

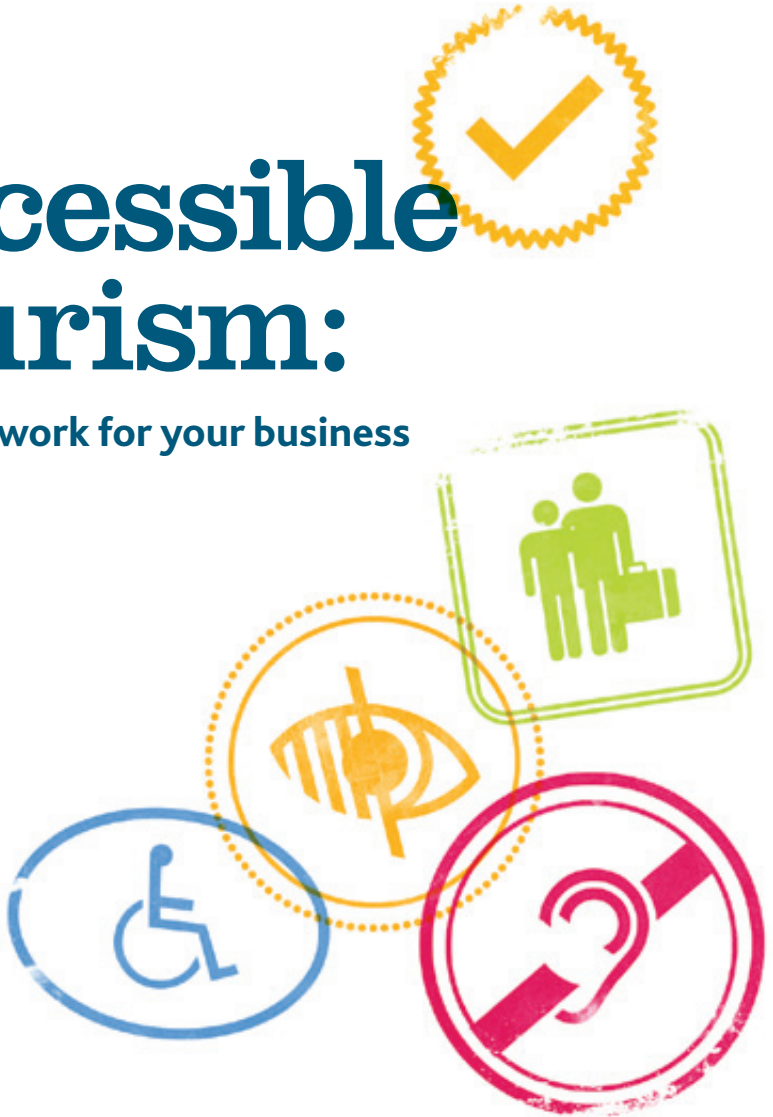


department for
culture, media
and sport

improving
the quality
of life for all

Accessible tourism:

Making it work for your business



Produced on behalf of the DCMS
Accessible Tourism Stakeholder
Forum for the 2012 Games

Our aim is to improve the quality of life for all through cultural and sporting activities, support the pursuit of excellence, and champion the tourism, creative and leisure industries.



Produced on behalf of the DCMS Accessible Tourism Stakeholder Forum for the 2012 Games



Foreword



No sensible person in business makes life more difficult for their customers. The most successful businesses make life easier. The information in this leaflet will make both your life easier and your business more successful.

By making your own hotel, guesthouse or tourist site more accessible, you are instantly making your business more attractive to at least 11 million potential disabled visitors from here in England, and millions more from abroad. Visitors who travel frequently, stay longer than average, and spend more per trip.

You should make sure your business is as welcoming and accessible to everyone including those with disabilities. Some see that as a financial burden. Not so. As well as being fair to the one in five of us who have a disability of some sort or other, it is actually a sound financial investment to improve your bottom line and your business's future.

Read on and you see why that is the case. You will find ideas on improving your business, links to tax breaks and advice on promoting yourself to a new market with huge potential. My advice is to act now, and be ready in good time for the boom in tourism right across the UK that will come as we approach the London 2012 Olympic and Paralympic Games.

A handwritten signature in blue ink that reads "Margaret Hodge".

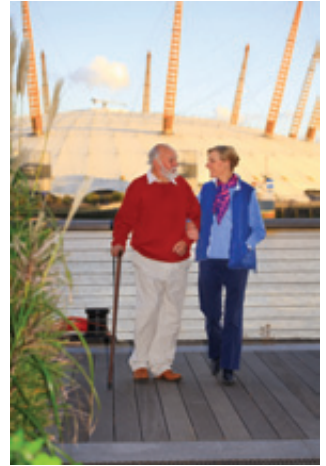
Margaret Hodge MP
Minister for Culture,
Creative Industries and Tourism

Recognising the business potential

There are over 11 million people in England with a disability¹ – that’s almost one in five people. Many could have a condition that requires only a small adjustment. There are a wide range of disabilities which include people who are:

- Blind and partially sighted
- Deaf or hard of hearing
- Wheelchair users
- Walking or using their hands with difficulty
- Those with arthritis
- People who have learning difficulties

All of these groups and those travelling with them could be your potential customers and bring you business. Are you ready for them?



11,000,000

There are over 11 million people in England with a disability

¹ Taking Part Survey 2007/08



**12 per cent of all
overnight domestic trips
in England between
January and June 2009
were made by visitors
with access needs,
contributing almost
£1bn to the economy**

Boosting tourism – the value

There is a huge economic potential in providing better services and encouraging more tourism from disabled people. New figures from the UK Tourism Survey highlight the importance of this sector:

12 per cent of all overnight domestic trips in England between January and June 2009 were made by visitors with access needs, or those accompanying someone who had access needs. This amounts to 5.7 million trips, contributing almost £1bn to the economy in just six months.



Domestic overnight trips in England January – June 2009

Total number of England trips	46.15 million
Travel with someone with a disability	12% of trips
Total number of nights spent on trip	133.54 million
Travel with someone with a disability	15% of nights
Total England expenditure on trip	£7,741.33 million
Total spent on trips with someone with a disability	£923.23 million

Source: Six month UKTS data only. Annual figures may potentially show a doubling of these amounts.



Disabled people tend to take longer holiday breaks than the average – four days as opposed to the average length of stay of three nights – and therefore tend to spend more money per trip (£216 as opposed to £197 overall).

Once disabled people have found accommodation that suits their needs, they can be loyal customers returning year on year.

Disabled people tend not to travel alone and are often accompanied by carers, family or friends. Over 50 per cent travel with a partner, 20 per cent with a child and between 21-25 per cent with a companion². This will increase occupancy and bring in extra revenue.

50%

Over 50 per cent of disabled people travel with a partner

“Our disabled customers have been drawn from all corners of the UK with high numbers of repeat clients, including a group of friends from Scotland and Cornwall, who meet up ‘around half-way’ for a week.”

The Hytte, Northumberland



² UKTS

Adapting to an ageing population

The UK population is ageing with increased incidence of disability and it is estimated that by 2025 more than a third of the UK's population will be over 55. People are living longer and staying active until much later in life.

Between 2000 and 2005, 32 per cent of inbound visitors to Britain were aged over 54³ this translates to more than five million over 55s visiting Britain from overseas in 2005⁴.

There are now 20 million people aged over 50 and 11 million over state retirement age⁵ in the UK and these numbers are growing rapidly.

The numbers of travellers over 85 has increased and there is a growing market for grandparents holidaying with their grandchildren.



**There are now
20 million
people aged
over 50 in
the UK**

³ International Passenger Survey

⁴ VisitBritain. *Foresight* issue 37 November 2006

⁵ *Older people in the UK, Key facts and statistics 2008*, Age Concern

With an increasing number of customers likely to be of an older age, you may need to make some improvements to your facilities, such as providing more places to rest, larger lettering on signs and literature and a range of auxiliary aids. You could invite a group of elderly visitors in to give their own comments and suggestions.

“The over 50s buy 40 per cent more holidays than the under 30s, averaging five or six breaks per year.”
 Professor Richard Scase, 2005⁶



UK population growth projections to 2028

	2018 Growth over the next 10 years	2028 Growth over the next 20 years
Over 50s	4.1 million (20%)	6.7 million (33%)
Over 65s	2.6 million (27%)	5.1 million (53%)
Over 80s	788,000 (29%)	2.3 million (85%)
Total population	5.3 million (9%)	9.6 million (16%)

Source: *Older people in the UK, Key facts and statistics 2008*, Age Concern.
 Note: growth projections and percentages are based on 2006 population figures.

⁶ Global Remix: The Fight for Competitive Advantage (2005)

Tapping into the overseas market

Many disabled people living abroad will want to experience what the UK has to offer and many will want to come here during the London 2012 Olympic and Paralympic Games.

Worldwide the number of people with impairments accounts for 600-900 million people which represents a significant market⁷. There are, for instance, over 18 million disabled people in the US who are likely to travel to the UK⁸. Out of the 124 million people in Europe who have disabilities⁹, 70 per cent (87 million) are physically and financially able to travel and, together with accompanying friends and family this group is expected to generate expenditure of 80 billion Euro¹⁰.



Disabled people can be loyal customers and return year on year



⁷ OSATTE: Accessibility Market & Stakeholder Analysis 2005

⁸ Open Door organisation 2005

⁹ European Commission 2004

¹⁰ OSATTE: Accessibility Market & Stakeholder Analysis 2005

Accommodating an under-served market

We have shown above that disabled people took 5.7 million trips in the first six months of 2009. However, the potential market is even greater.

We know from the Taking Part Survey that nearly half (48.6 per cent) of those with a limiting disability and just over a third (34.6 per cent) of those with a non-limiting disability did not take a holiday that lasted at least a week in 2007/08, and that when asked 15 per cent and 23 per cent respectively said that they would consider going on holiday in the UK if the conditions were right. If all of those who said they were prepared to take a holiday were encouraged to do so then this would also boost volume and value of tourism for UK businesses.



Holiday taking 2007/08 and propensity for holiday taking

	Limiting disability	Non-limiting disability
Number of people in England (000's)	8,387	3,005
Have you had a holiday in the last 12 months that lasted a week? Negative responses (no)	48.6%	34.6%
Would you consider going on holiday in the UK? Positive responses (yes)	15%	23%

Source: DCMS Taking Part Survey 2007/08.



Creating business opportunities

To cater successfully for this growing market, businesses should be aware of the main barriers¹¹ to tourism that disabled people face:

- Problems with accessibility and lack of facilities
- A lack of disability awareness
- Poor and inaccurate information
- Inaccessible transport

Business opportunities can be created by addressing these barriers. Many more disabled people are likely to take a holiday or trip if conditions are right, so you should be able to provide the following:

- Accessible accommodation and attractions
- Detailed information about the facilities and services on offer and the accessibility of the local area
- A good first impression
- An understanding of disabled people's needs



Many more disabled people are likely to take a holiday or trip if conditions are right

¹¹ Research by Leonard Cheshire and VisitBritain

All these improvements will increase your business prospects in a growing market. You will also make a real difference to the quality of life of disabled people; enabling them to have the same opportunities and choices as non-disabled people and greater participation in leisure activities.

The Disability Discrimination Act 1995 requires all service providers to make reasonable steps to change physical features that make it impossible or unreasonably difficult for a disabled person to use a service. Providing facilities for disabled people to the level required by law and beyond can sometimes seem a big deal, but the buoyant market and long-term gain will justify your time and cost outlay. There are many low cost or free changes you can make that will significantly enhance the accessibility of your business.



Tax incentives

Don't forget that many of the adjustments potentially needed in relation to duties under the Disability Discrimination Act will qualify for tax relief, either as a revenue expense, or through capital allowances. You might want to check if you are eligible by looking at HMRC's fact sheet *Disability Discrimination Act – new access requirements – tax guidance* at www.hmrc.gov.uk



Case studies

Below are just some examples of businesses that are improving the services they offer to disabled people and which have reported a growth in business and loyalty from returning customers:

The Hytte – a self-catering accommodation business in Northumberland offering a large range of facilities for disabled people – saw occupancy levels rising to 97 per cent in 2007/08 compared with the Northumberland average of 55 per cent. The Hytte enjoys an increasing number of word of mouth recommendations with a high number of repeat clients.

Inter Continental Hotels Group (IHG) has installed ceiling track hoisting facilities for disabled guests in five of its hotels in London which has generated a Total Gross Revenue of £344,755, largely as a result of a notable increase in residential conference business.

The London Eye has installed facilities for wheelchair users and people with mobility issues. This attraction has an average attendance of 40,000 visitors with disabilities per year, worth over £210,000, and 99 per cent of disabled customers say that they would recommend the London Eye to friends because of the disabled facilities provided.

More details can be found on the DCMS website at www.culture.gov.uk



How can you reach this key market?

Obtain practical help and advice by reading:

- 'Easy does it: Simple, low cost changes to benefit you and your visitors' available from www.visitengland.com/easydoesit
- The free online think access 'Q-Book' from East Midlands Tourism on how to make your business more accessible: www.q-book.co.uk
- 'Realising potential: Disability Confidence builds better Business' published by the Employers' Forum on Disability: www.efd.org.uk

Provide training for yourself and employees – try:

- 'Welcome All' www.welcometoexcellence.co.uk
- 'Profit Through Access' from Tourism North East: www.profitthroughaccess.co.uk
- 'Learning Bursts' from Tourism South East
- 'Access for All' – free for members of Tourism for All UK www.tourismforall.org.uk/TFA-Business.html

Give good information – write an access statement:
www.visitengland.com/accesstatements

If you are an accommodation business and want to improve and gain recognition for your accessibility join the National Accessible Scheme: www.visitengland.com/nas

Consider the 'One Step Ahead' standard which helps accommodation businesses look at their services from the perspective of older guests and those who are a little less mobile: www.visitengland.com/onestepahead

Subscribe to Tourism for All UK and OpenBritain the UK's main information services for disabled and older visitors. Visit www.openbritain.net and www.tourismforall.org.uk/TFA-Business.html

Ask a local access group to carry out an audit for you to see how well you meet everyone's needs:
www.accessgroupresources.co.uk





The DCMS Accessible Tourism Stakeholder Forum for the 2012 Games

The 2012 Accessible Tourism Stakeholder Forum was set up by DCMS in April 2008 to help drive forward the programme of work to improve facilities for disabled visitors for the 2012 Games set out in *Winning: A tourism Strategy for 2012 and beyond* (DCMS 2007).

Details about the strategy and the Forum's work can be found on the tourism accessibility pages of the DCMS website www.culture.gov.uk

A sub-group of the Forum was set up to produce this business case and thanks are due to:

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