



Holiday survey results

September 2007



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Foreword

Following the requirements of the Disability Discrimination Act 2005, accessible holiday services are improving. This is why Arthritis Care is making changes to the way in which we help people with arthritis meet their holiday needs. We have been running specially adapted hotels since the 1960s when there was very little available in the holiday accommodation market for people with arthritis or other disabilities. The hotels have been much loved by their users but are no longer viable for us to run as a service.

With the help of our members and users of our services Arthritis Care has been able to get an insight into the needs of people with arthritis with regards to taking holidays and short breaks. There are nine million people in the UK living with arthritis. This is a considerable potential market for anyone delivering holiday services.

Key findings

- People with arthritis are moving away from wanting 'arthritis only' services – they are looking to the mainstream market with adaptations
- There are differences in holiday needs according to age. Older people have a specific set of needs – mainly UK breaks, group holidays, off-peak travel, arthritis specific services
- Younger people with arthritis:
 - use online facilities for research and bookings
 - like recommendations from others with arthritis
 - use online discussion forums.

The future

Arthritis Care aims to:

- Raise awareness with UK holiday service providers on the facilities needed by people with arthritis. For example, more rooms with walk-in shower facilities
- Provide online information on holiday services that can meet the needs of people with arthritis
 - information on holiday providers
 - tips and suggestions on items such as making travel arrangements
 - specialised service (for example, luggage delivery)
 - signposting to useful organisations
 - insurance.

1. Aim of the survey

The aim of the survey was to identify the needs of people with arthritis when booking holidays.

In particular it looked at:

- what type of holidays are being taken
- their specific needs such as facilities, services
- how they source information.

2. Methodology

The survey was undertaken online and by mail with people in contact with Arthritis Care either as members or people who visit our website.

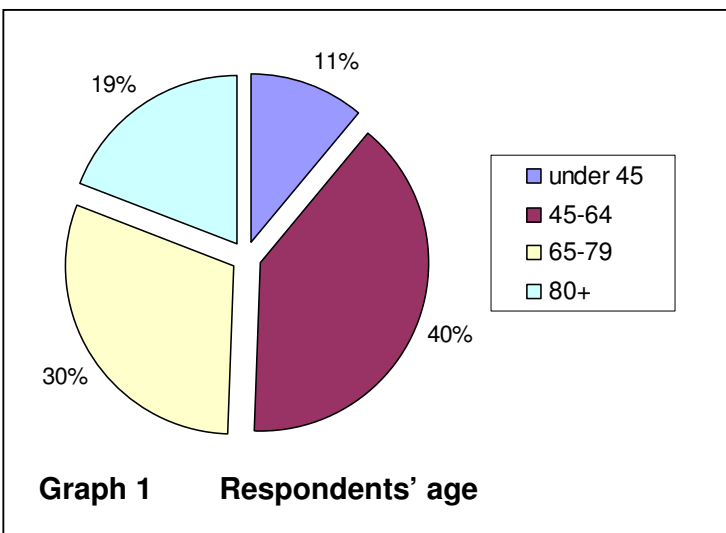
- **Online survey:** we emailed 4,840 people who visit our website regularly on 26 March 2007 with links to the online survey
- **Postal survey:** the survey was mailed out 27 March 2007 to 5,000 people in contact with Arthritis Care as members across the UK
- **Incentive:** a free 2007 RADAR holiday guide was offered to first responders to encourage an early response.

3. Respondents' profile

3.1. Response rate

The survey had a very high response rate with an overall response rate of 14 per cent (10 per cent website response, 17 per cent postal response). In total 1,334 people responded to the survey. The responses analysed are only taken from those responders who have arthritis themselves.

3.2. Age



Looking at the age breakdown nearly half of the respondents (49 per cent) were over 65 and 19 per cent over 80.

3.3. Regional distribution

Most respondents came from the South England region, which is in line with the UK population.

3.4. Gender

Our respondents were primarily female (83 per cent). 17 per cent were male.

4. Information/booking

4.1. Holiday information sourcing

When asked which source of information they used when planning a holiday, there was a marked distinction in respondents' preference depending on their age group:

- Up to the age of 64 the primary source of information is the Internet (27 per cent) followed by travel brochures (18 per cent).
- From 65 years of age, the respondents' first choice is travel brochures (27 per cent), followed by discussing their choice with friends and family (25 per cent).
- Other sources of information quoted were Arthritis Care (members only), holiday clubs and the Church.

4.2. Booking

In line with the general population, our respondents prefer to make their own travel arrangements, that is booking flights and accommodation separately.

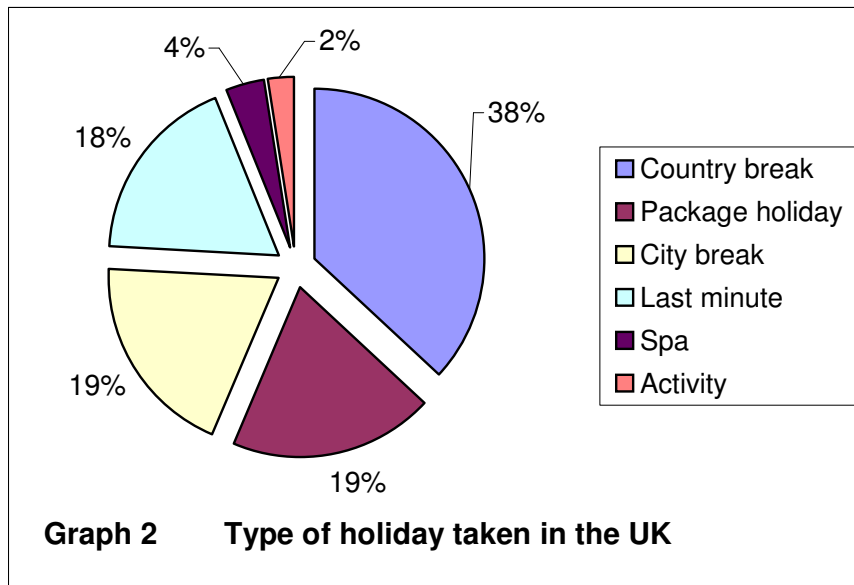
- 57 per cent of the respondents to the survey stated they liked to make their own travel arrangements when booking their holiday.
- Under 64s are more likely to make independent bookings (74 per cent) than over 65 years old (less than 50 per cent).
- Going on group holidays organised by others increased greatly for over 65, with a third for over 80s.

5. What holiday?

5.1. Type of holiday

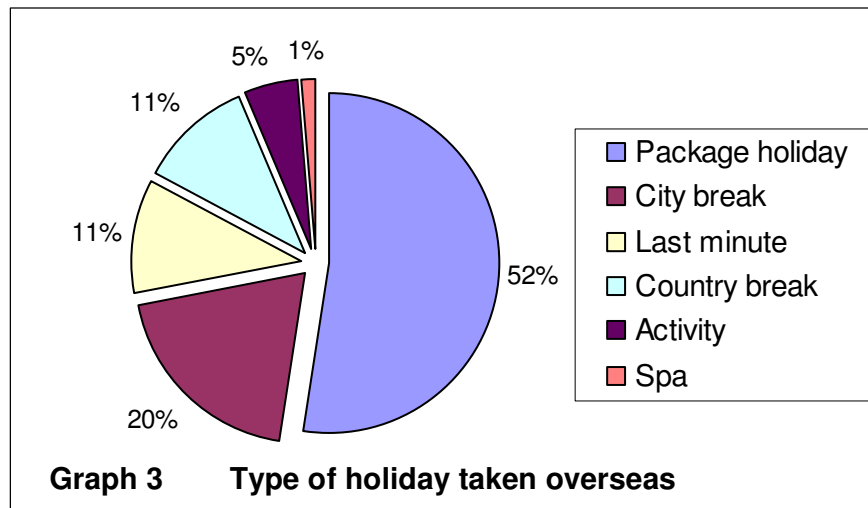
5.1.1. In the UK

When asked what type of UK holidays they had taken in the last two years the respondents' first choice was country holiday (38 per cent) and their second choice were package holiday and city break (both 19 per cent). See graph 2. This is no different from the general population, who also opt for UK country breaks.



5.1.2. Overseas

Respondents who holiday overseas clearly prefer package holiday (52 per cent). City break is their second choice (20 per cent). The only difference is for respondents over 80 years of age who prefer country break over city break as a second choice. The general population also prefers to go on package holiday abroad.



5.2. Frequency

Looking at the general population statistics, two thirds go on holiday at least once a year, with the average number of holidays being two¹. Respondents were in line with the general population average. 14 per cent of them go more than five times in two years. 68 per cent of respondents have been on at least one short break (one to four days) in the last two years. Three quarters of respondents have been on at least one holiday of five or more days in the last two years.

¹ Source: Holiday Purchasing Patterns, Key Note Market Assessment October 2006

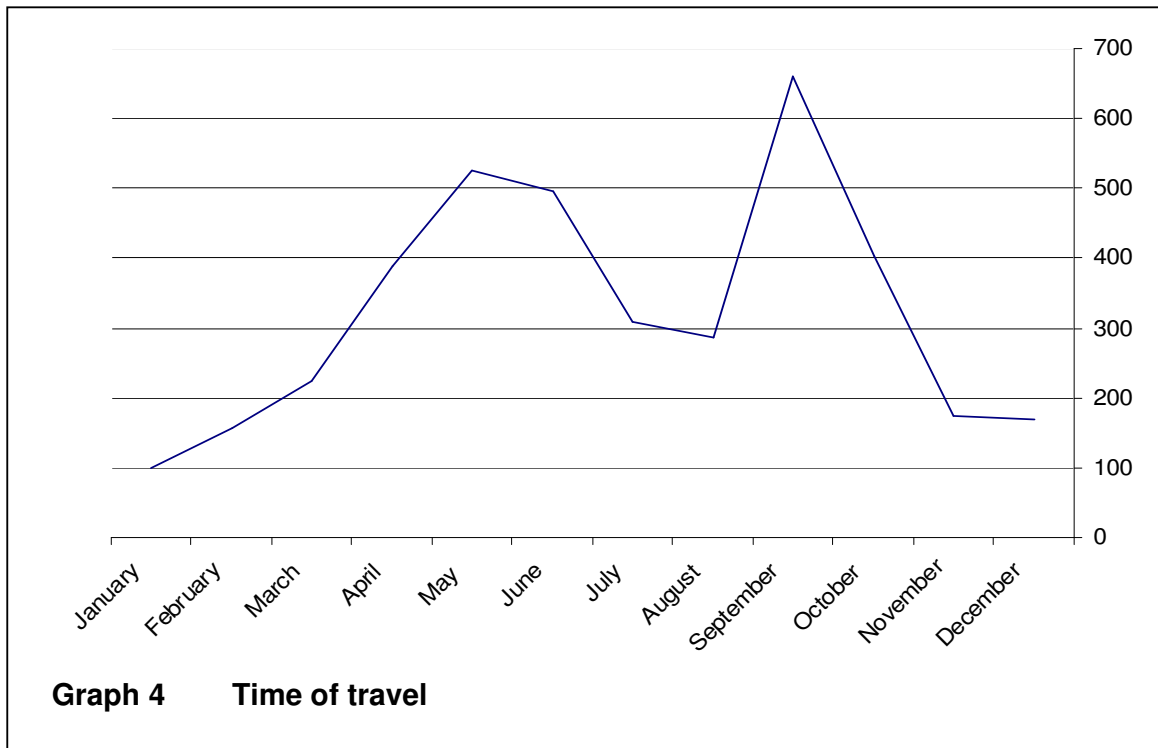
5.3. Travelling companion

When we asked respondents who they had been travelling with in the last two years responses varied by age group. Young adults (18-24 year olds) spent their holiday with their family. Yet 25 to 74 years olds mainly holidayed with their partner or spouse. Respondents over 75 years of age travel more often with friends.

5.4. Purpose of holiday

Like the general population respondents to the survey went on holiday firstly to get away and relax (41 per cent) and secondly to visit family or friends.

6. Time of travel



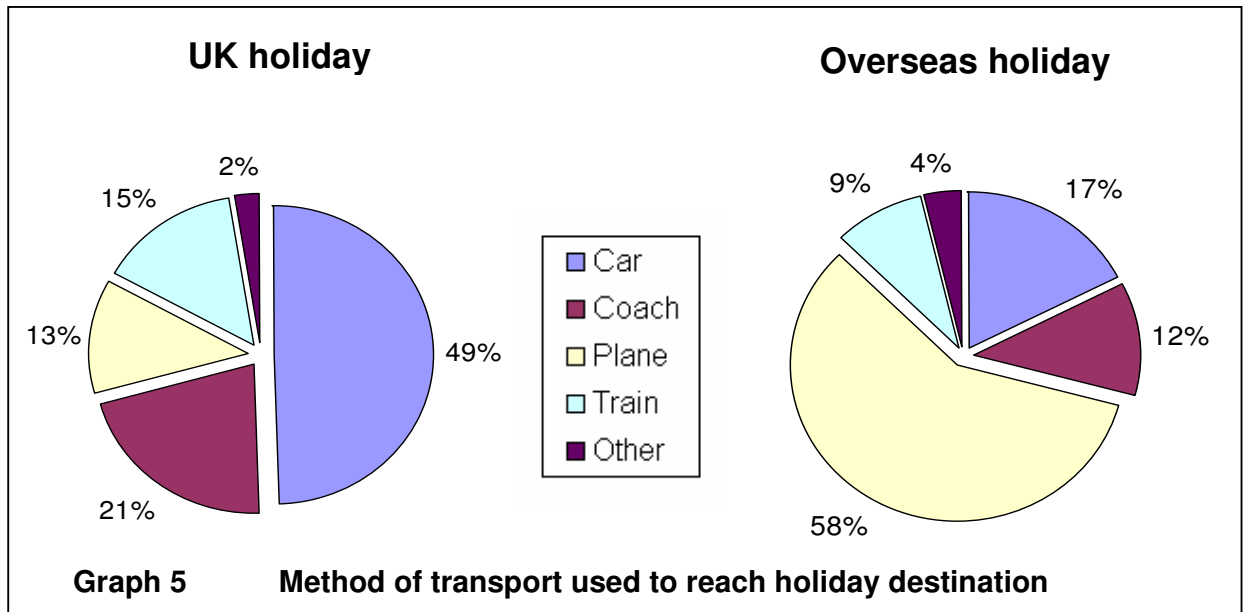
- The general population goes on holiday mostly during the summer school holiday – that is from July to September¹.
- Respondents to the survey prefer to travel off peak.
- Their favourite month is September, however the highest quarter overall is April to June. One third of respondents travel during this period.
- Of those travelling in high season, 55 per cent were of parenting age their choice is likely to be limited by their children’s school holidays.

¹ Source: Holiday Purchasing Patterns, Key Note Market Assessment October 2006

7. Location

Sixty-six per cent of respondents to the survey took all of their holidays in the UK. Asked which cities they had visited in the last two years, the top three cities were London, York and Edinburgh.

8. Transport



We asked respondents how they travelled to their holiday destination in both the UK and overseas. Only 37 per cent of respondents replied to that question.

Of those who responded travel by car in the UK was the most popular form of transport (59 per cent). This is lower than the general population who undertake three quarters of domestic trips by car¹. Respondents' second favourite means of transport is the coach. The proportion of respondents using the coach increased with age.

For overseas holidays, respondents prefer to travel by air (58 per cent), although not as often as the general population. In 2005, 81.4 per cent of outbound holidays involved the use of air travel as the main mode of transport².

9. Accommodation

9.1. Type of accommodation

The type of accommodation wasn't an important factor in the respondents' accommodation requirements. 45 per cent of them had no preference, whilst 17 per cent preferred family accommodation and 16 per cent independent hotels.

^{1 & 2} Source: Holiday Purchasing Patterns, Key Note Market Assessment October 2006

9.2. Catering

Respondents up to 54 years old prefer Bed and Breakfast accommodation (46 per cent), but over 55s half board (48 per cent).

9.3. Specific features

Questions about facilities had a very high response rate.

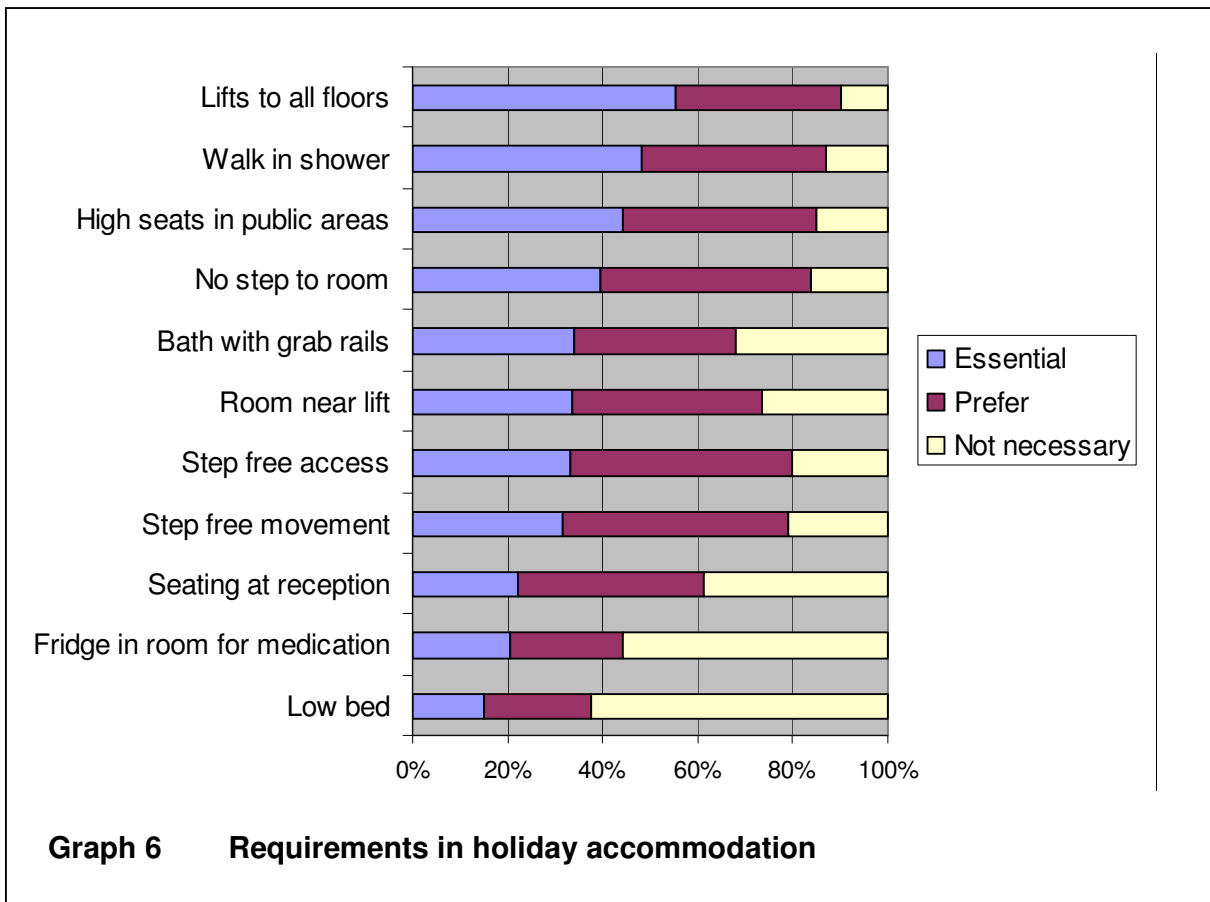
The questions asked respondents to rate their needs as essential, preferred or not necessary.

Two essential features stood out:

- Lifts to all floors (55 per cent of respondents)
- Walk in shower (48 per cent).

When adding the 'prefer' and 'essential' responses we identified nine important features. See graph 6.

Looking at the responses by age of respondent, those over 75 years old identified far more features as essential to their holiday accommodation. They considered seven to be essential (over 50 per cent of respondents) out of the 11 options.



Respondents were then asked what features were important in their choice of accommodation. Again there was a high response rate to this question with 78 per cent of respondents replying. We asked them to rate how important each feature was when choosing their accommodation. See graph 7.

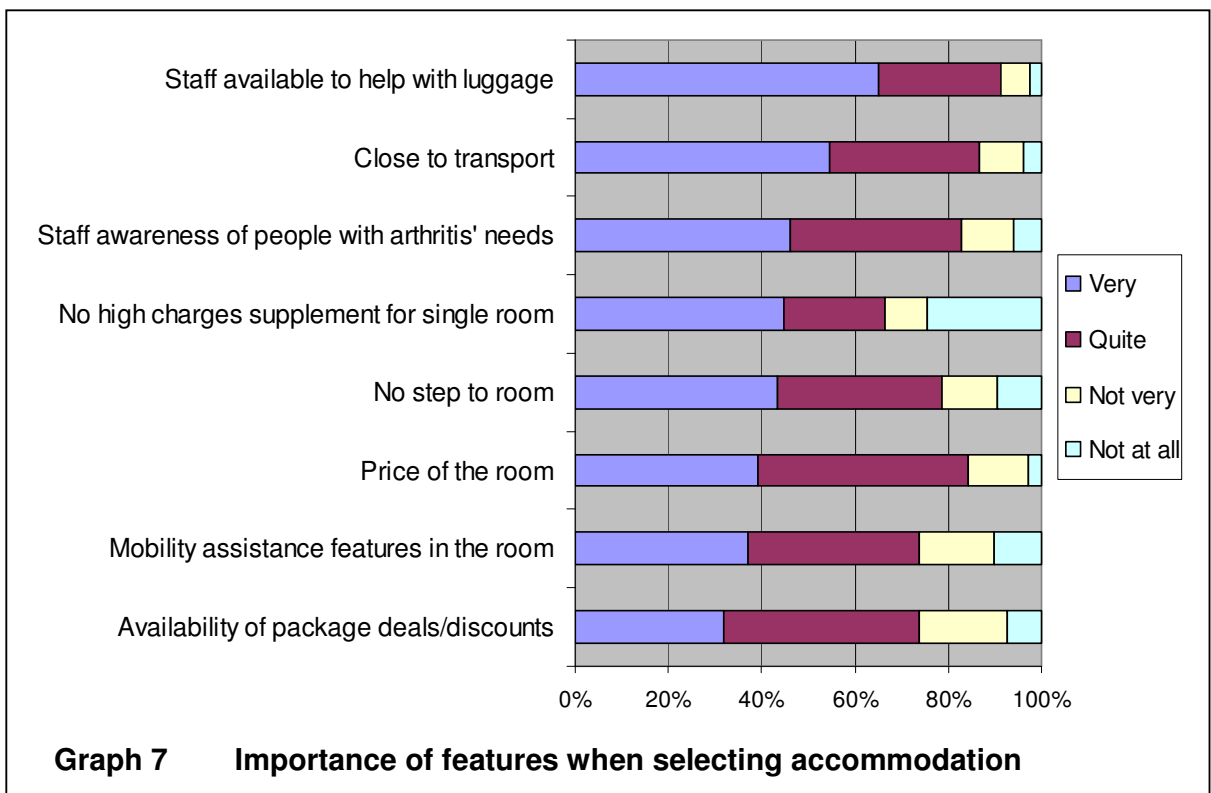
Two features were considered very important by the general population of people with arthritis:

- Staff available to help with luggage (65 per cent)
- Close to transport (54 per cent).

Staff awareness of the needs of people with arthritis was also more important (46 per cent). This suggests that the human factor is significant when choosing an accommodation.

There were interesting differences when looking at response trends across age groups:

- The price of the room was more important (over 50 per cent) to respondents under 44.
- Over 75 years old respondents identified five out of eight features as very important.
- Younger respondents were more likely to say the features were quite important than very important.



Information about Arthritis Care

- Arthritis Care is the UK's largest voluntary organisation working with and for all people with arthritis.
- We provide clear and accurate information about arthritis. Our helplines team offers practical, confidential support backed up by a wealth of useful publications, including Arthritis News, our bi-monthly magazine.
- Our website gives people 24-hour access to information and support, and allows people to talk to other people living with arthritis through online forums and other interactive means.
- We run a range of self-management and personal development programmes, giving people the confidence and skills to manage their arthritis and dramatically improve their quality of life.
- We put people with arthritis in touch with each other through our network of around 300 branches and groups. We also have offices throughout the UK's regions and nations.
- We campaign for greater awareness of the needs of everyone with arthritis, improved services and an end to discrimination.
- We work closely with health professionals and other arthritis organisations in the UK and internationally.



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