# GAMES CHANGER?

An Evaluation of London as an Accessible Visitor Destination

# CONSUMER RESEARCH

MAYOR OF LONDON

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# Consumer research – London's accessibility as a destination

## 1.1 Methodology applied in this study

This section reports on the results of the quantitative research undertaken by Arkenford Ltd amongst an audience affected by disability. We carried out fieldwork between 23 October and 7 December 2012.

We undertook research in the format of an online survey and focuses on the visitor journey encompassing all aspects that make up the visitor experience to London. A similar survey, conducted in 2009, provided some baseline measures to map progress from 2009 onwards. However, since the 2009 survey some of the key partners have changed and London has hosted the 2012 Olympics and Paralympic Games.

## 1.2 Sample profile

Table 2.1 below compares the profiles of respondents in the 2012 survey with the 2009 survey.

Table 2.1 Profile of respondents

| | 2012 | 2009 |
|---|---|---|
| Respondents who are Londoners | 11% | 46% |
| Respondents who have visit London regularly within the last 3 years | 75% | 60% |
| Sample who have mobility related disability | 62% | 65% |
| Sample who have sensory (visual/hearing/ autism spectrum disorder) related disability | 33% | 22% |
| Sample who have a learning disability | 5% | 14% |
| Sample who have other disabilities | 12% | n/k |
| Sample have more than one impairment | 27% | 61% |
| Sample undertake a caring role, either formally or informally caring for visitor with disability or a visitor with young child(ren) | 20% | 22% |
| Respondents who have visited London in the last 3 years | 75% | 83% |

| | | |
|---|---|---|
| Respondents travelled to London as part of a day trip for business/leisure | 61% | 80% |
| Respondents staying in London for business or leisure | 36% | 20% |
| Age Profile of respondents: | | |
| 16 – 24 years | 5% | 6% |
| 25 – 34 years | 11% | 12% |
| 35 – 44 years | 15% | 21% |
| 45 – 54 years | 26% | 20% |
| 55 – 64 years | 26% | 27% |
| 65 + years | 17% | 15% |

The age ranges of those surveyed in 2009 and 2012 are very similar. However, comparing the 2009 and 2012 respondent profiles on other characteristics, the sample in 2012 has a lower proportion of respondents that have visited London on a regular basis within the past 3 years. This is mainly due to the fact that the proportion of the sample that lives in London is much lower than the previous survey.

Those who have a sensory disability make up a higher proportion of the sample than in 2009 whereas the proportion with mental health/learning disabilities and those with multiple impairments is lower than the previous study.

Where possible we have compared sub samples of groups to determine what impact these changes in the profile of respondents have had on the findings.

In both the 2012 and 2009 studies we have included a sub sample of respondents who have visited London longer than 3 years ago (25% of sample in 2012 and 17% of the sample in 2009). This sub set of the sample illustrates the perception of how accessible London is. We believe this is an important factor as perception plays a part in making the initial decision to visit.

As with the previous wave this group is included in the total percentages reported. In analysing the data we find that there are no significant differences between those respondents that have visited and not visited in the last three years. Where there are differences in findings we draw them out and comment accordingly.

**Questionnaire**

The questionnaire broadly covered the following areas:

- Respondent profile (age, gender, origin, type of disability)
- London visit history and profile (visit history, type and frequency of visit)
- Visit activity covered the usage of:
- Pre-trip information
- Accommodation
- Transport used
- Attractions
- Eating and drinking
- Shopping
- Area of London visited

For each activity undertaken we set out to determine type and extent of use, rating across a number of factors, the influence of that activity on their decision to visit London, and the influence on their enjoyment of their trip.

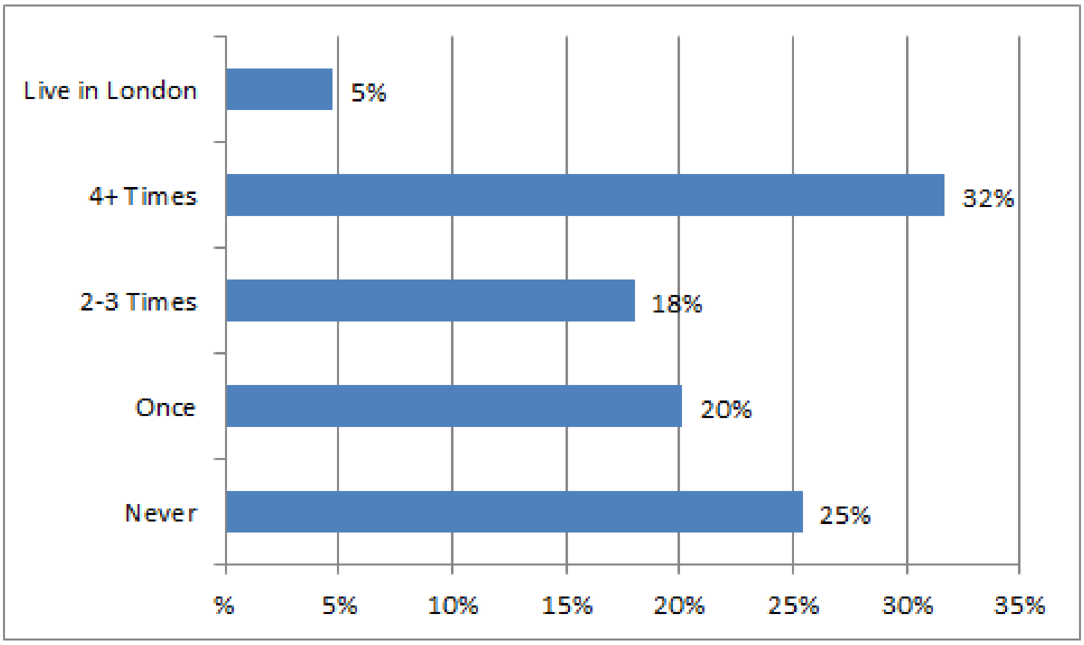
Respondents were asked to score their visit using a scale from 0 – 10 with 0 being 'not at all good' and 10 'excellent'. For analysis purposes we have defined a positive rating as the aggregation of people scoring factor of 7 to 10 and a negative rating of people scoring a factor 1 to 4.

The following sections report the key findings for each of these areas of activity.

Reason for visit

We asked all respondents how often they visit London and the purpose of their last trip.

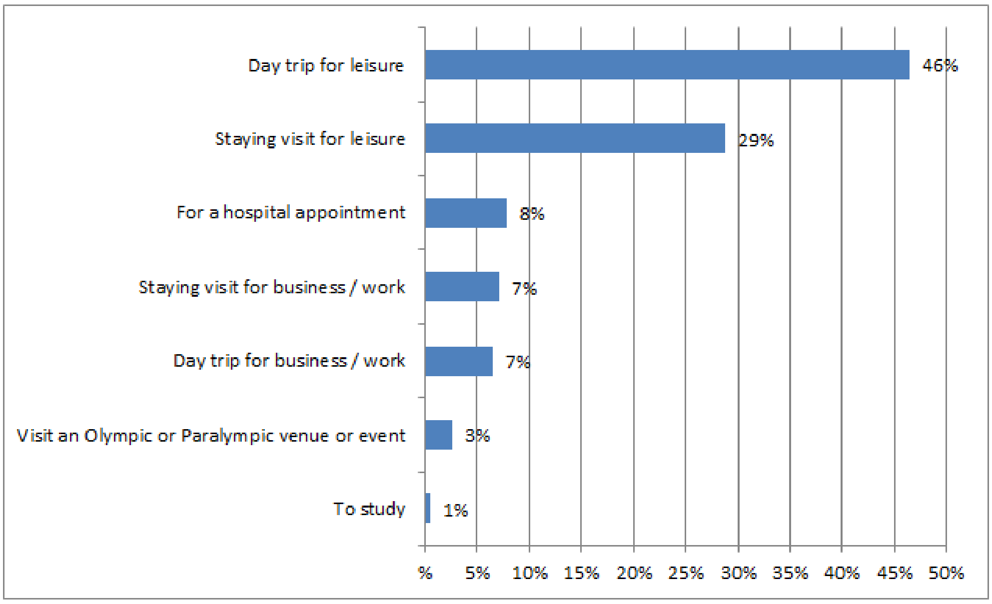
Chart 2.1 Frequency of visits in last 3 years




A quarter of respondents (25%) had not visited London within the past 3 years and only 5% of the sample lived in London.

Of those who had visited the capital city 20% had visited London once within the last three years, just under a fifth (18%) visited London 2 or 3 times and almost a third (32%) were regular visitors making 4 to over 20 visits within the last 3 years.

Chart 2.2 Purpose of last trip to London




Respondents were more likely to have visited as part of a leisure trip, with almost half the sample taking a day trip for leisure as their last visit to the capital.

Over a third of respondents stayed in London for their visit (7% staying visit for business purposes and 29% for leisure purposes).

Older people were more likely to make day trips for leisure whereas younger people were more likely to stay for leisure and study purposes.

Visitors from South East, South West, London and West/East Midlands were more likely to visit for leisure purposes.

**Demand for an accessible London**

We asked people about the importance to them of an accessible environment in London. 71% of the sample indicated that they would find London a hard place to move around if there is a lack of an accessible environment, a lower proportion than was recorded in 2009 (88%).

The types of people who would be most affected (finding London 'Quite' or 'very; hard) are:

- People with multiple disabilities and in particular those who have a mobility disability
- Working age groups, i.e. people aged between 25 – 44 years

Non Londoners would be more likely to find London a hard place to move around if it lacked an accessible environment. Reasons for this variation may be the result of familiarity of the environment and confidence travelling around the area from the Londoner point of view. If visitors with access needs perceived London to be inaccessible, the city would feel the impact on tourism.

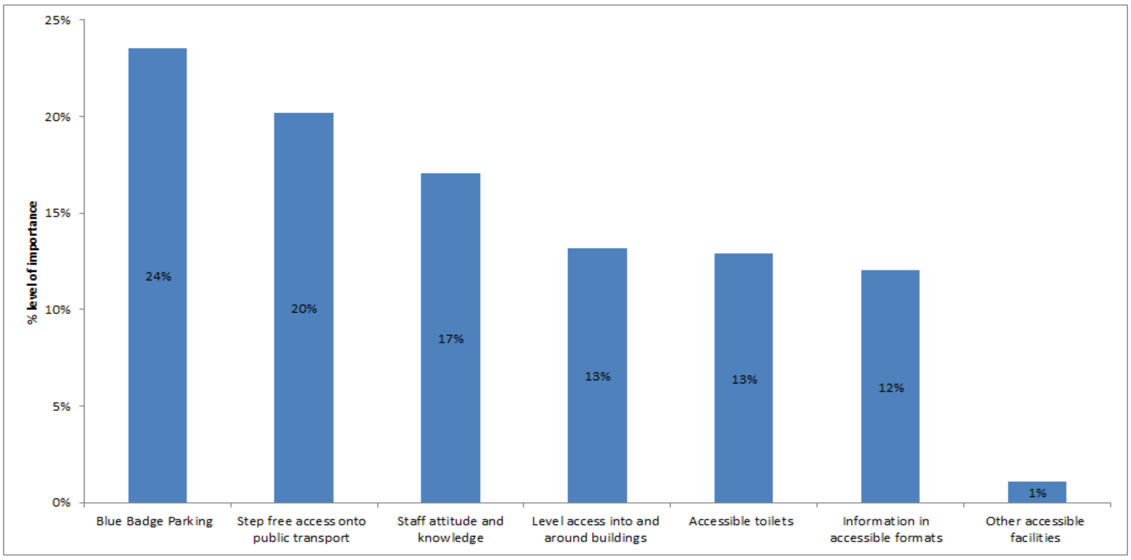
Compared with the previous survey, younger disabled people particularly are more likely to be affected in moving around London.

Chart 2.3 below shows the proportion of respondents ranking the importance of seven travel needs with the top three levels of importance and the percentage ranking each attribute the least important.

The attributes ranked most important (first) are:

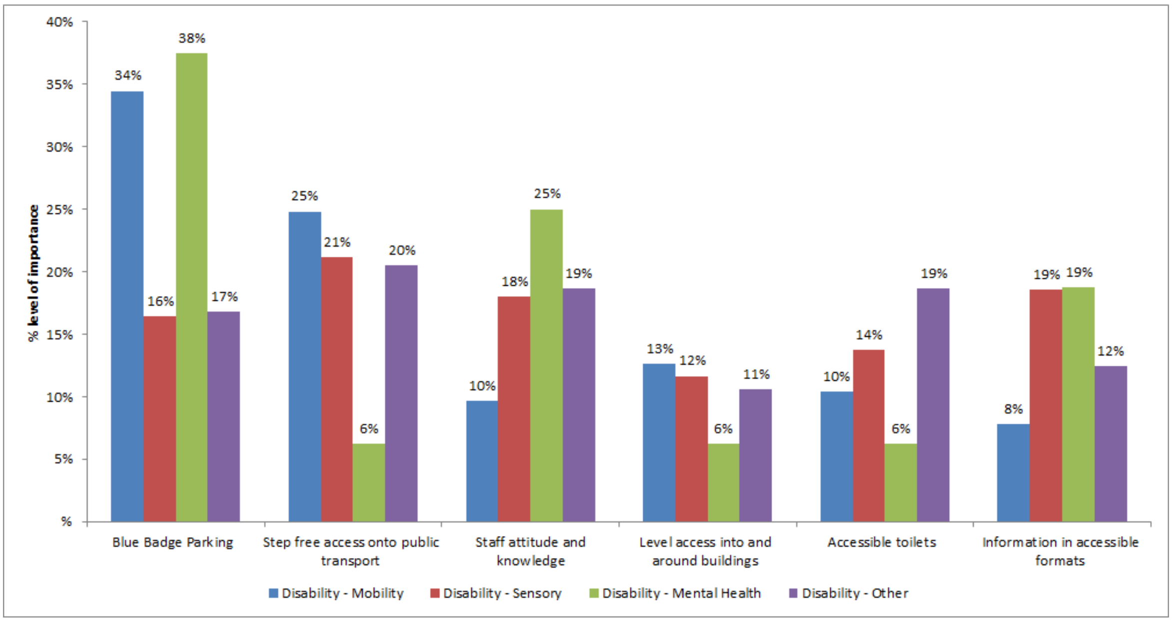
- Blue Badge Parking (24%)
- Step free access onto public transport (20%) and
- Staff attitude & knowledge (17%)

Chart 2.3 Percentage ranking needs first




The next chart goes a step further to investigate how the importance of different access needs varies by different disability groups.

Chart 2.4 Percentage ranking needs first by disability groups




Unsurprisingly those who have a mobility disability rank Blue Badge Parking and step free access onto public transport as most important.

Those who have a learning or mental health disability report Blue Badge Parking, staff attitude and knowledge and information in accessible formats as most important.

There is less differentiation between the access need factors tested for sensory disabilities indicating that they are all of equal importance to this group.

The top 3 factors of greatest importance for Londoners are:

- Step free access
- Blue Badge Parking
- Staff attitude and knowledge

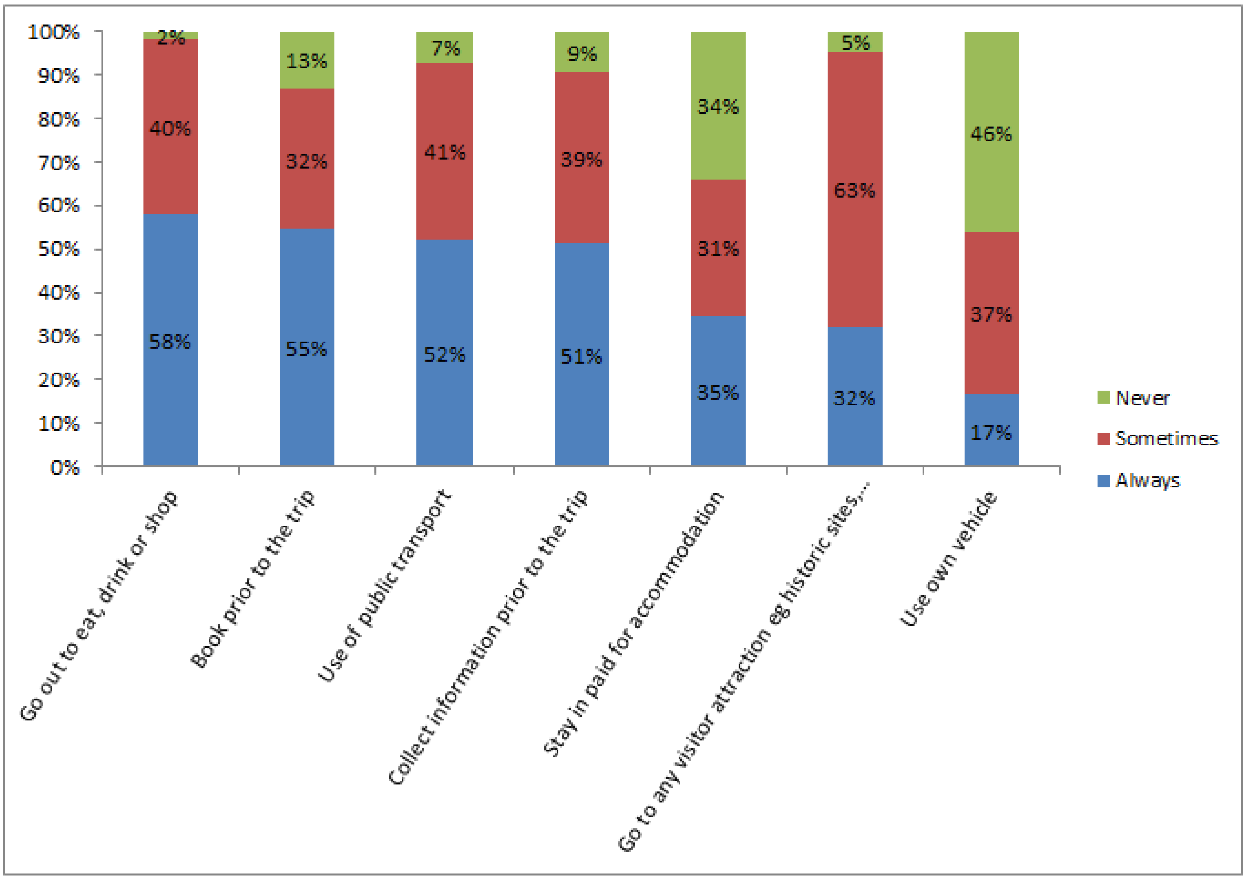
The top 3 factors of greatest importance for non-Londoners are the same but in a different order:

- Blue Badge Parking
- Step free access
- Staff attitude and knowledge

**Activities undertaken on last trip**

We asked participants who visited London how they prepared for their trip and their use of a selection of services/attractions.

Chart 2.5 Use of information and facilities when visiting London



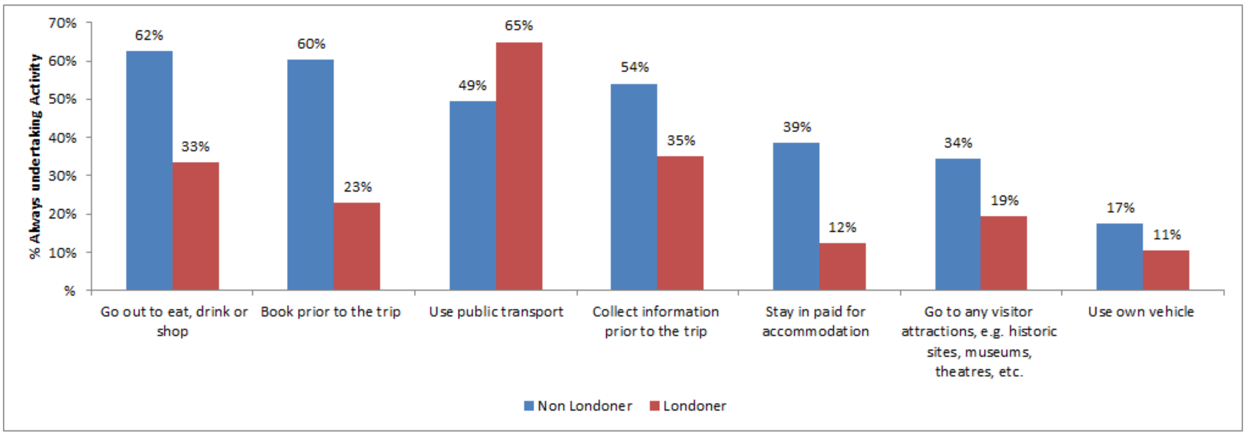

Over half always:

- Go out to eat, drink or shop (58%)
- Book prior to their trip (55%)
- Use public transport (52%)
- Collect information prior to the trip (51%)

Visiting attractions such as historic sites, museums and theatres is less frequent than the activities listed above, with 63% sometimes doing this activity.

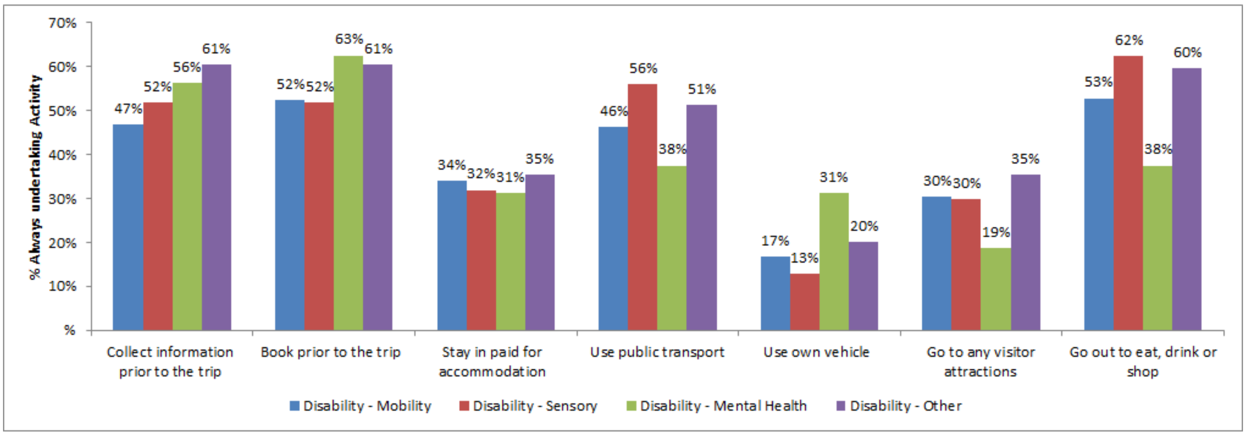
Over half the sample drive into London either always or sometimes (54%).

Chart 2.6 Activities 'Always' undertaken (Londoners vs. non Londoners)




Non Londoners are far more likely than Londoners to 'Always' undertake most activities with the exception of using public transport.

Chart 2.7 Activities 'Always' undertaken (by disability types)




Respondents with mobility disabilities are more likely to 'Always' go out to eat, drink and shop. Over half of this group also book prior to a visit.

Respondents with sensory disabilities are more likely to 'Always' go out to eat, drink and shop, and use public transport

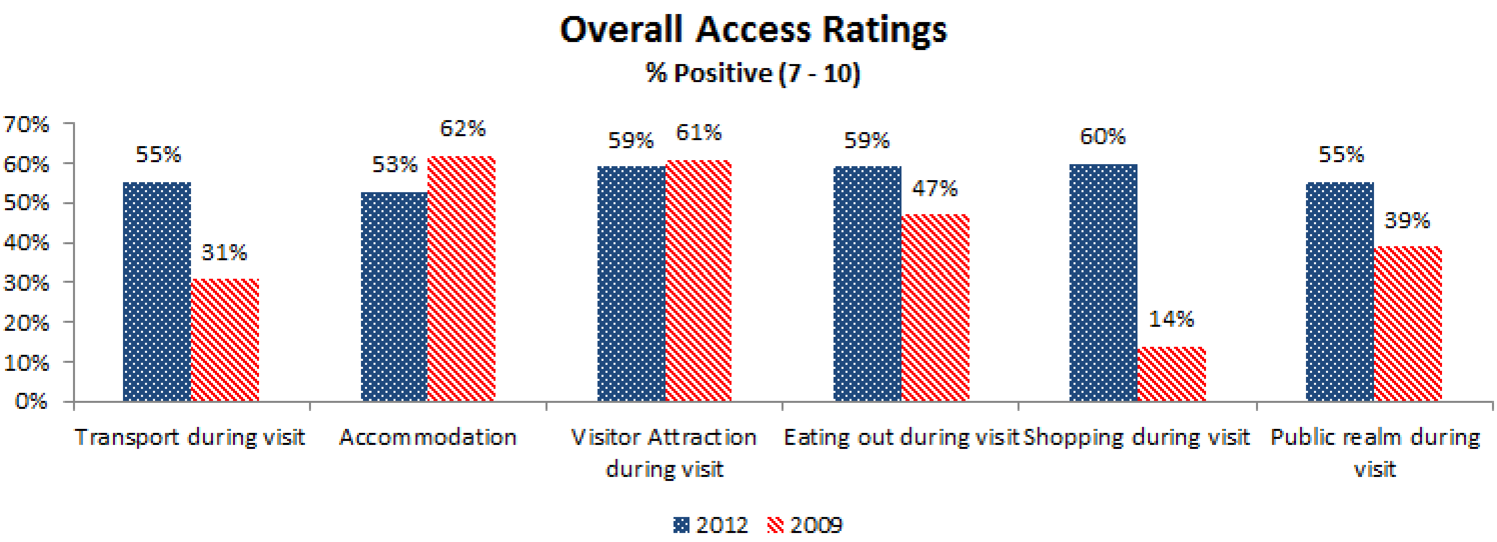
Respondents with mental health disabilities are more likely to 'Always' plan in advance of their trip.

Please note that it is hard to make a direct comparison with rates collected on the previous study, as we have added frequency as a factor for 2012.

Overall rating of facilities during last visit

We asked respondents their overall opinion on how London's facilities met their access needs (see chart 2.8 below).  People with learning disabilities rated eating out as the least positive rating in meeting their access needs whereas people with sensory disabilities gave this experience the highest positive rating.  There was no difference between Londoners and non-Londoner's overall experience accessing attractions.  However, Londoners rated each of the other facilities less positively than non-Londoners.

Chart 2.8 Positive ratings on overall accessibility of each facility/service




Positive overall access rating scores have improved across all areas with significant improvements recorded for Transport and Retail.

Public Realm and Eating Out ratings have also seen some increase and the ratings for Visitor Attractions have remained in line with the high scores received in 2009.

Only the Accommodation sector has recorded a lower overall access score when compared to 2009.

**Pre-trip information**

Table 2.2 below illustrates the proportion of respondents that used websites to source information prior to their last trip. We have compared this % with the 2009 insight where possible. This shows that there has been a decrease in the proportion of visitors accessing sites.

Table 2.2 Websites used prior to a trip to London

| **Source of website Information** | **2012 % accessing** | **2009 % accessing** | **Key type of User** |
|---|---|---|---|
| Transport providers website | 60% | 72% | People with a hearing/visual disability; older people; Londoners and regular visitors to London |
| Tourist board websites | 44% | 58% | Older people (75+); non-Londoners and visitors (2-3times in last 3 years) |
| Specific access information websites for visitors who have a disability | 26% | 38% | People with more than one disability; learning disability; |
| Accommodation's own website | 43% | 33% | 16-24 year olds; non-Londoners |
| General accommodation/hotel booking websites | 38% | N/A | Learning disability; older people (75+); |
| Attraction's own website | 52% | N/A | East England; West Midlands; infrequent visitors (visited once or 2-3 times in last 3 years) |
| Shops' own websites | 21% | N/A | Learning disability; 16-24yr olds; |
| Restaurants/cafes/pubs own websites | 32% | N/A | Older visitors (75+) |

| | | | |
|---|---|---|---|
| Other | 4% | N/A | 45 – 54 and 75+ year olds; Londoners |

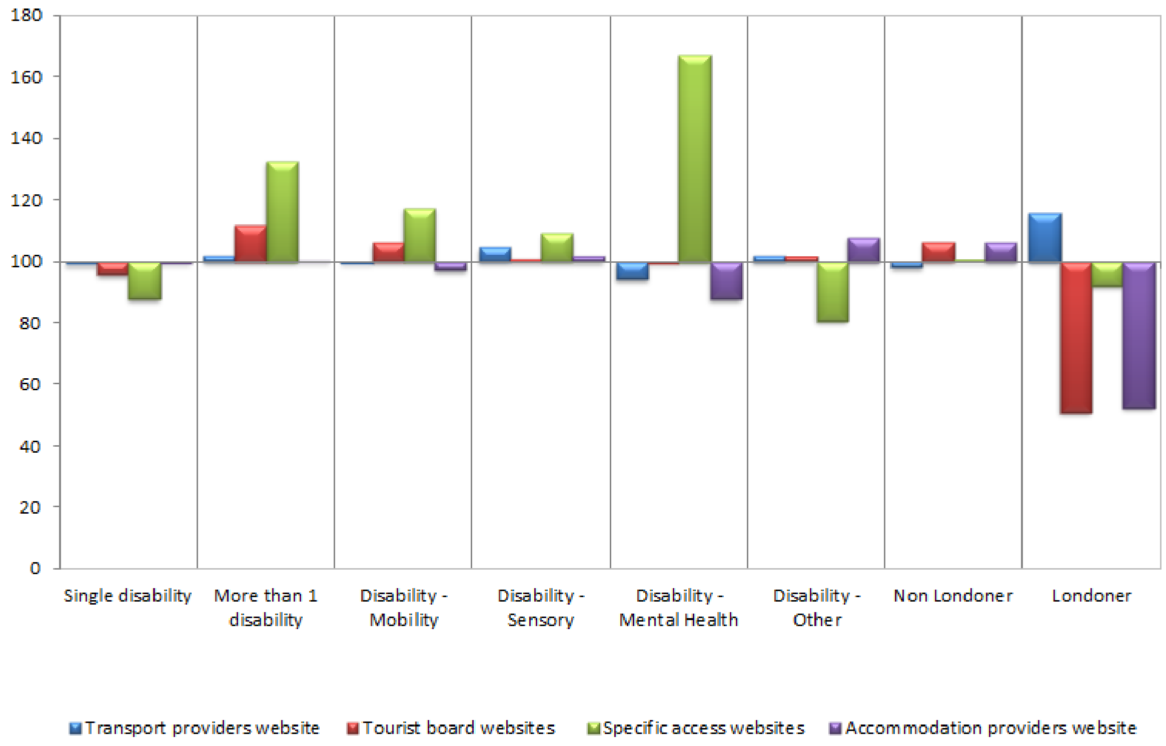
The chart below illustrates the types of visitor who are more likely to using different sorts of pre-trip information websites.

This shows that those with more than one disability and more specifically those with mobility and mental health disabilities are more likely to use specific access websites.

Londoners are more likely to use transport provider websites but far less likely to use the other websites listed given their familiarity with the environment.

The sample profile will therefore partly explain why there has been a reduction of website usage.

Chart 2.9 Types of visitor using different pre-trip information websites




We asked respondents if they were aware or had used a selection of access schemes and support initiatives designed to help people who have a disability. Table 2.3 below details those people were aware of and those they have used these resources.

Table 2.3 Awareness and use of resources

| Access scheme/initiative/information | 2012 % Awareness | 2009 % Awareness | 2012 % Used |
|---|---|---|---|
| Designated Blue Badge Parking | 61% | 86% | 36% |
| Shop Mobility Schemes | 58% | 72% | 22% |
| National Accessible Scheme (NAS) | 34% | 24% | 7% |
| Access Guides | 30% | 44% | 14% |
| Access Statements | 29% | 20% | 9% |
| Inclusive London Website | 18% | N/A | 12% |
| DisabledGo | 20% | 34% | 9% |
| None of the above | 17% | N/A | 31% |

Almost 1 in 5 respondents was not aware of any of the listed schemes and nearly a third of respondents have not used or tapped into any of these resources.

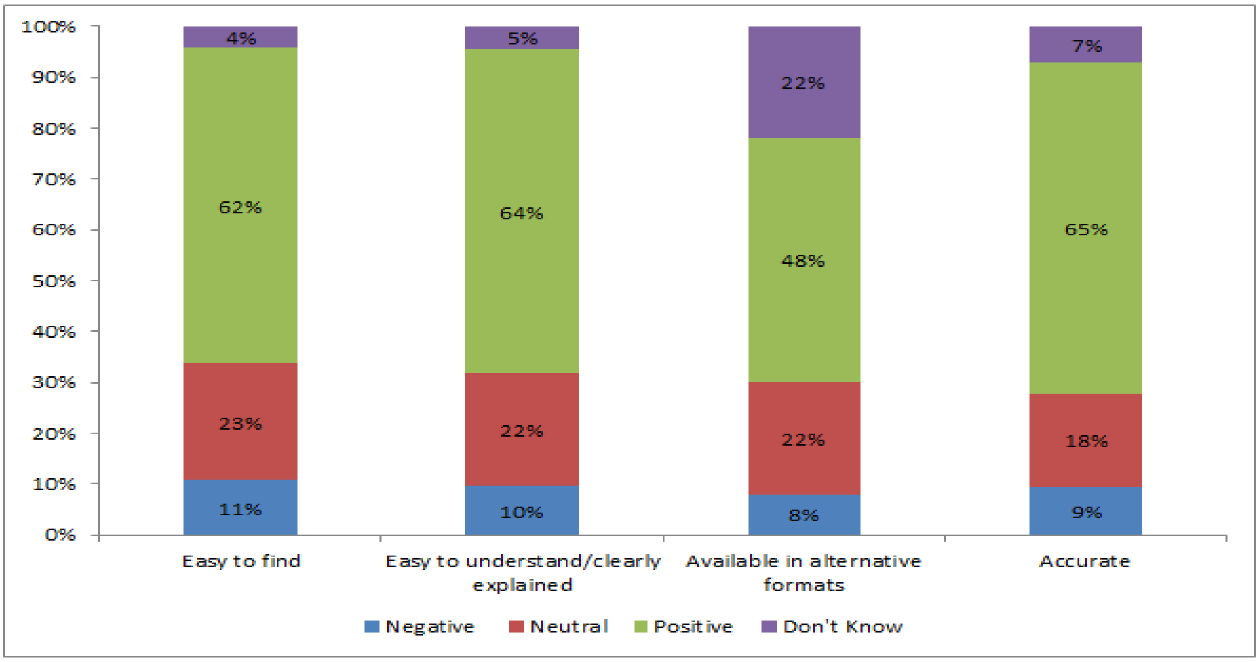
Awareness of many of these schemes is lower than recorded in 2009 with the exception of NAS (especially Londoners) and Access Statements.

Londoners are more likely to have used most of the schemes listed with the exception of designated blue badge parking and shop mobility schemes.

Those who visited London and who looked for online access information were strongly influenced by the information sought on the website (24%) or positively influenced (52%) by this information. Only a fifth (20%) reported this information having no influence on their decision to visit London.

This figure is slightly lower than recorded for 2009 where the % positively influenced for the individual sources of information ranged from 85% - 95%.

Chart 2.10 Rating of London information




- 65% of respondents were positive about the accuracy of the information
- 64% provided a positive score for the information being 'Easy to understand/clearly explained'
- 62% were positive about the information being 'Easy to find' (62% were positive)
- Only 48% were positive in relation to the information being 'Available in alternative formats'

Those with a sensory were generally most positive about the information, as well as respondents from younger age groups.

Those scoring low positive scores about sources of information were asked why they gave a low rating. Some considered accessible information not readily available in appropriate format and not consistently available in all transport points. For example:

"Information is easy to find [and] .... does prove helpful. There is often an assumption you have been to somewhere before rather than a first time visit. I should be able to go where I want not just where access is better."

"Information on oyster cards confusing; no information available at Euston station; free tube map so small it's almost impossible to read"

"TFL website is sometimes difficult to use and I have found that when using journey planner it doesn't always recognise valid place names"

### 1.1.1 Pre-trip information summary

There is widespread use of different information, and by no means are visitors going solely to sites dedicated specifically to accessibility.

The information available on mainstream websites is important to the disabled visitor to London and can have a strong influence on their decision to visit.

The research has identified the best known schemes / initiatives but there are many more that influence a trip. Work must continue to raise awareness and knowledge of the different types of scheme.

### 1.1.2 Pre-trip information ratings

The table below shows the proportion of positive ratings for a number of different aspects of pre-visit information. We break this it down by the different activity types and compared with the previous study:

Table 2.4 Comparison of ratings on pre-trip information

| | Transport | | Accommodation | | Attractions | | Eat & Drink | | Shopping | | Public Realm |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2012 | 2009 | 2012 | 2009 | 2012 | 2009 | 2012 | 2009 | 2012 | 2009 | 2012 |
| Availability of Information | 65% | 52% | 54% | 52% | 63% | 55% | 48% | 27% | 51% | 39% | 50% |
| Information in Alternative Formats | 52% | 35% | 44% | 41% | 53% | 39% | 52% | 26% | 45% | 27% | 46% |
| Website Accessibility | 65% | 52% | 56% | 48% | 64% | 60% | 51% | 28% | 50% | 40% | 52% |
| Information Accuracy | 63% | 46% | 55% | 48% | 65% | 59% | 52% | 27% | 52% | 35% | 52% |
| Information Usefulness | 66% | 50% | 55% | 55% | 66% | 62% | 53% | 30% | 52% | 35% | 53% |
| Staff Attitude & Knowledge | 55% | 33% | 51% | 62% | 61% | 54% | 54% | 30% | 52% | 23% | |

It is good to see that all types of activity score higher than in 2009, especially the Transport and Attractions pre-trip information which tend to receive highest % of positive scores across the different types of pre-trip information tested.

It would appear that different sectors increasingly realise their responsibility to provide improved accessible information.

**Information during trip**

The table below shows the proportion of positive ratings received during the visit to London broken down by the different types of activity undertaken.

Table 2.5 Comparison of ratings on trip during visit

| | Transport | | Accommodation | | Attractions | | Eat & Drink | | Shopping | | Public Realm |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2012 | 2009 | 2012 | 2009 | 2012 | 2009 | 2012 | 2009 | 2012 | 2009 | 2012 |
| Availability of Information | 62% | 49% | 54% | 55% | 66% | 57% | 54% | 36% | 55% | 26% | 34% |
| Information in Alternative Formats | 55% | 30% | 45% | 48% | 55% | 38% | 60% | 26% | 49% | 14% | 24% |
| Information Accuracy | 61% | 46% | 55% | 55% | 66% | 54% | 57% | 36% | 55% | 26% | 36% |
| Information Usefulness | 63% | 52% | 56% | 55% | 67% | 58% | 57% | 36% | 55% | 26% | 36% |
| Staff Attitude & Knowledge | 55% | | 54% | | 62% | | 59% | | 58% | | |

Again, significantly improved % of positive scores were given across all different types of information features, and across the different sectors.

Transport and Attractions seem to have made most progress and receive the highest ratings.

The Food and Drink and Retail sectors also received improved scores, but the Accommodation sector seems to have remained static.

**Transport**

The table below illustrates the proportion of respondents that use different forms of transport to travel to and around London.

Table 2.6 Proportion who use each type of transport to and around London

| Type of Transport | 2012 % Using to travel to London | 2009 % Using to travel to London | 2012 % using to travel around London | 2009 % using to travel around London |
|---|---|---|---|---|
| Train | 70% | 81% | 24% | 29% |
| Private car | 34% | 18% | 25% | 19% |
| Coach | 29% | n/a | 7% | n/a |
| Bus | 17% | 20% | 58% | 69% |
| Plane | 14% | n/a | 2% | n/a |
| Underground | 11% | 29% | 64% | 66% |
| Walk | 7% | 15% | 53% | 58% |
| Taxi | 4% | 7% | 45% | 45% |
| Ferry/river transport | 4% | 2% | 13% | 9% |

| | | | | |
|---|---|---|---|---|
| Docklands Light Railway | 3% | 7% | 18% | 22% |
| Trams | 3% | n/a | 9% | n/a |
| Cycle | 1% | n/a | 3% | n/a |
| Other | 1% | n/a | 2% | n/a |

Compared with the earlier (2009) survey findings, proportionally fewer respondents travelled to London by train and underground, and a higher proportion travelled by private car. Similarly proportionally more people travelled around London by private car compared with 2009 and travel on train or buses was proportionally lower in 2012 than in the earlier survey.

A key reason for this is the fact that we have fewer Londoners in the sample than in 2009.

Table 2.7 Type of transport used by visitors

| | Non Londoner | Londoner | Non Londoner | Londoner |
|---|---|---|---|---|
| Bus | 14% | 45% | 56% | 76% |
| Train | 71% | 69% | 22% | 41% |
| Coach | 31% | 9% | 6% | 9% |
| Taxi | 4% | 7% | 47% | 33% |
| Plane | 14% | 19% | 1% | 3% |
| Ferry / river transport | 3% | 12% | 12% | 22% |
| Docklands Light Railway | 2% | 12% | 15% | 41% |
| Trams | 1% | 14% | 8% | 9% |
| Private Car | 35% | 29% | 24% | 31% |
| Underground | 7% | 47% | 64% | 66% |
| Cycle | 1% | 5% | 3% | 5% |
| Walk | 5% | 26% | 53% | 55% |
| Other | 1% | 3% | 2% | 5% |

We can see that Londoners are far more likely to use the bus and London Underground to travel to and around London.

Non Londoners are more likely to drive to London, but Londoners are more likely to use a car to travel around London.

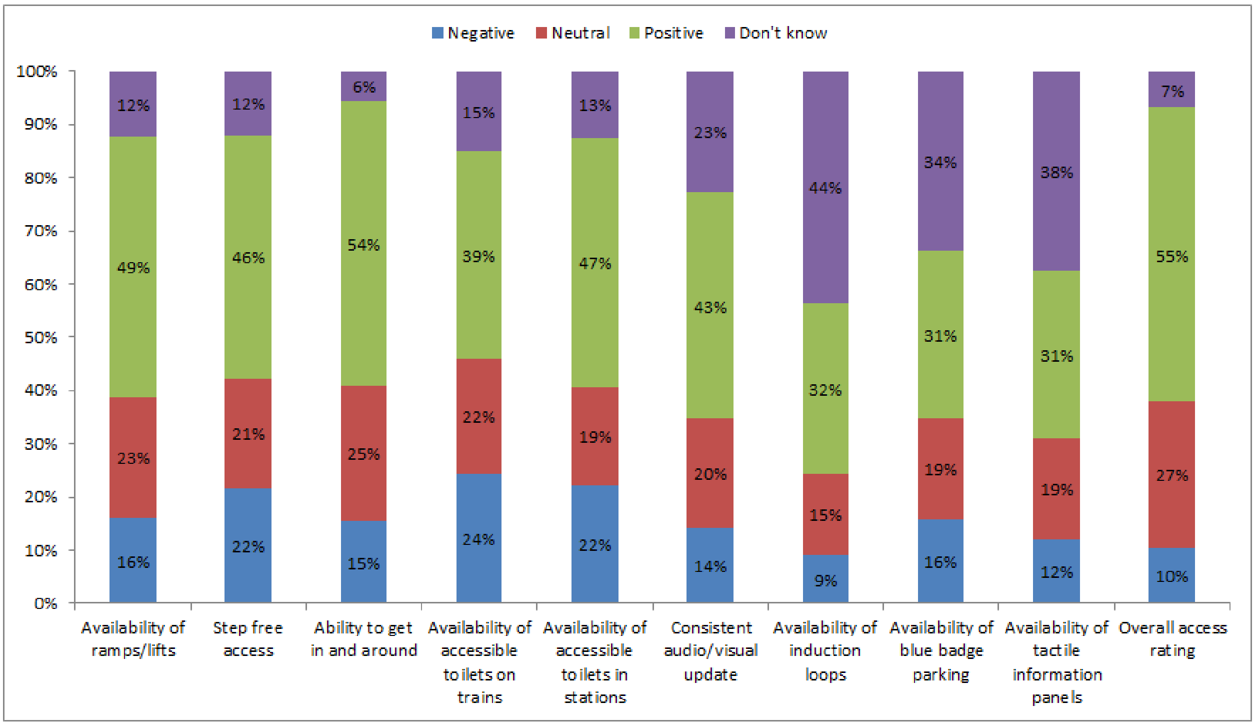
**Transport ratings**

We asked respondents to rate transport in London across a number of factors.

Ratings for pre-trip information and information available during the trip are as reported earlier in this document.

The chart below shows the scores given for other aspects of the experience.

Chart 2.11 Ratings of transport facilities/services




Compared to 2009 the overall rating received is up significantly (+24% for positive ratings).

- Non Londoners are more positive towards transport in the capital compared to Londoners themselves.
- Respondents that have a mobility related disability provide the least positive overall score.

The aspects that received the highest % of positive scores include 'availability to get in and around', 'availability of ramps / lifts' and 'accessible toilets in stations'.

All aspects received a significantly higher % of positive ratings than was recorded in 2009 indicating strong progress.

For almost two thirds of respondents (62%), accessibility of public transport has a strong influence on their decision to visit London (24% saying it has a strong positive influence and 37% some positive influence).

A quarter reported accessibility of public transport to have no influence and this did not appear to be associated with the persons' type of disability.

We asked those that gave transport in London a low rating to elaborate on why.

- 32% of comments related to information sought beforehand being out of date when they arrived at a place.
- 26% of comments related to advice not being readily available (e.g. signs/maps too small or not easy to find whilst travelling around between stations/stops)

- 9% felt that transport was too busy for them and people did not have the time to help them
- Only 1 person referred to the lack of or non-working lifts and escalators

When asked which city (anywhere in the World) has the most accessible public transport network, we received a range of responses. Top five places are:

London
Edinburgh
Sydney
Orlando/Florida
Newcastle

**Accommodation**

The table below illustrates the proportion of respondents that used or considered using different types of accommodation.

Table 2.8 Proportion who use each type of accommodation and influence on decision

| Type of Accommodation | 2012 % Using | 2009 % Using | 2012 % Considering | 2009 % Considering | 2012 Neither used nor considered |
|---|---|---|---|---|---|
| Mid-range hotel | 37% | 53% | 27% | 21% | 36% |
| With friends/relatives | 32% | 36% | 14% | 7% | 54% |
| Budget hotel | 25% | 29% | 31% | 44% | 44% |
| Luxury hotel | 15% | 24% | 20% | 21% | 65% |
| B&B | 15% | 10% | 23% | 28% | 62% |
| Serviced apartment/Self catering | 10% | n/a | 18% | n/a | 73% |
| Hostel | 5% | 11% | 11% | 4% | 85% |
| Other | 4% | n/a | 6% | n/a | 91% |
| University/student accommodation | 3% | n/a | 9% | n/a | 88% |

- Just over a third (37%) of respondents used mid-range accommodation during their stay in London.
- Almost a third (32%) of respondents stayed with friends and relatives
- Budget hotels were most likely to be considered (31%) out of all the options.
- Respondents were most likely not to use or consider hostels and University/students accommodation.

The 2012 research shows a drop in the overall access rating received for accommodation from 62% to 53%.

In comparison to 2009, proportionally fewer respondents used mid-range and luxury hotels and proportionally more used bed and breakfast accommodation. This suggests that there is a stronger accommodation offer in the bed and breakfast sector which is more effective at attracting visitors with access needs.

There were some variations in responses:

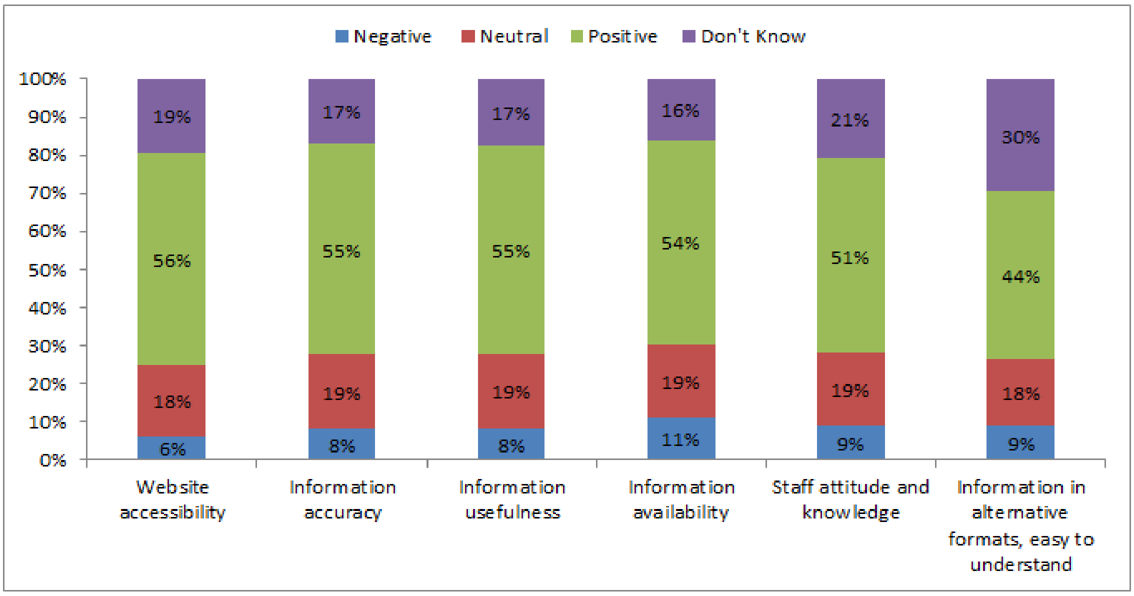
- Respondents with learning disabilities were least likely to use or consider using self-serviced/self-catering apartments and more likely to use budget hotels, bed & breakfasts, University/student accommodation or stay with friends/relatives
- People with learning disabilities are least likely to consider using or have used budget hotels, bed & breakfasts accommodation
- People with sensory disabilities were more likely to use luxury or mid-range hotels

Price had the strongest influence on their decision to use paid accommodation (70% reported it to be a ‘strong’ and 20% ‘some’ influence) with Location having the second highest influence on their decision (58% ‘strong’ and 31% ‘some’ influence). A majority considered accessible facilities and services to have either a strong influence (50%) or some influence (30%) on their decision to use accommodation. Information provision was important but less likely to influence their decision (33% strong influence, 42% ‘some influence).

We asked London visitors to rate several aspects about their pre-visit and visit access to information, attitudes and support. We present details in chart 2.12 for pre-visit ratings and chart 2.13 for ratings of facilities during their visit.

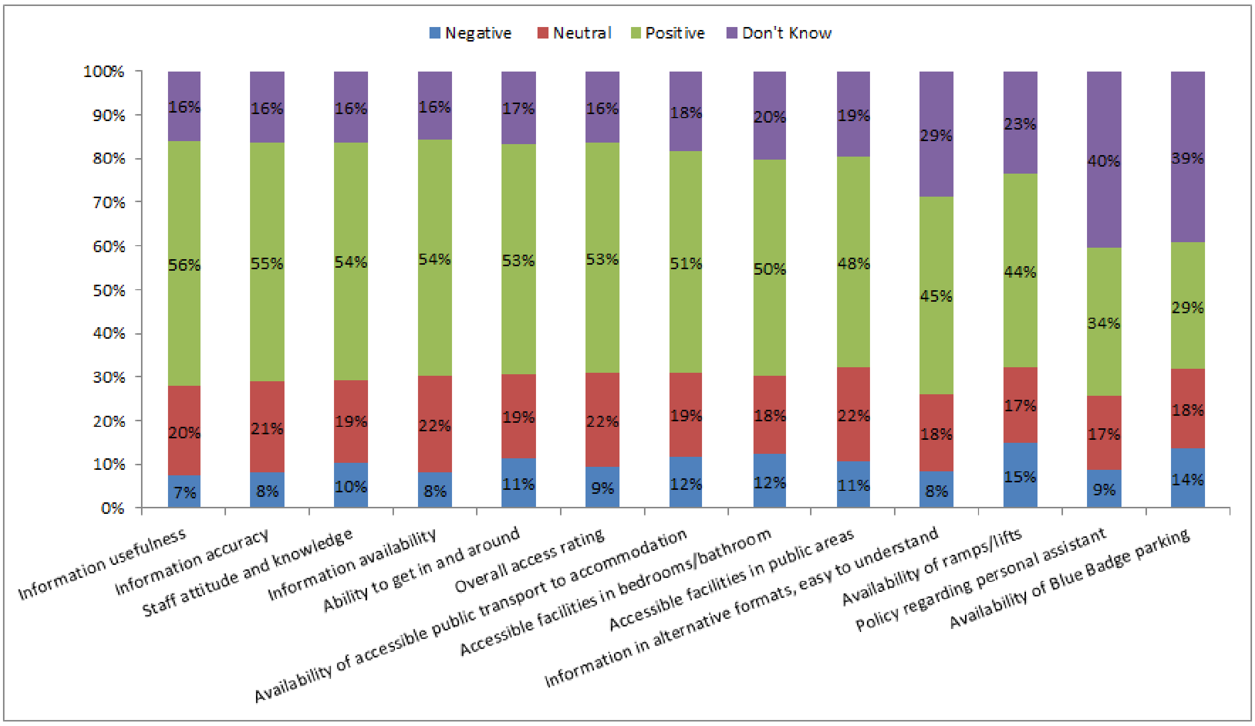
Prior to a person’s visit over half of respondents rated all but ‘information in alternative /easy to understand formats’ positively.

Chart 2.12 Ratings of pre-visit sources of information and staff attitudes




During their visits to London, 'policy regarding personal assistants' and 'availability of blue badge parking' received the least positive rating. We note that a large proportion of respondents rated these aspects as 'don't know'.

Chart 2.13 Rating of access to information, attitudes and support during visit




Having accessible accommodation was a positive factor influencing a person's decision to visit London with 27% reporting this to have a strongly positive influence and 35% a positive influence.

Most of those who rated accommodation low for positive accessibility and reported in general terms relating to hotel facilities sometimes being limited, for example:

*"Because it seems that lots of companies offer the minimum to meet legal requirements and others can be very accommodating"*

*"It [experience] was neither good nor completely bad. In general I find London hotels poor compared to the rest of the country"*

One person reported that cost as a major issue, especially if a person was travelling with a carer.

*"Only IHG hotels have policy of free room for paid carer. Otherwise, staying overnight would be impossibly expensive. Still forced to spend megabucks on accommodation because so few cheaper hotels available in central London (although better now than ever)"*

Cities with the most accessible accommodation on offer are:

- London
- Vancouver
- Manchester
- Edinburgh
- Sydney

Reasons given include:

- accessibility of accommodation close to transport services/venues/shops
- people being catered for without feeling discriminated/good service provided by staff
- cheaper range of accessible accommodation available
- and well planned facilities

**Attractions**

This section focuses on main attractions in London during 2012. We asked all respondents, whether or not they had visited London. The table below shows the % that have either visited or considered visiting each type of attraction and compared these figures with 2009.

Table 2.9 Proportion who use each type of attraction and influence on decision

| Type of Attraction | 2012 % Visiting | 2009 % Using | 2012 % Considering | 2009 % Considering | 2012 % Neither visited/considered |
|---|---|---|---|---|---|
| Parks & Gardens | 66% | 63% | 16% | 22% | 19% |
| Museums /Art galleries | 65% | 69% | 21% | 20% | 14% |
| Heritage sites | 59% | 39% | 25% | 33% | 15% |
| Main tourist attractions | 54% | 54% | 28% | 25% | 19% |
| West End theatres | 50% | 59% | 24% | 20% | 25% |
| Zoos/Aquariums | 35% | 28% | 31% | 31% | 34% |
| Exhibition venue | 31% | 43% | 28% | 26% | 41% |
| Music venue | 28% | 34% | 25% | 26% | 47% |
| Opera House/Concert hall | 20% | 27% | 28% | 27% | 52% |
| Other sporting venues | 17% | 19% | 16% | 24% | 67% |
| Other music venues | 16% | n/a | 27% | n/a | 57% |
| Olympic/Paralympic venues | 13% | n/a | 20% | n/a | 67% |

Other information sources indicate that peak summer visitor numbers to major attractions in London were significantly lower than was expected and down on previous years due, in the main, to the Olympics and poor weather.

That said our data records an increase in the % of respondents visiting different sites, or at least comparable volumes for most popular attractions including parks, gardens and museums/art galleries (visited by around two thirds of respondents).

Only 13% of participants visited Olympic/Paralympic venues.

Main changes in visiting attractions compared with the earlier survey are: a higher proportion visiting heritage sites and zoos/aquariums in 2012 than 2009; and proportionally fewer visited exhibitions/music venues in 2012 compared with 2009.

Parks and gardens, museums & art galleries and Olympic/Paralympic venues were more likely to be visited by people with learning disabilities and 'other' disabilities. Those who had mobility disabilities were less likely to visit museums and art galleries. Music venues were more likely to be visited by people who had learning and sensory disabilities.

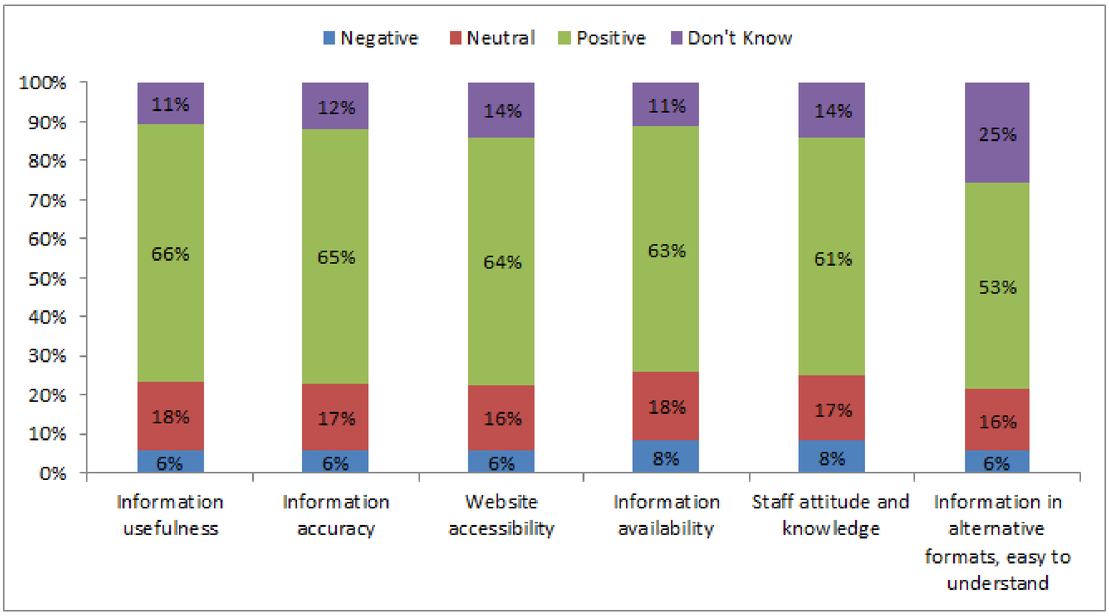
Londoners are an active group when it comes to visiting attractions, making the most of what London offers.

Order of influencers was:

- Price (65% 'strong' and 25% 'some' influence)
- Location (49% 'strong' and 37% 'some influence)
- Accessible facilities/services (47% 'strong' and 33% 'some' influence)
- Provision of information (36% 'strong' and 44%' 'some' influence)

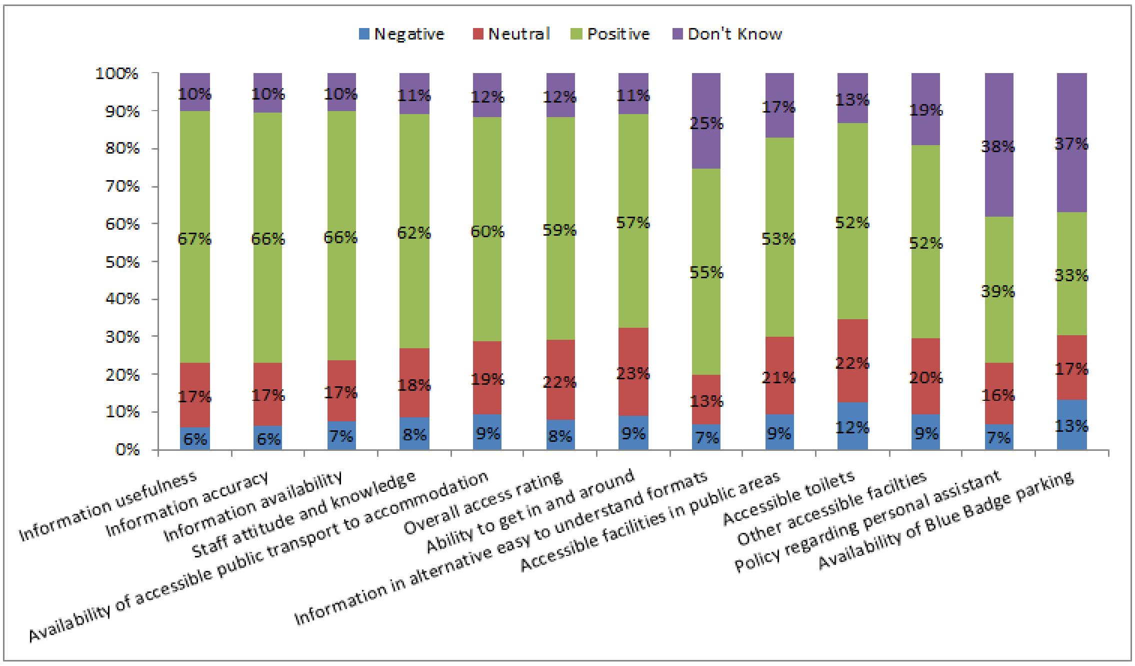
Respondents were asked to rate London's attractions in terms of how they meet their access needs. Chart 2.14 and Chart 2.15 show responses to pre-visit factors and facilities during a visit.

Chart 2.14 Rating of London's attractions to meet access needs pre-visit




Around two thirds of respondents rated the usefulness and accuracy of information to be good or excellent. Overall over half rated all factors to be either 'good' or 'excellent'.

Chart 2.15 Rating of London's attractions to meet access needs during their visit




Provision of accessible attractions had a positive influence on just over two thirds of respondents (29% 'strong' and 39% 'some' positive influence). However, a quarter of all respondents (25%) claimed such accessibility had no influence on their decision to visit the attraction.

Few people gave negative reasons about access to attractions. The main concerns from additional comments that did come out included:

- Lack of accessible parking near to attraction
- Staff attitudes
- Waiting times to visit attraction were too long

Top main cities/areas with the most accessible visitor attractions are:

- Florida
- Sydney
- London
- Paris
- Edinburgh
- Manchester

Main reasons for suggesting these places include:

- easy to move around the attractions
- Wheelchair friendly (including availability of ramps)
- feeling that attraction had considered the needs of visitors who have disabilities (including layout of venues)

**Eating and drinking**

While visiting London almost two thirds of respondents (65%) either did or expected to go out to eat and/or drink and shop. A fifth (20%) either planned to or did drink and eat out during their visit. Only 10% did not do any of these activities.

The table below breaks out the different types of food and drinking establishments flagging up the % that either used or considered using each.

Table 2.11 Proportion who use each type of eating/drinking establishments and influence on decision

| Type of Establishment | 2012% Using | 2009% Using | 2012% Considering | 2009% Considering | 2012Neither visited nor considered |
|---|---|---|---|---|---|
| Independent cafes/coffee bars | 58% | 59% | 25% | 24% | 16% |
| Traditional pubs | 56% | 43% | 25% | 26% | 20% |
| Independently run restaurants | 56% | 57% | 27% | 26% | 17% |
| Restaurant chains | 54% | 55% | 28% | 31% | 18% |
| Coffee shop chain | 47% | n/a | 26% | n/a | 27% |
| Sandwich bars | 46% | n/a | 27% | n/a | 28% |
| Hotel restaurants | 38% | 39% | 26% | 33% | 37% |
| Hotel bars | 36% | 34% | 19% | 26% | 45% |
| Wine bars/Bistros | 26% | n/a | 24% | n/a | 50% |
| Gastro pubs | 24% | n/a | 26% | n/a | 50% |
| Night clubs | 11% | 28% | 13% | 31% | 77% |

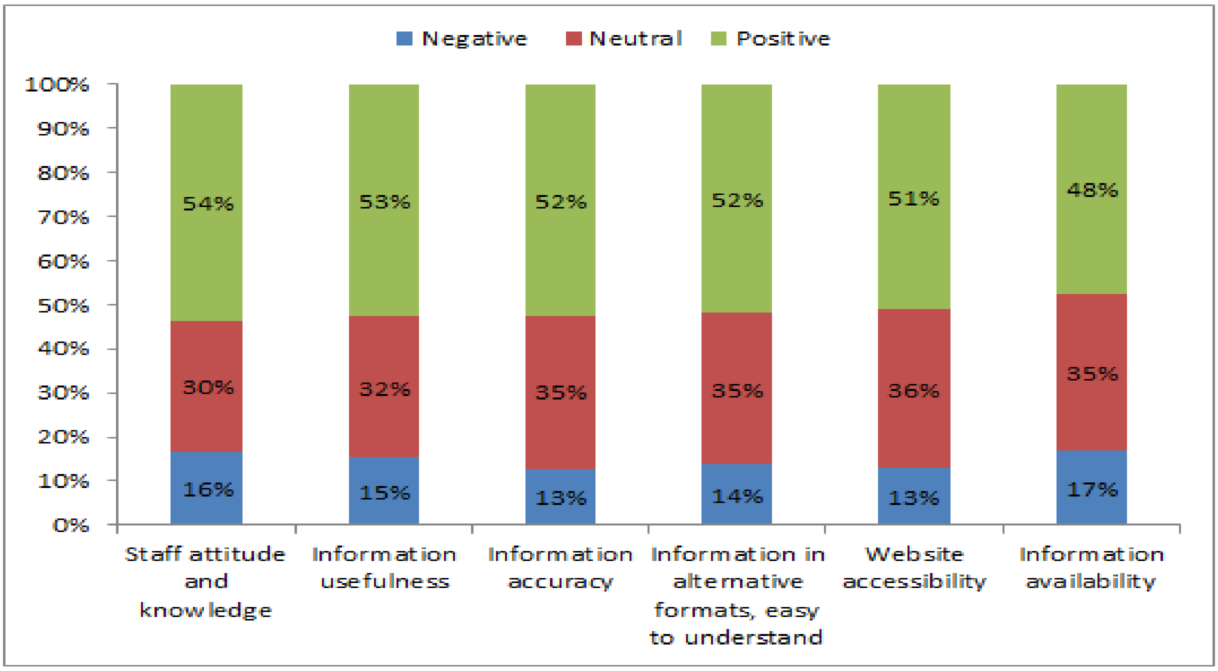
Over half of respondents sought independent outlets or traditional pubs (people with learning disabilities were more likely to visit traditional pubs as well as Londoners). Night clubs were least frequented or even considered. Londoners were less likely to visit or consider visiting hotel bars or restaurants.

Overall, there was little difference between 2009 and 2012 in people's usage and considerations to use places to eat and drink. The only exceptions were a greater use of traditional pubs and fewer people considering going to Night clubs.

Eating and drinking outlets in London were rated in terms of how they met people's access needs. Chart 2.16 relates to pre-visit information and staff attitudes/knowledge and Chart 2.17 relates to respondent's experiences during their visit.

Overall, respondents were positive about pre-visit information accessible factors. People with learning disabilities were least positive on all the listed factors. Londoners were more positive about website accessibility and usefulness of information but were less positive on the availability of and accessible format of information and staff attitude/knowledge.

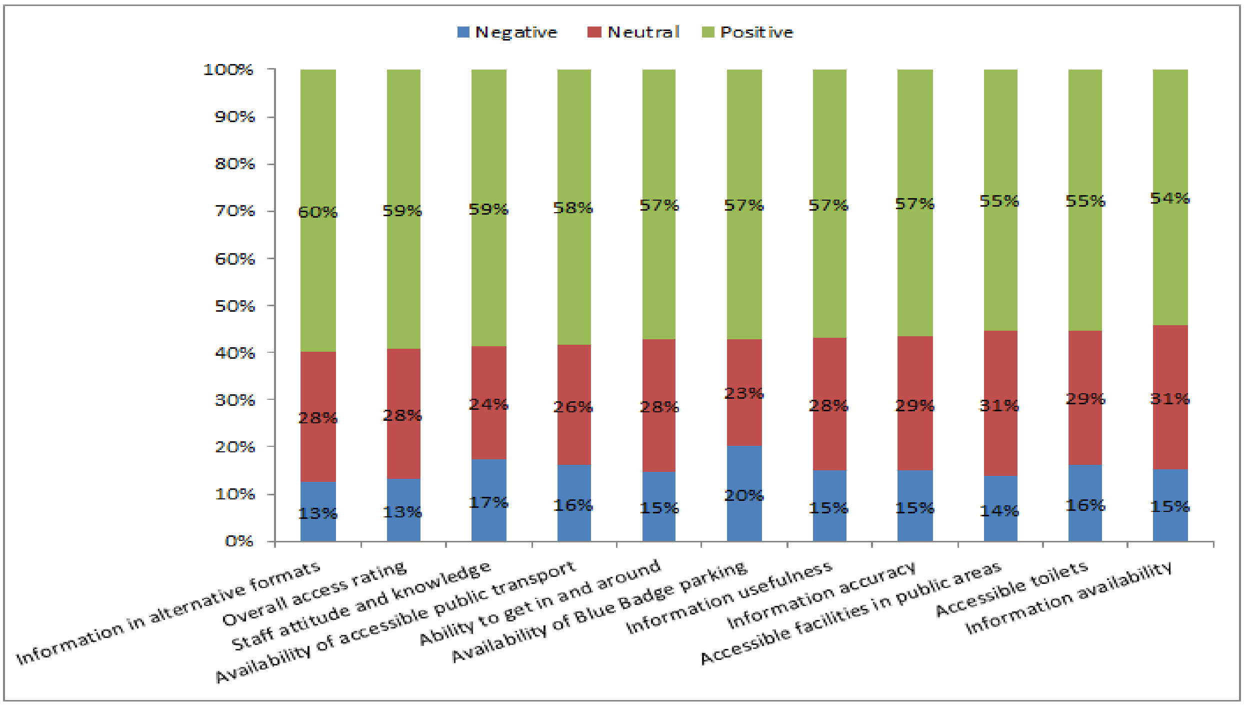
Chart 2.16 Rating of London's eating and drinking outlets to meet access needs pre-visit




People were positive about information and facilities during their visit and gave an overall access rating of 59%.

Londoners rated all the factors less positively than non-Londoners and older people (65+years) were more positive than other respondents. Respondents with sensory disabilities were more positive about the availability of accessible public transport to venues, blue badge parking and being able to get in and around London whereas people with mobility disabilities or learning disabilities were less positive about staff knowledge/attitudes, availability of public transport to venues, accessible facilities and toilets and easy to understand information.

Chart 2.17 Rating of London's eating and drinking outlets to meet access needs during their visit




Those who rated places negatively did so mainly because of access to and within the venue especially for toilets. A couple of responses related to eating places meeting particular dietary needs. For example:

*"A lot of places have disabled facilities and in a majority of areas they are good but trying to access them in a wheelchair is hard due to lack of space, a lot of time you have to manoeuvre around fixtures"*

*"when you get there [bar/restaurant] the entrance & access to toilets usually involve steps"*

*"Not many restaurants are focused on disability - tables crowded together makes it difficult for someone walking with a stick, impossible in a wheelchair"*

*"Past experience and poor availability of medically necessary diets particularly gluten free and poor staff attitude/concern towards it"*

Provision of accessible eating and drinking places had some influence (40%) on people's decision to visit London. 30% thought that these accessible places had a 'strong' influence and 21% no influence.

Main cities/areas with good hostelry facilities are:

London
America (including Florida, New York, Orlando, Palm Springs)
Sydney
Edinburgh

Main reasons for citing these places were:

- well-designed facilities/ease of access
- attitude
- prices
- awareness of different dietary needs and
- helpful/friendly staff

**Shopping**

We asked if they had visited or considered specific shops or shopping centres. London visitors were also asked to rate shop/shopping centre best for access.

Oxford Street was the most visited and was one of the destinations that all types of visitor perceived to be the best for access.

Shopping centres out of Central London were more likely to be neither visited nor considered by respondents.

Overall top areas with best access were:

Bond Street (16%)
Oxford Street (16%)
Harrods/Knightsbridge (15%)
Covent Garden (12%)

Top three for best access for people with mobility disabilities were:
Harrods/Knightsbridge
Covent Garden
Oxford Street

Top three for best access for people with sensory disabilities were:

Covent Garden
Oxford Street
Harrods/Knightsbridge

Top three for best access for people with learning disabilities were:
Oxford Street
Westfield, London
Greenwich and Harrods/Knightsbridge (equal third)

The table below shows the shopping districts visited and considered and compares these (where possible) with 2009 findings:

Table 2.12 Rating of selected shops and shopping centres

| Shop/Retail centre | 2012% Visited | 2009% Visited | 2012% Considered | 2009% Considered | 2012 % Neither visited nor considered | 2012 % Best for access |
|---|---|---|---|---|---|---|
| Oxford St | 56% | n/a | 18% | n/a | 26% | 16% |
| Covent Garden | 46% | 57% | 21% | 19% | 32% | 12% |
| Harrods/Knightsbridge | 44% | 47% | 19% | 20% | 37% | 15% |
| Regents St | 43% | n/a | 21% | n/a | 37% | 3% |
| Selfridges | 39% | 49% | 20% | 20% | 41% | 7% |
| Bond St | 39% | n/a | 23% | n/a | 38% | 16% |
| Camden | 26% | 33% | 15% | 21% | 58% | 4% |
| Carnaby Street | 26% | n/a | 22% | n/a | 52% | 1% |
| Kensington High St | 25% | 34% | 21% | 22% | 55% | 2% |
| Portobello Road | 25% | n/a | 22% | n/a | 53% | 2% |
| King's Road | 22% | n/a | 21% | n/a | 57% | 1% |
| Borough Market | 20% | 27% | 15% | 12% | 65% | 2% |

| | | | | | | |
|---|---|---|---|---|---|---|
| Canary Wharf | 20% | 33% | 22% | 13% | 58% | 5% |
| Greenwich | 19% | n/a | 18% | n/a | 62% | 3% |
| Brick Lane | 18% | n/a | 19% | n/a | 63% | 1% |
| Brent Cross | 16% | 24% | 17% | 15% | 67% | 6% |
| Croydon | 15% | n/a | 16% | n/a | 70% | 4% |
| Westfield, London | 13% | n/a | 19% | n/a | 68% | 5% |
| Westfield, Stratford | 12% | n/a | 17% | n/a | 71% | 6% |
| Bayswater | 11% | n/a | 20% | n/a | 69% | 1% |
| Kingston | 11% | n/a | 18% | n/a | 71% | 2% |
| Ealing | 10% | n/a | 18% | n/a | 72% | 1% |
| Other | 10% | n/a | 12% | n/a | 78% | n/a |

Places such as Covent Garden, Selfridges, Camden, Kensington High Street, Canary Wharf and Brent Cross were less likely to have been visited or considered by respondents in 2012 than in 2009.

In terms of London's retail offer meeting people's access needs, charts 2.18 and 2.19 display ratings for pre-visit and during a visit to London.

All but information in alternative/easy to understand formats was positively rated by half or more of respondents. During the London visit overall access rating received a positive rating from 60% of respondents (Chart 2.18). The three least positive ratings were for:

- Information in alternative/easy to understand formats (49% positive, but 27% did not know)
- Availability of shop mobility scheme (45% positive, but 32% did not know)
- Availability of Blue Badge parking (40% positive, but 32% did not know)

Around half of respondents were positive to shopping/retail centres. Those who did rate these outlets less positively did so because of ease of access to shops, attitudes of staff to help customers with disabilities, smaller shops not being accessible (compared with large department stores), uneven pavements and road works.

Chart 2.18 London's shops and shopping centres rated by ability to meet access needs pre-visit

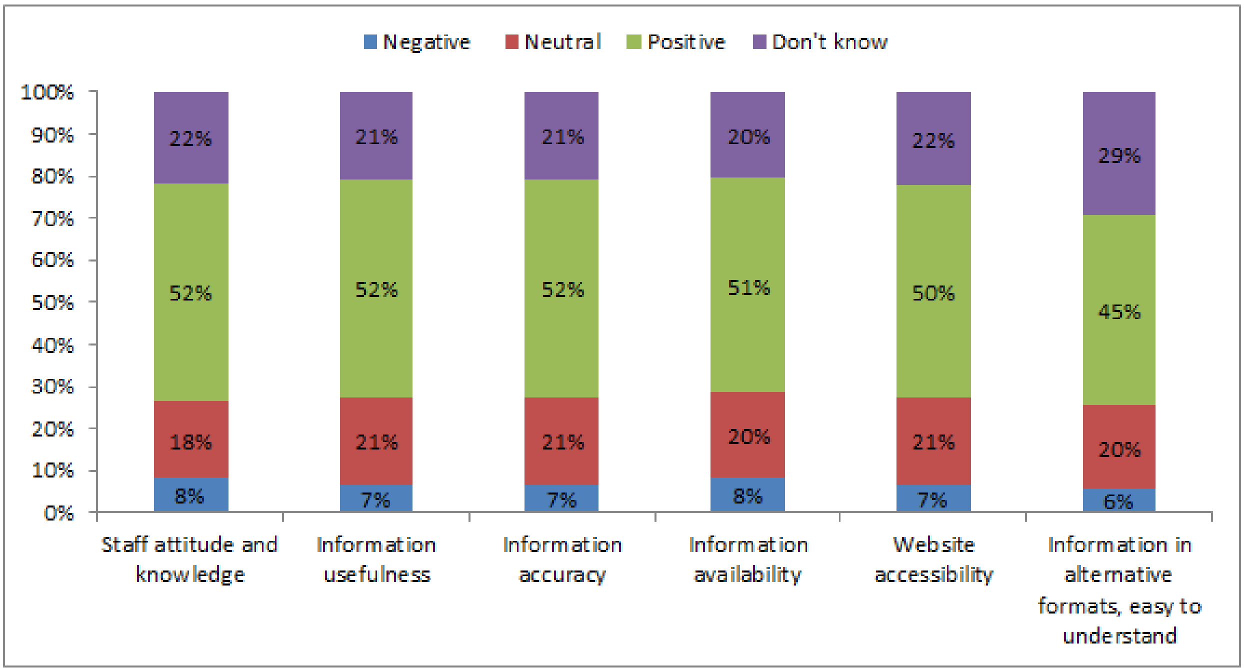
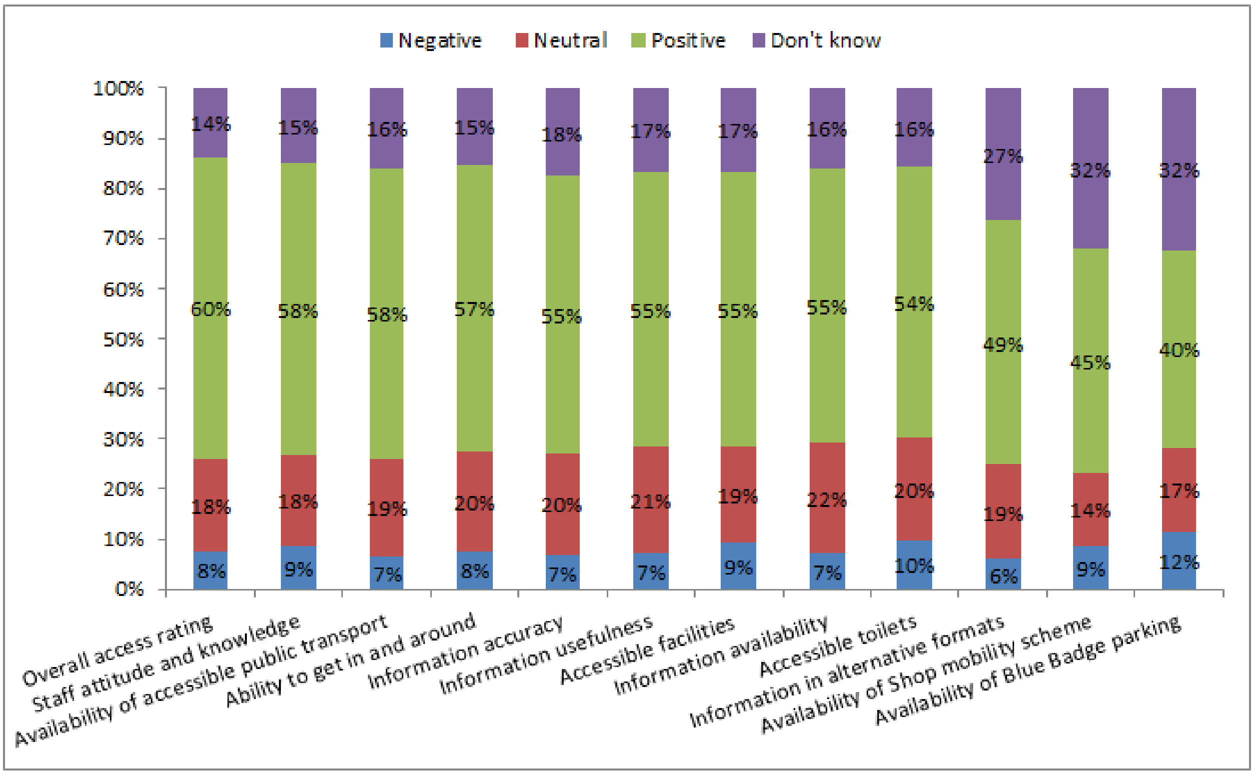



Chart 2.19 London's shops and shopping centres rated by ability to meet access needs during a visit.



The provision of accessible shops and shopping environments had less influence on people's decision to visit London with almost a third (32%) reporting that this had no influence on their decision. Only 18% of people with learning disabilities considered access to shops and centres to have no influence on their decision to visit.

Just over a fifth (21%) thought accessible shops and centres were a 'strong' influence whereas 36% thought there was 'some' positive influence on their decision.

Cities/countries rated as having the most accessible shops and shopping environments are:

- London
- York
- Barcelona
- Newcastle
- Sydney

Main reasons cited for these cities include:

- ease access to shops/centres;
- more accessible shops to visit within the retail areas (including wide range of shops)
- ease of travel around the cities (including pedestrianized areas)
- helpful/polite staff and
- Familiarity with the area.

**Areas of London visited – public realm**

We asked respondents for their opinions on visiting public places in London. A number of public areas were listed (table 2.13)

Table 2.13 Public places visited or would consider visiting

| Public Places | Destination(s) area(s) visited/would consider visiting | Main destination/area visited |
|---|---|---|
| Oxford Street | 54% | 16% |
| Trafalgar Square | 51% | 7% |
| Regent Street | 39% | 2% |
| City of London | 37% | 10% |
| King's Cross/ St Pancras | 35% | 3% |
| Leicester Square | 33% | 4% |
| Parliament Square | 32% | 2% |
| Knightsbridge | 30% | 5% |
| Camden Town | 21% | 4% |
| Portobello | 20% | 2% |
| Southbank | 20% | 3% |
| Canary Warf Riverside | 18% | 4% |
| Greenwich Town centre | 14% | 1% |
| Shepherds Bush | 12% | 1% |
| Exhibition Road | 10% | 3% |
| Victoria Park | 10% | 0% |
| North Greenwich | 8% | 1% |
| Stratford Town centre | 8% | 2% |
| Shoreditch/Hoxton | 4% | 1% |
| Lea Valley Park | 4% | 1% |
| Hoxton | 2% | 0% |
| None of these | 22% | 27% |

Main tourists' centres, Oxford Street and Trafalgar Square were the most likely public places to consider visiting although only 16% and 7% respectively visited these two destinations. Top two places for respondents with sensory and mobility disabilities were Oxford Street and City of London, whereas for people with learning disabilities the main destinations were Shepherds Bush and Southbank. Oxford Street was the most frequented destination for people with other disabilities and Londoners.

Top three places for accommodation are:

City of London
Oxford Street

Kings Cross/St Pancras

Top five areas for bars/clubs/restaurants:

City of London
Oxford Street
Southbank
Camden Town
Knightsbridge

Top five areas for public transport in and around the area:

Oxford Street
City of London
Trafalgar Square
Kings Cross/St Pancras
Camden Town

Top five areas for attractions:

City of London
Trafalgar Square
Exhibition Road
Canary Wharf
Oxford Street

Top five areas for shopping:

Oxford Street
City of London
Knightsbridge
Camden Town
Regent Street/Trafalgar Square (equal rating)

Top five places for open spaces/parks/green spaces:

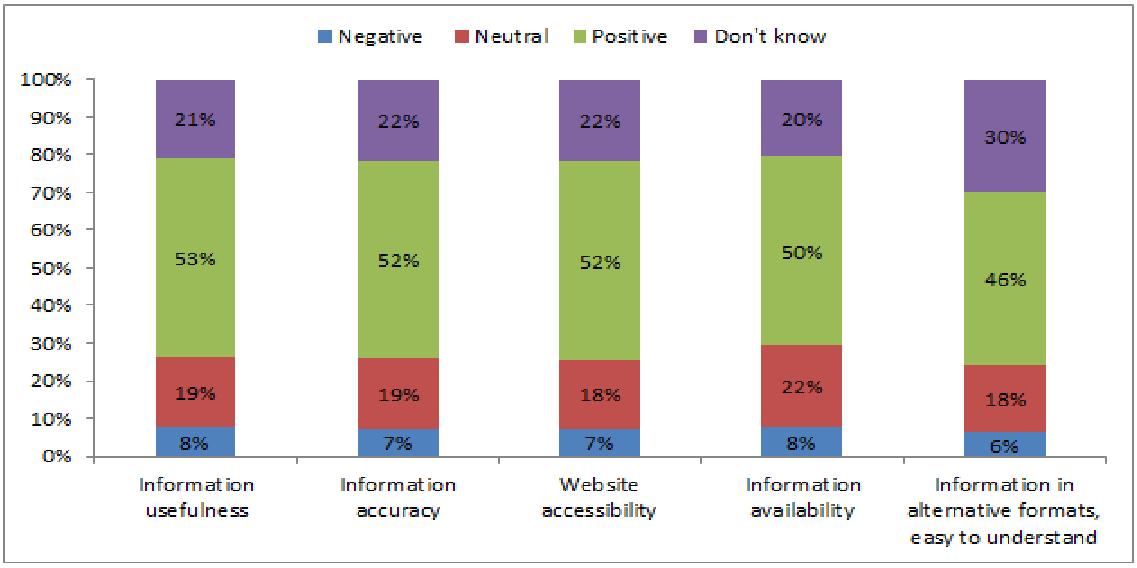
City of London
Trafalgar Square
Oxford Street
Canary Wharf
Greenwich Town/Knightsbridge (equal)

Only 16 responses were given for Olympic /Paralympic venues with the main venues being Stratford Town and City of London.

Charts 2.20 and 2.21 rank public places for access needs pre-visit and during the visit to London.

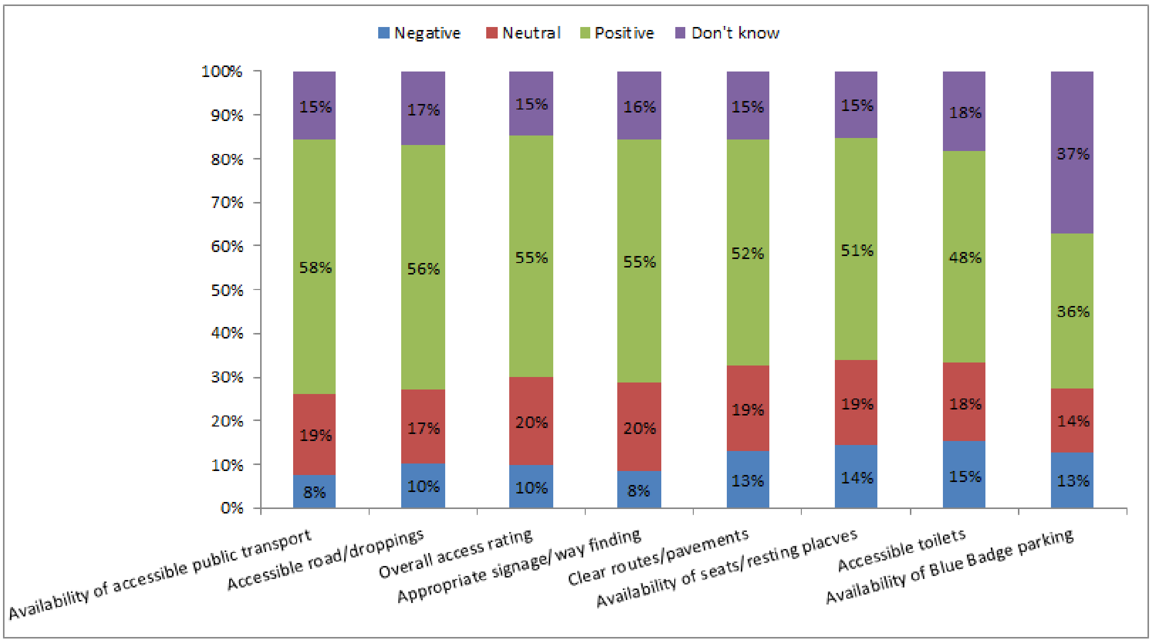
As with earlier ratings of pre-visit sources of information over half rated these features positively. Information presented in alternative/easy read formats was less positively rated, although almost a third (30%) of responses were 'don't know' (Chart 2.20)

Chart 2.20 Rating of London's information about public areas and how they meet access needs pre-visit




Respondents rated London access to public transport the most positive (58%) during their visit with accessible roads and pavements and street signage also positively rated by more than half of participants. However, accessibility of toilets was rated positively by less than half (48%) of respondents and just over a third (36%) of people considered the availability of blue badge parking to be good/excellent.

Chart 2.21 Rating of London's public areas and how these meet access needs during a visit




Overall, accessibility to public places did not have a strong positive influence on people's decision to visit London with under a quarter (23%) feeling that it had a 'strong' influence on their decision to visit whilst for almost a third (32%) accessibility had no influence on their decision.

Cities people have visited and considered the most accessible are:

- Sydney
- Vegas
- Manchester
- Vancouver
- Nottingham

Main reasons given include:

- design of the city - accessibility between buildings/centres or places not far apart from each other
- familiarity of the area
- good for sightseeing
- cheap transport
- good accurate information

- area is flat, traffic free and clean

**London ratings – staff attitudes and toilets**

Staff attitudes towards people who have disabilities and access to decent toilets are important when visiting places. The sections below summarise the ratings given for these two areas. Where possible we make comparisons with findings in 2009.

**Staff attitudes and knowledge**

16% of respondents ranked staff attitudes and knowledge as their top priority when they consider their access needs. Positive ratings (7 -10) for aspects of staff support in relation to different venues, pre- and during visits to London have been detailed in the table below.

Table 2.14 Positive ratings of staff attitudes and knowledge

| Positive Ratings (7-10) | Transport | Accommodation | Attractions | Eat & drink | Shopping |
|---|---|---|---|---|---|
| Staff Attitude/knowledge Pre-visit 2012 | 55% | 51% | 61% | 54% | 52% |
| Staff Attitude/knowledge Pre-visit 2009 | 33% | 62% | 54% | 30% | 23% |
| Staff attitude/knowledge During visit 2012 | 55% | 54% | 62% | 59% | 58% |
| Staff Attitude/knowledge During visit 2009 | 35% | 62% | 61% | 46% | 43% |

Respondents were more positive on all facilities compared with 2009. Attractions were rated the most positive (61%) both pre- and during their visit. However, pre-visit accommodation received less positive ratings in 2012 compared with 2009.

Table 2.15 summarises the proportion of negative ratings (0-4) recorded for each of the facilities and compares the proportions with the survey conducted in 2009. Respondents generally were less negative about all aspects of their pre-visit, especially for shopping, than in 2009. During their visit to London, attitudes were much less negative for transport, accommodation, attractions and shopping.

Table 2.15 Negative ratings of staff attitudes and knowledge

| Negative Ratings (0-4) | Transport | Accommodation | Attractions | Eat & drink | Shopping |
|---|---|---|---|---|---|
| Staff attitude/knowledge Pre-visit 2012 | 12% | 9% | 8% | 16% | 8% |
| Staff attitude/knowledge Pre- visit 2009 | 14% | 10% | 11% | 12% | 29% |
| Staff attitude/knowledge During visit 2012 | 13% | 10% | 8% | 17% | 9% |
| Staff attitude/knowledge During visit 2009 | 30% | 21% | 17% | 15% | 28% |

### 1.1.3 Toilets

The availability of accessible toilets is a necessity for people with disabilities. In 2009 only two comparable questions were asked about toilets – provision of accessible toilet facilities for transport and in the public realm.

Table 2.16 sets out the positive ratings across facilities and table 2.17 negative responses to accessible toilets.

Table 2.16 Positive ratings of accessible toilets

| Positive Ratings (7 -10) | Transport - in stations | Transport - on trains | Accommodation | Attractions | Eat & drink | Retail | Public Realm |
|---|---|---|---|---|---|---|---|
| Availability of accessible | 47% | 39% | 50% | 52% | 55% | 54% | 48% |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| toilets 2012 | | | | | | | |
| Provision of accessible toilet facilities 2009 | 18% (Transport general) | n/a | n/a | n/a | n/a | n/a | 22% |

Table 2.17 Negative ratings of accessible toilets

| Negative Ratings (0 - 4) | Transport - in stations | Transport - on trains | Accommodation | Attractions | Eat & drink | Retail | Public Realm |
|---|---|---|---|---|---|---|---|
| Availability of accessible toilets 2012 | 24% | 22% | 12% | 12% | 16% | 10% | 15% |
| Provision of accessible toilet facilities 2009 | 44% (Transport general) | n/a | n/a | n/a | n/a | n/a | 37% |

Hostelries and shopping centres/retail outlets were rated the most positive and least positive was accessibility of toilets on trains with just over a third rating them positively and almost a quarter of respondents rating them negatively. Participants were much more positive in 2012 than 2009 about accessibility to toilets on transport and in the public realm.

**Appeal of the Olympic and Paralympic Games**

The majority of respondents (71%) watched the Olympic Games at home with a minority visiting London to either ‘soak up the atmosphere’ or watch an event.  Only six respondents were involved in the Olympic Games (and 7 for the Paralympics) either as a volunteer or part of the Olympic/Paralympic family (table 2.18).

A lower proportion of respondents watched the Paralympics at home and over a third (34%) claimed to not be involved in the Paralympics.

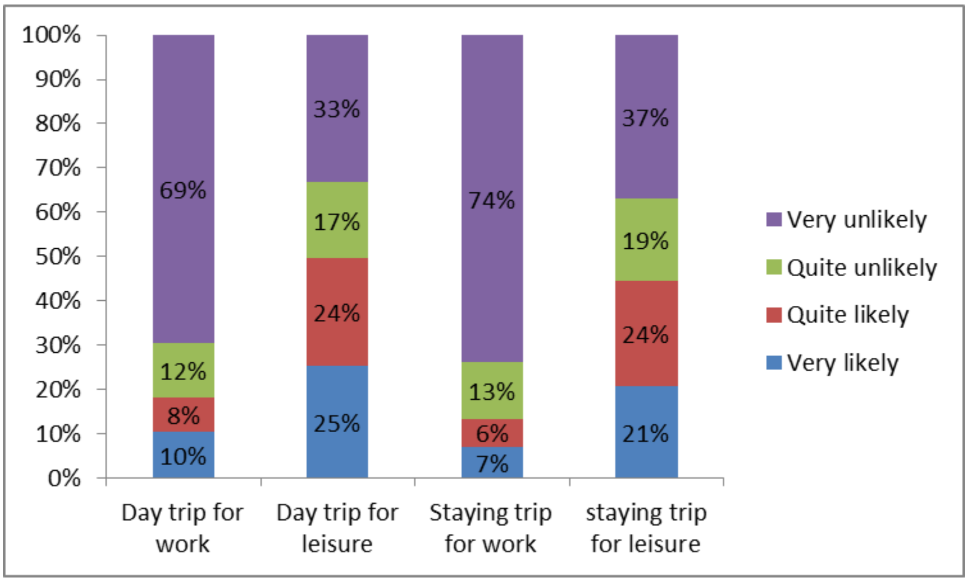
Table 2.18 Involvement with the Olympic/Paralympic Games

| Level of Involvement | Olympic Games% | Paralympic Games% |
|---|---|---|
| Watched at home | 71% | 60% |
| Came to London to soak up the atmosphere | 6% | 5% |
| Came to London to watch an event(s) | 6% | 5% |
| Volunteered at the Olympics/Paralympics as a Games maker/London Ambassador | 1% | 1% |
| Participated in the games as part of the Olympic/Paralympic family | 1% | 1% |
| None of these | 26% | 34% |

**Future visits to London**

Respondents thought that their visit to London in the next 12 months is likely to be for leisure reasons.

Chart 2.22 Likelihood of visiting London in the next 12 months




Over half (51%) thought that they would be likely to visit London in the next 12 months if it is more accessible demonstrating the importance of an accessible capital city.

## Other formats and languages

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### Chinese

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### Hindi

यदि आप इस दस्तावेज की प्रति अपनी भाषा में चाहते हैं, तो कृपया निम्नलिखित नंबर पर फोन करें अथवा नीचे दिये गये पते पर संपर्क करें

### Vietnamese

Nếu bạn muốn có văn bản tài liệu này bằng ngôn ngữ của mình, hãy liên hệ theo số điện thoại hoặc địa chỉ dưới đây.

### Bengali

আপনি যদি আপনার ভাষায় এই দলিলের প্রতিলিপি (কপি) চান, তা হলে নীচের ফোন্ নম্বরে বা ঠিকানায় অনুগ্রহ করে যোগাযোগ করুন।

### Greek

Αν θέλετε να αποκτήσετε αντίγραφο του παρόντος εγγράφου στη δική σας γλώσσα, παρακαλείστε να επικοινωνήσετε τηλεφωνικά στον αριθμό αυτό ή ταχυδρομικά στην παρακάτω διεύθυνση.

### Urdu

اگر آپ اِس دستاویز کی نقل اپنی زبان میں چاھتے ھیں، تو براہ کرم نیچے دئے گئے نمبر پر فون کریں یا دیئے گئے پتے پر رابطہ کریں

### Turkish

Bu belgenin kendi dilinizde hazırlanmış bir nüshasını edinmek için, lütfen aşağıdaki telefon numarasını arayınız veya adrese başvurunuz.

### Arabic

إذا أردت نسخة من هذه الوثيقة بلغتك، يرجى الاتصال برقم الهاتف أو مراسلة العنوان أدناه

### Punjabi

ਜੇ ਤੁਹਾਨੂੰ ਇਸ ਦਸਤਾਵੇਜ਼ ਦੀ ਕਾਪੀ ਤੁਹਾਡੀ ਆਪਣੀ ਭਾਸ਼ਾ ਵਿਚ ਚਾਹੀਦੀ ਹੈ, ਤਾਂ ਹੇਠ ਲਿਖੇ ਨੰਬਰ 'ਤੇ ਫ਼ੋਨ ਕਰੋ ਜਾਂ ਹੇਠ ਲਿਖੇ ਪਤੇ 'ਤੇ ਰਾਬਤਾ ਕਰੋ:

### Gujarati

જો તમને આ દસ્તાવેજની નકલ તમારી ભાષામાં જોઈતી હોય તો, કૃપા કરી આપેલ નંબર ઉપર ફોન કરો અથવા નીચેના સરનામે સંપર્ક સાધો.

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