

SCOTLAND VISITOR SURVEY 2023

ACCESSIBLE TOURISM (12 SLIDES)

1. What proportion of visitors to Scotland had a health condition?
2. What proportion of visitors had specific access requirements or other special needs?
3. How easy did they find it to get around on their trip in Scotland?
4. Did they encounter any access barriers or problems?

June 2024

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Accessible tourism

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Background

- VisitScotland has undertaken Scotland-wide visitor surveys over a number of years. Recent surveys have taken place in 2011/2012 and 2015/2016. The scheduled survey in 2020 was postponed due to the Covid-19 pandemic
- The visitor survey explores different aspects of the visitor experience in Scotland and content is updated each time to reflect changes in the consumer and market environment. The visitor survey is therefore not a tracking survey
- The survey was commissioned by VisitScotland and undertaken by independent market research agency, Progressive Partnership Limited
- The survey involved short face to face interviews with visitors across Scotland between March and October 2023. A more detailed online survey was emailed to visitors on their return home and ran from April to November 2023.
- The sample comprises leisure overnight visitors only
- The data is weighted to reflect the profile of visitors to Scotland and it's regions



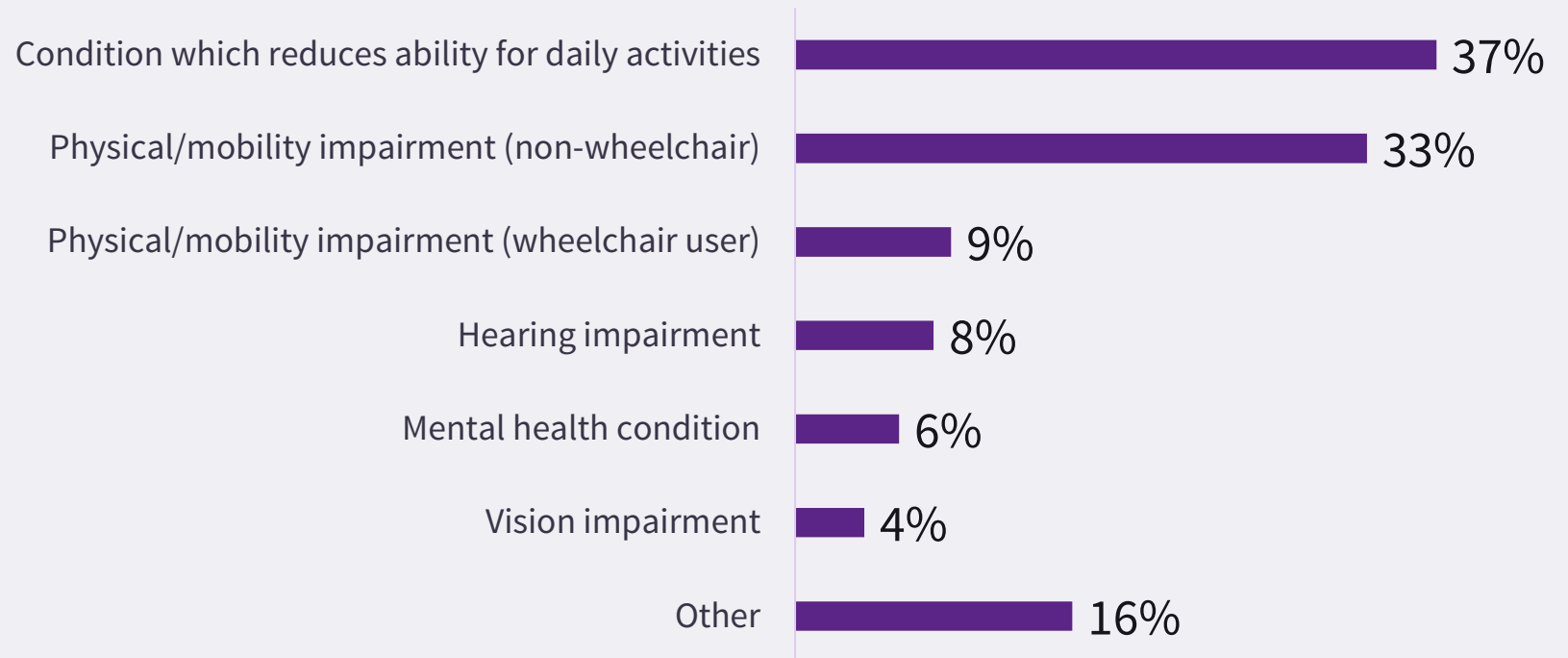
1. Health conditions

Around one in ten visitors had a long-term health condition, most commonly an illness or condition that reduces ability to carry out day-to-day activities or a mobility impairment.

9%

of respondents reported they have long-term health condition, disability or infirmity

Types of long-term health condition or disability



2. Did you or anyone in your group have specific access requirements or other special needs?

9%

of visitors stated that they had specific access requirements or other special needs

(for example parking, wheelchair or buggy access, disabled facilities, vision impairment)

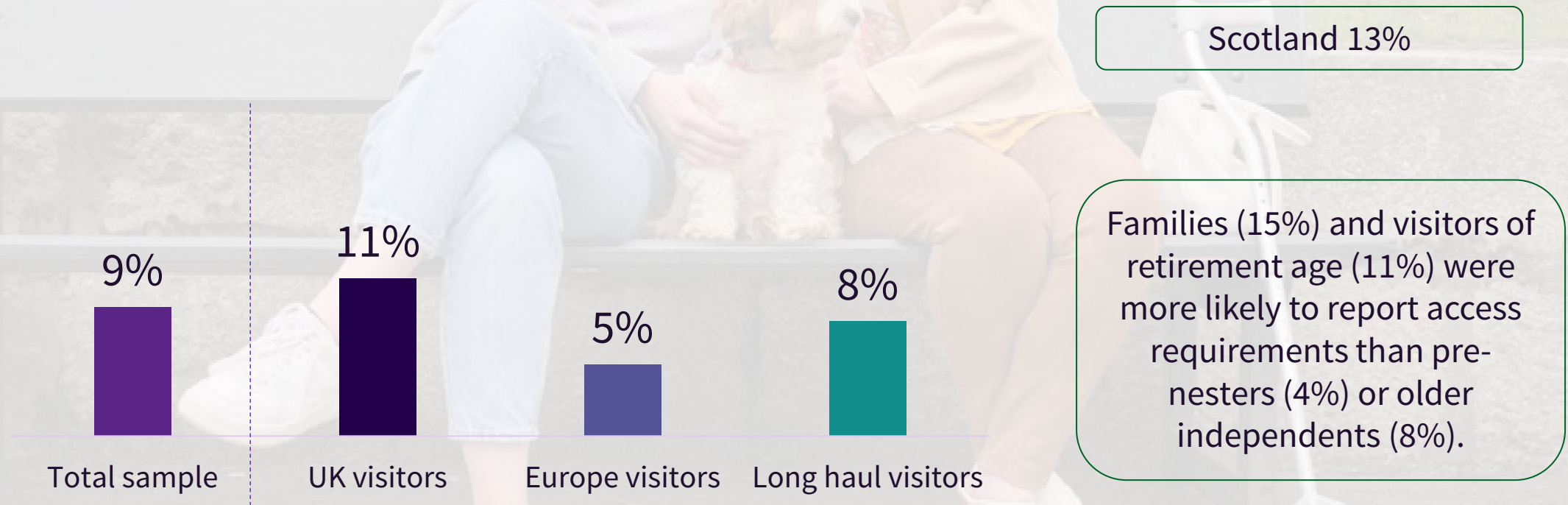
Base (Stage Two:
All): 3,011

Q57 (Stage 2): Did you or anyone in your group have specific access requirements or other special needs (e.g. parking, wheelchair or buggy access, disabled facilities, vision impairment, etc.) during your holiday or short break in Scotland?



2.1 Did anyone in group have specific access requirements or special needs: by market

Around one in ten visitors reported that they or someone in their group had specific access requirements, most frequently families or retirement aged visitors.



3. Ease of getting around for those with access requirements

35%

of visitors with access requirements stated that it was very easy to get around during their trip in Scotland (9 or 10 out of 10)

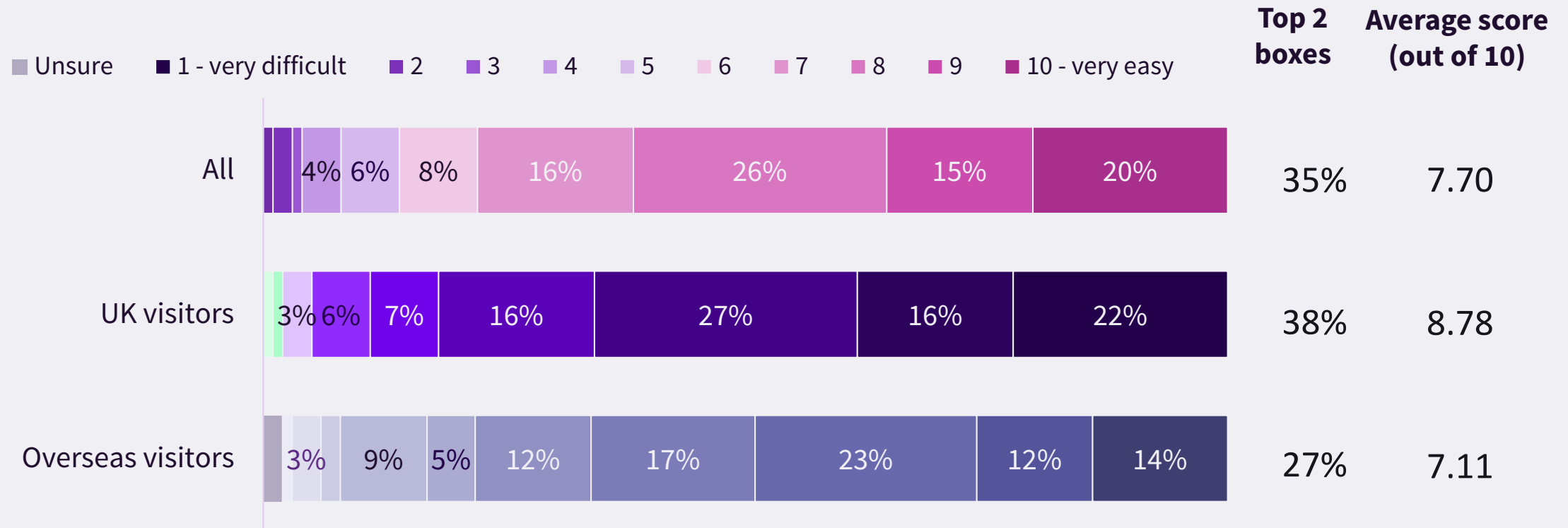
Base (visitors with access requirements): Total 266; UK 167; Overseas 99

Q58 (Stage 2): On a scale of 1 to 10, where 1 is very difficult and 10 is very easy, how easy or difficult did you or the member of your group with specific access requirements find it to get around on your trip in Scotland?



3.1 Rating of ease of getting around for people with access needs: by market

Although the majority of visitors with special access requirements rated the ease of getting around during their trip as easy rather than difficult, only a minority rated it as very easy. UK visitors tended to provide more positive scores than visitors from overseas.



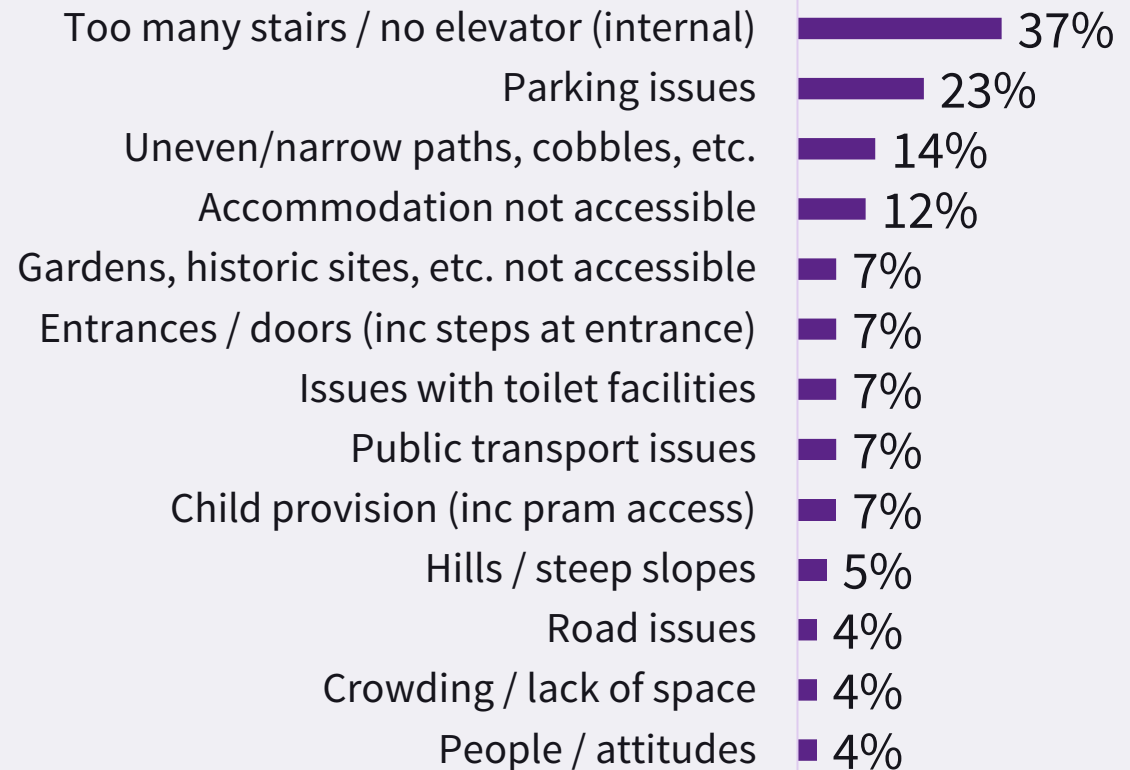
4. Problems and barriers encountered

19%

of those with access requirements encountered barriers or problems

One in five of visitors who had someone with access requirements in their party reported that they experienced some difficulties during their trip, most commonly issues with stairs or parking.

Please note small base size of 57.



Q59 Base (visitors with access requirements): 266; Q60 Base (visitors who experienced problems): 57

Q59 (Stage 2): Did you or the member of your group encounter any access barriers or problems during your visit to Scotland?; Q60 (Stage 2): What access barriers or problems did you or the member of your group encounter?

Open-ended question

5. Definitions used within this report

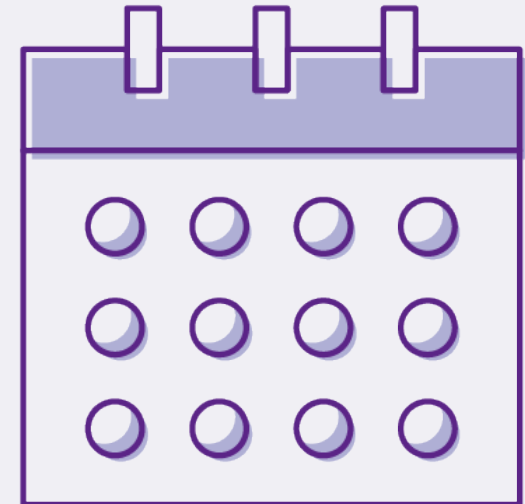
- Within this report, **the term visitor is used to refer to respondents to the survey**. Data has been weighted to reflect the profile of visitors to Scotland and its regions using the national statistical monitors (Great Britain Tourism Survey and International Passenger Survey). More detail is available within a separate Background and Methodology report.

- **Within this report the following market definitions apply**

UK: respondents resident in Scotland or the rest of UK

Europe: respondents resident in Scotland's core markets of France, Germany, Spain, Italy, Netherlands and any other European country

Long haul: respondents resident in USA, Canada and Australasia



Contact Us

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Contact Us:

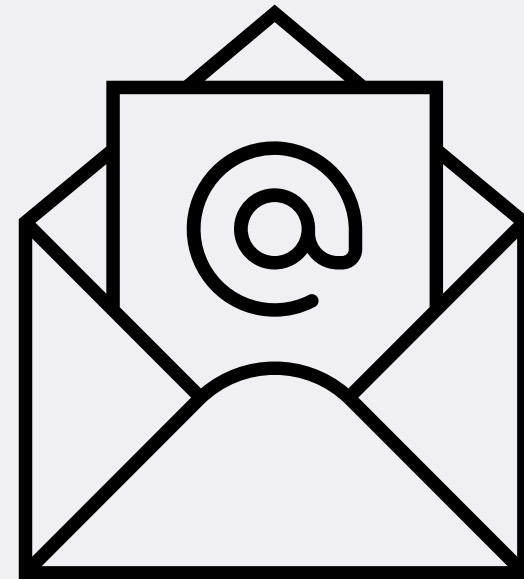
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