

National Survey on Accessibility Provision 2015

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1. Executive Summary

- 1.1 We have conducted 1,512 telephone interviews with an industry representative sample of serviced accommodation operators in Britain to:
- Collect data on accessibility provision for Eurostat
 - Understand more about the issues faced by businesses in providing for guests with accessibility needs, and what could be done to help them to improve their accessibility provision

30% of establishments are accessible

- 1.2 In the weighted Britain survey sample, three in ten (30%) establishments say they have step-free access from the building entrance and have at least one room intended for wheelchair users. There is some variation by country: 31% of establishments in England and Scotland, and 25% in Wales.
- 1.3 The figures for Eurostat are:

Country	Accessible stock	Accessible rooms
England	10,751	29,359
Scotland	2,314	7,126
Wales	792	2,042
Britain total	13,857	38,527

Size of establishment is the dominant factor which influences accessibility

- 1.4 Size of establishment is the dominant factor which influences the likelihood of an establishment being accessible or not. Other possible factors such as designator, grading and location are either not significant, or they appear to be significant but only when size is not controlled for.
- 1.5 Nearly all (96%) establishments interviewed with over a 100 rooms are accessible, as are most (80%) establishments with 51 to 100 rooms. At the other extreme, a minority (12%) of businesses with 1 – 5 rooms are accessible.

'Accessibility needs' synonymous with 'mobility needs' for many operators

- 1.6 A theme throughout the interviews is that many operators seem to think instantly of 'mobility needs' when the term 'accessibility needs' is mentioned, in spite of many questions in the survey referring directly to other types of accessibility need.

- 1.7 Most (73%) businesses are doing something to address mobility needs. Designated accessible parking spaces are the most common form of mobility provision, and these are found in half (50%) of establishments.

Some sensory needs are quite well met; others are not

- 1.8 About half (49%) of establishments have fire alarms with flashing lights, and just over a third (37%) have large print information. Hearing loops (8% of establishments) and vibrating pillow pads linked to the fire alarm (7%) are harder to find.

Dietary requirements and bedding allergies are well catered for

- 1.9 Dietary requirements (89% of establishments) and non-allergenic bedding (77%) are well catered for by the industry, even if they are not well understood to qualify as meeting 'accessibility needs'.

Weakness in promotion of accessibility provision

- 1.10 Nearly two thirds (63%) of businesses which provide for accessibility needs say they do not promote the fact that they do.

Staff training is not widespread

- 1.11 A minority (21%) of businesses have undertaken staff training with respect to welcoming guests with accessibility needs. It is only widespread among the largest establishments (73% of those with over a 100 rooms have undertaken staff training).

Some operators notice the benefits, but they appear to be in the minority

- 1.12 One in four (25%) respondents say they have noticed the benefits to their business of making provision for guests with accessibility needs. Among these businesses, the most commonly noticed benefits are 'increased customer satisfaction' (61%) and 'repeat business' (53%).

Intentions to improve accessibility provision

- 1.13 A minority (19%) of businesses are likely to improve accessibility provision in the next two years, while many (55%) are 'very unlikely' to. The larger the establishment, the more likely it is to improve.
- 1.14 The focus of improvements appears to be mainly on mobility provision. Sensory provision, promotion and staff training appear to be much lower priorities.

Education task facing the business support teams

- 1.15 Most (72%) operators say that 'nothing' would encourage or help them to improve provision for guests with accessibility needs.
- 1.16 Although this result might seem concerning at face value, the impression we have gained throughout interviewing is that in spite of earlier questions being asked about sensory needs, dietary requirements, etc, many respondents still have 'mobility needs' firmly in the front of their mind as a synonym for 'accessibility needs'.
- 1.17 Financial assistance with the set-up (10% of respondents) is the most commonly answered type of possible encouragement mentioned.

2. Background and Methodology

Why was this research commissioned?

- 2.1 Eurostat requires Britain to collect data on 'the number of [serviced] establishments having one or more bedrooms accessible for persons with reduced mobility, including wheelchair use' from 2015.
- 2.2 In Britain this data cannot be collected through the registration process, because unlike in many other European countries, there is no compulsory registration scheme for accommodation businesses. Therefore it was necessary to conduct bespoke research to gather the required data for Eurostat.
- 2.3 At the same time, the National Tourist Boards saw this survey as an opportunity to understand more about the issues faced by businesses in providing for guests with accessibility needs, and what could be done to help them to improve their accessibility provision.
- 2.4 The survey therefore had two objectives:
 - To gather the data required by Eurostat
 - To inform the business support teams in England, Scotland and Wales on where the industry is currently at with accessibility provision and what they could do to support them effectively

How has this research been conducted?

Source of business databases

- 2.5 The three NTBs each provided us with their database of serviced accommodation businesses participating in their Quality Scheme. We then supplemented this with data purchased from a list broker containing non-assessed business to give a more comprehensive database of assessed and non-assessed businesses.

Sampling

- 2.6 In each country we devised quotas to represent the industry in terms of:
 - Region
 - Sector (hotels and non-hotels)
 - Assessed / non-assessed
 - Size

2.7 We have conducted a total of 1,512 interviews with businesses owners or managers in November and December 2015. Refusal rates are 5% for quality-assessed businesses and 12% for non-assessed businesses – the most common reason for refusal being caught at a busy time.

2.8 The tables below show the sample composition for each country. During interviewing we have come across 15 respondents telling us that they manage more than one property. These ‘multi-management’ properties cut across different regions and so are shown separately.

2.9 The original quotas are shown in brackets.

ENGLAND	Assessed by VisitEngland		Not assessed by VisitEngland	
	Hotels	Non-hotels	Hotels	Non-hotels
North	13 (9)	19 (17)	65 (67)	123 (124)
Midlands	6 (6)	18 (13)	47 (48)	84 (92)
South	23 (13)	30 (25)	78 (97)	186 (180)
London	1 (2)	19 (5)	27 (18)	13 (34)
Total	43 (30)	86 (60)	217 (230)	406 (430)
Total single-managed properties: 752				

Availability of data for some cells in England has resulted in the re-organisation of some quotas, e.g. extra assessed hotels in the South to make up for shortfall in non-assessed hotels in the South

SCOTLAND	Assessed by VisitScotland		Not assessed by VisitScotland	
	Hotels	Non-hotels	Hotels	Non-hotels
North	23 (21)	67 (58)	26 (27)	33 (55)
East	14 (12)	30 (33)	15 (16)	20 (20)
West	14 (15)	38 (36)	19 (17)	20 (23)
South	4 (5)	15 (14)	10 (10)	16 (17)
Edinburgh	6 (8)	20 (15)	12 (10)	14 (12)
Glasgow	7 (5)	3 (3)	11 (10)	6 (8)
Total	68 (66)	173 (159)	93 (90)	109 (135)
Total single-managed properties: 443*				

**Although this is lower than the target of 450 interviews, the number of multi-management properties in Scotland (described below) makes up for the slight shortfall here*

Availability of data for some cells in Scotland has resulted in the re-organisation of some quotas, e.g. extra assessed non-hotels in the North to make up for shortfall in non-assessed non-hotels in the North

WALES	Assessed by Visit Wales		Not assessed by Visit Wales	
	Hotels	Non-hotels	Hotels	Non-hotels
North	9 (7)	48 (40)	9 (10)	43 (60)
Mid	5 (4)	22 (21)	6 (5)	27 (31)
South West	5 (4)	31 (25)	8 (7)	37 (38)
South East	9 (3)	16 (16)	5 (5)	22 (24)
Total	28 (18)	117 (102)	28 (27)	129 (153)
Total single-managed properties: 302				

Availability of data for some cells in Wales has resulted in the re-organisation of some quotas, e.g. extra assessed non-hotels in the North to make up for shortfall in non-assessed non-hotels in the North

SIZE BY COUNTRY	Size (no. of rooms)				
	Micro (up to 5)	Small (6 to 20)	Medium (21 to 50)	Large (51 to 100)	Very large (over 100)
England	237	353	89	50	23
Scotland	186	145	50	36	26
Wales	145	125	18	9	5
Total	568	623	157	95	54

MULTI-PROPERTY MANAGEMENT	Hotels	Non-hotels
England	19	19
Scotland	-	8
Wales	2	-
Total	21	27
Total multi-management properties: 48 (from 15 interviews)		

Weightings and reporting of results

- 2.10 As Scotland and Wales have been over-sampled for greater individual accuracy of results, we have weighted the overall results for single-managed properties in Britain in line with the following estimated proportions of total stock:

Country	% of serviced stock in Britain
England	75.2%
Scotland	17.3%
Wales	7.5%

- 2.11 As there are only 15 interviews based on multi-management properties, their sample is too small to report on separately, and their findings cannot easily be incorporated into the findings for single-managed properties due to slightly different questions. Therefore we just use the findings from these 15 interviews in the calculations for Eurostat in Section 3. The survey findings in Sections 4 to 6 are based just on the 1,497 interviews with single-managed properties.
- 2.12 Differences in results among England, Scotland and Wales are mostly not significant. Therefore we report the results combined but highlight any differences in answers to particular questions where significant. The full breakdown of results by country can be viewed in the cross-tabulations.

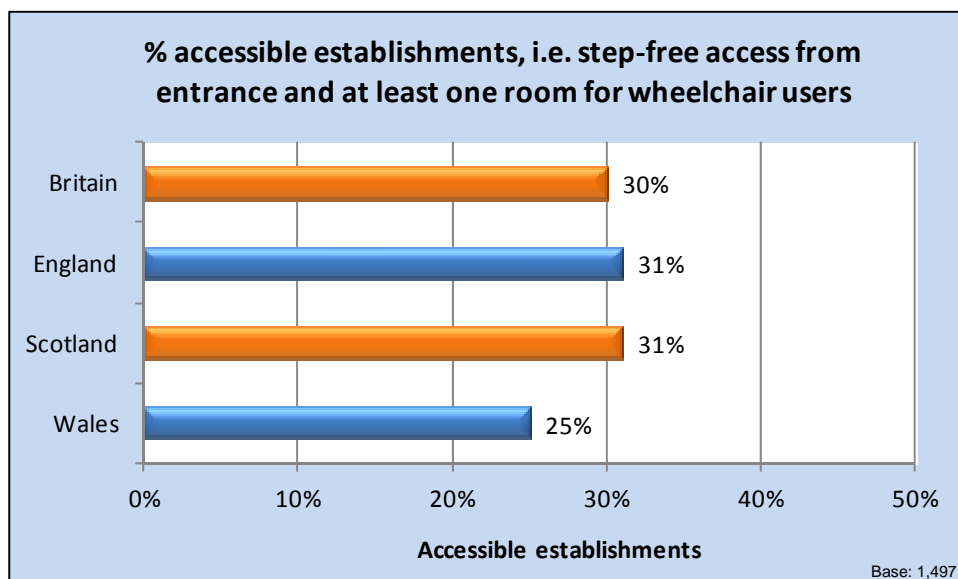
Questionnaire

- 2.13 A copy of the questionnaire used for the telephone interviews is included as an appendix.

3. Eurostat Calculations

- 3.1 One of the two main objectives of this research is to calculate the number of accessible serviced establishments and the number of accessible serviced rooms in England, Scotland and Wales. In this Section we discuss our process to arrive at these figures.
- 3.2 All charts shown in this Section are based on single-managed property interviews as multi-management property data cannot easily be divided up by location type, grading etc. We use the data from multi-property interviews in the table at the end of the Section as part of the overall calculations for Eurostat.
- 3.3 We have considered three definitions of 'accessible':
- (1) 'Self-declared' in Q20: at least one room accessible for wheelchair users or guests with reduced mobility
 - (2) At least one room for guests in a wheelchair and step-free access from the entrance
 - (3) At least one room for guests in a wheelchair and step-free access from the entrance and a level-entry wheel-in shower
- 3.4 Following discussion of the results, it has been decided that definition 2 above is the most appropriate definition of 'accessible'. It gives a more concrete basis for measuring accessibility than definition 1, which is open to interpretation.

Overall view by country

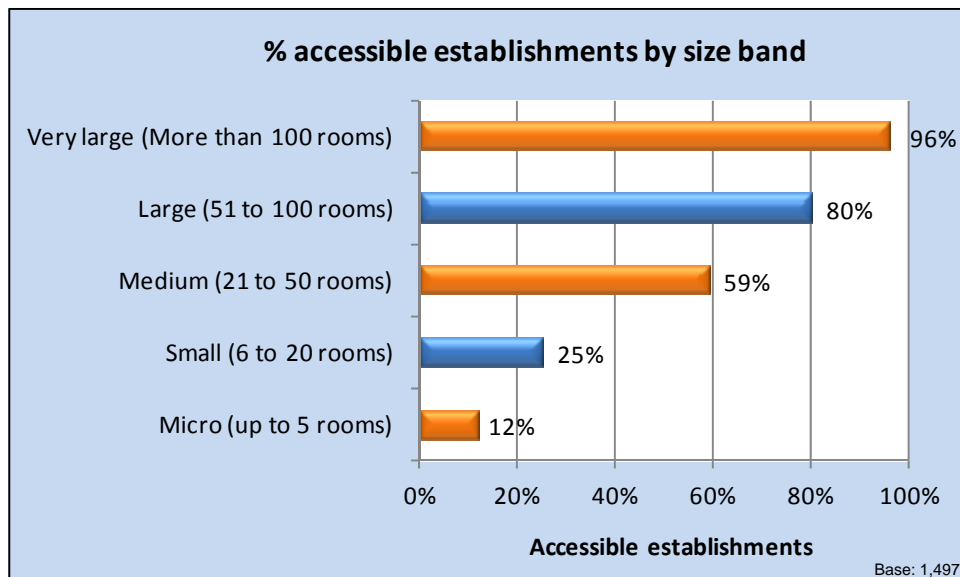


- 3.5 In the weighted Britain survey sample, three in ten (30%) establishments have step-free access from the building entrance and have at least one room intended for wheelchair users. For these we use the term 'accessible establishments' according to definition 2.
- 3.6 There is some variation by country. England and Scotland have the same result, but their difference with Wales is significant at the 95% confidence level.

What are the key factor(s) which distinguish between accessible and non-accessible establishments?

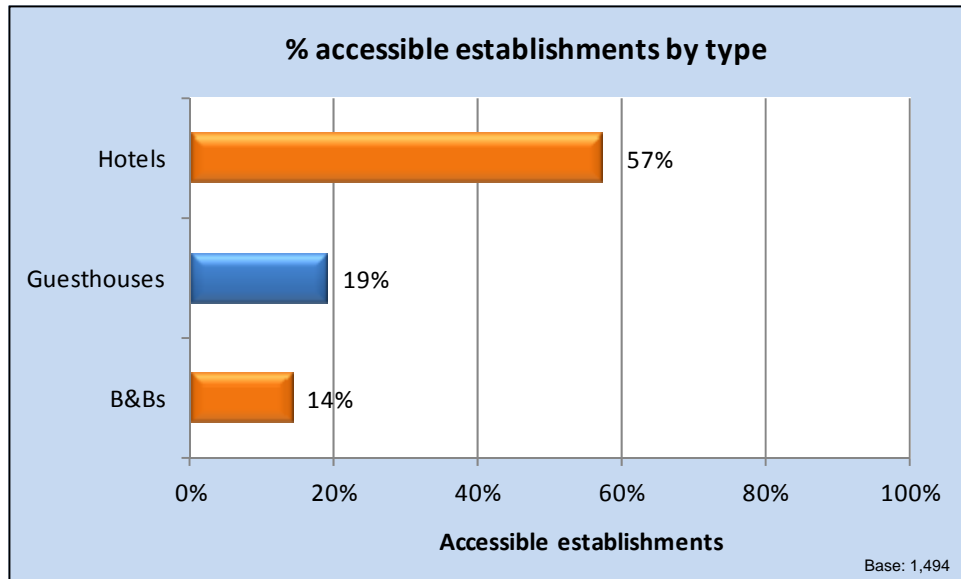
- 3.7 Identifying the key factor(s) which distinguish between accessible and non-accessible establishments is an important part of the research, as this allows us to gross up sample results to the population accurately. Below we discuss investigate a number of possible factors in turn.

Size of establishment



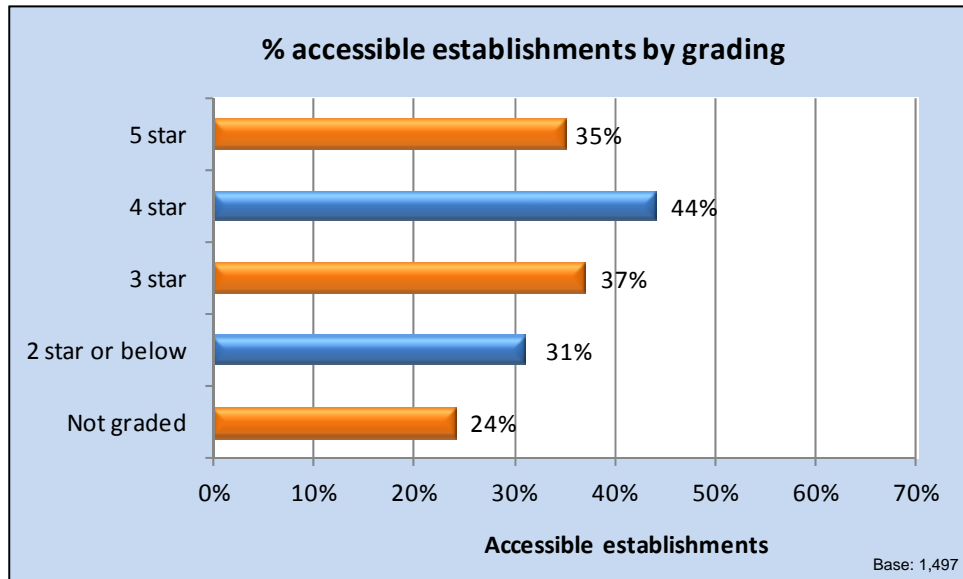
- 3.8 Size of establishment clearly affects the likelihood of it being accessible. In our analysis we have ordered the raw data from smallest to largest in terms of number of rooms and have looked for 'watersheds' which separate one size of business from another in terms of likelihood of accessibility. The five size bands on the above chart show where these watersheds occur.

Type of establishment



- 3.9 Type of establishment (designator) also distinguishes accessibility significantly, but is this just because hotels are generally larger than guesthouses and B&Bs?
- 3.10 In our analysis we have controlled establishment size as a factor and found that when doing this, the designator no longer affects the likelihood of accessibility significantly where sample sizes are reliable, e.g. there is no significant difference between hotels of 6 – 20 rooms when compared to non-hotels of 6 – 20 rooms etc.
- 3.11 Therefore we can conclude that while type of establishment does affect the results, the underlying cause is size, not the fact that it is a different designator.

Grading

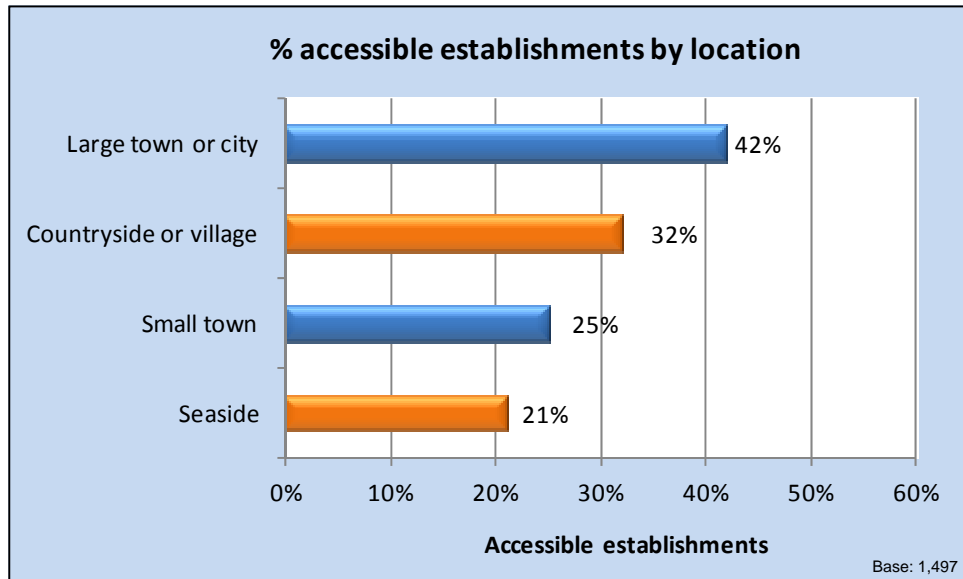


- 3.12 Although accessibility provision does not feature in grading requirements, assessed businesses are encouraged to consider it and they do at least have to make an *Access Statement / Guide*.
- 3.13 Whether a business is officially graded (by an NTB or the AA) or not and their star rating seems to have some effect on the results.
- 3.14 Two in five (40%) graded businesses are accessible, which compares to a lower proportion (24%) of non-graded businesses. The difference is significant at the 95% confidence level.
- 3.15 Within graded businesses, accessibility seems to improve moving up through the ratings to 4 stars (the base of 5 star businesses is quite low – 56).

What happens when size is controlled for though?

- 3.16 When size of establishment is controlled in the data, the differences between graded and non-graded businesses are no longer significant.

Location



- 3.17 Type of location affects accessibility, but again, not when size is controlled for. Accessible establishments are more likely to be found in large towns and cities, but this is because the largest businesses are more likely to be located there.

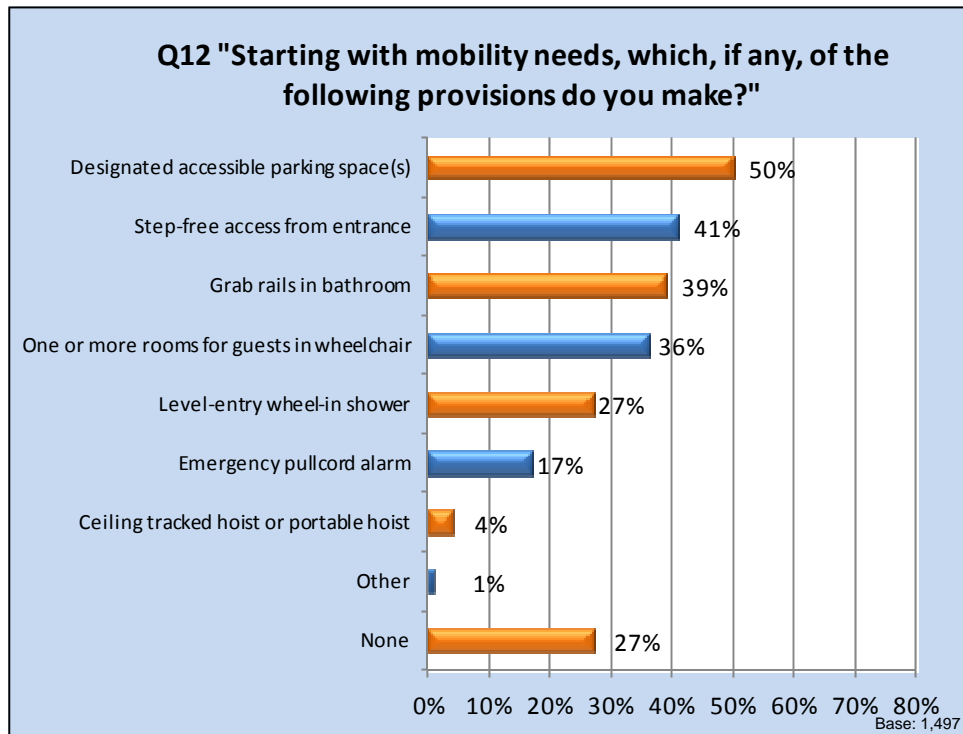
Conclusion

- 3.18 Size of establishment is the dominant factor which influences the likelihood of an establishment being accessible or not. Other possible factors are either not significant, or they appear to be significant but only when size is not controlled for.
- 3.19 Therefore in the calculations for Eurostat we have grossed up sample results to the known industry populations in each of England, Scotland and Wales by size of business. The table below shows the outcomes of these calculations. There is a detailed spreadsheet provided separately.

Country	Accessible stock	Accessible rooms
England	10,751	29,359
Scotland	2,314	7,126
Wales	792	2,042
Britain total	13,857	38,527

4. What do Businesses Currently Provide?

Mobility needs



Some of the answer codes have been abbreviated in the interests of keeping the chart readable; the questionnaire in the appendix shows the full wording asked in the interviews

Most businesses are doing something

- 4.1 Most (73%) businesses are doing something to address mobility needs.
- 4.2 Designated accessible parking spaces are the most common form of mobility provision, and these are found in half (50%) of establishments. Results vary significantly by size. Three quarters (75%) of large and very large establishments provide accessible parking spaces, compared to a lower proportion (45%) of small and micro establishments.

Results vary greatly by establishment size

- 4.3 All of the remaining prompted mobility provisions also vary greatly by establishment size. For example, step-free access from the entrance is almost universal (97%) among very large establishments, but not the norm among micro establishments (23% of businesses).

4.4 Further details of differences by size of establishment can be viewed in the cross-tabulations.

Reasons for differences between accessibility definitions considered for Eurostat

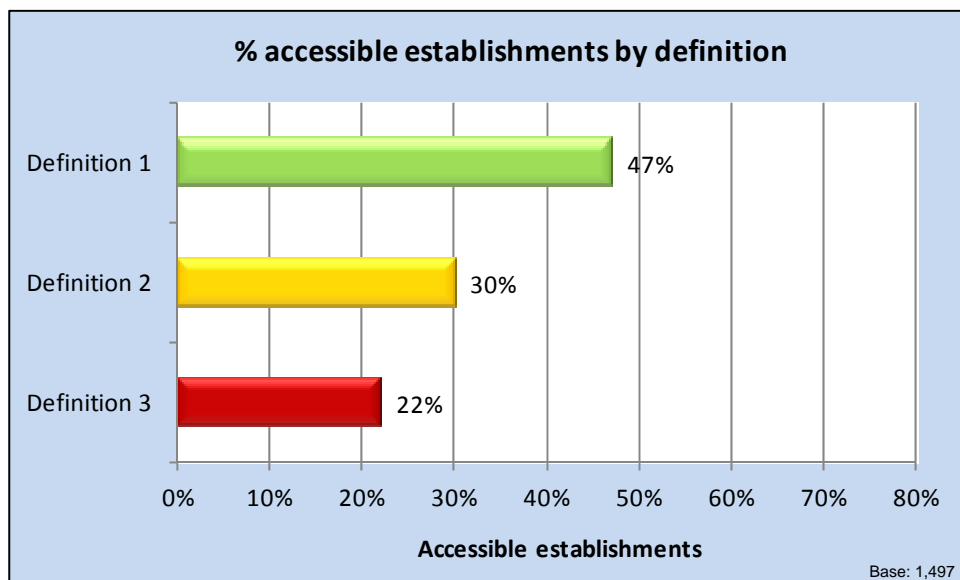
4.5 In Section 3 we discussed three possible definitions of 'accessible':

(1) 'Self-declared' in Q20: at least one room accessible for wheelchair users or guests with reduced mobility

(2) At least one room for guests in a wheelchair and step-free access from the entrance

(3) At least one room for guests in a wheelchair and step-free access from the entrance and a level-entry wheel-in shower

4.6 The chart below shows the proportion of businesses meeting each definition:



4.7 There is a sizeable drop in accessible businesses between definitions 1 and 2. The main reason for the difference in results is that some establishments have rooms which are accessible for less profound mobility needs (e.g. elderly people using a walking stick), but not wheelchair users.

"The one room can handle a wheelchair ... there are two other rooms on the ground floor for people with some mobility"
Micro business, South East England

"The one room available is for reduced mobility, but not wheelchairs"
Small business, South West England

4.8 'Step-free access from the building entrance' (41% of establishments) and 'level-entry wheel-in shower' (27%) are also conditions of meeting the stricter

definitions of 'accessible'. Some establishments have made a lot of effort to be accessible, but possibly 'fall down' because of one detail they haven't or cannot solve.

"The room available is great for reduced mobility should they also be able to manage one flight of stairs"

Small business, South East England

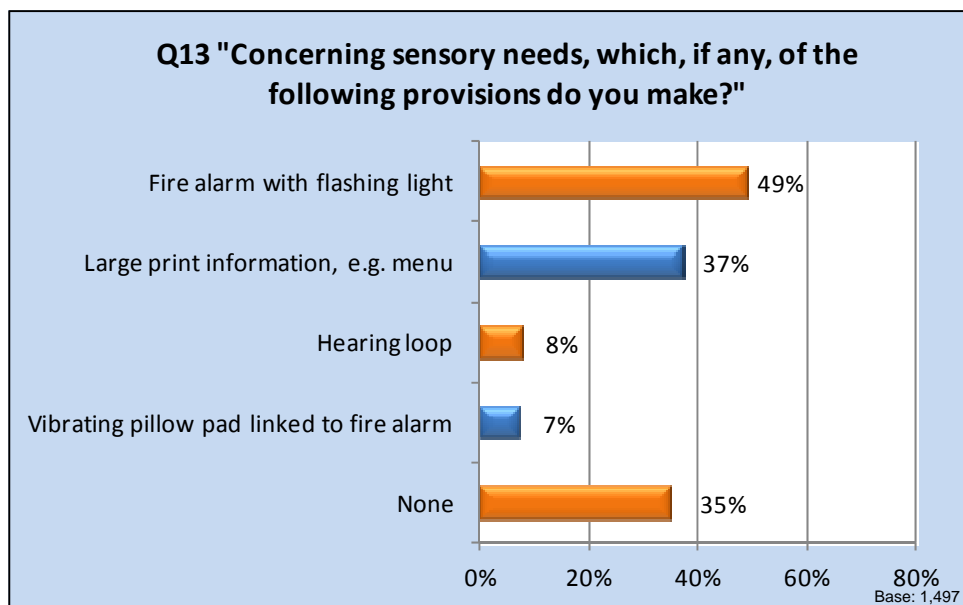
"The rooms are for reduced mobility [rather than wheelchairs] as there are steps to them"

Micro business, North Wales

"We have made six rooms accessible for wheelchair users but don't have a wheel-in shower"

Large business, North Scotland

Sensory needs

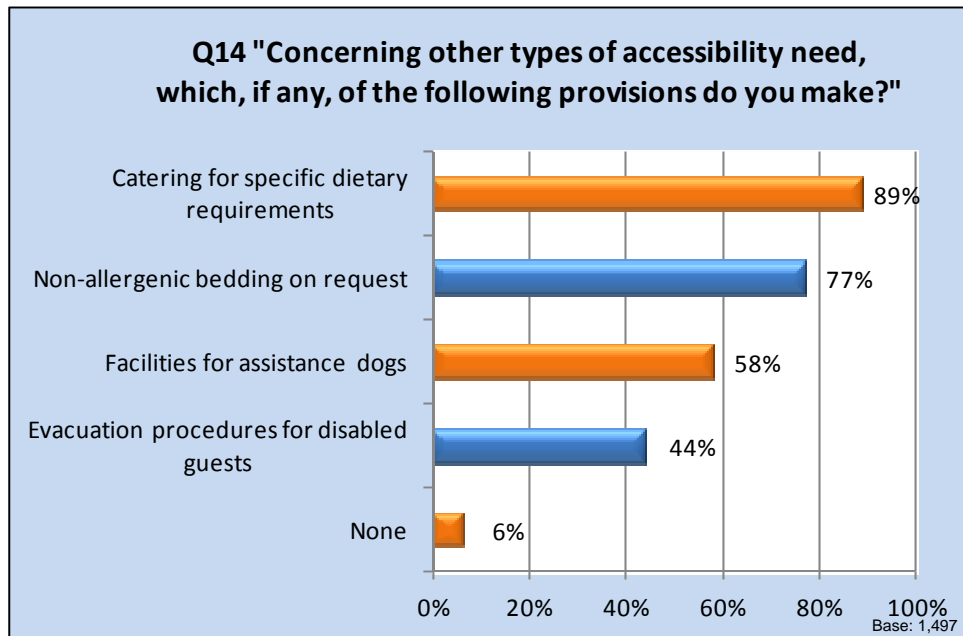


Some sensory needs are quite well met; others are not

- 4.9 Fire alarms with flashing lights are important for deaf guests who may not otherwise be aware the alarm is going off. About half (49%) of establishments have these.
- 4.10 If a guest needs a hearing loop, then they will probably need to visit a very large establishment, where the majority (68%) provide this. The same is true of vibrating pillow pads, whereby the majority (69%) of very large establishments provide them, but they are unlikely to be found in medium, small or micro establishments (3% provide them).

"I can think of a group of guests with hearing impairments that met at our hotel and have been back quite a few times since"
Large business, North East England

Other types of need



Dietary requirements and bedding allergies well catered for

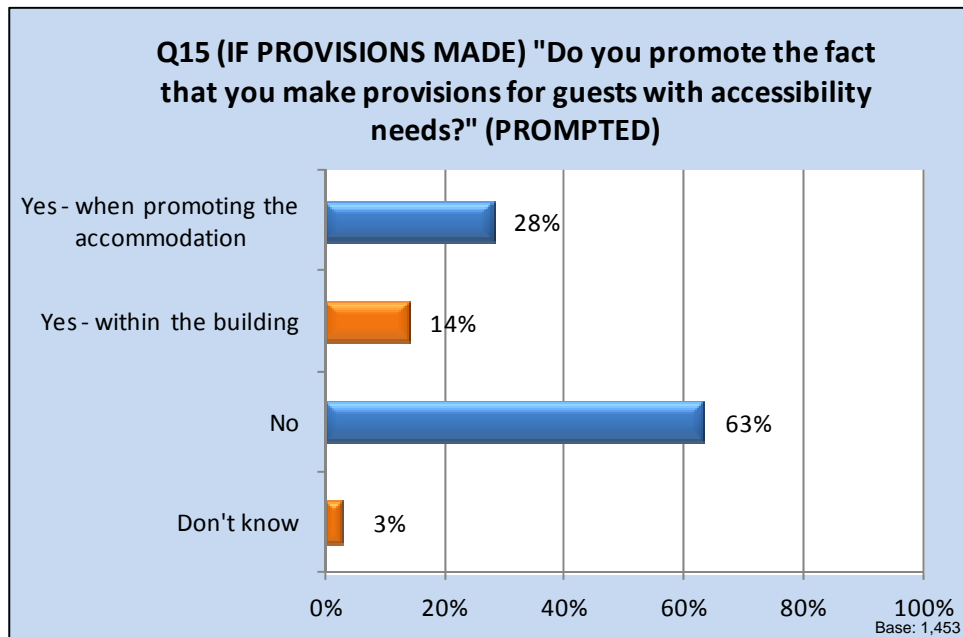
4.11 The need to provide for dietary requirements and bedding allergies (e.g. feathers) is well understood across the industry. These are the only two accessibility needs we have prompted in the survey which are met by the majority of businesses across all sizes. They are also the only two needs whereby differences in provision by establishment size are not significant.

"We have returning customers and better engagement with customers because of our allergen-aware restaurant"
Small business, South West England

Evacuating the building when disabled

4.12 Most (89%) large and very large establishments have a Personal Emergency Evacuation Plan (PEEP). This compares to a minority (27%) of micro businesses. However it could be argued that a Plan is more essential in a larger establishment as it could be harder (and take longer) to find the way out of a multi-story hotel compared to a small B&B with two rooms.

Promoting provision



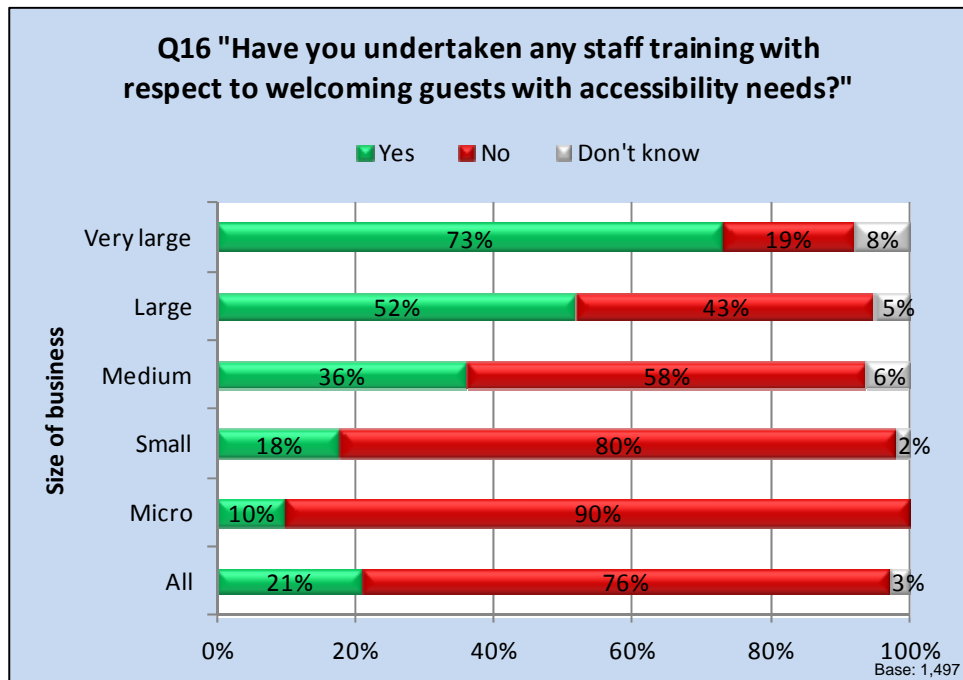
Accessibility provision appears not to be promoted particularly well

- 4.13 While most businesses are doing something to address accessibility needs, they are less active in promoting the fact that they do.
- 4.14 Promotion of accessibility improves with establishment size, but even 27% of very large businesses, for all the extensive provisions they make, do not promote it at all.

"We don't promote the fact that we are accessible but we can say that Professor Hawking has stayed here ... he seemed happy enough"
Small business, East of England

"We do have regulars who are chuffed because we have signed up with Coeliac UK, and we have great reviews from the menu that we offer, but we don't really push for it"
Small business, South West England

Staff training



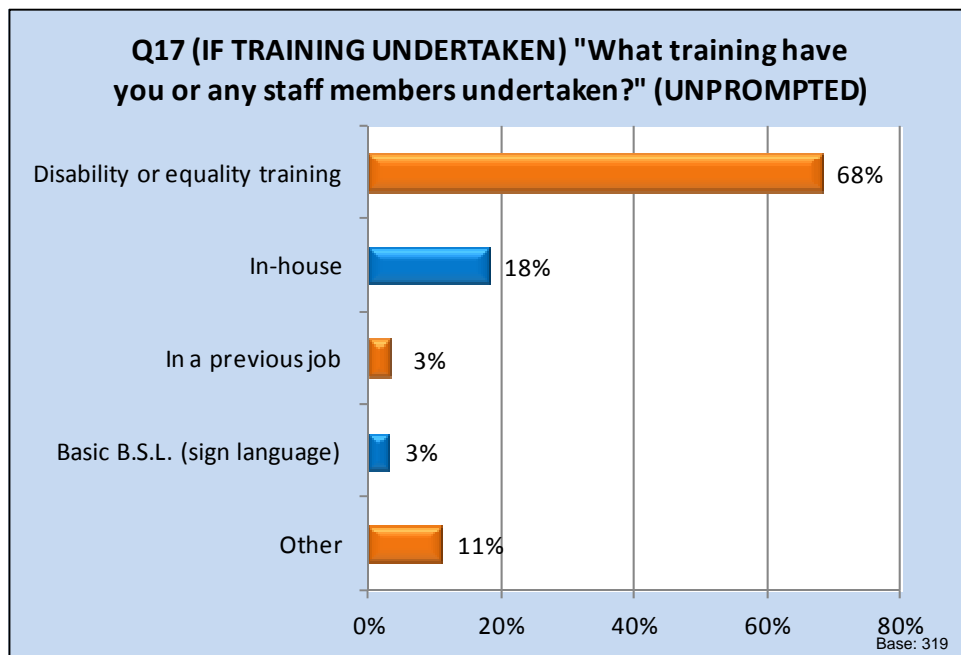
Significant variations by size

- 4.15 The welcome that staff give to guests with accessibility needs is an important aspect of VisitEngland's advice to the trade. Staff training varies considerably by size of business, as can be viewed on the above chart.
- 4.16 Some operators have pointed out that staffing in the tourism industry can be seasonal and high turnover, making commitment to training difficult and costly. It is also fair to say that many small and micro business owners do not employ anyone.
- 4.17 Nevertheless, it appears from these results that training staff on how to welcome guests and handle accessibility needs is an opportunity being missed by many businesses.

"We have regular HR training that includes dealing with guests with specific needs"

Very large business, North Scotland

Type of training undertaken



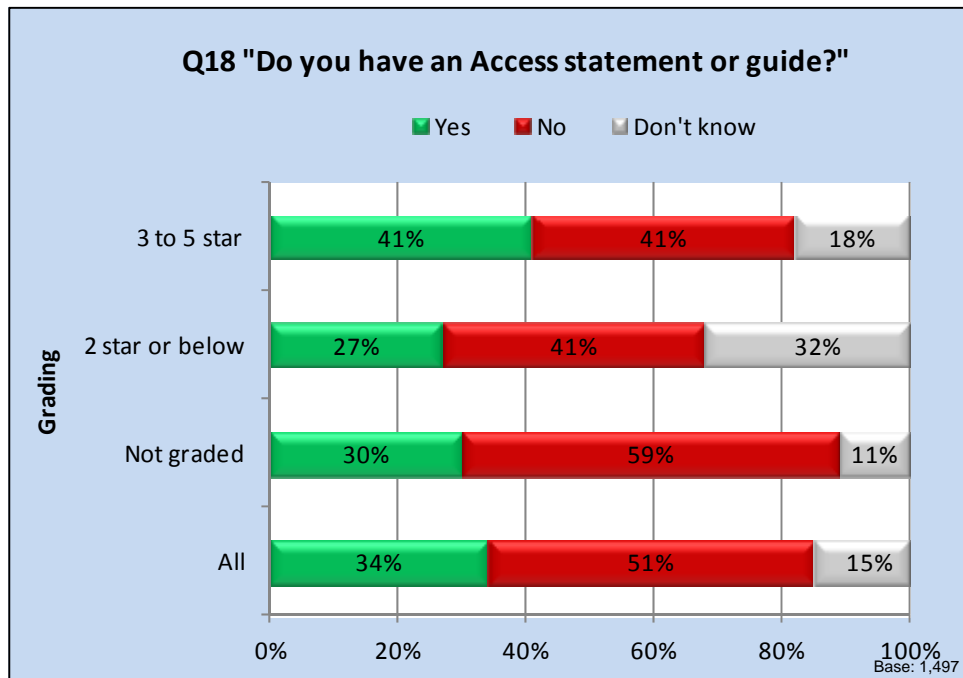
Mixture of formal and informal training

4.18 Where staff members have undertaken training, this is usually disability or equality training. Some businesses (18%) also opt to conduct more informal training in-house¹ (rather than pay for external trainers). It often appears to be part of wider induction or general training.

"In-house general training includes disability training"
Medium business, South West Wales

¹ 'In-house' and 'in a previous job' were not originally answer codes to the question but are the most common answers to come from the 'other' category

Access Statement / Guide

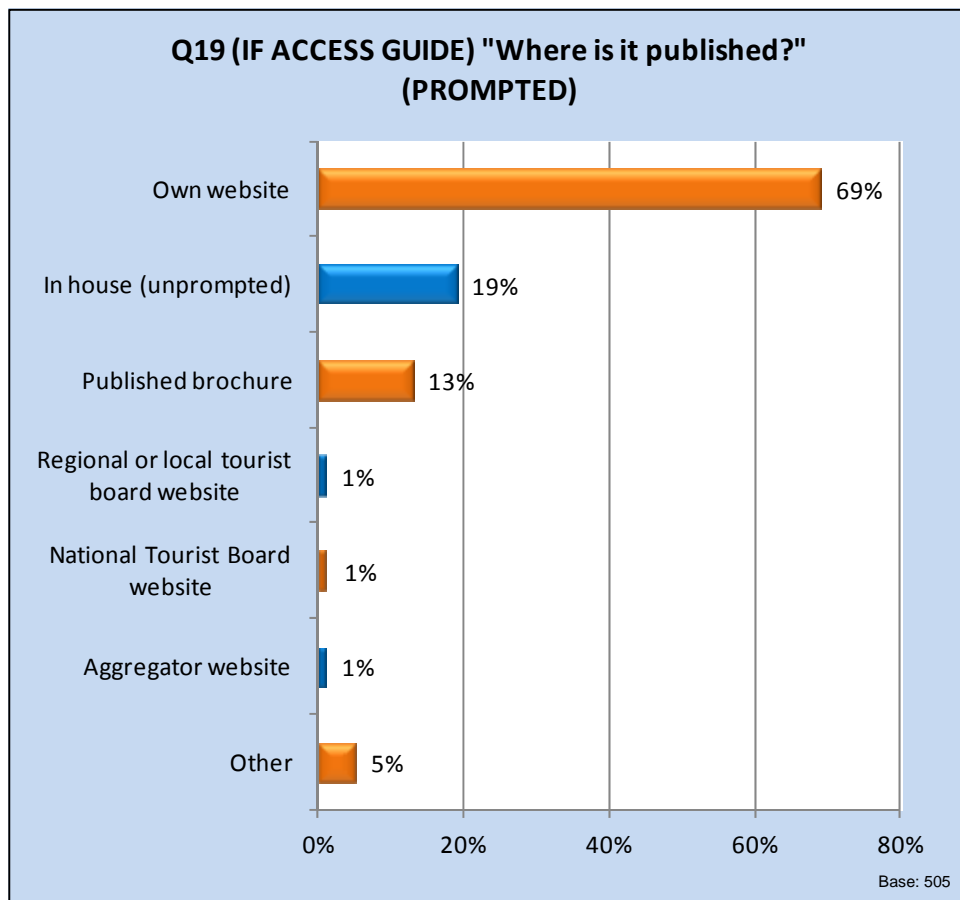


Many do not realise they have an Access Statement

- 4.19 Having an Access Statement or Guide is a requirement of the NTBs' grading scheme. This makes the results to Q18 all the more interesting because only two in five (40%) graded business managers believe that they have one.
- 4.20 This is one of few questions where the results differ greatly by country. About half (53%) of businesses in Wales say they have an Access Statement, which compares to 36% in England and 15% in Scotland. Differences in results are not due to differences in the make-up of graded and non-graded businesses in each country's sample.

"We give out our Access Statement to every guest on arrival"
 Small business, North Wales

Publishing the Access Statement



Own website but not other websites

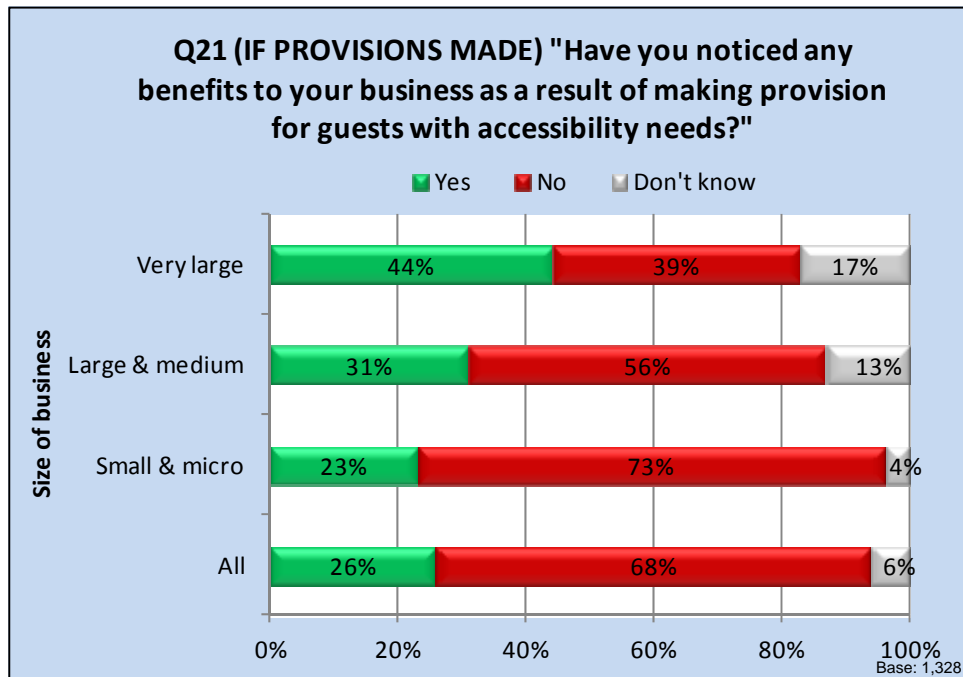
- 4.21 The majority (69%) of businesses which say they have an Access Statement publish it on their own website. Online, this tends not to go further onto third party websites.
- 4.22 One in five (19%) respondents say they make it available within the accommodation. This is usually a physical copy in the reception area or in rooms. Although not strictly speaking 'publishing' and therefore this was not one of the original pre-coded answers to the question, many respondents feel this is their way of making their Access Statement known.

"We have a physical copy at the hotel"
Large business, South West Wales

"In the bedrooms"
Micro business, North Wales

5. Benefits of Provision

Noticing the benefits



Q21 has been asked to all businesses which provide for at least one accessibility need

Some operators notice the benefits, but they appear to be in the minority

- 5.1 One in four (26%) respondents say they have noticed the benefits to their business of making provision for guests with accessibility needs. These are in the minority; nevertheless there are some strong testimonies which support the case for encouraging more businesses to meet accessibility needs.

"We have customers who come time and time again, and they know what they need and the staff know them so we can accommodate our guests. We have a group of deaf ladies that come every year and we have quite a few people with guide dogs."

Very large business, North West England

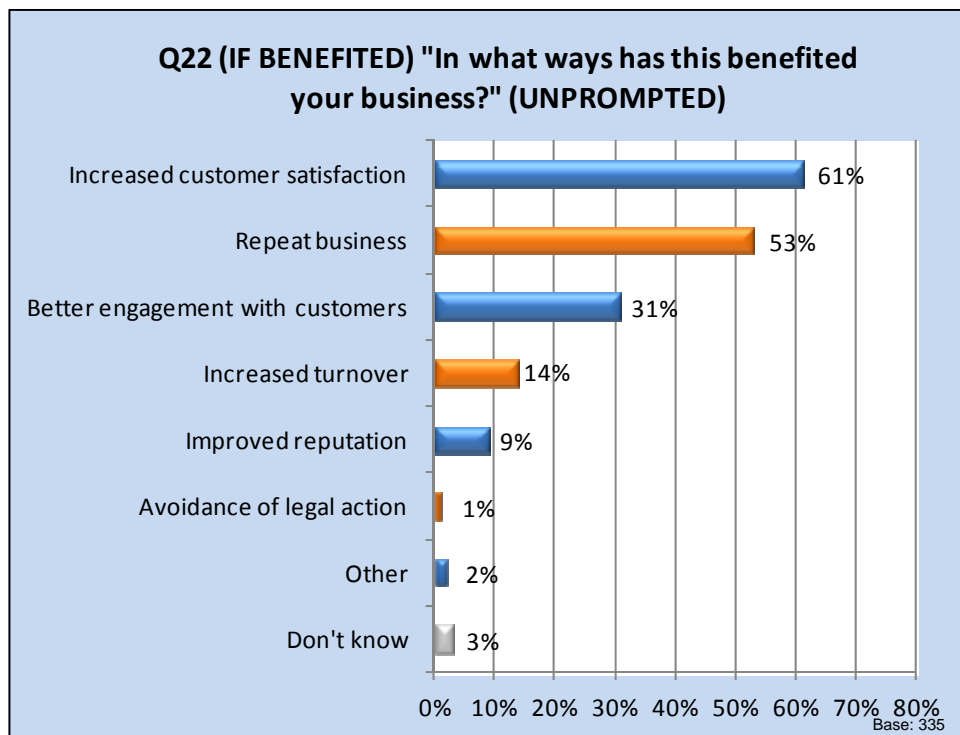
The better the provision, the more the benefits are noticed

- 5.2 Q21 has been asked to all businesses which provide for at least one accessibility need, but the better the provision, the more the benefits are noticed:

Respondent group	% noticing the benefits of provision
Provide for at least one accessibility need	26%
Accessible by definition 1, i.e. at least one room accessible for wheelchair users or guests with reduced mobility	34%
Accessible by definition 2, i.e. at least one room for guests in a wheelchair and step-free access from the entrance	39%
Accessible by definition 3, i.e. at least one room for guests in a wheelchair and step-free access from the entrance and a level-entry wheel-in shower	43%

5.3 The percentage noticing the benefits also increases when non-mobility needs that are less commonly met such as hearing loops and vibrating pillow pads are provided. However it is unclear whether this is because those same businesses are better at providing for mobility needs.

Types of benefit



Mixture of 'hard' and 'soft' benefits noticed

- 5.4 Operators noticing the benefits of accessibility provision have seen this in a number of ways. Repeat business (53% of respondents) is a 'hard' benefit in the sense of customers returning to spend their money again, whereas 'increased customer satisfaction' (61%) and 'better engagement with customers' (31%) are 'softer' feel-good benefits for staff and customers alike.
- 5.5 Results to Q22 do not vary significantly according to the types or extent of accessibility provisions made.
- 5.6 Below we now discuss the key themes from open comments about benefits made during interviews.

Greater customer satisfaction

- 5.7 The most frequently mentioned benefit of improving accessibility provision is an improved experience for visitors. This includes elderly guests, as well as those with a disability.

"We deal with a lot of elderly groups at our hotel so it has be good making small changes to help our customers"
Large business, South East England

"Customers are impressed with the accessibility facilities we have here for them"
Very large business, South East Wales

"Makes things easier even for elderly guests as well as disabled"
Small business, South East Wales

- 5.8 Not only do businesses see some customers' improved satisfaction with the accommodation, but those who offer a menu catering for those with dietary requirements have noticed an increased appreciation of the kitchen's efforts.

"I've received letters from customers who have gluten and other allergies thanking me for accommodating them, and it's also been put on Trip Advisor"
Micro business, South East England

Improved stay sees repeat business

- 5.9 Higher satisfaction due to accessibility provision often appears to translate into repeat business.

"Guests come back and say that these are the best disabled rooms they've stayed in"
Small business, South West England

"More people with accessibility needs do come back to stay"
Large business, North East England

"What we find is people coming back and asking for the same room. We also get personal letters of thanks"
Small business, Yorkshire

Some see a slight increase in turnover

- 5.10 Some (14%) operators have noticed an increase in turnover since improving their accessibility provision. Sometimes this is repeat business, and sometimes word-of-mouth or online reviews encourage others with accessibility needs to stay.

“We find that the rooms we provide for guests with accessibility needs are usually booked up”

Medium business, South West England

“Very slight increase of turnover”

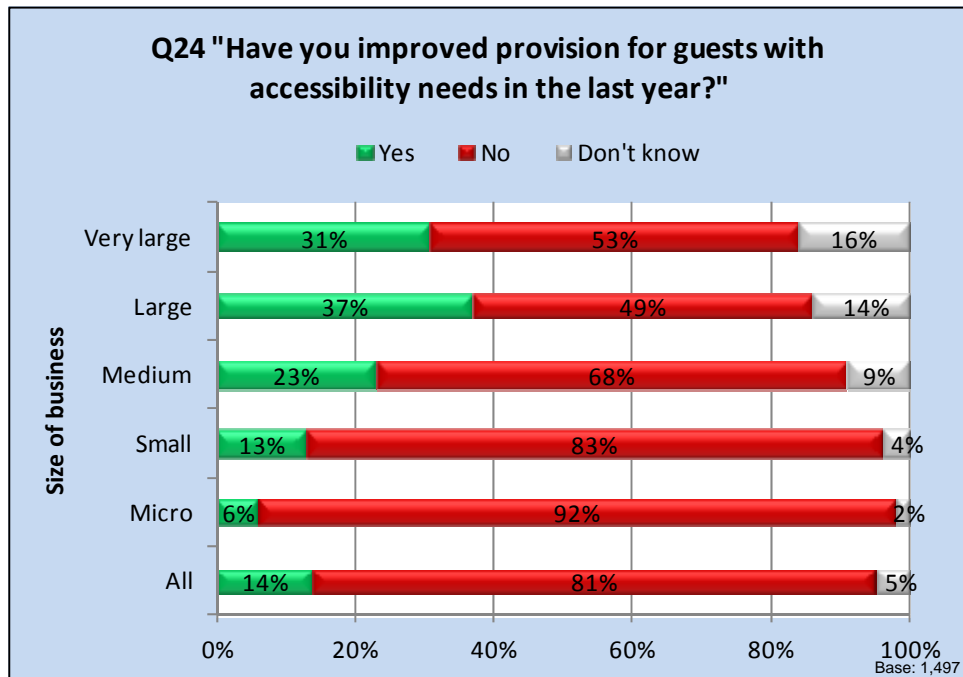
Small business, South West England

“Small percentage increase in customers”

Small business, Yorkshire

6. Changes in Provision, Encouragement and Barriers

Recent improvements



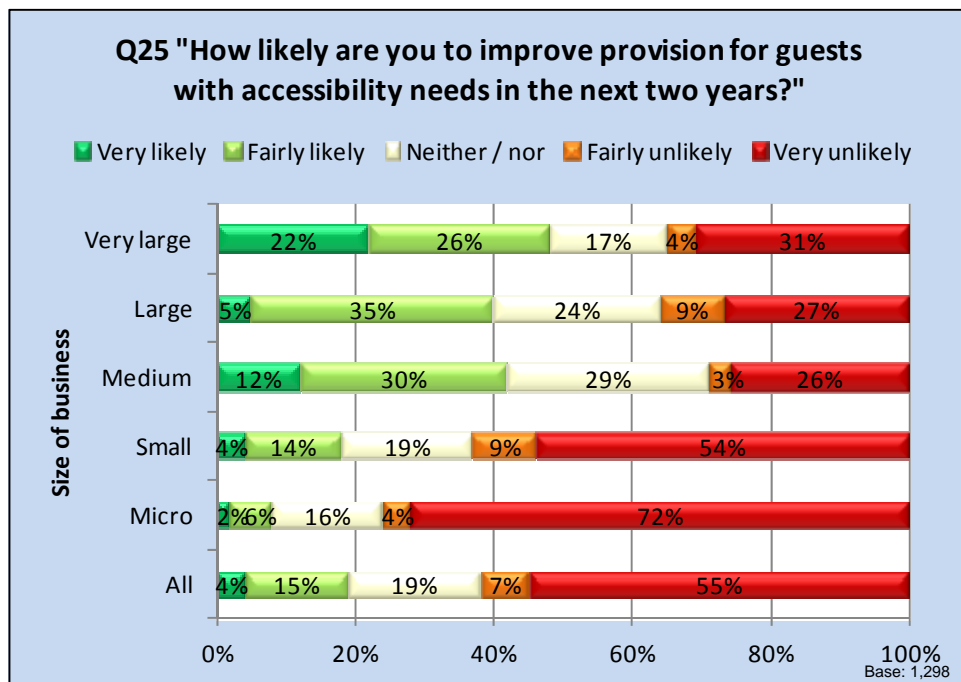
The above question has been asked as part of a grid to make it less leading – please refer to the questionnaire in the appendix for the full grid question

Minority have improved provision in the last year

- 6.1 About one in seven (14%) businesses have improved their accessibility provision in the last year; improvements are more likely to be found among larger businesses.

"We have just installed new [accessible] bedrooms in the last year and the number of bookings with people with accessibility needs has gone up significantly since we've put them in"
 Very large business, North Scotland

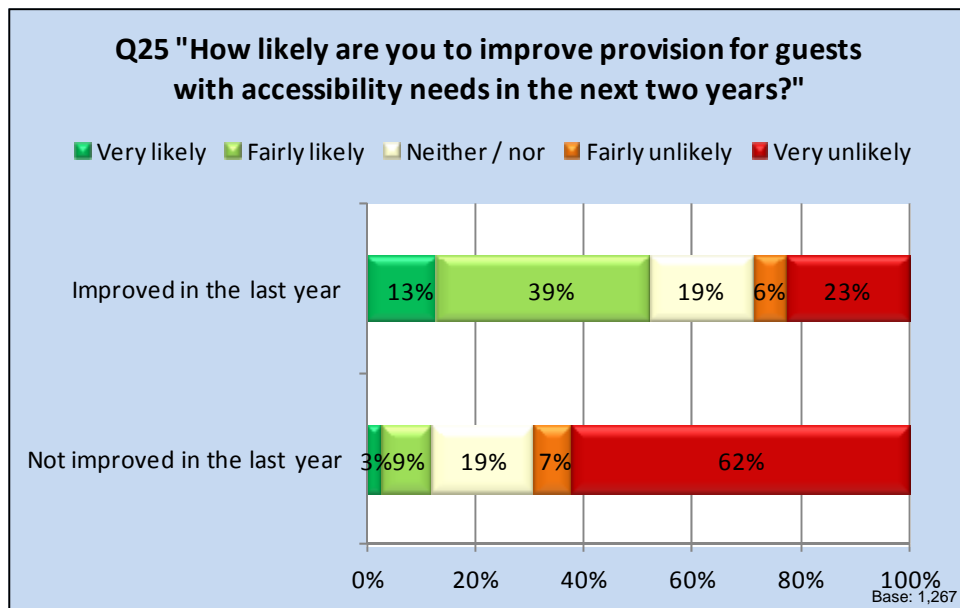
Intentions to improve



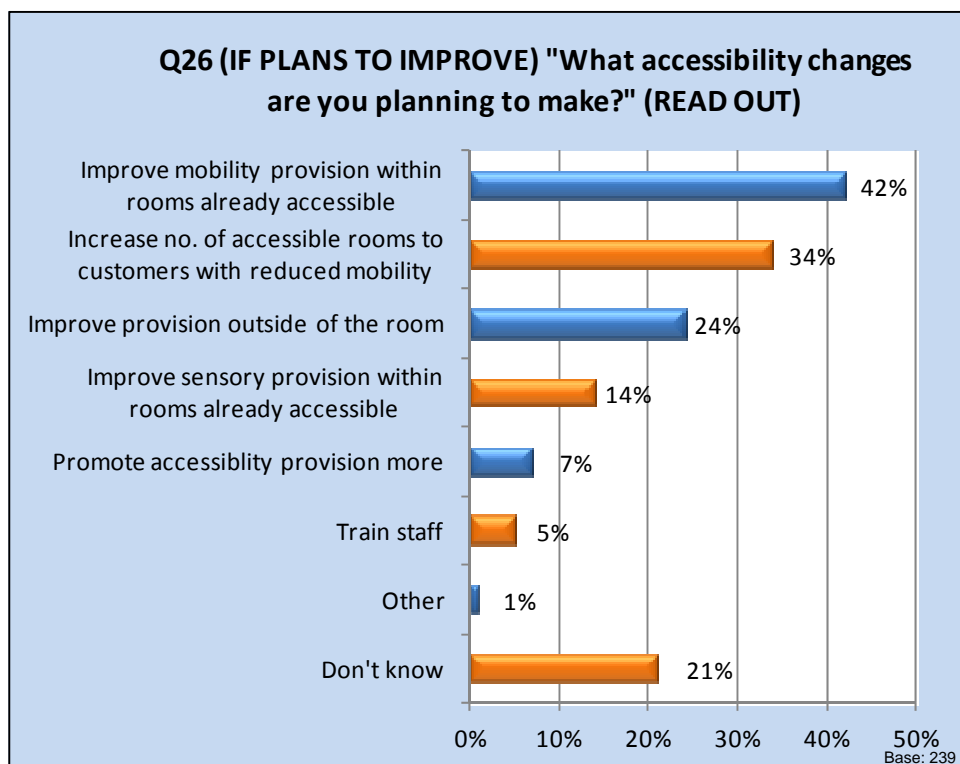
The above question has been asked as part of a grid to make it less leading - please refer to the questionnaire in the appendix for the full question

Significant task facing the business support teams

- 6.2 The NTBs would like to see more action being taken by operators to improve accessibility provision; encouraging this is a significant task.
- 6.3 Small and micro businesses are not particularly 'movable' in their intentions, with most (72%) micro businesses and over half (54%) of small businesses giving the end of the scale 'very unlikely' answer to this question. Later we look into why this is.
- 6.4 Some medium and larger operators who are already doing a lot to provide, are keen to do more. In fact if a business has already improved provision recently, they are much more likely to improve again in the next two years than businesses which have not improved recently, as the chart below shows:



Types of change planned



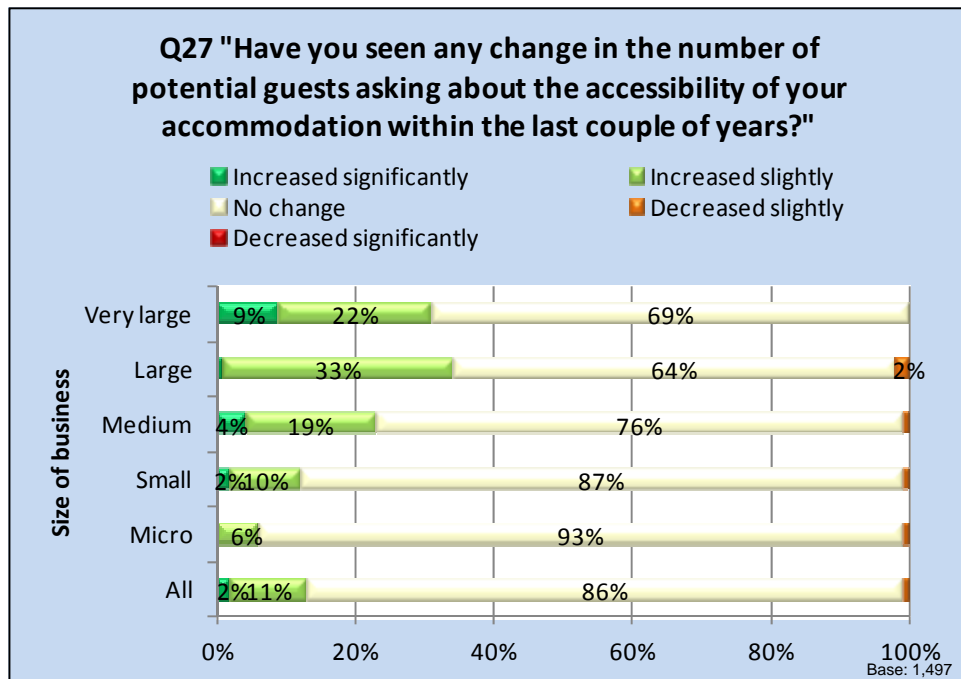
Focus is more on mobility provision

6.5 Among operators which intend to improve accessibility provision, the focus seems to be mainly on mobility provision. Sensory provision, promotion and

staff training appear to be much lower priorities. This is a common theme throughout the research in terms of what comes to mind when ‘accessibility needs’ are talked about.

“We are planning to make another room available for disabled guests”
 Very large business, Glasgow

Changes in demand



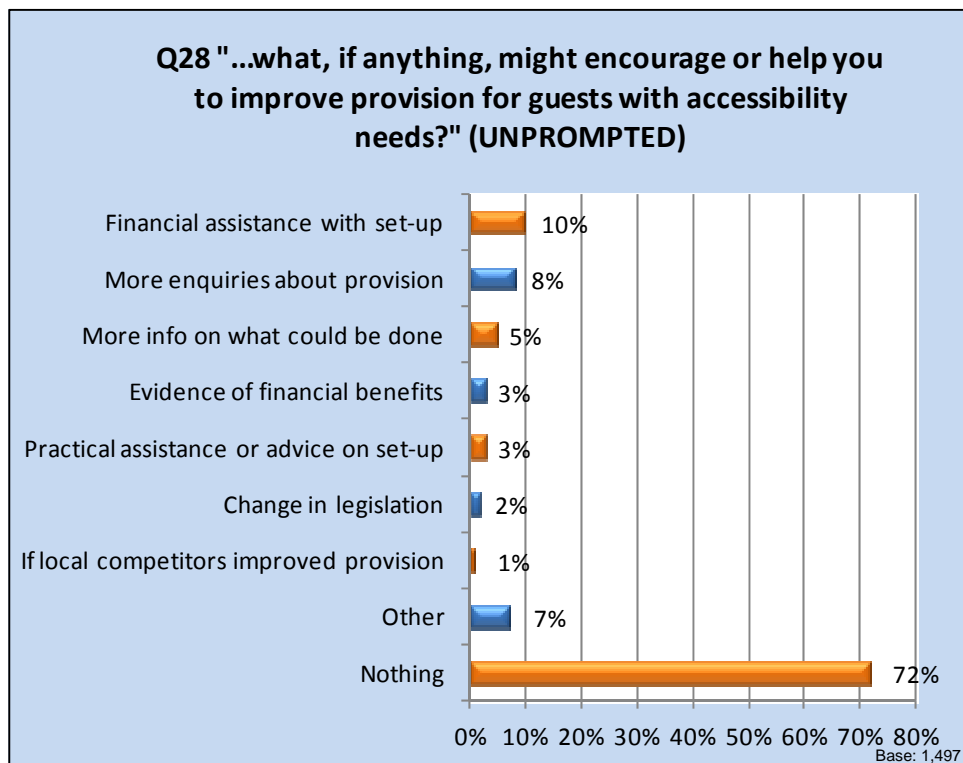
Most businesses have noticed no recent changes in demand

- 6.6 Most (86%) businesses have noticed no change in the number of potential guests asking about accessibility within the last couple of years.
- 6.7 The results vary in relation to the extent to which businesses provide for accessibility needs, although the differences between respondent groups meeting accessibility definition 1, 2 or 3 do not vary significantly. The most significant difference is between businesses which provide for no needs at all, and those which provide for at least one need:

Respondent group	% noticing increase in accessibility enquiries
No accessibility needs provided	1%
Provide for at least one accessibility need	14%
Accessible by definition 1, i.e. at least one room accessible for wheelchair users or guests with reduced mobility	20%
Accessible by definition 2, i.e. at least one room for guests in a wheelchair and step-free access from the entrance	23%
Accessible by definition 3, i.e. at least one room for guests in a wheelchair and step-free access from the entrance and a level-entry wheel-in shower	27%

"I have a lot of enquiries from families asking if the downstairs room would be suitable for Granny"
 Micro business, West Midlands

What can be done to encourage businesses to improve?



Education task facing the business support teams

- 6.8 Most (72%) operators say that 'nothing' would encourage or help them to improve provision for guests with accessibility needs.
- 6.9 Although this result might seem concerning at face value, the impression we have gained throughout interviewing is that in spite of earlier questions being asked about sensory needs, dietary requirements, etc, many respondents still have 'mobility needs' firmly in the front of their mind as a synonym for 'accessibility needs'. We discuss the reasons for answering 'nothing' under Q29 later.
- 6.10 Financial assistance with the set-up (10% of respondents) is the most commonly answered type of encouragement mentioned overall and among micro and small businesses.
- 6.11 Medium to very large businesses would be more motivated by increased enquiries from potential customers about provision (14% of respondents).
- 6.12 Below we now discuss the key themes from open comments about possible encouragement made during interviews.

Some already have plans to make changes

- 6.13 Some businesses say they already have work underway, or plan to improve the accessibility provision in the accommodation.

"We are looking to make further improvements like adding a platform lift and a hydro pool and other improvements"

Large business, South East outside London

"We will put grab rails in the bathrooms"

Small business, North Wales

"We have just refurbished all the bedrooms and improved accessibility provisions"

Very large business, North Scotland

- 6.14 However, while the willingness and drive to make changes is sometimes there, not all businesses are sure in their knowledge of what and how to make those changes.

"We will be making changes in the next two years but we are not 100% sure what because it is still a grey area for us"

Small business, South East Wales

"We are constantly making improvements although I couldn't tell you exactly what we'll be doing next"

Medium business, North West England

Funding would boost motivation

- 6.15 As cost is a major obstacle for some respondents looking to improve provision, a source of funding would help them put into practice accessibility improvements they could not otherwise afford.

“Tax relief / grants would help”

Medium business, North West England

“We would be likely to improve provisions provided there is financial assistance from boards or the government”

Small business, South West England

“We would benefit from some kind of financial assistance from the Welsh Government regarding this”

Micro business, Mid Wales

“Funding would be the main thing”

Very large business, North Scotland

Training and information are important

- 6.16 Awareness is key when it comes to thinking about what improvements could be made to a business. This includes advice on what could feasibly be done to the building, but also in terms of helping staff have a greater understanding of customers' potential needs.

“Having advice to hand would be good”

Large business, North Wales

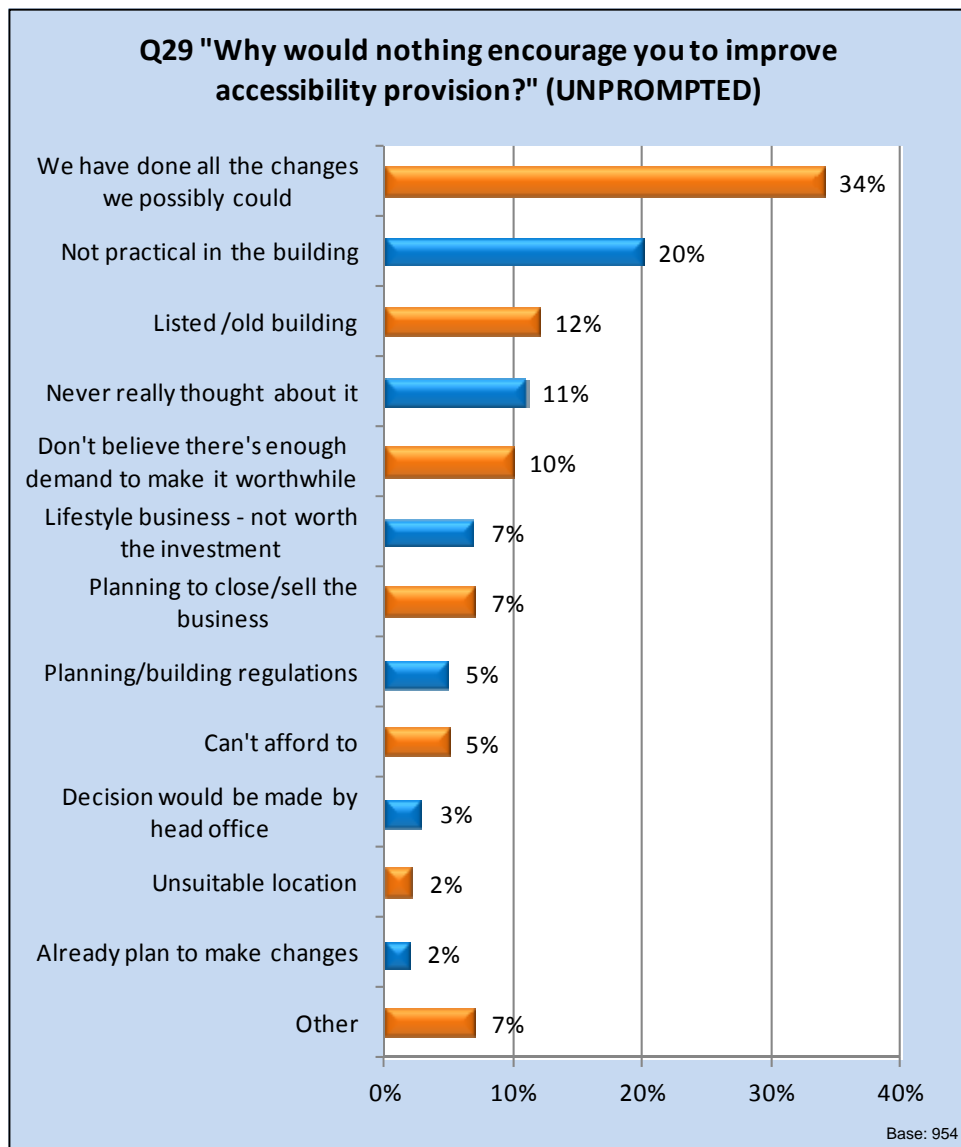
“Just having some advice on requirements”

Medium business, North Scotland

“Anything that is person-to-person in terms of training or learning would be a benefit”

Micro business, East of England

Barriers to improving provision



Mobility needs at the forefront of the mind

- 6.17 Physical changes for mobility needs remain at the forefront of the mind; making operators aware of how much they could do beyond this seems to be one of the most important tasks facing the business support teams.
- 6.18 Below we now discuss the key themes from open comments about barriers made during interviews.

Unconvinced of the need to change

- 6.19 Some respondents don't believe they need to make changes. For them, any cost involved with improving accessibility needs to be offset by a definite, positive impact on their business.

"If there was a massive increase in sales for that market then we might look into it"

Small business, South East Wales

"Don't feel it would be of any benefit to me to make the improvements to provisions"

Micro business, West Scotland

- 6.20 Accommodation providers who are regularly at capacity do not see how improving provision could benefit their already booked-out rooms.

- 6.21 Others have had no – or very few – enquiries from customers about any need to increase or improve accessibility.

"We've had three requests in the last fifteen years"

Micro business, South East England

"If the demand was there we would look into it"

Medium business, South East England

"It would be hard to justify further investment when only about 1% of our guests have disability needs"

Small business, East Midlands

"I've only ever had one enquiry asking if I had a downstairs room here, so I can't say there's much demand for it"

Small business, South West Wales

Some locations do not draw guests with accessibility needs

- 6.22 Location is a factor for some providers who do not feel the need to improve provision. Those with accommodation in areas attractive to guests looking to enjoy outdoor pursuits, or accommodation that in itself is deemed less accessible, say their target market does not have a need for further changes.

"We don't get many disabled visitors here, we're on the edge of Dartmoor!"

Small business, South West England

"Where we are located is very hilly in general. As an area it's not the best for accessibility."

Small business, North Wales

"Most of the guests are professional workers linked to the University which is located nearby. Accessibility provision is not a priority."

Micro business, South East outside London

"Most of our customers are walkers in this area"

Micro business, North West England

"We are located in a very remote part of the world and our guests come here for the walking and so the demand for accessible provision generally isn't there"

Small business, North West England

"Location is not the best for disabled people, don't think it would make much difference what we did to the building - it's just not somewhere where they want to come"

Small business, Mid Wales

Listed and old buildings can be a no-go for physical changes

- 6.23 A frequently mentioned obstacle when it comes to improving accessibility provision is the age of the building. In some cases this means respondents' accommodation is set in a listed building. With this comes both the perceived impracticality of improving provision, and also the regulations against altering the building.

"We are a listed building so not possible to do anything. All rooms are upstairs and we have no lift."

Medium business, North Wales

"No access for wheelchairs, doors are too narrow. It's a Victorian house and we can't make them bigger."

Micro business, South West Wales

"We are tied as it's an old listed building and we are quite tied with what we can do – downstairs access is fine, there are no steps into the building – it's just to get to the bedrooms you have to go up stairs"

Micro business, North Scotland

"The conservation area does not allow for any changes to be made. A complete research project has already been made in regards to the property, but it would be impossible"

Small business, South East England

- 6.24 Some businesses with old or listed buildings say they have already looked into making their accommodation more accessible, but have come up against planning restrictions.

"We have problems as we're a listed building - I did actually apply for a lift but the council wouldn't approve the planning for it"

Small business, Yorkshire

"Our rooms are not big enough for wheelchair access so even if we did install stair lifts and things, wheelchair users would not be able to navigate about the rooms"

Micro business, London

- 6.25 The costs associated with making changes to some old buildings can be steep, according to some respondents. These associated costs are too much of a barrier for them.

"We are a 17th century house so it doesn't lend itself to any disability facilities, they can't even get over the threshold in a wheelchair. It would cost us £30,000 to create accessibility for wheelchair users. We did look into it but we can't afford it."

Micro business, Mid Wales

Further businesses put off by costs

- 6.26 It is not just those with old and listed buildings that see costs as a barrier to improving accessibility provision. For some respondents – particularly small and micro businesses – the financial cost of improvements is too large to take on.

"It would also cost too much money to make it worth it"

Micro business, South West England

"The only thing we could potentially do would be to have a stair lift put in, but in all honesty having looked into it and as much as we would like to offer the extra provision it simply would not make financial sense for us"

Micro business, South West Wales

Ruining the aesthetics

- 6.27 Improving accessibility provisions could put off other guests according to some respondents.

"I have a fear that 'normal' guests would be put off by the adaptations required to improve the provision"

Small business, South West Wales

"Don't want the place to look like a nursing home"

Small business, South West England

- 6.28 Additionally, some respondents run the business from their own home and don't want to 'ruin the look' of their home.

"The property is my home as well as business and I don't want to change it all"

Micro business, South East England

"We are running the business from our home and over the years we've looked into making some changes such as grab rails etc but decided not to because we also share the space with our family and don't want to change the place too much"

Micro business, West Midlands

'We're closing the business'

- 6.29 While not against changes, some respondents say they plan to close or sell the business in the near future. Making any changes at this point, for them, is not seen as a necessity.

"We're winding the business down"

Micro business, North West England

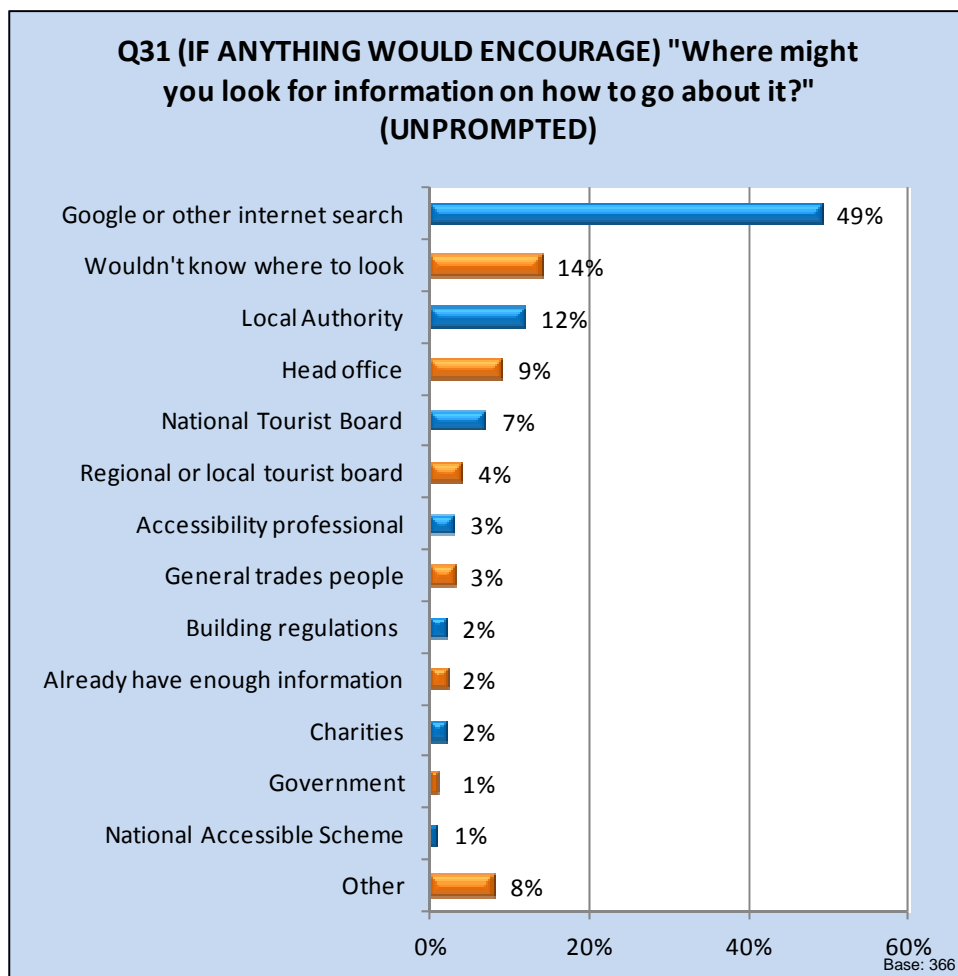
"We are in our seventies and are selling the business. We'll leave all that to someone younger who wants to take over the place."

Small business, South West Wales

"We're selling the business in 2016"

Micro business, North Scotland

Where to look for help



General internet searches

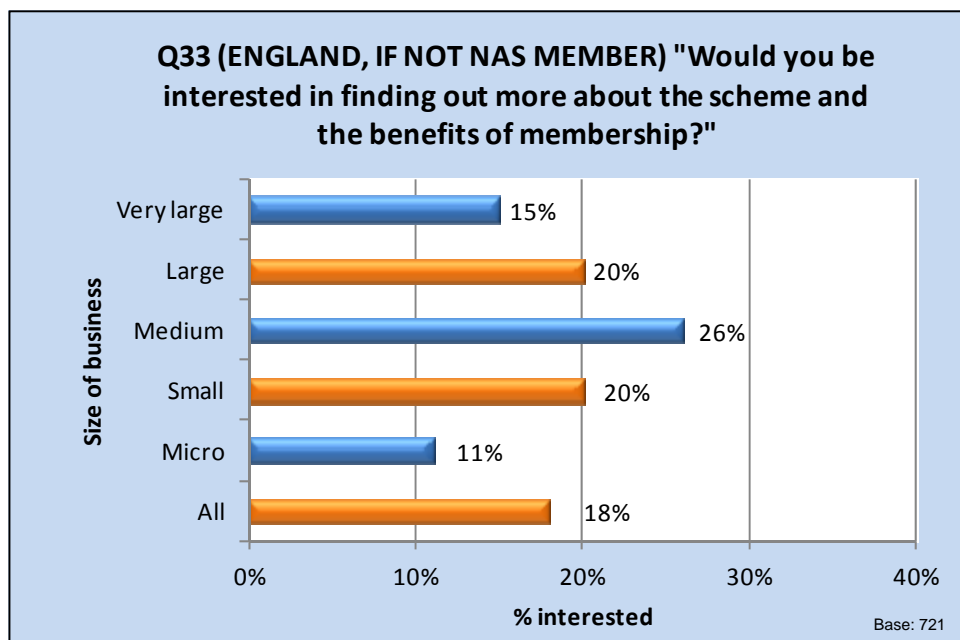
- 6.30 'Google or other internet search' is by the most common method by which interested businesses might look for information on improving their accessibility.
- 6.31 More definite sources of information vary across a range of public and private organisations or individuals listed on the above chart.

"We have a good relationship with a member of staff at a local centre for dementia, who is a good point of contact"

Small business, North West England

- 6.32 Just over half (54%) of very large establishments would turn to their head office, as would a quarter (25%) of large establishments.

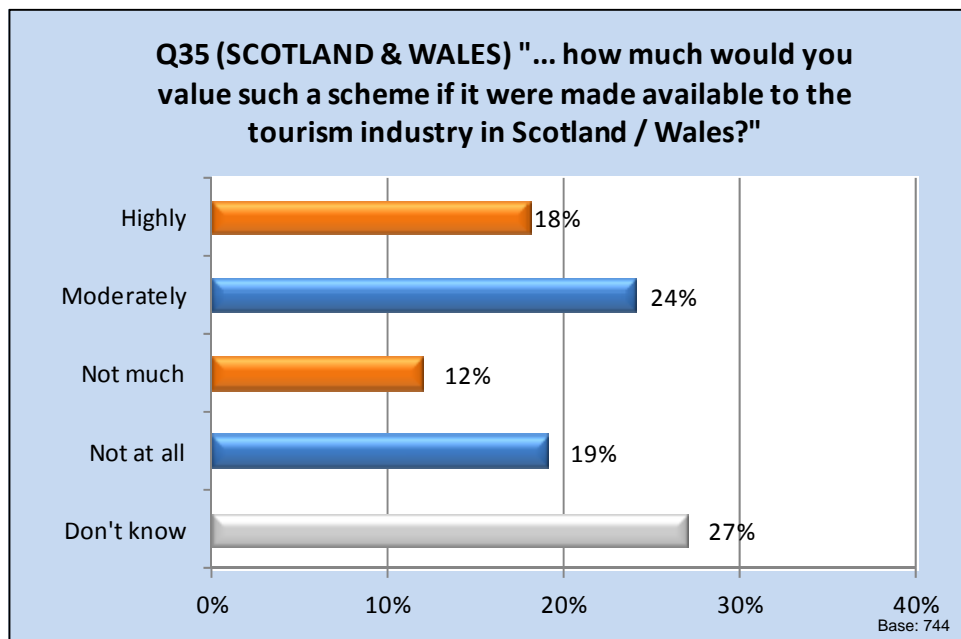
National Accessible Scheme



Some interest in NAS

- 6.33 1% of business interviewed in England have answered that they are a member of the National Accessible Scheme. Among non-members, about one in five (18%) say they would be interested in finding out more about the scheme and the benefits of membership. Contact details of interested respondents will be provided separately.
- 6.34 Interest in NAS among non-members varies by size of business and it peaks in the middle (medium sized businesses) while tailing off at the extreme ends (micro and very large businesses). Micro businesses are the most reluctant to improve accessibility provision. At the other extreme, very large businesses are willing to improve, but many turn to their head office for support (discussed under Q31 above).

NAS equivalent in Scotland and Wales



Reasonable degree of interest in a scheme in Scotland and Wales

- 6.35 Interest in a quality grading scheme for access provision in Scotland and Wales is fairly high. Close to half (43%) of respondents in Scotland would value such a scheme 'highly' or 'moderately', as would a similar proportion (40%) of respondents in Wales.
- 6.36 The reason for the fairly high proportion of 'don't knows' is not knowing enough about what such a scheme would entail.

7. Implications for the National Tourist Boards

- 7.1 Here we conclude with implications for the National Tourist Boards based on the research findings. As significant differences in the results between the three countries are not widespread, the implications are common to all three NTBs except where stated otherwise.

The trade need to understand that accessibility needs are not necessarily mobility needs

- 7.2 If the NTBs are to encourage more businesses to look into improving accessibility needs, perhaps the first and most important hurdle to overcome is convincing them that 'accessibility needs' is a broader subject than what they think it is.
- 7.3 As can be seen from the selection of open comments on barriers included in this report, many operators 'jump' straight into talking about complicated and costly physical changes for mobility needs when asked to comment on the subject of accessibility.
- 7.4 We have found on many occasions that the mention of 'accessibility needs' in the introduction instantly caused respondents to put up the defences and say that they don't provide anything because their building isn't suitable etc. It is only through asking them if they provide for dietary requirements, bedding allergies etc that we have sometimes been able to even start the interview.
- 7.5 In a similar way, using the most common non-mobility provisions as a way into talking to businesses about the subject of accessibility may result in a more receptive listener.

Promotion and staff training both need to increase

- 7.6 Further to the above, the trade also need to understand that taking positive action on accessibility is not just limited to physical provision. VisitEngland spends much time on the other two pillars of accessible tourism – 'information & promotion' and 'welcome'. It seems there is still much work to be done on these two areas before the majority of businesses are doing them.

Promoting the benefits

- 7.7 As only the minority of businesses say they have seen the benefits of providing for accessibility needs, it would be hard to use this statistic as a way of 'selling' accessibility provision to the trade.
- 7.8 However, among those seeing the benefits, there are many convincing case studies to be shared and respondents willing to give them. This would be a powerful tool to use in selling accessibility provision.

Overcoming the barriers

- 7.9 As we have found when trying to secure interviews, starting the dialogue with easier and less costly provisions is an effective way into the subject. For example, providing a water bowl and toilet area for assistance dogs (currently only done by 58% of establishments) is much less daunting than trying to install a lift in a narrow guesthouse.
- 7.10 Not only could many businesses be encouraged to do some of the 'easier' provisions, but also having done them and become 'warmed up' to the subject, they may then find some of the more difficult and costly provisions less daunting.

Access Statement – many graded businesses do not realise they have one

- 7.11 We understand that having an Access Statement (or Guide as it is called in Scotland) is a requirement of being graded, but many graded businesses say they do not have one.
- 7.12 We get the impression from interviewing it is more likely they don't understand what it is rather than they don't have one. Either way, opportunities are being missed here because some businesses are active in promoting theirs.

Some opportunity to sign more businesses up to NAS

- 7.13 In England there is some opportunity to sign more businesses up to the National Accessible Scheme, as 127 non-members have given their contact details.

Quality grading scheme in Scotland and Wales?

- 7.14 We do not know what is involved in setting up and promoting NAS or an equivalent scheme in Scotland and Wales, but there is a degree of interest among the trade in having such a scheme.

National Survey on Accessibility Provision

Questionnaire

Introduction provided separately

Q1 Could I just start by asking whether you manage one or more than one serviced accommodation property? (*Close if no serviced accommodation managed*)

One property.....

More than one property

SINGLE PROPERTY

Q2 Could I just confirm that your establishment is a: (*read from database*)

Hotel

Guesthouse

B&B

Serviced apartments

Q3 And it is based in: ? (*read from database*)

England.....

Scotland.....

Wales.....

Q4 (ENGLAND)

And the region of the country is: ? (*read from database*)

North East

North West

Yorkshire and the Humber

East Midlands

West Midlands

East of England.....

London.....

South East outside London

South West.....

Q5 (SCOTLAND)

And the region of the country is: ? (*read from database*)

North (Aberdeen City, Aberdeenshire, Eilean Siar, Highland, Moray, Orkney Islands, Shetland Islands)

East (Angus, Clackmannanshire, Dundee City, East Lothian, Edinburgh, Falkirk, Fife, Midlothian, Perth & Kinross, West Lothian)

West (Argyll & Bute, East Dunbartonshire, East Renfrewshire, Glasgow, Inverclyde, North Ayrshire, North Lanarkshire, Renfrewshire, Stirling, West Dunbartonshire).....

South (Dumfries & Galloway, East Ayrshire, Scottish Borders, South Ayrshire, South Lanarkshire)....

Q6 (WALES)

And the region of the country is: ? *(read from database)*

- North.....
- Mid.....
- South West.....
- South East.....

Q7 (ALL)

Which of the following best describes your type of location?

- Seaside.....
- Large town or city.....
- Small town.....
- Countryside or village.....

Q8 Are you currently graded by: ? *(read out appropriate tourist board plus the AA)*

- VisitEngland.....
- VisitScotland.....
- Visit Wales.....
- AA.....
- No official rating.....

Q9 (IF CURRENTLY GRADED)

What is your current star rating?

- 5 star.....
- 4 star.....
- 3 star.....
- 2 star.....
- 1 star.....
- Listed.....

Q10 (IF NOT CURRENTLY GRADED)

Has your establishment previously been graded by either the AA or VisitEngland / VisitScotland / Visit Wales?

- Yes, within the last five years.....
- Yes, more than five years ago.....
- No.....
- Don't know.....

Q11 How many bedrooms do you have in your establishment?

Q12 We would like to understand what provisions you may or may not make for guests with accessibility needs. Starting with mobility needs, which, if any, of the following provisions do you make? (*Read out*)

- Designated accessible parking space(s)
- Step-free access from the building entrance to one or more rooms (can include access by lifts)
- One or more rooms intended for guests who use a wheelchair
- An ensuite bathroom to an accessible room with a level entry wheel-in shower (i.e. no raised shower tray or step-up)
- Grab rails in the bathroom.....
- Emergency pullcord alarm
- Ceiling tracked hoist or portable hoist on request.....
- Other.....
- None

Please specify other _____

Q13 Concerning sensory needs, which, if any, of the following provisions do you make? (*Read out*)

- Large print information, e.g. menu
- Hearing loop, e.g. at reception or in meeting rooms
- Fire alarm with flashing light.....
- Vibrating pillow pad linked to fire alarm, e.g. Deafgard
- Other.....
- None

Please specify other _____

Q14 And concerning other types of accessibility need, which, if any, of the following provisions do you make? (*Read out*)

- Facilities for assistance dogs (water bowl and toilet area)
- Catering for specific dietary requirements
- Non-allergenic bedding on request (e.g. non-feather)
- Evacuation procedures for disabled guests, e.g. Personal Emergency Evacuation Plan (PEEP).....
- Other.....
- None

Please specify other _____

Q15 (IF ANY ACCESSIBILITY PROVISIONS MADE)

Do you promote the fact that you make provisions for guests with accessibility needs? (*Prompt and tick all that apply*)

- Yes - when promoting the accommodation
- Yes - within the building.....
- No.....
- Don't know.....

Q16 Have you undertaken any staff training with respect to welcoming guests with accessibility needs?

- Yes
- No.....
- Don't know.....

Q17 (IF TRAINING UNDERTAKEN)

What training have you or any staff members undertaken?

- Disability or equality training.....
- Basic B.S.L. (Sign Language).
- Other.....
- Please specify other _____

Q18 Do you have an Access statement or guide?

- Yes
- No.....
- Don't know.....

Q19 (IF YES)

Where is it published? (*Tick all that apply*)

- Own website
- National Tourist Board website.....
- Regional or local tourist board website.....
- Aggregator website (e.g. booking.com).....
- Published brochure
- Other.....
- Please specify other _____

Q20 (ALL)

How many of your rooms, if any, are accessible for wheelchair users or guests with reduced mobility? (If more than one serviced establishment, ask for total accessible rooms across all serviced establishments)

- 0
- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10
- More than 10
- (If more than 10) Please specify how many _____

Q26 (IF PLANS TO IMPROVE ACCESSIBILITY)

What accessibility changes are you planning to make? (*Read out*)

- Increase number of accessible rooms.....
- Improve mobility provision within rooms already accessible.....
- Improve sensory provision within rooms already accessible
- Improve provision outside of the room
- Train staff
- Promote accessibility provision more
- Don't know.....
- Other.....

Please specify other _____

Q27 (ALL)

Have you seen any change in the number of potential guests asking about the accessibility of your accommodation within the last couple of years?

- It has increased significantly
- It has increased slightly
- No change
- It has decreased slightly
- It has decreased significantly

Q28 As the population ages, more and more people will have accessibility needs. What, if anything, might encourage or help you to improve provision for guests with accessibility needs? (*Unprompted*)

- More information on what could or should be done
- Financial assistance with the set-up
- Practical assistance or advice on the set-up.....
- Evidence of financial benefits to the business.....
- Evidence of non-financial benefits to the business.....
- Change in legislation
- If local competitors were to improve their own provision
- More enquiries from potential customers about provision
- Nothing.....
- Other.....

Please specify other _____

Q29 (IF NOTHING WOULD ENCOURAGE IMPROVING PROVISION)

Why would nothing encourage you to improve accessibility provision? (*Unprompted*)

- Can't afford to
- Lifestyle business - not worth the investment
- Nervous about getting it wrong
- Decision would be made by head office
- Too busy to look into it.....
- Don't believe there's enough demand to make it worthwhile
- We have done all the changes we possibly could
- We are waiting to see if regulations and standards remain unchanged for long enough.....
- Never really thought about it
- Other

Please specify other _____

Q30 *Interviewer: record all useful comments on anything that would encourage or hinder businesses to improve provision*

Q31 (IF ANYTHING WOULD ENCOURAGE IMPROVING PROVISION)

If at any point in the future you did decide to improve accessibility provision, where might you look for information on how to go about it? (*Unprompted*)

- National Tourist Board (VisitEngland / VisitScotland / Visit Wales)
- National Accessible Scheme (England only)
- Regional or local tourist board.....
- Local Authority
- Charities.....
- British Standard BS8300.....
- Building Regulations.....
- Google or other internet search
- Head office
- Accessibility professional
- General trades people (e.g. builders).....
- Already have enough information - don't need any more.....
- Wouldn't know where to look.....
- Other.....

Please specify other _____

Please specify other _____

Q32 (ENGLAND)

Are you a member of the National Accessible Scheme (NAS)?

- Yes
- No.....
- Don't know.....

Q33 (ENGLAND; IF NOT A MEMBER OF NAS)

Would you be interested in finding out more about the scheme and the benefits of membership?

- Yes
- No.....

Q34 (ENGLAND; IF INTERESTED IN NAS)

Please could I take your name and contact details?

Name _____

Email _____

Telephone _____

Q35 (SCOTLAND & WALES)

England has a quality grading scheme for access provision. How much would you value such a scheme if it were made available to the tourism industry in Scotland/Wales?

- Highly.....
- Moderately.....
- Not much.....
- Not at all.....
- Don't know.....

Q36 Which of the following best describes the ownership status of your business?

- Owner-managed
- Independently owned but managed by a non-owner
- Part of a chain.....
- Other.....

Q37 (IF OWNER-MANAGED)

Is your tourism business your main source of income?

- Yes
- No.....
- Prefer not to say.....

Q38 *Interviewer: Ask to respondents who have been particularly enthusiastic about the benefits of being accessible.*

VisitEngland / VisitScotland / Visit Wales might like to follow up with a selection of businesses which have seen clear benefits of being accessible. This might result in a case study being produced or further understanding of the benefits being discussed. Would you be interested in being contacted again for this purpose?

- Yes
- No.....
- Not asked.....

Q39 (IF INTERESTED IN FOLLOW-UP)

Please could I take your name and contact details? (Or type "already gathered" if already gathered in Q34 above)

Name _____
Email _____
Telephone _____

Thank you for your time

MULTIPLE PROPERTIES

Q40 How many serviced accommodation properties do you manage?

1
2
3
4
5
6
More than 6
(If more than 6) Please specify _____

Q41 How many of those properties are based in: ?

England _____
Scotland _____
Wales _____

Q42 And how many properties are: ?

Hotels _____
Guesthouses _____
B&Bs _____
Serviced apartments _____

Q43 How many bedrooms do you have across all your serviced properties?

Q44 We would like to understand what provisions you may or may not make for guests with accessibility needs. Starting with mobility needs, which, if any, of the following provisions do you make? In each case, please say whether you have the facilities in all your properties, some properties or no property. (*Read out*)

	In all properties	In some properties	In no property	Don't know
Designated accessible parking space(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Step-free access from the building entrance to one or more rooms (can include access by lifts)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
One or more rooms intended for guests who use a wheelchair	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
An ensuite bathroom to an accessible room with a level entry wheel-in shower (i.e. no raised shower tray or step-up)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Grab rails in the bathroom	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Emergency pullcord alarm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ceiling tracked hoist or portable hoist on request	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Please specify other provisions				

Q45 Concerning sensory needs, which, if any, of the following provisions do you make? (*Read out*)

	In all properties	In some properties	In no property	Don't know
Large print information, e.g. menu	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hearing loop, e.g. at reception or in meeting rooms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fire alarm with flashing light	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Please specify other provisions				

Q46 And concerning other types of accessibility need, which, if any, of the following provisions do you make? (*Read out*)

	In all properties	In some properties	In no property	Don't know
Facilities for assistance dogs (water bowl and toilet area)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Catering for specific dietary requirements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Non-allergenic bedding on request (e.g. non-feather)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Please specify other provisions	_____			

Q47 (IF ANY ACCESSIBILITY PROVISIONS MADE)

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

	All properties	Some properties	No property	Don't know
When promoting the accommodation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Within the building	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q48 Have you undertaken any staff training with respect to welcoming guests with accessibility needs?

- Yes, in all properties
- Yes, in some properties
- No
- Don't know

Q49 (IF TRAINING UNDERTAKEN)

What training have you or any staff members undertaken?

- Disability or equality training
- Basic B.S.L. (Sign Language)
- Other
- Please specify other _____

Q50 How many of your serviced properties, if any, have at least one room which is accessible for wheelchair users or guests with reduced mobility?

- 0
- 1
- 2
- 3
- 4
- 5
- 6
- More than 6
- (If more than 6) Please specify _____

Q51 And could you tell me or at least estimate how many rooms in total across all your serviced properties are accessible for wheelchair users or guests with reduced mobility? (*Interviewer: if they are unable to give an exact figure, help them to at least narrow down an estimate within a range*)

Q52 (IF ACCESSIBLE ROOMS)

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

- Yes
- No.....
- Don't know.....

Q53 (IF NOTICED BENEFITS)

In what ways has this benefited your business? (*Unprompted*)

- Increased customer satisfaction
- Better engagement with customers.....
- Repeat business
- Increased turnover
- Improved reputation
- Avoidance of legal action
- Don't know.....
- Other.....

Please specify other _____

Q54 *Interviewer: record all useful comments made*

Q55 How likely are you to make each of the following changes to any of your properties in the next two years?

	Very likely	Fairly likely	Neither / nor	Fairly unlikely	Very unlikely	Not applicable
Increase capacity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Increase staff numbers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Improve provision for guests with accessibility needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q56 (IF PLANS TO IMPROVE ACCESSIBILITY)

What accessibility changes are you planning to make? (*Read out*)

- Increase number of accessible rooms.....
- Improve mobility provision within rooms already accessible.....
- Improve sensory provision within rooms already accessible
- Improve provision outside of the room
- Train staff
- Promote accessibility provision more
- Don't know.....
- Other.....

Please specify other _____

Q57 As the population ages, more and more people will have accessibility needs. What, if anything, might encourage or help you to improve provision for guests with accessibility needs? *(Unprompted)*

- More information on what could or should be done
- Financial assistance with the set-up
- Practical assistance or advice on the set-up
- Evidence of financial benefits to the business.....
- Evidence of non-financial benefits to the business
- Change in legislation
- If local competitors were to improve their own provision
- More enquiries from potential customers about provision
- Nothing.....
- Other.....

Please specify other _____

Q58 (IF NOTHING WOULD ENCOURAGE IMPROVING PROVISION)

Why would nothing encourage you to improve accessibility provision? *(Unprompted)*

- Can't afford to
- Lifestyle business - not worth the investment
- Nervous about getting it wrong
- Decision would be made by head office
- Too busy to look into it.....
- Don't believe there's enough demand to make it worthwhile
- We have done all the changes we possibly could
- We are waiting to see if regulations and standards remain unchanged for long enough.....
- Never really thought about it
- Other.....

Please specify other _____

Q59 *Interviewer: record all useful comments on anything that would encourage or hinder businesses to improve provision*

Thank you for your time