear: **42% named Scotland as their first choice and a further 25% named it as their second choice**. This further emphasises the scale of the opportunity for Scottish tourism



ALMOST TWO THIRDS FELT THE TOURISM INDUSTRY COULD MAKE A DIFFERENCE

When those with impairments and health conditions were asked what the tourism industry could do to make a difference, 57% in this group responded. The areas the Scottish Tourism Industry can help are listed below but notably, **reduced costs and the provision of more advance information** about any areas of concern were key:



"WE JUST NEED REALLY CLEAR INFORMATION UP FRONT ABOUT THE PROPERTY - AND SOMEONE TO ASK FOR FURTHER DETAILS OR REASSURANCE"

"THEY COULD MAKE AVAILABLE SPECIFIC RECOMMENDATIONS OF PLACES TO ACCOMMODATE OUR NEEDS"

"THEY COULD DO WITH HAVING DISABILITY FRIENDLY PACKAGES AND ASKING DISABLED PEOPLE TO GIVE THEIR OPINIONS AND WORK WITH THEM TO MAKE IT MORE ACCESSIBLE"

"MORE 'REAL PERSON REVIEWS' - FROM OTHERS WHO FACE SIMILAR PROBLEMS WHEN TRAVELLING"

"MORE INFORMATION ABOUT HOW THEY MEET ANYONE WITH AN ADDITIONAL SUPPORT NEED"

"MORE AUTISM-FRIENDLY - FROM TRAVEL, THE HOTEL, THE EATING OPTIONS - WE NEED REASSURANCES"

"UPFRONT AND EASY INFORMATION ABOUT THE LOCAL AREA, TIPS FROM LOCALS"

In their own words

WHAT IMPACTS HOLIDAY CHOICE IN HOUSEHOLDS WITH HEALTH CONDITIONS AND IMPAIRMENTS?

Price is the most common factor which impacts choice of holidays in households with health conditions.

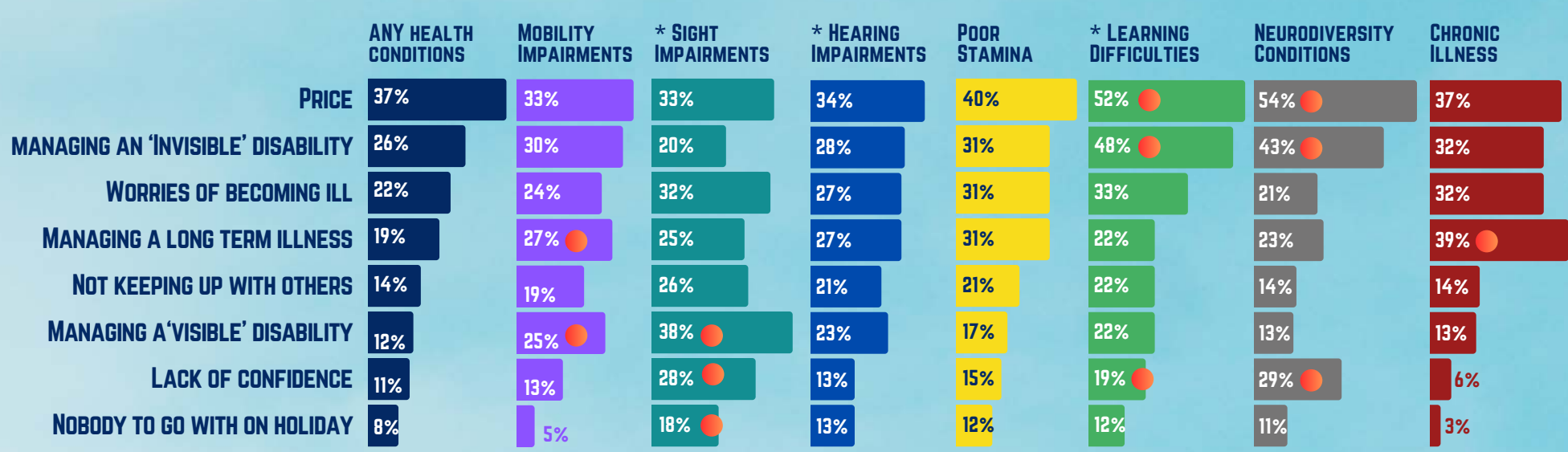
Managing invisible disabilities, worries about becoming ill and managing long term illnesses were the next most important aspects.

Interestingly, in households with people living with neurodiversity and learning difficulties both price and managing invisible disabilities are particularly important.

The least important factors were confidence to go on holiday and having nobody to go on holiday with.

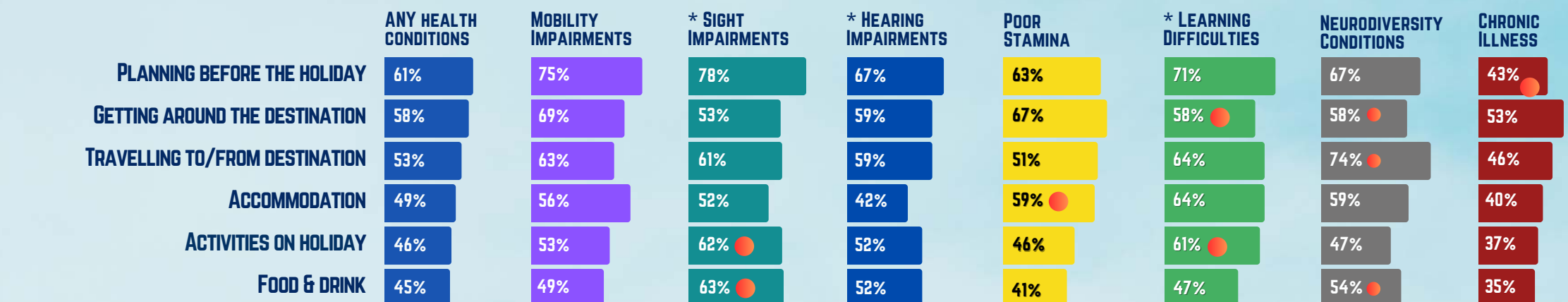
Households with people living with sight impairments and learning difficulties appeared to have more factors to consider.

The key finding is that primary concerns are similar across different groups with health conditions and impairments.



AREAS TO IMPROVE A HOLIDAY JOURNEY

To better understand where the tourism industry can focus on to reduce barriers for these households, the respondents were asked to rate their concerns in different areas. The chart below summarises the degree of concern at each stage for those with health problems, as well as a range of different conditions and impairments. The concerns for each area and the individual sub groups are summarised below:



In their own words

"I NEED DETAILED INFORMATION ABOUT WHERE I'M GOING AND IT'S NOT ALWAYS AVAILABLE"
"TRYING TO FIND GOOD TRAVEL INSURANCE THAT COVERS ALL MY CONDITIONS"

"I NEED TO PLAN EVERYTHING METICULOUSLY - MY SON HAS AUTISM AND REALLY STRUGGLES IF THINGS GO WRONG"
"CHRONIC PAIN LIMITS MY MOBILITY"

"MAKING SURE MY SON'S SENSORY NEEDS CAN BE ACCOMMODATED"
"MAKING ALL OF THE CONNECTIONS WHEN MY MOBILITY IS SO LIMITED"

"WILL THE HOTEL BE ACCESSIBLE - HAVE A LIFT, A WALK-IN SHOWER. WILL THE BED AND SHEETS BE THE RIGHT TEXTURE AND TEMPERATURE"
"MY SISTER IS EPILEPTIC SO WE LOOK AT PLACES NOT TOO FAR FROM HOSPITALS"

"I CAN'T WALK ANY DISTANCE AND CAN ONLY VISIT SIGHTS WHICH ARE WHEELCHAIR ACCESSIBLE"
"I WORRY THAT SOME OF THE THINGS WE WANT TO DO WON'T BE POSSIBLE FOR MY DAUGHTER WHO HAS HEARING DIFFICULTIES"

"I HAVE CONDITIONS WHICH REQUIRE DIETARY ADAPTIONS AND I WORRY THAT I MIGHT NOT BE ABLE TO GET THIS WHILST AWAY"
"MY CHILD IS AUTISTIC AND HAS SEVERE SENSORY ISSUES WITH FOODS"



The above analysis illustrates similar concerns across different groups and a range of options to encourage households with people living with health conditions and impairments to go on holiday, some of which can be implemented relatively, simply, quickly and cheaply.

There are opportunities to not just make accommodation more accessible, but to improve planning, getting around a destination, information on activities and food and drink and show this community they are being listened to, encouraging these households with people living with health conditions and impairments to book holidays in Scotland.