

# Accessibility – Non Participation

May 2018

# Introduction and Methodology

## AIMS

to better understand the reasons why some people with health conditions and impairments are not taking holidays

## METHODOLOGY

Kantar TNS conducted 6,171 face-to-face interviews with a representative sample of the GB population between Feb-March 2018

## OUTPUTS

Weighted to be nationally representative

Results can compare general population, population without impairments and the population with a health condition or impairment

SIZE THE OPPORTUNITY

## Size of the opportunity

**430,000**



**£116.7M**

*British adults with an impairment did not take a domestic trip in the last 12 months due to the lack of accessibility provision*

*Opportunity if each person with an impairment took a domestic holiday*

## Key findings

### 19% of the population has an impairment

*The most common impairment is a long term illness*

*Those with an impairment have an older and lower socio-economic profile*

### 48% of those with an impairment have taken a holiday in the last year

*Long domestic holidays (4+ nights) are the most common type of trip*

*International trips have the greatest disparity between those with and without an impairment*

### 46% cite main reason for not taking holiday as beyond their control

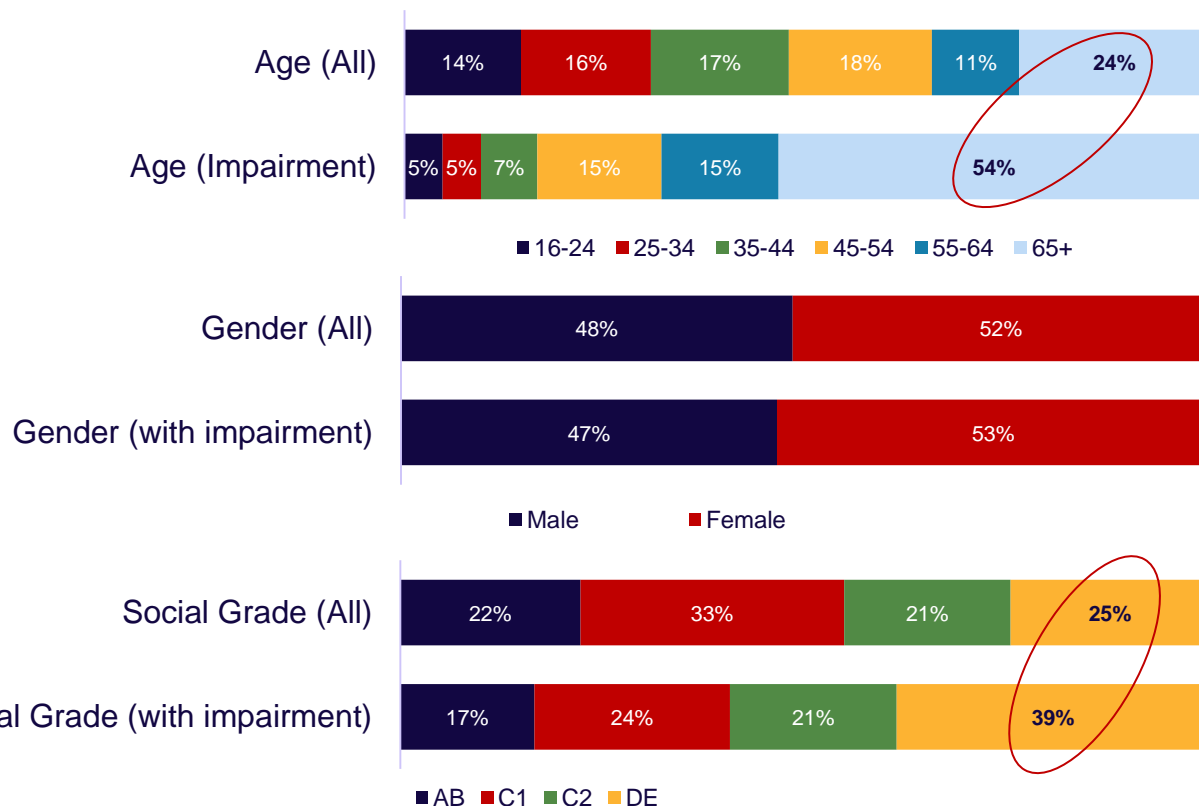
*31% say they cannot afford + 15% health issues*

*8% (430k) of those who did not take a trip cited an accessibility concern*

*5% (306k) cited an accessibility concern as the main reason*

# Respondent's profile

Those with an impairment tend to be older and from a lower Social grade.



# Respondent's profile

19% of the population has an impairment

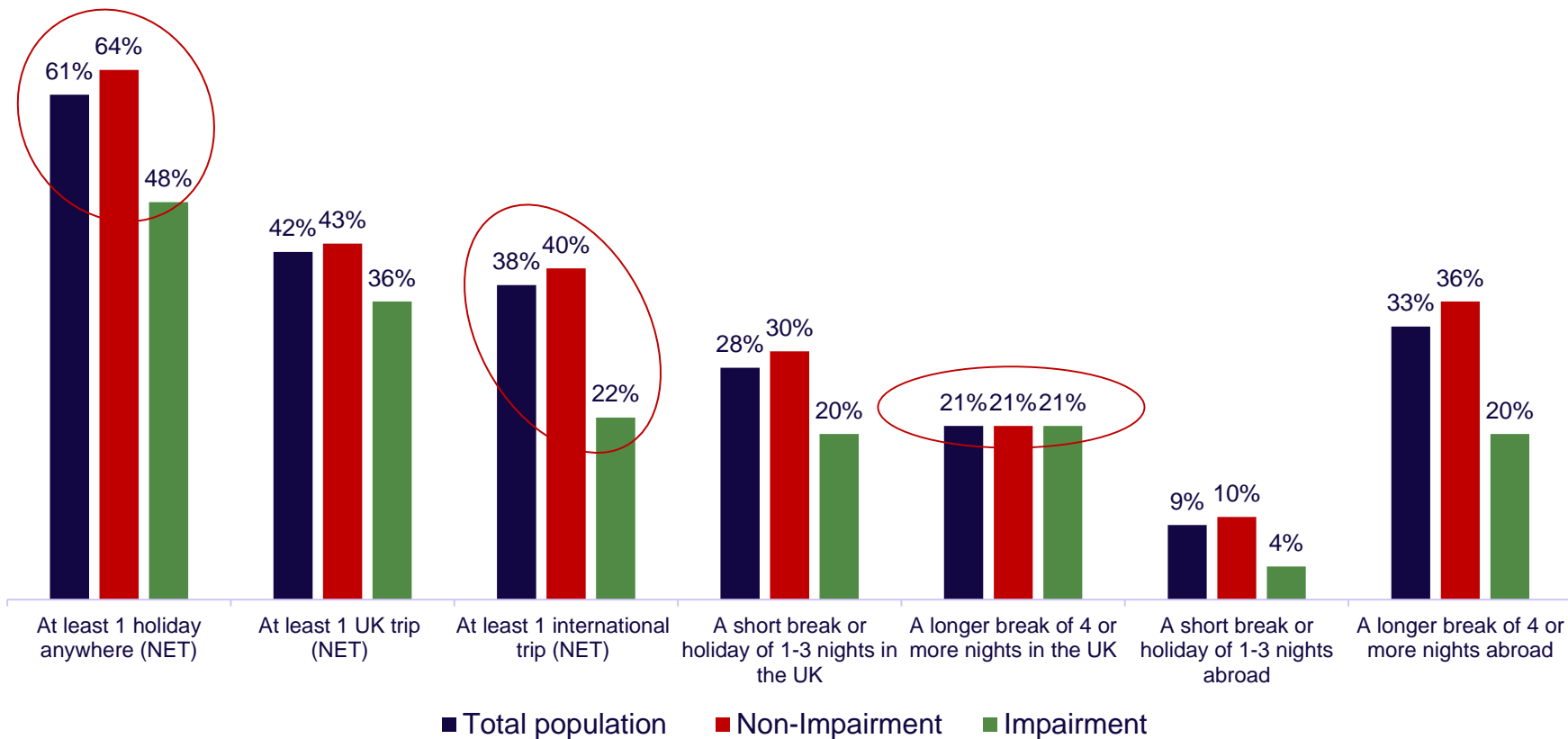
The most common type of impairment is a long term illness

6% of the population have mobility impairments

Type of impairment	Incidence in British population
<b>Any impairment (NET)</b>	<b>19%</b>
<b>I have a long-term illness (e.g. AIDS, arthritis, cancer, diabetes)</b>	<b>11%</b>
<b>Mobility impairment (NET)</b>	<b>6%</b>
<i>I have a mobility impairment (non--wheelchair user)</i>	<i>5%</i>
<i>I have a mobility impairment (wheelchair user)</i>	<i>1%</i>
<b>Hearing impairment (NET)</b>	<b>4%</b>
<i>I have partial hearing loss</i>	<i>4%</i>
<i>I am deaf</i>	<i>&lt;1%</i>
<b>Vision impairment (NET)</b>	<b>2%</b>
<i>I am partially sighted</i>	<i>2%</i>
<i>I am blind</i>	<i>&lt;1%</i>
<b>I have learning difficulties</b>	<b>1%</b>

# Holiday in the last 12 months: UK and Abroad

- 48% of those with an impairment took a holiday vs 61% Total Population
- Greatest difference for International Trips
- Longer +4 nights domestic trip is at parity



Q2: In the past 12 months, which of the following types of short breaks or holidays have you taken?  
 Base: All respondents (n=6171), impairment (n=1459), without impairment (n=1554)

# Reasons not to take a domestic trip

- 8% of people with impairment have not taken a trip due to accessibility issues
- most affected by affordability (33%) and reasons beyond their control such as illness (15%)
- Those without an impairment are also limited by the cost (20%) but also because they prefer to go abroad (18%) or are too busy (36%)

Reasons not to take domestic trip	All respondents	Non-Impaired	Impaired
Can't afford it	22%	20%	33%
<b>TOO BUSY (NET)</b>	<b>33%</b>	<b>36%</b>	<b>16%</b>
<i>Too busy/No time due to work or studies</i>	18%	20%	7%
<i>Too busy/No time due to family commitments</i>	17%	18%	10%
Prefer to go abroad	16%	18%	7%
<b>ACCESSIBILITY AND HEALTH ISSUES (NET)</b>	<b>4%</b>	<b>1%</b>	<b>23%</b>
<i>Health/ill health: Can not go away</i>	3%	1%	15%
<b>ACCESSIBILITY ISSUES (NET)</b>	<b>1%</b>	<b>0%</b>	<b>8%</b>
<i>Lack of transport that suited my needs</i>	1%	0%	3%
<i>Lack of accessibility information on places to stay and visit</i>	0%	0%	3%
<i>Lack of attractions that suited my needs</i>	0%	0%	2%
<i>Lack of accommodation that suited my needs</i>	0%	0%	1%
<i>Concern of how I will be treated by staff</i>	0%	0%	0%
Poor weather	8%	8%	7%
Cheaper to go abroad	4%	4%	4%
Don't like going away	3%	3%	6%
Don't want to go on my own/no one to go with	1%	0%	2%
Have pets	1%	1%	1%
No real reason	13%	13%	8%
Other	3%	2%	4%

Q4: You said you have not taken any short breaks or holidays in the UK over the last 12 months, why is this?

Base: Those who not taken a domestic trip in the last 12 months

All respondents (n=1694), impairment (n=735), without impairment (n=959)




# Main reason not to take a domestic trip

- 5% of people with impairment have not taken a trip due to accessibility issues
- For those with an impairment affordability (31%) and health (15%) most commonly mentioned main reasons not to travel.
- In comparison, those without an impairment most commonly mentioned being busy (34%) and preferring to go abroad (16%) as the main reason not to take a

Main reason not to take domestic trip	All respondents	Non-Impaired	Impaired
Can't afford it	21%	19%	31%
<b>TOO BUSY (NET)</b>	<b>31%</b>	<b>34%</b>	<b>14%</b>
<i>Too busy/No time due to work or studies</i>	15%	17%	6%
<i>Too busy/No time due to family commitments</i>	15%	17%	8%
<b>ACCESSIBILITY AND HEALTH ISSUES (NET)</b>	<b>4%</b>	<b>1%</b>	<b>20%</b>
<i>Health/ill health: Can not go away</i>	3%	1%	15%
<b>ACCESSIBILITY ISSUES (NET)</b>	<b>1%</b>	<b>0%</b>	<b>5%</b>
<i>Lack of transport that suited my needs</i>	0%	0%	2%
<i>Lack of accessibility information on places to stay and visit</i>	0%	0%	1%
<i>Lack of accommodation that suited my needs</i>	0%	0%	1%
<i>Lack of attractions that suited my needs</i>	0%	0%	1%
Prefer to go abroad	15%	16%	7%
Poor weather	6%	7%	5%
Don't like going away	3%	3%	6%
Cheaper to go abroad	3%	3%	2%
Have pets	1%	1%	1%
Don't want to go on my own/no one to go with	1%	0%	2%
No real reason	13%	13%	8%
Other	3%	2%	3%

## Size of the opportunity

**430,000**  **£116.7M**

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*Opportunity if each person with an impairment took a domestic holiday*

## Main Reason

**306,000**

**£83M**