



# MIDAS: Accessibility & Inclusiveness

## Motivations, Influences, Decisions and Sustainability in a Post-Pandemic Era

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Image: Visit Britain / Nemorin

# Welcome to MIDAS

## A FOUNDATIONAL STUDY ON INTERNATIONAL TOURIST MOTIVATIONS, DECISION-MAKING & SUSTAINABILITY

The purpose of this study is to explore the population of international leisure travellers in a post-pandemic environment in order to inform how best to inspire, convert and delight them – each of these elements driving accretive economic benefit to Britain via its tourism offering.

This is a more in-depth analysis of the results of the study than the previously published report.

We spoke to global tourists/prospective tourists in the following markets: Australia, Austria, Belgium, Brazil, Canada, China, Denmark, France, Germany, Hong Kong, India, Ireland, Israel, Italy, Japan, Netherlands, New Zealand, Norway, Poland, Saudi Arabia, South Korea, Spain, Sweden, Switzerland, South-East Asia (Malaysia, Singapore, Thailand), UAE, USA. Full sample sizes are shown here by Britain Considerers and Britain Visitors.

Fieldwork took place between 18<sup>th</sup> March and 23<sup>rd</sup> April 2022.

Country	Considerers	Visitors	Total	Country	Considerers	Visitors	Total
Australia	653	383	1,036	Japan	698	304	1,002
Austria	451	203	654	Netherlands	373	274	647
Belgium	398	263	661	New Zealand	421	252	673
Brazil	840	251	1,091	Norway	369	250	619
Canada	673	329	1,002	Poland	404	259	663
China	658	345	1,003	Saudi Arabia	369	278	647
Denmark	369	239	608	SEA*	737	298	1,035
France	661	342	1,003	South Korea	686	316	1,002
Germany	702	302	1,004	Spain	617	384	1,001
Hong Kong	391	261	652	Sweden	367	259	626
India	580	446	1,026	Switzerland	412	222	634
Irish Republic	184	513	697	UAE	378	284	662
Israel	382	234	616	USA	855	721	1,576
Italy	715	285	1,000	<b>TOTAL</b>	<b>14,343</b>	<b>8,497</b>	<b>22,840</b>

Note:\* South-East Asia (SEA) is comprised of equally-weighted samples from Malaysia, Singapore and Thailand



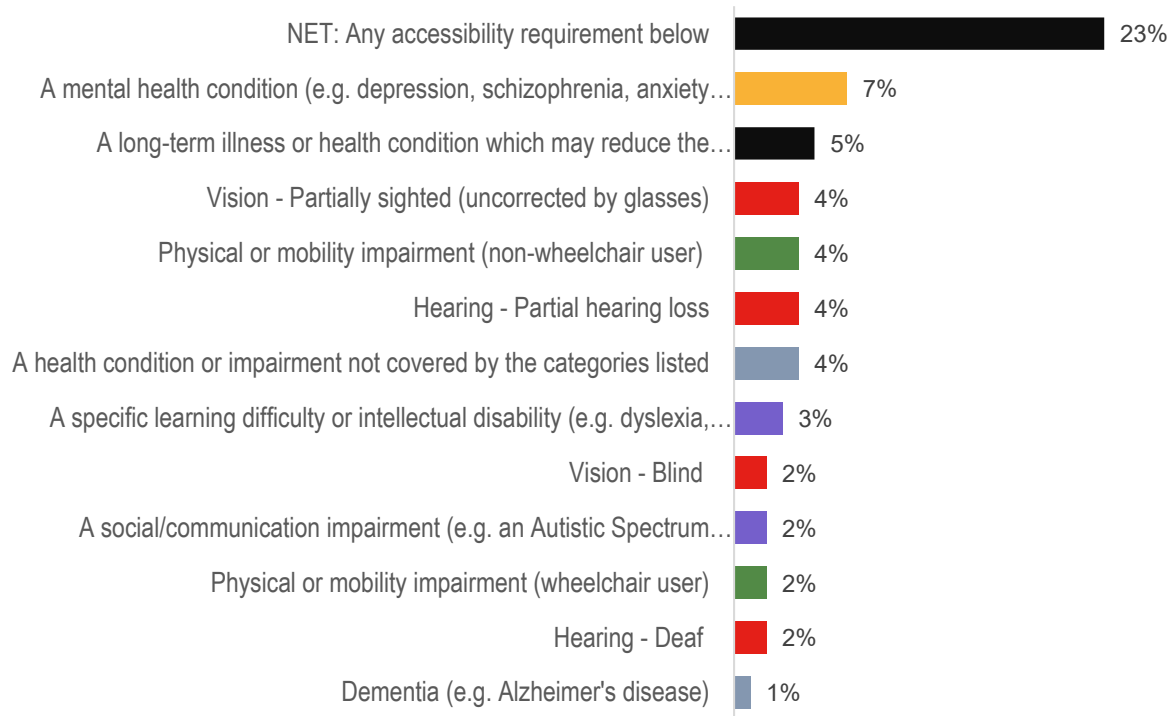
## **Emergent Driver: Accessibility & Inclusiveness**

**What can we learn about accessibility and inclusiveness as it applies to international tourists and Britain?**

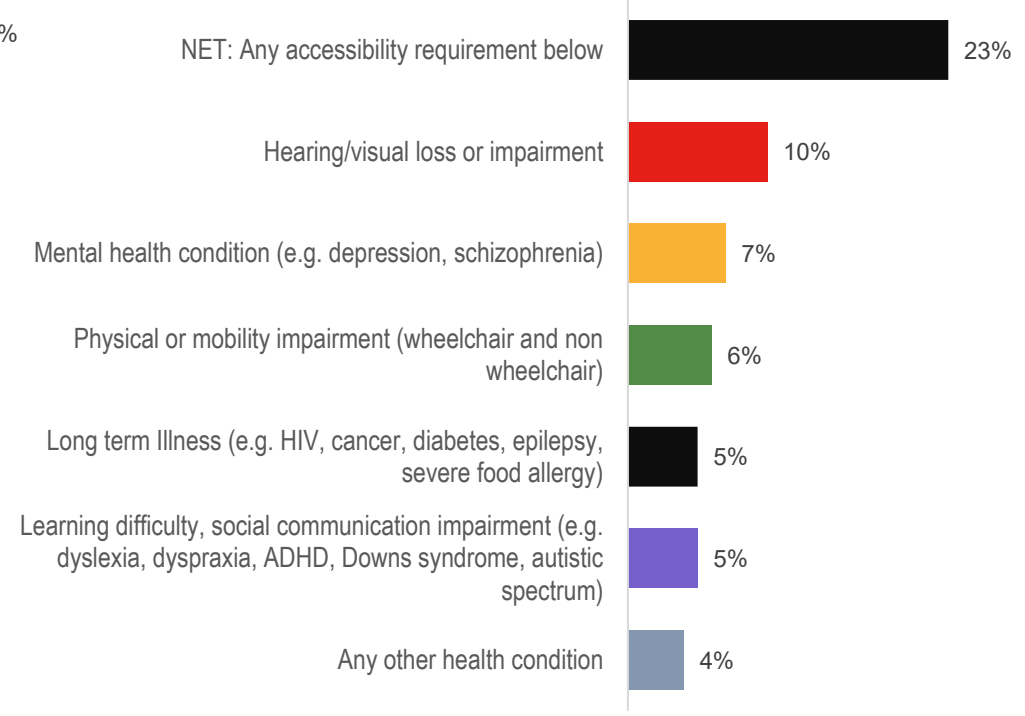
# A quarter of travellers either have, or travel with, someone who has an accessibility requirement, with hearing/sight loss or impairment being the most prevalent

## Types of health conditions/disabilities

### Total



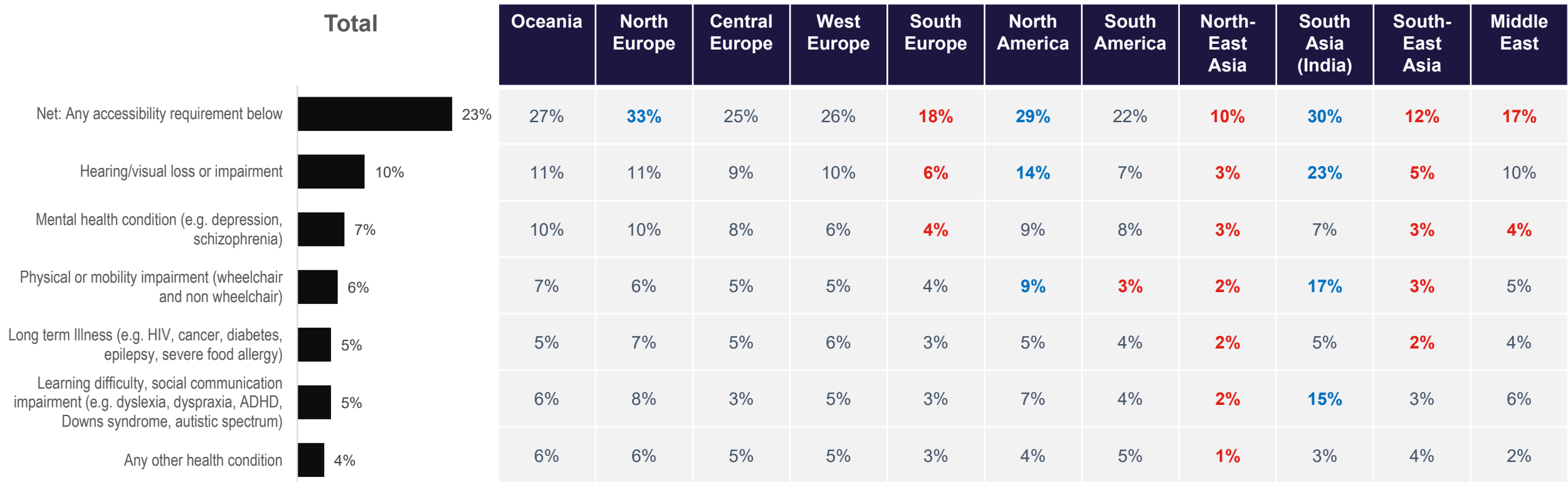
### Nets: Clustering Full List Into More Succinct Groupings (See colour codes)



# North Europe, South Asia and North America see the highest proportion of travellers with accessibility requirements, predominantly hearing or visual loss/impairment-related

These patterns are likely to reflect a combination of regional health status, but equally, values, inclusivity and support for people with accessibility requirements in each local region.

Types of health conditions/disabilities by visitor region



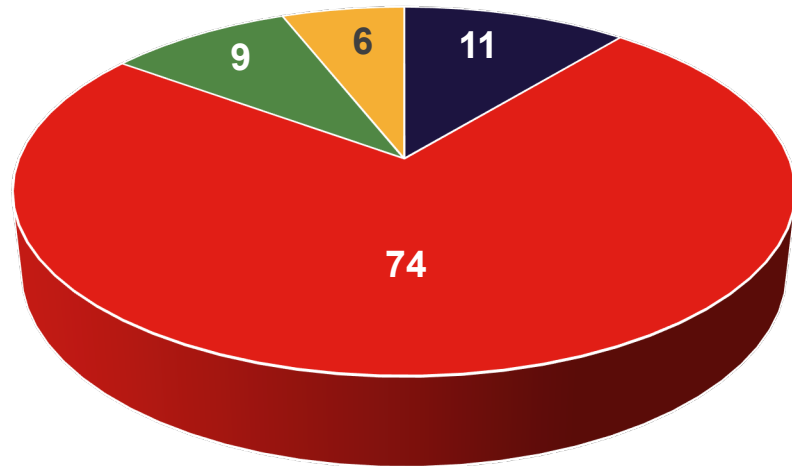
# Britain is also seen as one of the more inclusive and accessible countries, amongst those tested, by travellers with accessibility requirements



E1 Please indicate which destinations you associate with the following statements.  
Base: Total Global N=22,224 Weighted and by health impairment

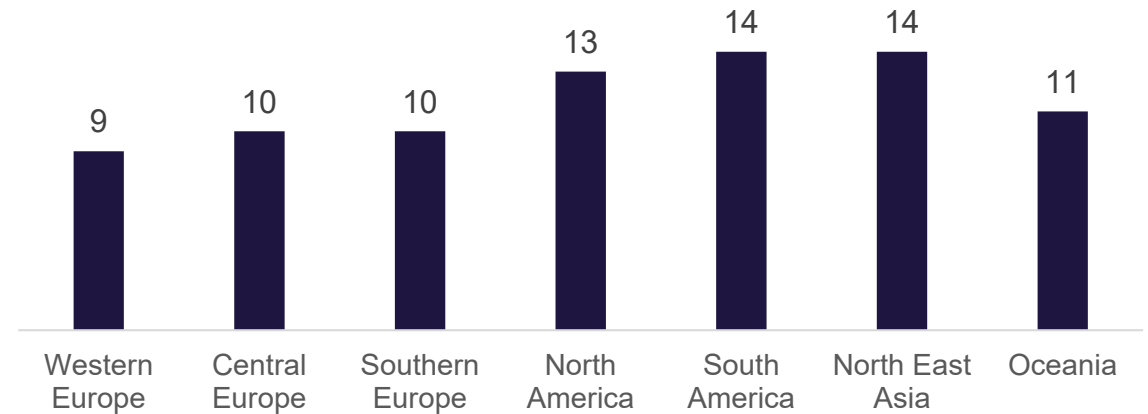
# 1 in 10 travellers (in countries where the question was posed\*), identify as being part of the LGBTQIA+ community

Do you identify as part of the LGBTQIA+ community?



■ Yes ■ No ■ Don't know ■ Prefer not to say

Regions by % LGBTQIA+ Identity



*Within the LGBTQIA+ community, there is a skew to younger travellers, with 52% being under 35yrs (compared with 39% total population)*

\*NB: question not asked in China, UAE, Saudi Arabia, Denmark, SEA, India, Poland, Norway, Israel, Sweden

J5 Do you identify as part of the LGBTQIA+ community? Total 15,335 (not asked in the following countries: China, UAE, Saudi Arabia, Denmark, SEA, India, Poland, Norway, Israel, Sweden)

↑ Higher than comparative sample @ 95%  
↓ Lower than comparative sample @ 95%

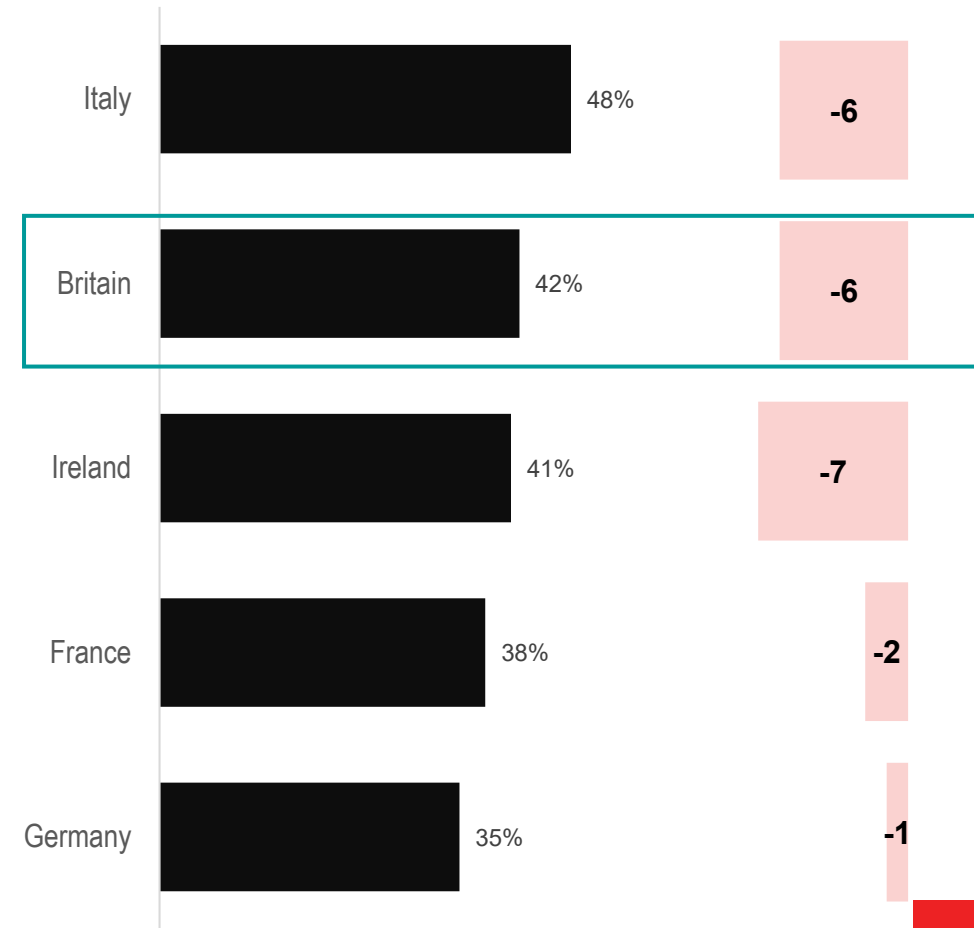
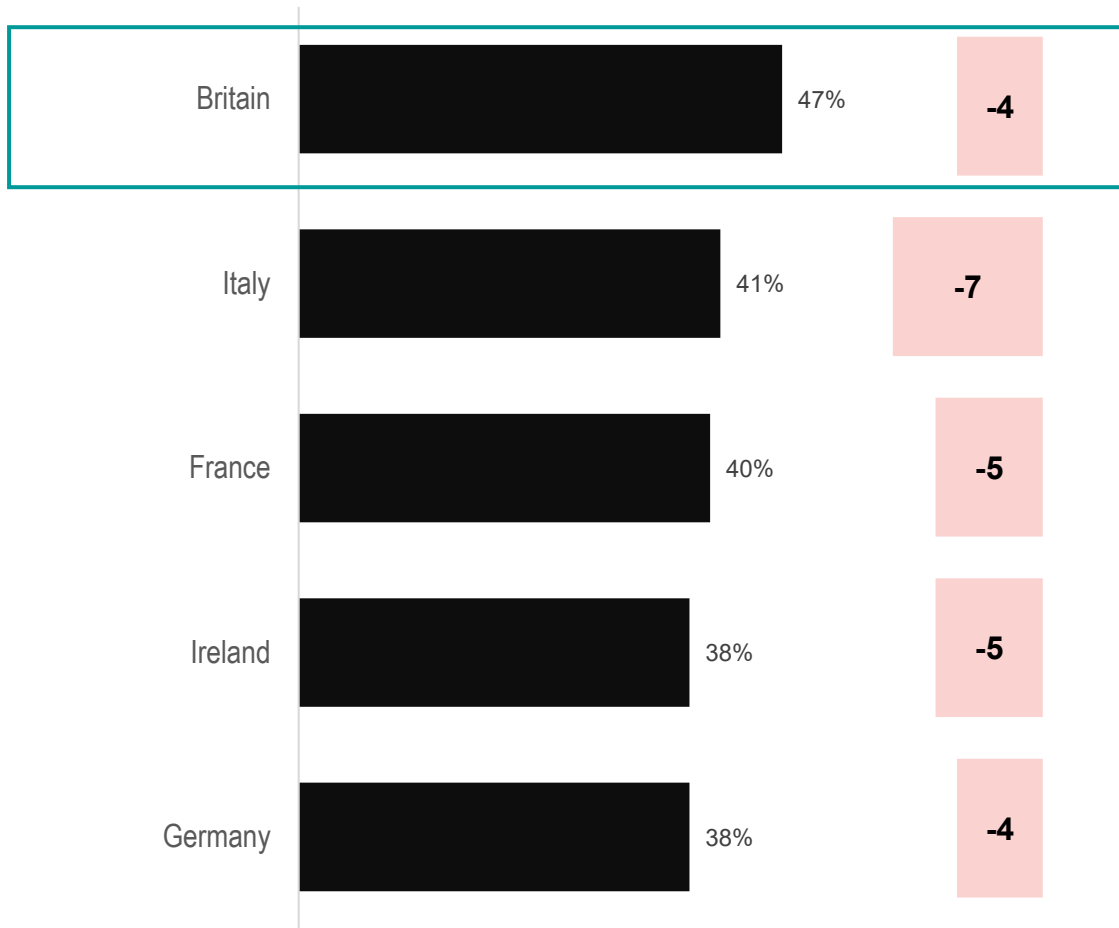
# Britain is seen as one of the most inclusive and accessible countries amongst LGBTQIA+ travellers although perceptions are weaker than amongst total population

'Is inclusive and accessible for visitors like me' (by LGBTQIA+ travellers)

Difference in score from those who don't identify as LGBTQIA+

'Is a welcoming place to visit' (by LGBTQIA+ travellers)

Difference in score from those who don't identify as LGBTQIA+



E1 Please indicate which destinations you associate with the following statements.  
Base: Total Global N=22,224 Weighted and by health impairment



**One in four travellers or their companions travel with accessibility needs**, the most prevalent of which are hearing/vision impairment and mental health.

Northern Europe, South Asia and North America have the highest penetration of those with accessibility tourism needs.

Currently, **Britain is seen as inclusive and welcoming amongst these tourists**.

Approximately **one in ten tourists identify as part of the LGBTQIA+ community**

**Britain is seen as one of the more welcoming and inclusive countries** for the LGBTQ+ community although scores are lower than amongst the non-LGBTQ+ community (as per other countries), so there is still room for improvement when it comes to inclusivity.

## In Summary

One in four tourists or their immediate travelling companion(s) will have accessibility needs, but this is not a barrier in wanting to visit Britain.

One in ten tourists identify with the LGBTQ+ community, within which being seen as inclusive, and welcoming will be increasingly important