



# Scottish Tourism Index - Spring 2023

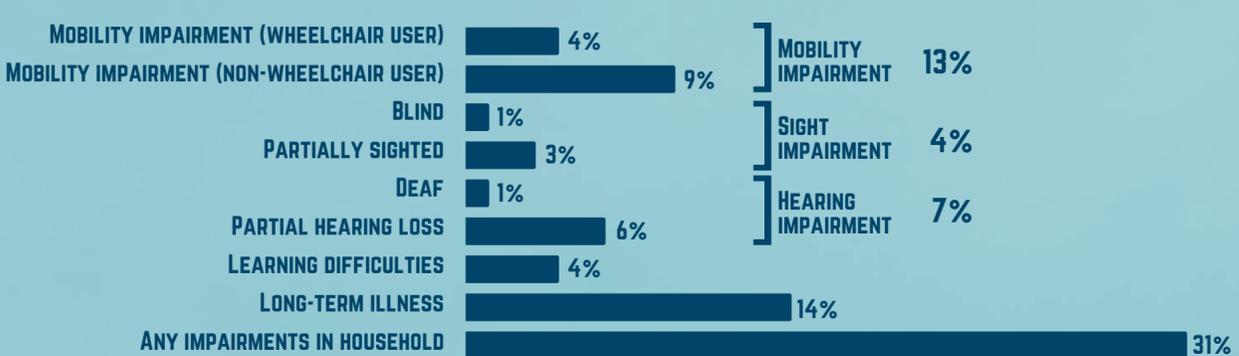
## THERE IS A REAL DEMAND FOR DOMESTIC HOLIDAYS AMONGST SCOTS WHO HAVE IMPAIRMENTS AND SPECIFIC ACCESSIBILITY NEEDS - BUT THE BARRIERS NEED TO BE ADDRESSED BY SCOTTISH TOURISM OPERATORS IF THIS POTENTIAL IS TO BE REALISED

As the populations in developed countries evolve to an increasingly older profile with higher proportions suffering from impairments and disabilities, the tourism industry has often struggled to keep up to the pace of ensuring that all aspects of the tourism experience are as accessible as possible. This is also the case in Scotland, although importantly, more and more businesses have tried to provide a more accessible experience - especially over the last couple of decades.

Commissioned by VisitAberdeenshire, 56 Degree Insight are currently working with tourism businesses in the area, providing bespoke advice and consultancy to help them to optimise their research and insight gathering to better understand their customers. In discussions with one such operator, Dalriada Luxury Lodges located just outside Stonehaven, it became clear that there was a need for more information and understanding of the needs of those with different types of impairment - how can they as a business provide a best in class experience in this area? We were keen to help by increasing the amount of information available, and as a starting point, in April, we added a question about impairments in the respondent's household to the Scottish Tourism Index. In this and subsequent surveys, we will be able to analyse tourism patterns amongst those with different types of impairment. This first analysis illustrates that the demand for holidays is just as high amongst most with impairments as it is the wider population - and that there is a real potential amongst the domestic markets, especially amongst those with mobility impairments.

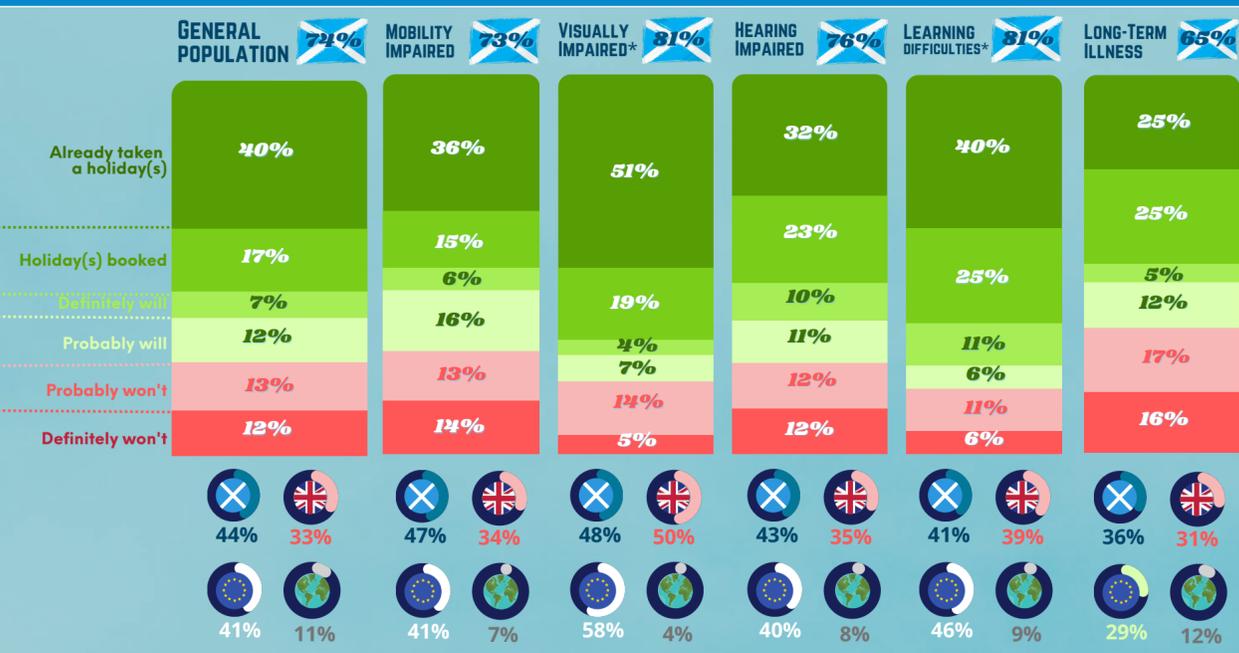
### OVER THREE IN TEN SCOTTISH HOUSEHOLDS HAVE MEMBERS WHO HAVE AN IMPAIRMENT OF SOME KIND

Just over three in ten Scottish households have someone with some form of impairment or accessibility issue living there (31%). This illustrates the extent to which ensuring your tourism business is geared up to reflect these needs is vitally important - not only is inclusivity important, in a commercial sense it is also too large a market to ignore. Long term illnesses impact one in seven households (14%), however mobility impairments are also key with 13% affected. Hearing and visual impairments should also be borne in mind however with 7% and 4% of households impacted. But how important are these segments to tourism? We find out below.....



### HOLIDAY TAKING IS AT SIMILAR LEVELS TO THE OVERALL POPULATION BUT WITH SCOTLAND A MORE POPULAR CHOICE AMONGST THOSE WITH MOBILITY ISSUES

When we compare the holiday taking behaviours and intentions amongst those who have a household member with some form of impairment or accessibility issue and the overall population, what is immediately apparent is that there is a similar level of holiday taking across most impairments to the overall average. Indeed there is evidence that those with visual impairments or learning difficulties are more likely than average to take holidays (although the small sample sizes in each of these cases means that we shouldn't attempt to draw too many conclusions). Only those with longer term illnesses are rather less likely to be taking holidays. Interestingly, the biggest opportunities for Scottish tourism businesses appears to be amongst the mobility impaired population and those with visual impairments, both of which have higher than average likelihood to holiday in Scotland.

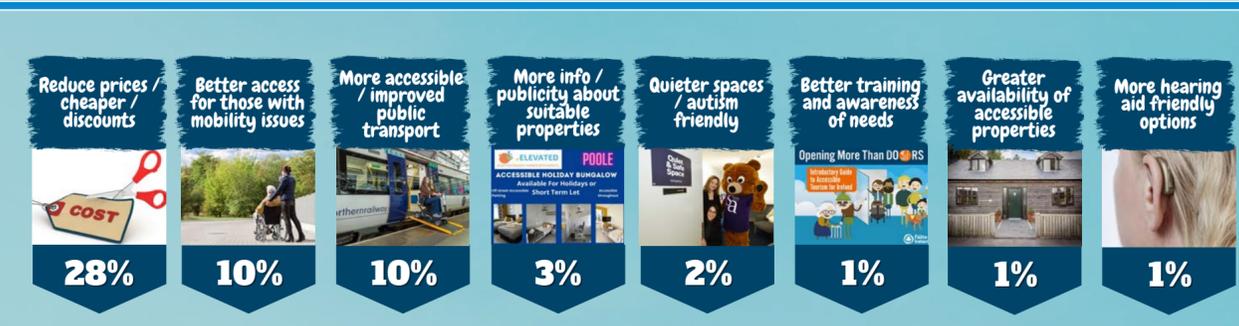


Clearly, there are real opportunities for Scottish tourism businesses to provide holiday experiences for those with impairments and accessibility issues. But the infrastructure and suitable facilities need to be in place - so what could Scottish tourism businesses do better to make the product more appealing and accessible?

\* NOTE: SAMPLE SIZES FOR THOSE WITH VISUAL IMPAIRMENTS AND LEARNING DIFFICULTIES EACH HAVE FEWER THAN 50 RESPONDENTS - RESULTS SHOULD BE REGARDED AS INDICATIVE ONLY

### THE BARRIERS TO THOSE WITH IMPAIRMENTS INCLUDE COST, ACCESS, GETTING TO THE DESTINATION AND A LACK OF INFORMATION

The main area identified by those with a household member who has some form of impairment relate to the costs to stay in many properties which are otherwise accessible. Although this will often reflect the additional investment that has been made, they still need to be affordable - three in ten from such households raised this as an issue. One in ten called out accessibility issues for those in wheelchairs or with other walking aids, whilst a similar proportion highlighted the need for public transportation to be more accessible. And 3% called out the need for more publicity and promotion of suitable holiday properties.



Read more about the fabulous lodges at Dalriada and the levels of accessibility on offer at [WWW.DALRIADALODGES.COM](http://WWW.DALRIADALODGES.COM)



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 2nd wave of 2023, with fieldwork taking place on the 24th-25th April. Some 1,006 Scots were interviewed. For further information visit [www.56DegreeInsight.com](http://www.56DegreeInsight.com)