Accessibility & Inclusion – enabling growth of the Suffolk Visitor Economy

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destinationresearch
delivering results : measuring what matters

On behalf of:

Suffolk Growth

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Introduction, Methodology and Approach

Introduction

One in five people in the UK have an impairment, which may affect where they choose to stay or visit. People with health conditions & impairments and their travelling companions spend around £15.3 billion on trips in England each year, and given our ageing population domestically, the value of the "purple pound" is set to grow. This report summarises the findings of consumer and business surveys across Suffolk to evaluate the importance of the "purple pound".

Consumer survey

The aim of the consumer survey was to better understand the reasons why some people with health conditions and impairments are not taking holidays. The results compare general population, population without impairments and the population with a health condition or impairment. In particular, the survey measures the number of British adults with an impairment that did not take a domestic trip to Suffolk in the last 12 months due to the lack of accessibility provision and the potential income that could be generated if each person with an impairment took a domestic holiday.

The responses were captured via an online omnibus survey. This is a method of quantitative research where data on a wide variety of subjects is collected during the same interview. Usually, multiple research clients will provide proprietary content for the survey, while sharing the common demographic data collected from each respondent. The main advantage of a shared survey vehicle like Omnibus is that it offers affordable and high-quality representative research. The report findings are based on nationally representative sample of 2,000 GB adults.

Introduction, Methodology and Approach

Business Survey

The business survey was designed to provide a review of accessibility within the visitor economy, measuring levels of accessible tourism – that is, tourism which is accessible for person with limited mobility but also for individuals with sensory disabilities, learning disabilities, chronic diseases or other health impairments. The survey presents good practice and recommendations to improve and develop this aspect of the market.

We used a telephone research method conducting 40 structured interviews with a representative sample of the various types of Suffolk businesses part of the visitor economy covering aspects of training, staffing, promotion, financial implications as well as accessibility provision within the business and the surrounding local environment.

This report

This report first presents the findings from the consumer omnibus survey, summarising the profile and characteristics of respondents as well as identifying the proportion of the population that has an impairment. This is then followed by an analysis of consumers with an impairment that have taken a holiday in the last year, leading to an estimate of the size of the opportunity if each person with an impairment took a domestic holiday. We then turn our attention to the supply side, with a summary of findings from the telephone in-depth interviews, before we end with a set of conclusions and key findings regarding opportunities, sector gaps and the outlook for the county's visitor economy.

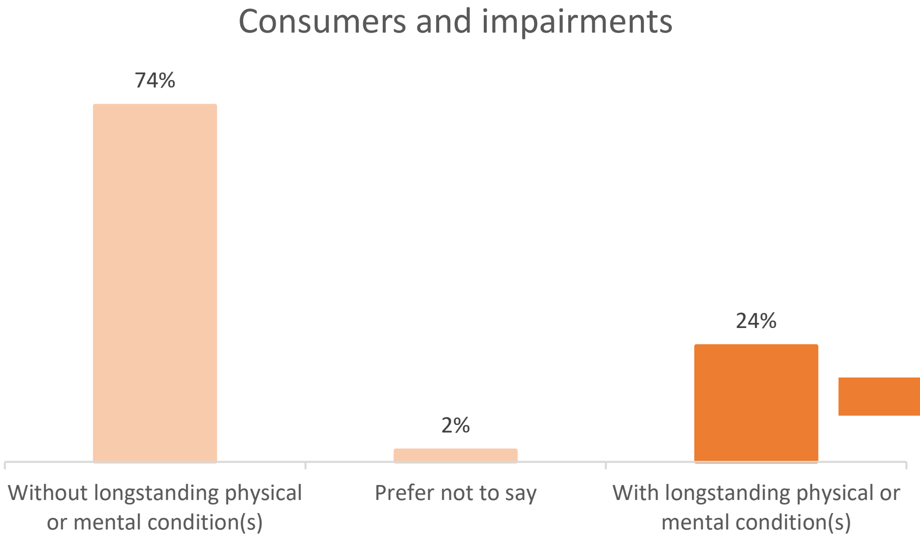
Research Outputs – Consumer Survey

- Longstanding Physical or Mental Condition(s)
- Respondent Profile
- Socio-Economic Profile
- Ethnicity
- Geography
- Holiday Patterns
- Reasons Not to Take a Domestic Trip
- Main reason not to take a domestic trip
- Size of the Opportunity

Consumer Research Outputs – Longstanding Physical or Mental Condition(s)

The results show that 24% of respondents has an impairment.

The most common impairment is a long term illness (55%), followed by a mental health condition (45%).



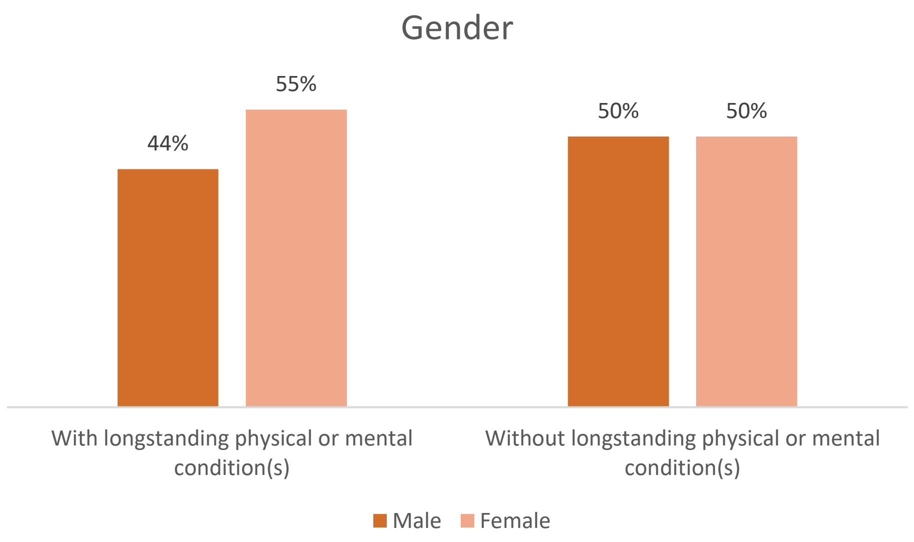
Type of health conditions or impairments	Percentage
I have a long-term health condition (e.g. diabetes back pain, arthritis)	55%
I have a mental health condition	45%
I have a long-term illness (e.g. AIDS, arthritis, cancer, diabetes)	30%
I have a mobility impairment (non-wheelchair user)	24%
I have partial hearing loss	11%
I have a behavioural/ emotional condition (i.e Autism, ADHD, OCD, Tourettes etc.)	10%
I have a mobility impairment (wheelchair user)	3%
I am partially sighted	3%
I have long-term visible differences and disfigurement	2%
I have learning difficulties	2%
I am deaf	1%
Prefer not to say	4%

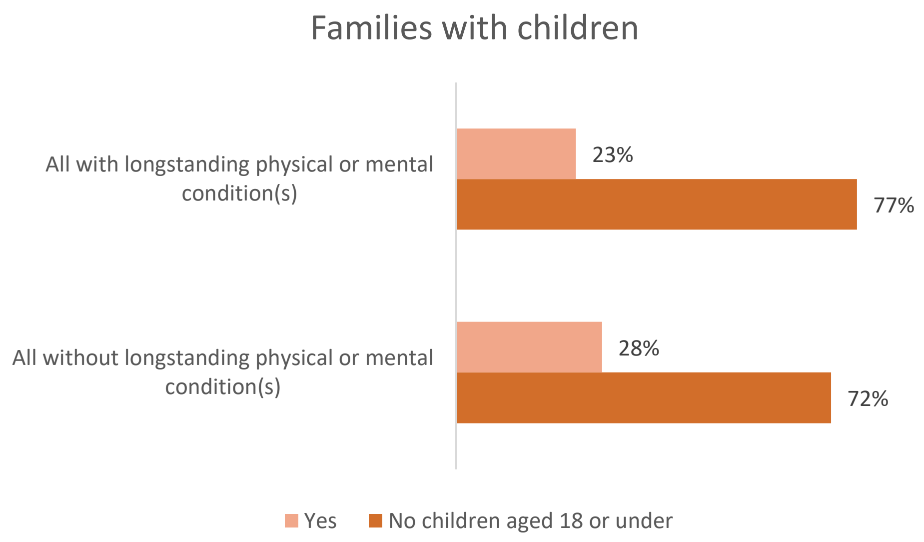
Do you have a longstanding physical or mental condition or disability that has lasted or is likely to last 12 months and which has a substantial adverse effect on your ability to carry out day-to-day activities?
(If Yes) - Do you have any of the following health conditions or impairments?

Consumer Research Outputs – Respondent Profile

Respondents with an impairment include a higher proportion of females (55%)

Just under a quarter of respondents with an impairment have children aged 18 or under, compared with 28% of those without impairments.

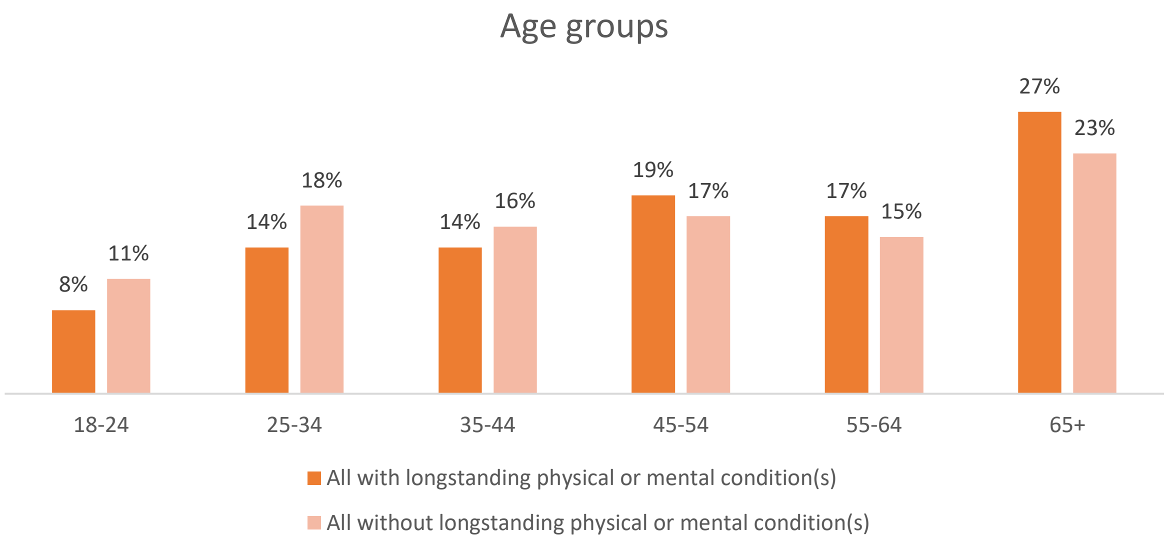


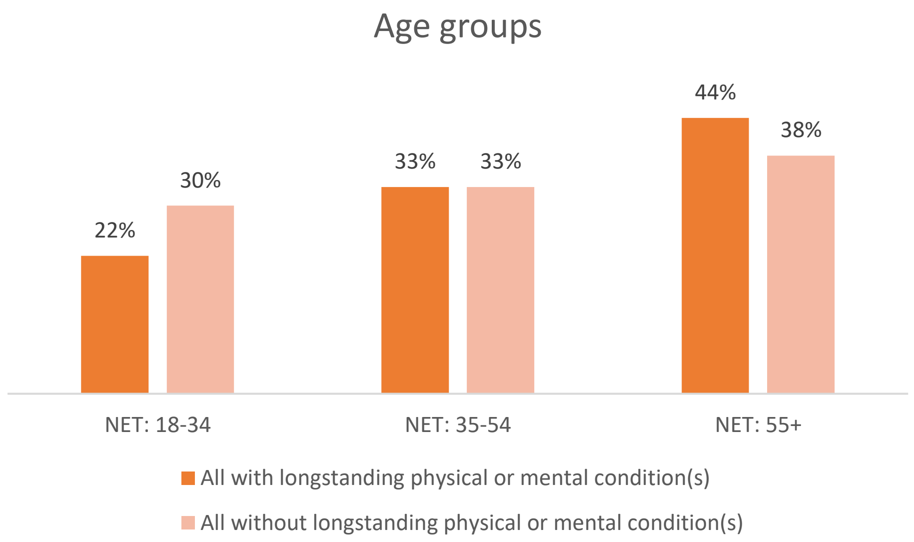


What is your gender?
Do you have any children aged 18 or under? If so, how old are they?

Consumer Research Outputs – Respondent Profile

Those with an impairment have an older profile. More than two in five (44%) are aged 55 and over, compared to 38% of those without a longstanding physical or mental condition.



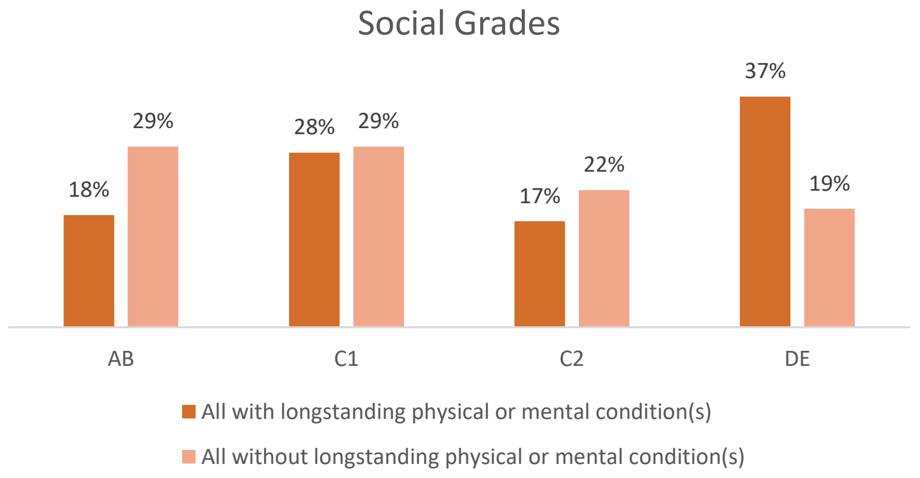


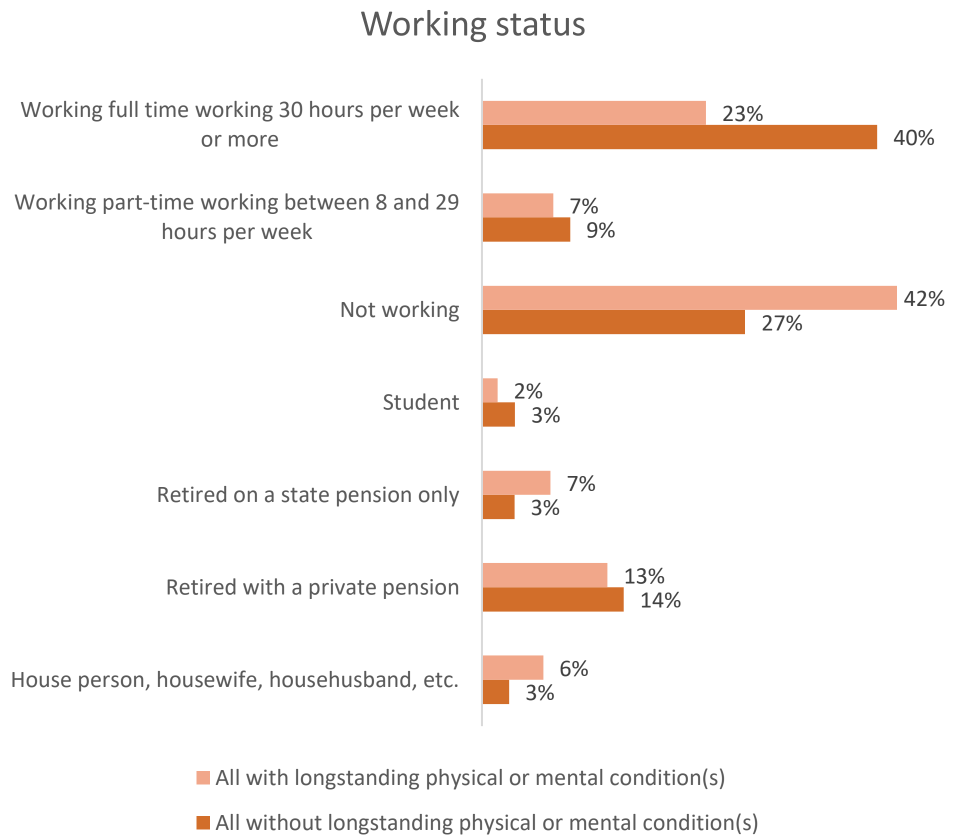
What is your age?

Consumer Research Outputs – Socio-Economic Profile

Those with an impairment have a lower socio-economic profile, with 35% in the DE groups, compared to 19% of those without impairments.

Two in five respondents with longstanding physical or mental conditions are not currently working.

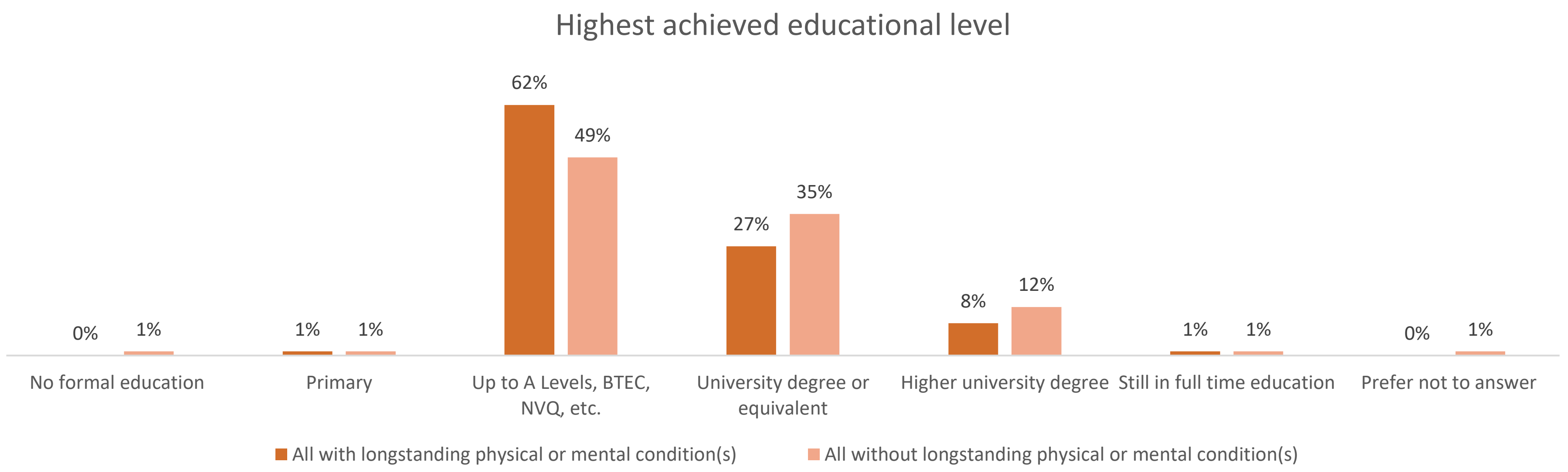




Please indicate which of the following best describes your working status today, taking into account any changes due to the impact of the Coronavirus pandemic

Consumer Research Outputs – Socio-Economic Profile

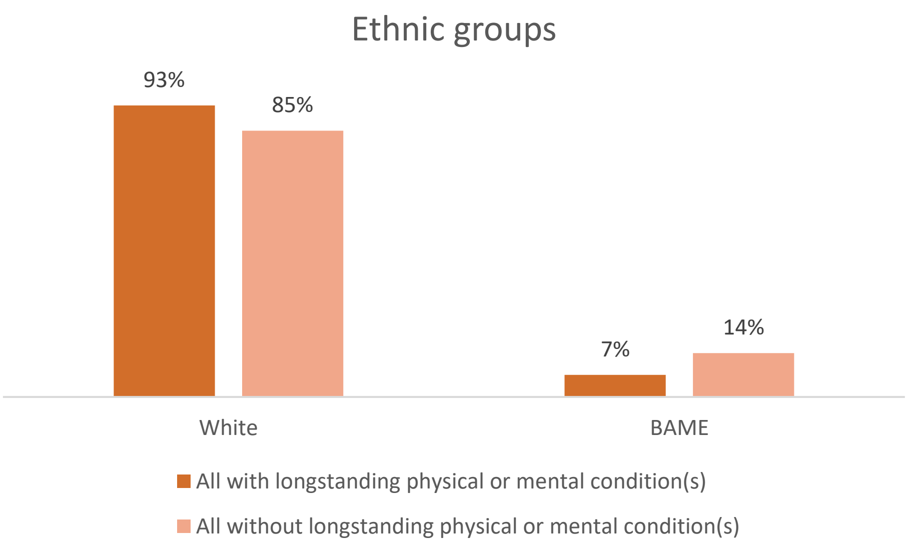
Highest achieved levels of education are greater amongst respondents without physical or mental conditions. Just under half (47%) have a at least university degree or equivalent, compared to 35% of those with an impairment.

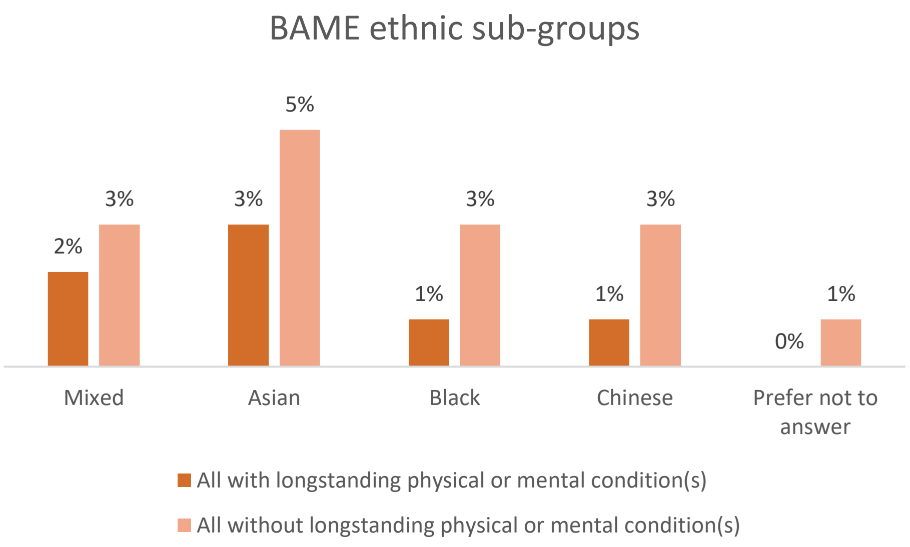


What is the highest educational level that you have achieved to date?

Consumer Research Outputs – Ethnicity

A higher proportion of respondents with an impairment are of a white background (93%), compared to 85% of those without longstanding physical or mental conditions.



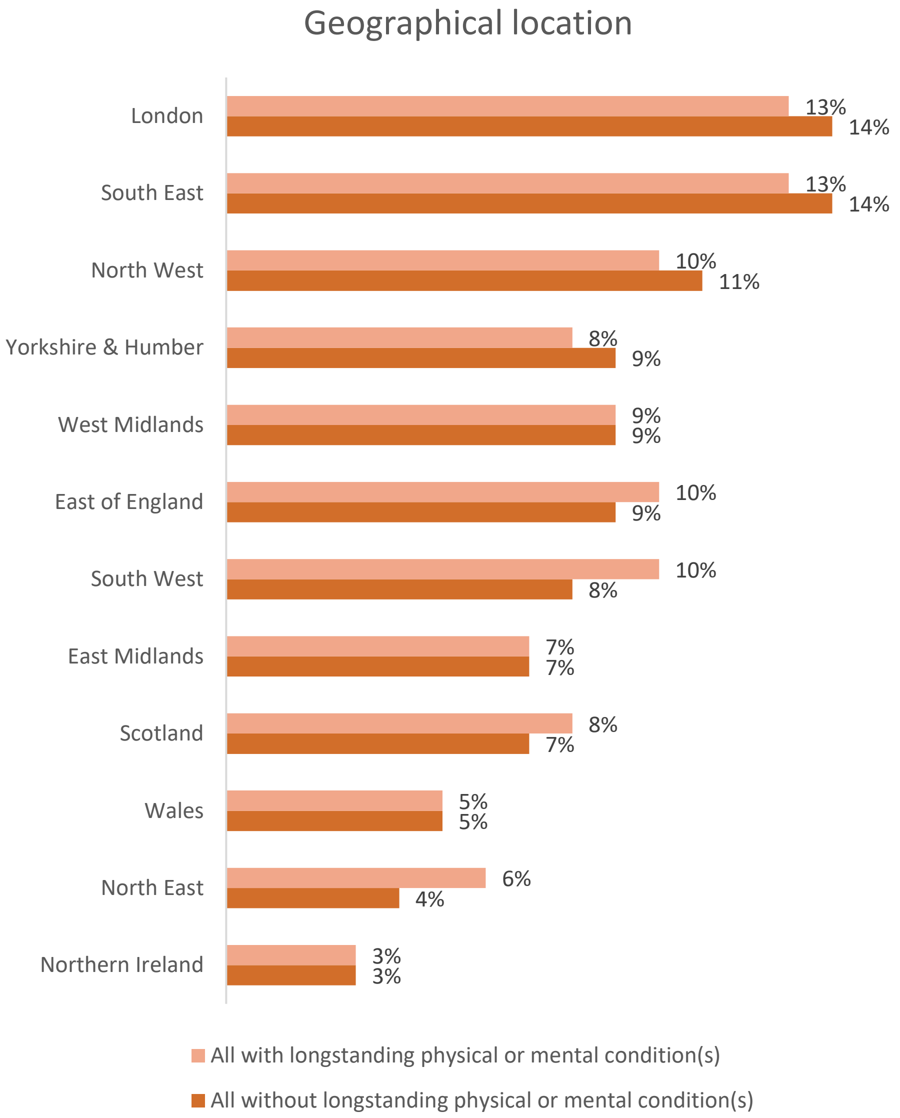


To which of the following ethnic groups do you consider you belong?

Consumer Research Outputs – Geography

The survey was based on a nationally representative sample of respondents, with London, South East and North West being the biggest contributors.

Respondents with impairments are proportionally better represented in the East of England, South West, Scotland and North East England.

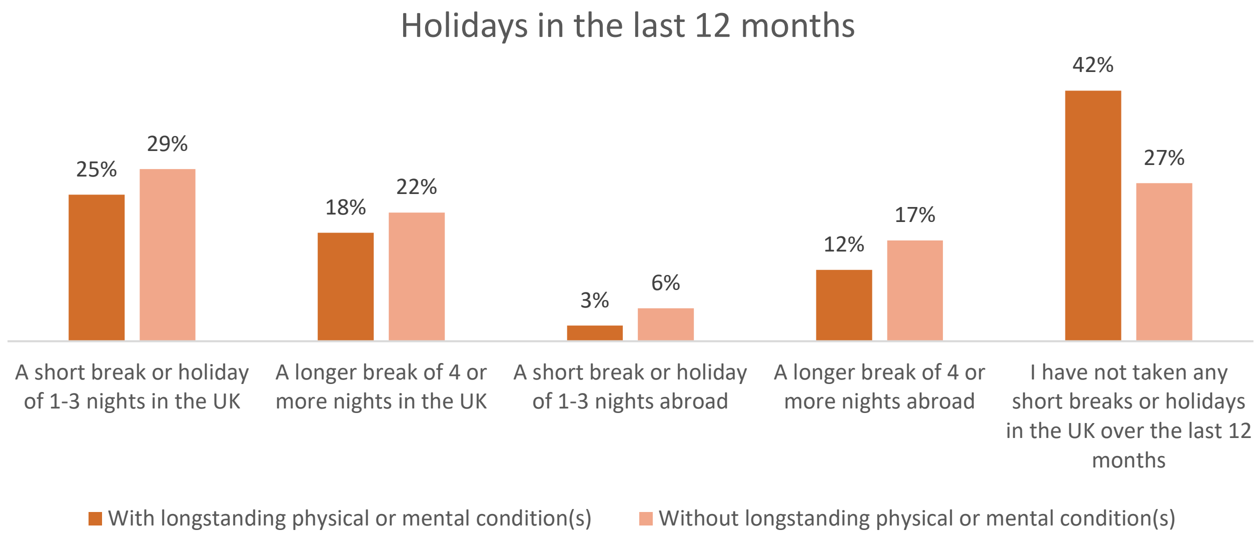


Where do you live?

Consumer Research Outputs – Holiday Patterns

Three in five (58%) of those with an impairment took a holiday in the last 12 months, compared to 73% of those without impairments.

UK holidays accounted for 46% of all holidays taken by those with an impairment, whereas 15% travelled abroad. For those without impairments, the equivalent percentages were 51% and 23%.



In the past 12 months, which of the following types of short breaks or holidays have you taken?

Consumer Research Outputs – Reasons Not to Take a Domestic Trip

For this group, affordability (26%) was the most commonly mentioned main reasons not to travel. The effects of COVID (related to anxiety about contracting the virus) and restrictions due to COVID (e.g. travel restrictions, lockdowns, etc) were also important (10% and 9% respectively).

Health issues accounted for 10% of all reasons for not taking a short breaks or holidays in the UK over the last 12 months.

9% of those who did not take a trip in the last 12 months cited an accessibility concern

In comparison, those without an impairment most commonly mentioned affordability (25%) and restrictions due to COVID (e.g. travel restrictions, lockdowns, etc) as reasons not to take a holiday (13%).

Reasons not to take a domestic trip	Impaired	Non-Impaired
Health/ill health: Cannot go away	**10%**	2%
Lack of accommodation that suited my needs	**1%**	1%
Lack of transport that suited my needs	**2%**	2%
Concern of how I will be treated by staff	**1%**	0%
Lack of accessibility information on places to stay and visit	**3%**	0%
Lack of attractions that suited my needs	**2%**	1%
Can't afford it	26%	25%
Too busy/No time due to work or studies	3%	5%
Too busy/No time due to family commitments	3%	5%
Prefer to go abroad	3%	4%
Have pets	10%	9%
Effects of COVID (related to anxiety about contracting the virus)	10%	8%
Restrictions due to COVID (e.g. travel restrictions, lockdowns, etc)	9%	13%
Don't like going away	8%	5%
Don't want to go on my own/no one to go with	5%	7%
No real reason	3%	9%
Poor weather	0%	2%
Other	1%	2%

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

Consumer Research Outputs – Main Reason Not to Take a Domestic Trip

5% of those who did not take a trip in the last 12 months cited an accessibility concern as the main reason.

For those with an impairment, affordability (38%) and health (16%) most commonly mentioned main reasons not to travel.

In comparison, those without an impairment most commonly mentioned affordability (38%) and restrictions due to COVID (e.g. travel restrictions, lockdowns, etc) as the main reasons not to take a holiday (13%).

Reasons not to take a domestic trip	Impaired	Non-Impaired
Health/ill health: Cannot go away	**16%**	**3%**
Lack of accommodation that suited my needs	**1%**	**1%**
Lack of transport that suited my needs	**2%**	**0%**
Concern of how I will be treated by staff	**0%**	**0%**
Lack of accessibility information on places to stay and visit	**1%**	**0%**
Lack of attractions that suited my needs	**1%**	**0%**
Can't afford it	38%	38%
Too busy/No time due to work or studies	2%	5%
Too busy/No time due to family commitments	1%	4%
Prefer to go abroad	3%	6%
Have pets	11%	8%
Effects of COVID (related to anxiety about contracting the virus)	9%	8%
Restrictions due to COVID (e.g. travel restrictions, lockdowns, etc)	4%	10%
Don't like going away	5%	6%
Don't want to go on my own/no one to go with	3%	5%
No real reason	0%	0%
Poor weather	0%	1%
Other	3%	4%

And which ONE of these reasons is the MOST important?

Consumer Research Outputs – Size of the Opportunity

In order to estimate the size of the opportunity of encouraging consumers with impairments - that is with longstanding physical or mental condition(s), we first identified the number of respondents who said they could not take a domestic trip due to impairment issues. We then applied economic and trip data relating to Suffolk. We used data from the GB Tourism Survey (GBTS) and Cambridge Model results (2021) to estimate the size of the opportunity.

There were 748,000 domestic trips to Suffolk in 2021(1).
The results of the survey show that 24% of the population has an impairment and 58% of them have taken a holiday in the last year.
We therefore conclude that 42% of those with an impairment (75,398 people) have not taken a holiday in the last year.

- 9% (6,786) of those with an impairment who did not take a trip cited an accessibility concern
- 5% (3,770) cited an accessibility concern as the main reason

(1) Cambridge Model
(2) GB Tourism Survey (GBTS)

Consumer Research Outputs – Size of the Opportunity

- The average length of domestic holiday for people with impairment (4.28 nights per trip), the average spend per night on domestic holidays for people with impairment (£71.01) and the average group size is 2.91 people(3).

- 6,786 adults with an impairment did not take a domestic trip in the last 12 months due to the lack of accessibility provision.
- £6 million in value if each person with an impairment took a domestic holiday.

6,786 people x 4.28 nights x £71.01 x2.91 people = **£6,001,642**

- 3,770 adults with an impairment did not take a domestic trip in the last 12 months and the lack of accessibility provision was the main reason for not visiting.
- £3.3 million in value if each person with an impairment took a domestic holiday (when accessibility provision was considered the main reason for not visiting).

3,770 people x 4.28 nights x £71.01 x2.91 = **£3,334,246**

Suffolk Growth

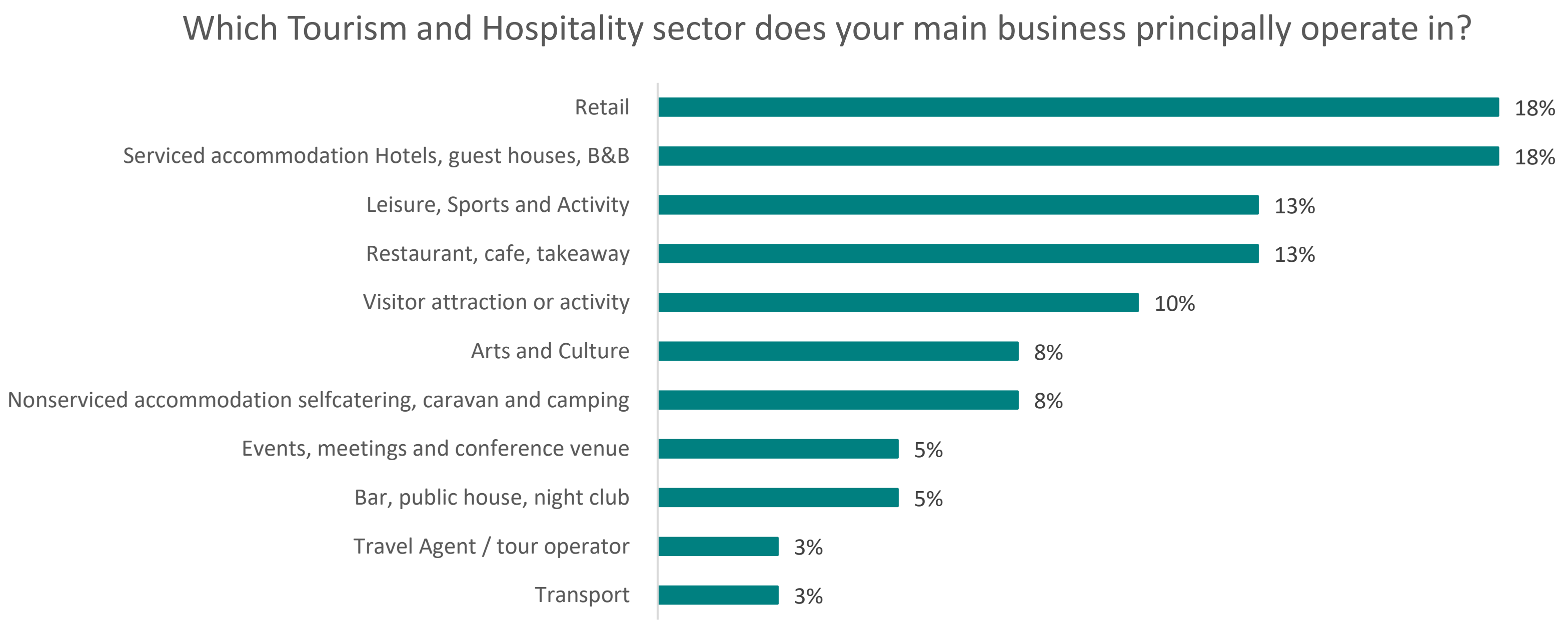
(1) Cambridge Model
(2) GB Tourism Survey (GBTS)
(3) VEE Consumer Survey 2022

Research Outputs – Business Survey

- Business Profile
- Accessibility Adaptions
- Staff Training
- Future Staff Training
- Employees
- Accessibility Schemes
- Business Benefits
- Local Environment
- Opportunities within Disability and Impairment Market
- Other Comments

Business Research Outputs – Business Profile

Retail and serviced accommodation were the largest two groups of respondents followed by leisure, restaurants and visitor attraction groups.

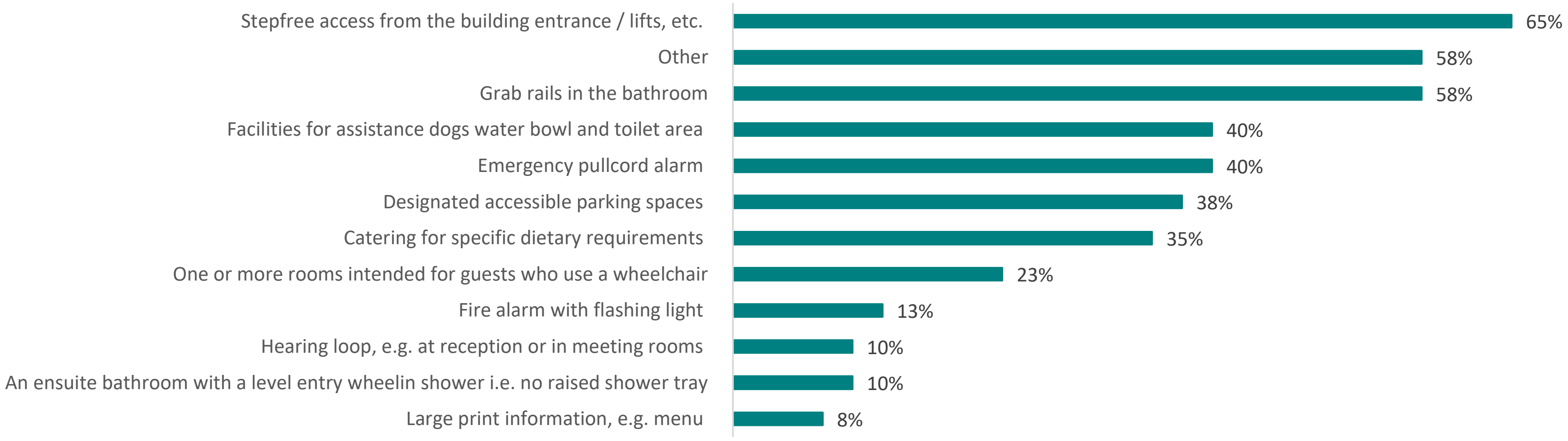


Which Tourism and Hospitality sector does your main business principally operate in?

Business Research Outputs – Accessibility Adaptions

Respondents were asked about any adaptations they have made to improve accessibility. (For example, this could be anything from providing disabled parking, ramped access and an accessible toilet in a communal area, down to providing a magnifying glass at reception or information in large print or providing armed chairs for people with mobility challenges and welcoming assistance dogs.) The majority of changes that were made were step free access (65%), grab rails in the bathroom (58%). Facilities for assistance dogs and emergency pull cords were next most popular (40% each). 'Other' adaptations were reported by a further 58% - these included: large doors, grab rails (away from bathrooms), disabled toilets and staff with sign language skills.

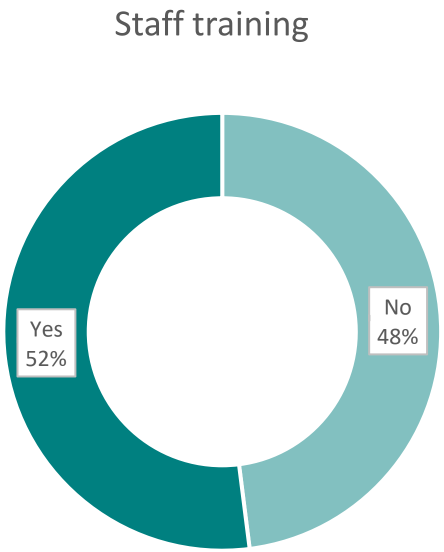
Please tell us about any adaptations you have made to improve accessibility

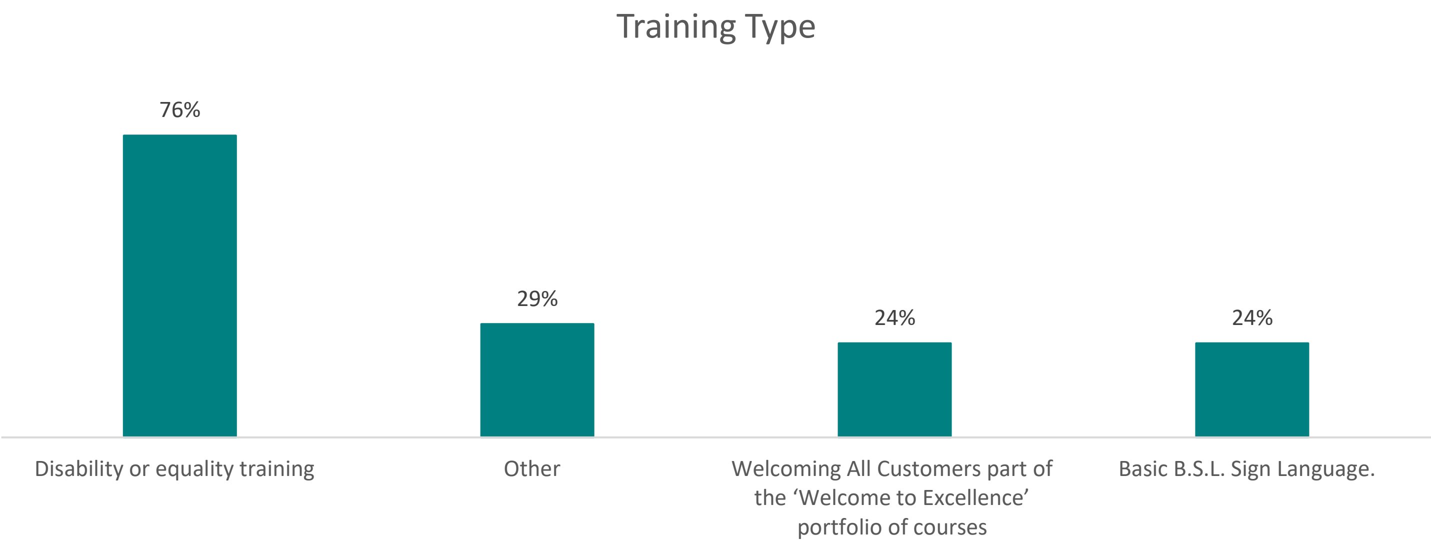


Please tell us about any adaptations you have made to improve accessibility.

Business Research Outputs – Staff Training

Over half of respondents (52%) reported that they had given their staff training specific to welcoming guests with accessibility needs. Of these more than three quarters (76%) had given disability or equality training, a quarter had given ‘Welcoming all Customers’ and a similar number ‘BSL sign language’. Among the responses for ‘other’ were autism & dementia awareness, mobility scooter use and ‘in house’ courses.



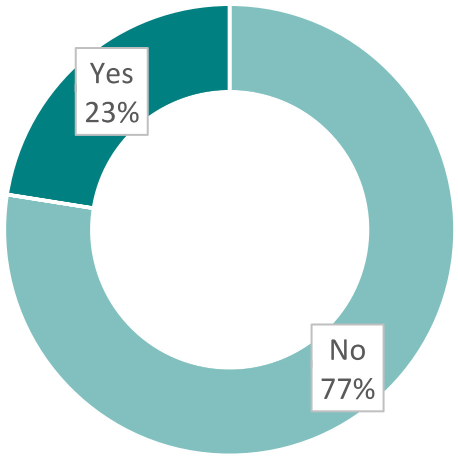


Have you undertaken any staff training with respect to welcoming guests/visitors with accessibility needs?
What training have you or any staff members undertaken?

Business Research Outputs – Future Staff Training

When asked if there a specific training area that they are looking to develop in future, almost a quarter a (23%) said yes, but the majority (77%) said that they were not planning to do so. A selection of their response are shown below.

Future Staff training



I would like more disability awareness training

I would potentially look at anything that was available

All of the above (Disability Awareness, Basic Sign Language, Dementia Awareness) and anything other that comes up.

I would like to access Dementia Awareness training and Disability Awareness.

And is there a specific training area that you are looking to develop in future? (For example, Disability Awareness, Basic Sign Language, Dementia Awareness etc.)

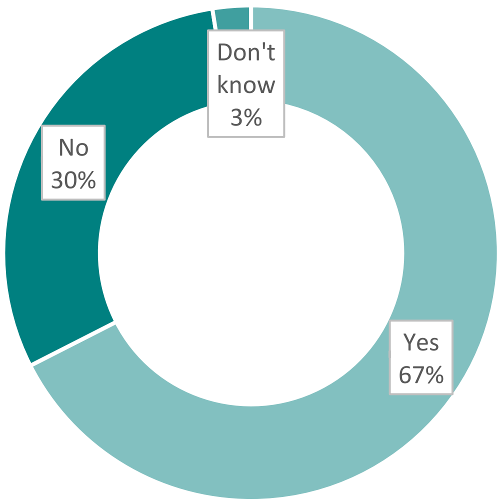
Business Research Outputs – Employees

Only one fifth of respondents had employees or placements that had a known disability/impairment, accounting for an average of 12% of the workforce. When it came to Access Champions within their organisations over two thirds responded that they did (67%) with 30% saying that they did not and 3% not knowing.

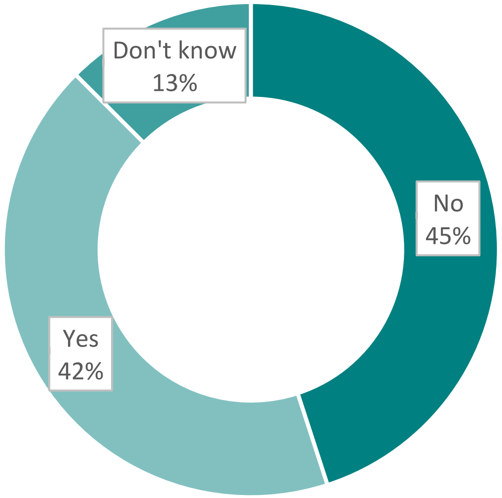
Just under half of respondents (47%) have an accessibility statement slightly more than said they did not (45%)

Employees with disabilities

Access Champion



Accessibility Statement

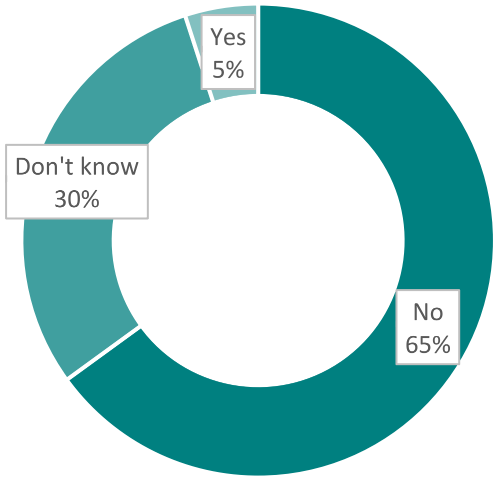


Do you have any employees or placements within your business that have a known disability/impairment?
(If yes) What is the estimated percentage of employees within your workforce with a disability/impairment?
Do you have an Access Champion? Do you have an Accessibility Statement or Guide?

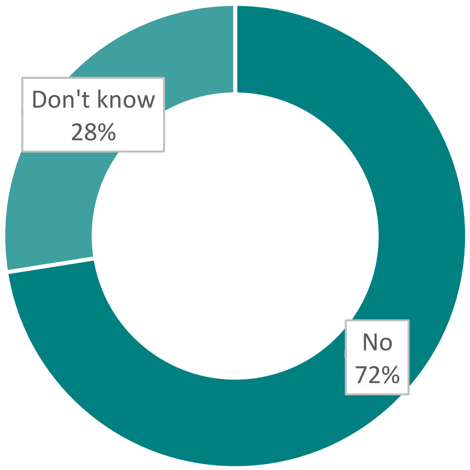
Business Research Outputs – Accessibility Schemes

In relation to the various accessibility schemes and the respondents membership, or participation across all schemes, activity is limited.

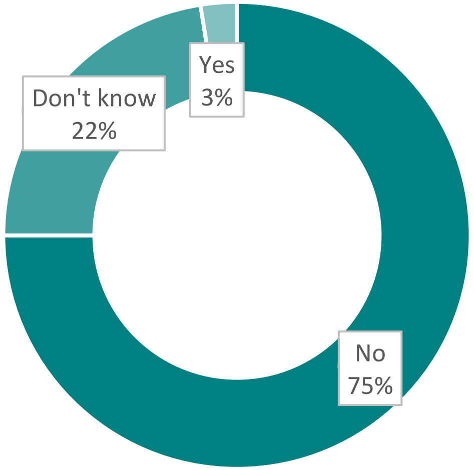
Access Able



National accessible scheme



Any other scheme



Are you registered with Access Able?
Are you part of the National Accessible Scheme?
Are you part of any other schemes?

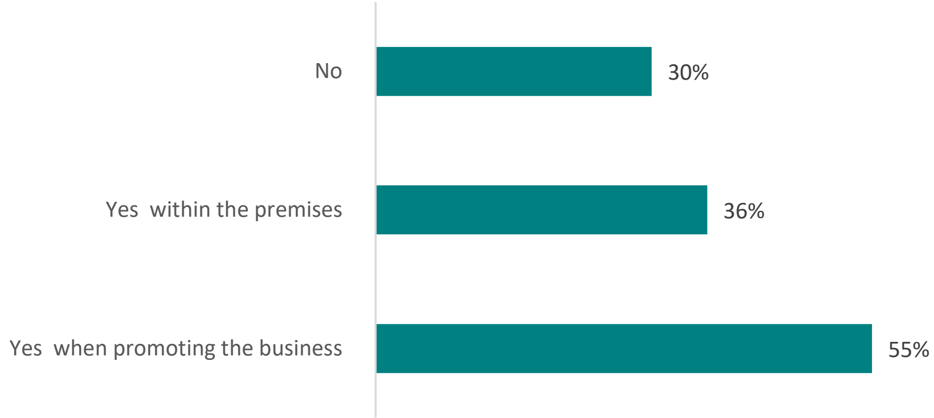
Business Research Outputs – Business Benefits

Just over half (55%) of the respondents promote their accessibility provisions, and less (36%) do so within their premises. Less than a third (30%) do not promote the accessibility provisions at all. Again a little over half (53%) have noticed a benefit to their business as a result of the accessibility provision against (43%) who had not.

It is estimated that 8% percent of visitors/customers have a disability or impairment

% visitors/customers with a disability or impairment

Do you promote the fact that you make provisions for guests with accessibility needs?



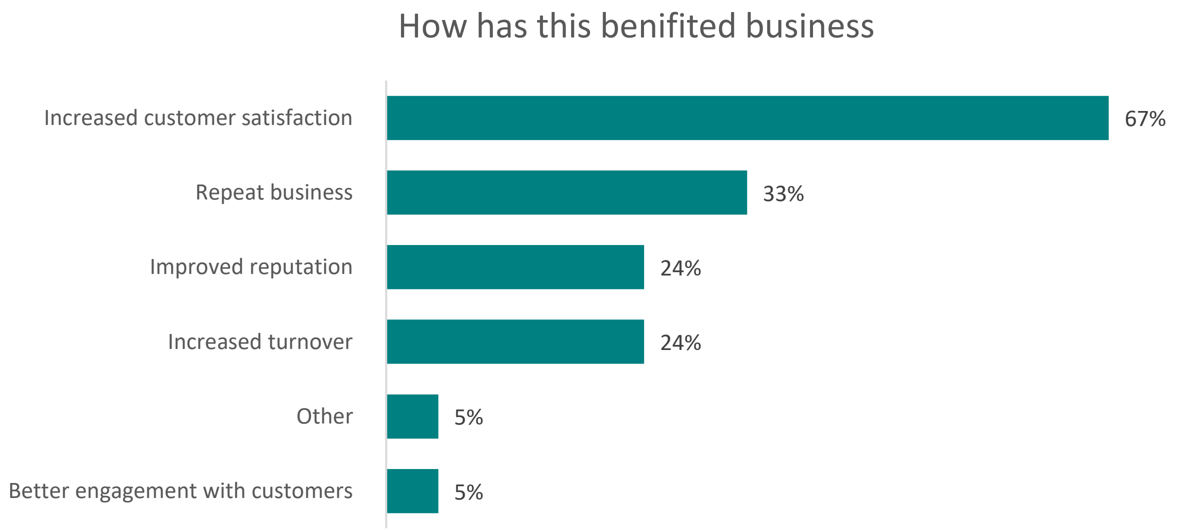
Have you noticed any benefits to your business as a result of making provision for guests with accessibility needs?

Do you promote the fact that you make provisions for guests with accessibility needs?
Have you noticed any benefits to your business as a result of making provision for guests with accessibility needs?
Approximately what percentage of visitors/customers of your business have a disability or impairment

Business Research Outputs – Business Benefits

Two thirds (67%) of respondents had benefited through ‘increased customer satisfaction’, one third cited ‘repeat business’ (33%), and a quarter ‘improved reputation’ and ‘increased turnover’ (24% each).

When asked to estimate what percentage of their visitors/customers had additional access requirements most reported this to be less than 5%.



In what ways has this benefited your business?

Business Research Outputs – Local Environment – Positive comments

Opinions were often specific to the locality of the respondent's business was based. Some general themes have been identified below.

There is a toilet block with full disability access (Christchurch park) They are public toilets adjacent to disability parking spaces.

Some of the larger camping and caravan sites have wheelchair access

There are dropped kerbs and there are plenty of facilities like toilets with wheelchair access.

The newer places have wheelchair access and some have lifts.

Promenades and some attractions and restaurants cater for people with accessibility need and wheelchair users

The marina has an area that is dedicated to people with disabilities that wish to sail. About 150 people with disabilities use the facilities every week. There are disabled toilets and a shower on the site.

There is a good bus service and buses with built in ramps for wheelchairs.

How accessible in your opinion is the surrounding local environment for a visit?

Business Research Outputs – Local Environment – Negative comments

Opinions were often specific to the locality of the respondent's business was based. Some general themes have been identified below.

I think toilet facilities in the immediate area need improving.

There are a lot of listed buildings near us and they are in the same position as we are in terms of altering the buildings.

We are a bit short of disabled parking. There is plenty but spaces could be spread about a bit more.

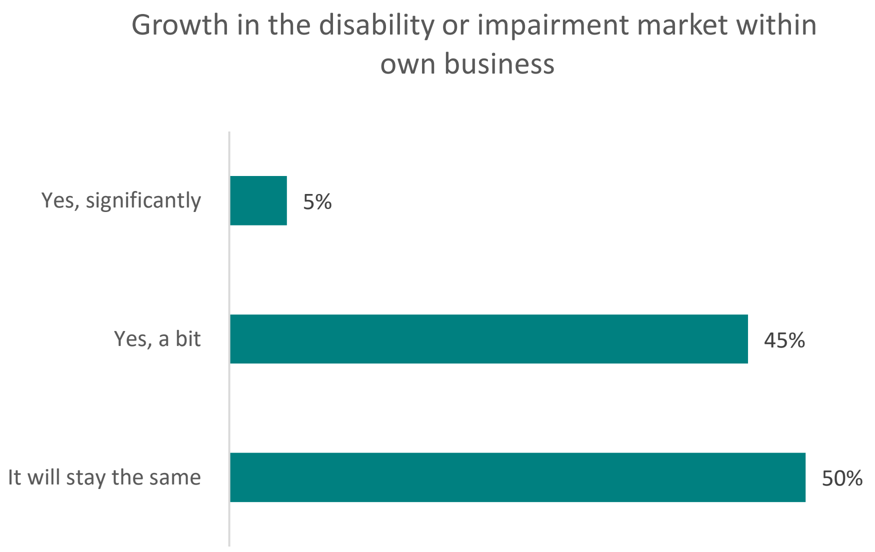
Uneven terrain in rural and coastal areas means that some facilities and attractions have limited accessibility and the use of car is essential.

I think it is lacking in providing accessibility for people with sensory issues, like deafness or sight problems.

How accessible in your opinion is the surrounding local environment for a visit?

Business Research Outputs – Opportunities within Disability and Impairment Market

Only 5% see the disability or impairment market as one that could grow significantly within their business, although 45% said that it would a bit. Half of respondents said it would stay the same. The respondents were then asked what barriers exist to developing this market – some responses are listed here on the right.



The age of the buildings makes it impossible

Unaffordable costs

Area is not really suitable for disabled travellers

Listed buildings cannot have so many alterations

Do you see this (disability or impairment market) as a market that could grow within your business?

Business Research Outputs – Other Comments

Respondents were asked if they had any other comments. These mostly related to adapting to customer requests:

If we were in a tourist area and there was the market out there, I would invest more in this.

We have an extensive action plan we just need to reach out for more finance.

We encourage customers to ask if they have any special requests and we do our best to accommodate them.

We currently have a partially sighted volunteer who is doing and audit for us to see what we can do to improve the experience for partially sighted people.

We have discussed having a quieter day for people with sensory difficulties, but we have not implemented it yet.

We will do what we can for customers who need something different.

We try to be active to accommodate visitors needs and are always open to suggestions.

It is not an adaptation, but we do our best on a personal level to help.

What barriers are there if any to developing the disability or impairment market within your business?

Research Outputs – Key Take Outs

- Key take outs

Key Findings – Consumer Survey

- 24% 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
- 58% of those with an impairment have taken a holiday in the last year
- Short domestic holidays (1-3 nights) are the most common type of trip
- 54% cite main reason for not taking holiday as beyond their control - 38% say they cannot afford + 16% 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
- 6,786 adults with an impairment did not take a domestic trip in the last 12 months due to the lack of accessibility provision
- £6 million in value if each person with an impairment took a domestic holiday
- 3,770 adults with an impairment did not take a domestic trip in the last 12 months and the lack of accessibility provision was the main reason for not visiting.
- £3.3 million in value if each person with an impairment took a domestic holiday (when accessibility provision was considered the main reason for not visiting).

Key Findings – Business Survey

- Retail and serviced accommodation were the two largest groups of respondents followed by leisure, restaurants and visitor attractions.
- The majority of adaptations and changes were step free access (65%) and grab rails in the bathroom (58%).
- Over half of respondents (52%) reported that they had given their staff training specific to welcoming guests with accessibility needs.
- Of these, 76% had facilitated disability or equality training, a quarter ‘Welcoming all Customers’ and ‘BSL sign language’.
- 77% said that they were looking at a specific training area that they are looking to develop in future.
- One fifth of respondents had an employee or placement that had a known disability/impairment and 67% had an Access Champion.
- Just under half of respondents (47%) have an accessibility statement.
- Just over half (55%) of the respondents promote their accessibility provisions, and 36% do so within their premises.
- A little over half (53%) have noticed a benefit to their business as a result of the accessibility provision against (43%) who had not.
- Two thirds of respondents had benefited through ‘increased customer satisfaction’ (67%), one third cited ‘repeat business’ (33%), and a quarter ‘improved reputation’ and ‘increased turnover’ (25%).
- Half see the disability or impairment market as one that could grow significantly (5%) or grow a bit (45%) within their business.

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