
GAMES CHANGER?

An Evaluation of London as an Accessible Visitor Destination

MAYOR OF LONDON

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Accessible visitor destination.

**A REPORT BY LIVETOURISM TO THE GREATER
LONDON AUTHORITY
MARCH 2013**

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1 EXECUTIVE SUMMARY

Mayor of London Boris Johnson pledged to make London's Olympic and Paralympic Games the most accessible ever. To help meet this pledge, in 2009 the London Development Agency (LDA) commissioned a study to assess the accessibility of London as a visitor destination and its readiness to welcome disabled visitors – 'Is London Ready to Welcome Disabled Visitors?'

Following the Games, the Greater London Authority (GLA) has commissioned LiveTourism (working with Arkenford Leisure) to replicate the study to evaluate progress made since 2009 and make recommendations for a continuing legacy programme.

London's can-do attitude and much celebrated visitor welcome from the Games Makers created a positive experience subsequently communicated around the world. Wider perceptions of disability have improved dramatically. Global success on this scale has created a legacy and an expectation of what London can deliver in the future. The IPC Athletics World Championships in 2017 will be a major test of whether London can live up to its enhanced reputation.

This report finds that London has become a more accessible city across all aspects of the visitor experience since 2009. There are now opportunities to build on achievements to date.

Four key recommendations for a continuing legacy programme have emerged from the study:

Key Recommendations

- Create an Accessible Visitor Experience Concordat with major stakeholders representing every sector of the visitor journey to help continue a coordinated approach to improving London's accessibility
- Actively promote London as an accessible visitor destination and promote the improvements made to London's accessibility
- Review and consolidate information provided to disabled visitors
- Encourage Boroughs to adopt a consistent approach to accessibility and inclusion

This study comprises three strands of research and supporting case studies:

• **Consumer research** into the views of disabled people and carers based on 511 online quantitative interviews undertaken between October and November 2012

• **Stakeholder research** comprising 46 face-to-face and telephone interviews with businesses, public, private and voluntary sector organisations (a number of which contributed to the 2009 research).

- **Desk research** to identify reports, studies and initiatives developed or completed since 2009
- **A series of case studies** (written and video) illustrating good practice in delivering an accessible visitor experience.

The Visitor Journey concept is at the heart of the report's methodology and recommendations. This recognises that the visitor experience is more than the time spent in the destination; it starts with the first decision to plan a trip, through to returning home and remembering their experience. A seamless visitor experience requires businesses and organisations to recognise the role they play in creating, delivering or influencing each stage of the journey.

1.1 Key consumer findings

Between 2009 and 2012 consumer ratings of accessibility have improved across most aspects of the London visitor experience. Shopping recorded a 46% improvement (from 14% of consumers rating positively in 2009 to 60% in 2012) and transport recorded a 24% improvement (from 31% to 55%).

Findings also indicate a more consistent level of access across the visitor journey resulting in a more seamless experience. In 2009, positive consumer ratings ranged widely: from a low of 14% for shopping to a high of 62% for accommodation. In 2012, positive ratings are all within a 7% range (53%-60%).

However the positive ratings equate to an average of 56% across all sectors. Put in perspective a business achieving just over 50% satisfaction rates would consider there is still much to do to improve the customer experience. To ensure that the Games leave a meaningful legacy in the form of an accessible city, so must London.

While findings reflect a significant shift in the views of disabled people, including that London is now regarded as being more (or at least equally) accessible than other city destinations, a caveat is the impact that the Games and the associated media coverage has had on customer perceptions. Balancing the positive consumer research with stakeholder interviews and records of what is happening 'on the ground' the view is that there is 'still work to be done'.

Transport: an increase; 55% of consumers rated transport positively for access (+24% increase in ratings from 2009). Consumers were more positive about: the availability of ramps/lifts, induction loops and tactile information panels; consistent audio/visual updates and staff attitude and knowledge. Reasons given for a low rating included out-of-date information and advice not being readily available.

Accommodation: a decline (-9%) in positive access ratings to 53%. Mid-range hotels continue to be the most popular choice, despite a -16% decline in those using them since 2009. B&Bs are slightly more popular than they were, though a higher proportion of people consider them (23%) than actually use them (15%).

Attractions: little change; 59% rated attractions positively for access in 2012. Strongest ratings and improvements were for information provision and staff; weaker ratings for onsite accessible facilities especially the provision of blue badge parking. 13% visited an Olympic/Paralympic venue.

Eating and drinking: an increase (+12%) in positive access ratings to 59%. Some of the largest increases in ratings relate to information and staff attitude.

Shopping: an increase (+46%) in positive access ratings to 60%. Improvements recorded across the board, especially in relation to information provision and staffing.

Public realm: an increase (+16%) in positive access ratings to 55%. Improved ratings for accessible road crossings/dropped kerbs, clear routes and pavements, signage/way finding.

Access needs: visitors ranked their most important access needs. They listed the top three as:

- Blue badge parking
- Step-free access onto public transport
- Staff attitude and knowledge

Significant improvements have been recorded in the perceptions of staff attitude and knowledge and investment has been made in extending step-free access.

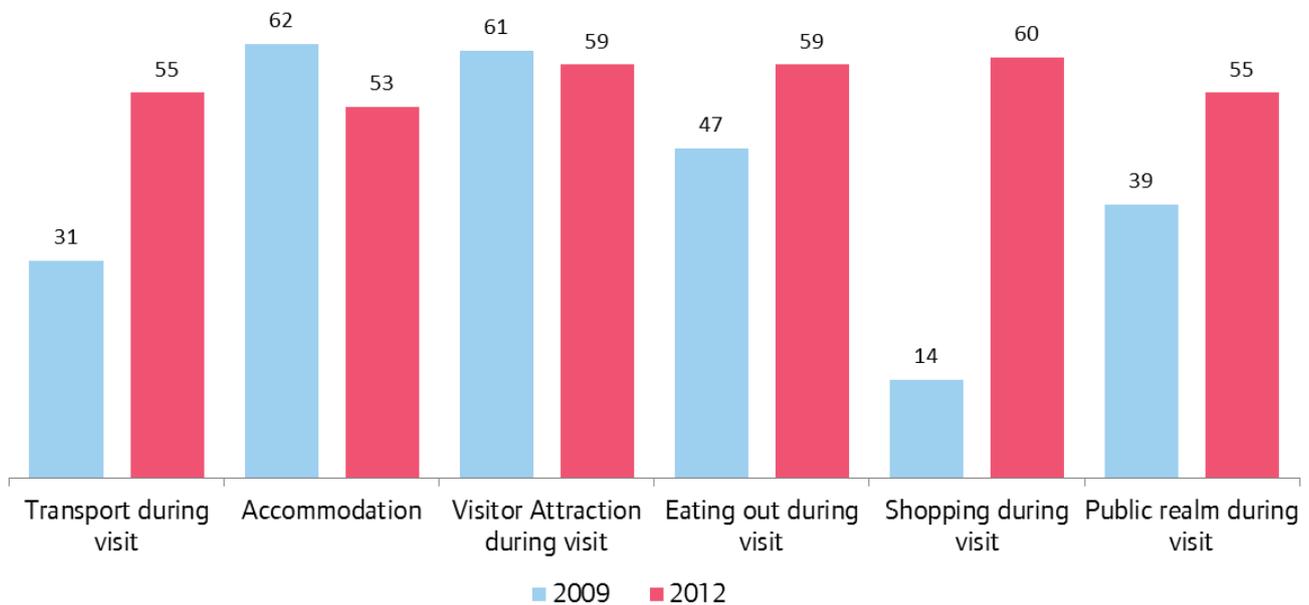
However, while blue badge parking is the most important factor for visitors, customer awareness of the scheme has declined (-25%) and availability of information is a key issue. Awareness of other access schemes and initiatives is also lower, notable exceptions being access statements and the National Accessible Scheme.

Similarly in relation to the websites visitors use before a trip, dedicated access sites have lost popularity and more visitors are using businesses' own sites. Tourist board sites, while seeing lower usage than in 2009, remain popular (44% used prior to their visit).

It is our view that while the research confirms significant improvements London still has some way to go and more work to do to ensure that the Olympic and Paralympic Games leave a meaningful legacy in the form of an accessible city.

The chart below reflects overall access scores of key areas rated on a scale of 1 – 10 and shows the change in positive ratings – i.e. those scoring from 7 to 10 – as a comparison to 2009.

Overall Access Ratings – percentage positive (7 – 10)



1.2 Key stakeholder and desk research findings

Seven key themes emerged from interviews with stakeholders and desk research.

1.3 The Games provided a catalyst, focus and momentum for access improvements

Every stakeholder interviewed spoke about the positive impact of the Games in improving the accessibility of London's visitor experience. London's achievements exceeded all expectations.

The Games created a reason, timeline and deadline for making access happen. Achievements came about because organisations bought into the concept of the Games as an experience and were committed to working differently to make change happen. Flagship projects such as the South Bank Thames Walk improvement programme were the result of organisations working together and recognising their role in delivering a seamless visitor journey.

1.4 Maintaining the post-Games legacy

Stakeholders reported concerns about maintaining the quality of experience post Games. The Games created a momentum and, despite the challenges resulting from economic uncertainty and austerity measures, there was a real determination to deliver. Without the focus of the Games, stakeholders are now concerned that organisations will revert to their 'normal' ways of working.

While appreciating 'Games time' can't realistically be replicated there is a risk of not sharing or adopting the valuable lessons learned.

1.5 Existing 'islands of good practice' need to be linked to realise their full potential

All stakeholders cited new developments and good practice in accessibility happening around London e.g. Oxford/Regent Street crossing, the South Bank Thames Walk improvement programme and assisted theatre performances. There are a number of standout attractions, accommodation and

Business Improvement Districts (BIDs) undertaking innovative works. However many examples are potentially standalone ‘islands of good practice’. For London to become truly accessible, the visitor needs to know where they are and be able to move easily between them.

1.6 Low awareness of available training and support

A large number of training and support resources are available for improving accessibility including ‘Destination London’ – the GLA’s online course for tourism and hospitality teams. However, low awareness among businesses about what is available continues. Organisational change to tourism in London requires more consideration about how best to channel resources to businesses. London & Partners has day to day contact with tourism and hospitality businesses therefore the corporate website would be the natural place to host Destination London.

1.7 Boroughs are balancing political agendas with evermore challenging funding allocations

The competing demands of limited resources continue to affect London boroughs’ ability to improve accessible facilities and services for visitors. Access Officer and Tourism Officer posts continue to decline. Also there has been a loss of focus on visitors: boroughs’ ‘disability’ agendas are now more concentrated on for example social welfare, benefits and housing.

Key findings relating to Boroughs:

- Blue badge parking – with no one London wide online/printed reference source covering all Boroughs, information about locations and restrictions remains fragmented and difficult to find for visitors.
- Public realm improvements – boroughs interpret guidelines differently resulting in inconsistency of approach (and the potential for legal challenge).
- Planning – some Business Improvement Districts (BIDs) report that planning policies are preventing access improvements
- Accessible toilets – boroughs are increasingly seeking alternative ways of providing facilities due to the unsustainable cost of upkeep
- Information collection – the number of access audits carried out for hospitality / tourism businesses and organisations has increased but there are concerns about data collection and accuracy. The resulting data rarely feeds through to mainstream visitor websites

1.8 Significant improvements made in London’s transport network

All stakeholders applauded the step-change in the accessibility of London’s transport network, while recognising that there is a long way to go.

London Underground – massive investment and improvement since 2009. However at 150-years-old, it remains the most inaccessible part of the city’s transport system and stakeholders urge the Mayor not to ‘take his foot off the pedal’. Tackling London’s interchange gateways and routes to major attractions are key factors in improving overall visitor accessibility. For example, there are now

more step-free stations on the network, but South Kensington, which feeds several of London's must-see attractions, is still not one of them.

Overground – full upgrade since 2009 with platform extensions and a new accessible fleet. Concerns going forward are a lack of station staff and a move to automated services.

Buses – led the way with the world's first wheelchair accessible service. Despite improved facilities and training there are reports of frustration e.g. ramps not working properly, drivers not pulling into the kerb correctly. New bus driver training is planned to be introduced from summer 2013.

Taxis – all 22,000 black cabs are accessible. Additional improvements made include more colour contrast, swivel seats and induction loops.

River services – public sector facilities are mostly accessible, a slightly more mixed picture for the private sector.

Airports – despite speculation of being underprepared for the Games, the two main London airports responded well with increased staff levels and mobility equipment. Stakeholders flagged up that this enhanced level of service is not possible outside 'Games time' but also recognised that lessons learnt can be taken forward and services adapted where possible.

Pedestrian – many improvements made including pedestrian countdown systems, 94% of standalone pedestrian crossings with audible or tactile signals and continued work on the 'Legible London' way finding system.

1.9 Access information is not reaching the widest audience

Since 2009, the information available to disabled visitors has undoubtedly increased, including the development of the specialist access website – 'Inclusive London' which offers information on tourism businesses across the capital.

Inclusive London website and App has received over 12 million hits since its launch, has over 35,000 businesses registered and the App was named App of the week by the Sunday Times. This shows the value of providing such detailed information. However looking forward, stakeholders and disabled people want to see more access information available in mainstream provision and this should be the public sector focus. Private sector specialist sites will continue meeting the needs of a niche audience without public sector intervention. Public sector promotion of them however is essential. In the long term integrating access information into mainstream sites will reach a much larger audience including those people who don't see themselves as having a disability.

The above findings sit within a context of political, legislative and structural changes since 2009 which collectively carry implications for the delivery of accessibility improvements. They include the launch of the Equality Act 2010 (stakeholders flagged up a concern that 'disability' is losing prominence as a result); reorganisation of tourism delivery in London (loss of the quality development role for London and no specialist tourism advisor or access champion); on-going decline in the number of London borough access officers and increasing fragility of many local access groups.

For this reason the report purposely focuses on progressive ways to maintain momentum towards the ultimate aim of an accessible city. The BIDs represent one such opportunity. They have increased in number (13–25) and have a greater impact on the visitor experience. Stakeholders identify that the pockets of investment made by BIDs need to join up in order to create a seamless visitor experience across London.

1.10 Conclusions and recommendations for change

The Games created a common goal to improve accessibility, and consumer perceptions of access have improved significantly across most aspects of London's visitor experience.

Going forward, the challenge is to maintain the momentum achieved at 'Games time' and not revert back to 'normal time' (i.e. ways of operating before the Games). With the city's access reputation at an all-time high, the pressure to meet future visitor expectation could not be greater.

In 2009 we reported concern for delivery against budget restraints but stakeholders and the GLA committed to do whatever it took to showcase London during the Games. The reality going forward is that, post 2012 it will be more difficult for all businesses and organisations to make the case for allocating further funding and resources to the accessibility agenda.

Without fail all stakeholders cited the need for a co-ordinating role and spoke of the clear need for political leadership to continue to progress the good practice achieved. To meet the Mayor's vision of using the Games as a springboard for transforming London into one of the most accessible cities on earth (see <http://www.london.gov.uk/accessiblegames>) it is essential that there is a continuing drive to deliver the accessibility agenda with a defined action plan.

In the absence of resources for one organisation to take on the London wide co-ordination role the following eight recommendations are made:

1.11 Create an Accessible Visitor Experience Concordat with major stakeholders representing every sector of the visitor journey to help continue a coordinated approach to improving London's accessibility

London needs more linkage between the main accessible tourist sites. A city wide concordat with an overall perspective of what is happening across London, coordinated by e.g. the GLA or London & Partners, would enable the many stakeholders and accessible projects to work together around the single focus of delivering a seamless visitor experience. The Mayor's river concordat provides a good example where all parties work together, knowledgeable of what each other will deliver, support and can add.

Some of the key issues to address are:

- Identify and work with those organisations that have direct responsibility or an influencing role in the visitor journey e.g. BIDs, and keep abreast of organisational changes
- Establish a communication channel for training and business support. London & Partners for example could effectively host and promote the Destination London training programme.
- Lobby Transport for London to continue their investment programme in step free access and other access improvements. Prioritising upgrades in line with their impact on key areas of the visitor

economy e.g. transport options to leading attractions would help ensure that some of the main 'attractors' to London were accessible.

1.12 Actively promote London as an accessible visitor destination and promote the improvements made to London's accessibility

London's businesses, boroughs, public sector, charities and dedicated individuals are delivering enormous improvements and making London more accessible for visitors. This should be widely promoted in London, nationally and internationally, helping to make substantial contributions to the city's visitor economy (International visitors to England with a health condition spend over £300¹ million each year). All businesses and organisations have a role to play led by London & Partners as the official promotional organisation for London.

1.13 Review and consolidate consumer information provision

To reach the widest audience access information needs to be presented and available to visitors, including those who don't consider themselves to be disabled. Working with the main private sector providers of dedicated accessibility sites to improve the prominence of the information collected, will go some way to addressing this.

Some of the key issues to address are:

- Review criteria for information collection and agree a common standard of detail - A number of different commercial and not-for-profit organisations carry out access audits. They use different criteria and terminology which cause confusion and mean disabled people don't get the information they need
- Encourage London businesses to include more access information (access statement) on their own websites

1.14 Encourage boroughs to adopt a consistent approach

Visitors don't recognise boundaries, and inconsistent approaches leave them confused.

Some of the key issues to address are:

- Blue badge parking and public toilets are particular issues and received some of the lowest positive scores in the consumer research. To gain consistency and availability will require intervention at different levels within boroughs.
- Champion a focus on disabled visitors in borough access agendas - In tourism honey pot boroughs a refocus on access and inclusion issues in balance with the wider remit of the Equality Act will simultaneously benefit both visitors and residents
- Showcase best practice standards in the public realm - London requires a more consistent approach across boroughs to eliminate issues ranging from visitor confusion to legal challenge. Undertaking more South Bank type public realm improvement schemes that link up 'islands of good practice' will help to achieve a more joined-up accessible visitor experience and will help to demonstrate best practice particularly in challenging environments such as London's historic areas.

¹ Estimate based on doubling of 6 month provisional figures from International Passenger Survey 2010

1.15 Set up an official London-wide access advisory panel

The Olympic Delivery Authority's Built Environment Access Panel was very successful in helping to deliver accessible venues for the Games. This group continues to work with the London Legacy Development Corporation helping to ensure that the new development in and around the park maintain high standards of accessibility and inclusion. A similar official panel of 'access and inclusive design professionals' that has a London wide role could deliver the technical knowledge and experience required for access projects that is often too demanding for volunteer groups. With the demise of many local access groups and the reduction in the number of borough access officers, this recommendation becomes increasingly vital.

1.16 Share access officer resources across boroughs

The decline of access officers is a continuing trend and with more funding cuts at borough level, this is unlikely to change in the short-to-medium term. More widespread and faster sharing of information and resources across boroughs would help maintain access to specialist skills as well as steer decision making. An appropriate lead on this would be London Councils.

1.17 Re-commission London's accommodation database

Disabled and older visitors should have a choice of accessible hotel accommodation in terms of location, price and facilities. Having an accurate picture of London's accessible accommodation and the number of rooms available helps to monitor the GLA's existing planning policy and would assist the hotel demand study. Re-commissioning the London Development Agency's comprehensive accommodation database would be the most effective way of taking this forward and will also assist in providing information on the number of accessible hotel bedrooms in London.

1.18 Repeat consumer research to monitor progress

Customer experience is the most powerful driver for change. Repeating this research every three-four years will allow a continued monitor of progress against established baselines.

1 INTRODUCTION

2.1 Mayor's Vision

Speaking in Beijing ahead of the closing ceremony of the 2008 Paralympic Games, Mayor of London Boris Johnson pledged to make London's Games the most accessible ever. The Mayor said he would work with 2012 organisers and authorities across London to ensure the capital did everything possible to maximise not only access to the Games but access to the city's many hotels, restaurants, nightspots and other leisure venues for generations to come. "The London 2012 Games must act as a catalyst to transform access for disabled people around the city."

2.2 London Ready to Welcome Disabled Visitors?

In 2009 the London Development Agency (LDA) in partnership with the Greater London Authority (GLA) and the London Organising Committee for the Olympic Games (LOCOG) commissioned LiveTourism to study the accessibility of London as a visitor destination and its readiness to welcome disabled visitors.

'Is London Ready to Welcome Disabled Visitors' was published in February 2010. The report identified major initiatives underway at that time to improve accessibility in London; made recommendations on priority public sector interventions and influences and established a baseline against which to measure progress. One recommendation was to replicate the study in 2012 to enable an objective evaluation of progress and achievement.

2.3 Objectives of this evaluation

This study evaluates progress made since 2009 and makes recommendations for a continuing legacy programme.

The study has, using the baseline measurements and the recommendations in 'Is London Ready to Welcome Disabled Visitors':

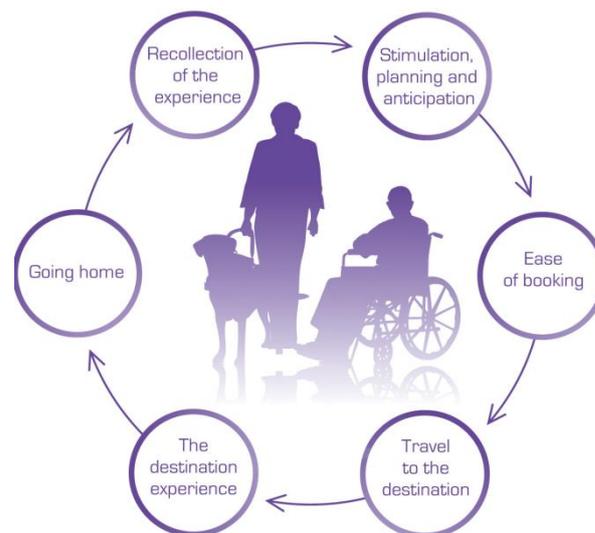
- undertaken consumer research with a sample of 511 disabled respondents to replicate that undertaken in 2009 and evaluate progress; (see section 3)
- evaluated the projects and programmes put in place by the GLA and others, where appropriate, in response to these recommendations; (see Appendices)
- looked at the wider picture of how the public sector responded to the need to create an accessible welcome for disabled visitors to London in 2012 by undertaking key stakeholder research; (see section 4)
- quantified lessons learnt and identified work still needed to further improve the accessibility of the visitor experience (see section 6)
- considered how the economic impact to London / added value of the accessibility improvements can be measured; (see section 6)
- made recommendations on how to continue improving the visitor experience as part of a wider legacy programme for London; (see section 7) and
- identified who is best placed to continue this important work (see section 7)

2.4 The Visitor Journey

Our methodology is LiveTourism's VisitorJourney© model. It takes a visitors' view of the six stages that make up the whole visitor experience. These stages range from their first decision to plan a visit

through to returning home and remembering their trip. The model clearly identifies the role each organisation and business plays in creating a seamless and successful visitor experience.

The process recognises the crucial link between accessibility and the quality of the overall visitor experience.



The fundamental principle of this approach is that in identifying recommendations for change, the consumer research findings reported in section 3 should take the lead in determining how organisations and businesses respond to visitor needs.

The recent evaluation study report (December 2012) of the Accessibility and Inclusion Integration Group² post-Olympic and Paralympic Games concludes that a focus on the end-to-end experience is key to providing an all-round great experience. It is best summarised in one phrase '*Delivering joined-up accessibility through joined – up planning*'

2.5 A note about terminology

We recognise that there are a number of different ways of defining disability and the term "disabled people". The Greater London Authority has adopted the social model of disability, the model used by Deaf and Disabled People's Organisations. This includes understanding and addressing the physical and social barriers that prevent disabled people from participating on an equal level with others.

The Equality Act 2010 defines disability as a 'physical or mental impairment which has a substantial and long term adverse effect on a person's ability to carry out normal day to day activities'.

²The AIIG was set up by the GLA and LOCOG to focus on a joined up London 2012 Games spectator experience across all elements of their journey - pre-trip, the London experience and travel.

2.6 Revisiting 2009

LiveTourism commissioned a robust piece of consumer research into the views of disabled visitors staying in the capital in order to assess both London's readiness to receive visitors and to underpin recommendations for future change. Specialist tourism market research company Arkenford conducted the research with 582 respondents in November and December 2009.

2.7 Visitor research findings from 2009:

- Transport was heavily criticised for being inaccessible. Facilities – where in place – were not working reliably or often enough
- Lack of budget accommodation options
- Attractions were mostly meeting the needs of disabled visitors
- Eating and drinking establishments received low scores for accessibility and staff attitude
- Disappointing access to shopping in the honey pot areas
- Public realm issues related to signage, pavements and lack of clear routes
- Experience of public toilets was hugely negative – both provision and quality
- Staff attitude rated low in all sectors but especially in transport, eating and drinking and shopping.

LiveTourism conducted a review of recent research and policy documents including looking at the experience of other cities that hosted major sporting events. We researched the progress underway in the main sectors of the visitor economy such as accommodation, information provision and attractions.

We also interviewed 46 key stakeholders in the public, private and voluntary sectors in order to identify current practice, recommendations for future improvements and baselines for monitoring progress.

2.8 Key stakeholder findings from 2009:

- Fragmented public sector support and intervention for access
- The borough role is crucial and needs reviving
- Information available to disabled visitors is fragmented, confusing and limited
- There is a proliferation of business training and support
- Businesses essentially go their own way
- Requirement to take a focused and pragmatic approach on what can be delivered between 2009 and the Olympic and Paralympic Games
- Recognition of the need to safeguard the legacy

2.9 The recommendations for public sector interventions were:

- Develop an access master plan driven by the GLA through their London 2012 City Operations Programme
- Appoint an access officer/mayoral advisor to manage the project
- Appoint an influential 'Access champion'
- Focus on public sector resources – prioritise development in Honey Pot Zones e.g. West End and South Bank
- Set up a single Access Advisory Forum

- Allocate responsibility for the delivery of information
- Review the work of all public sector bodies

2.10 Actions taken

The London Development Agency published the report in February 2010 and as a result the GLA developed its Accessibility for Visitors work stream as part of its role of co-ordinating the London 2012 City Operations Programme.

Following the Mayor's devolution proposals published in June 2010, LDA functions folded into the GLA. The Accessibility for Visitors work stream transferred to the GLA's London 2012 City Operations team, under the London Experience projects. They streamlined the work to comprise three projects:

- Access improvement works to the South Bank riverside walk – a capital works project to make the pedestrian route from Hungerford Bridge to Tower Bridge more accessible. Linked to the Access improvements, the project also created Photo Routes focussed on walking routes leading to the South Bank and designed for people with learning difficulties, and others who find way finding easier when illustrated by photographs (see <http://photoroute.com/southbank>).
- Information provision: Partnering with Direct Enquiries to develop Inclusive London - a website and iPhone app with information on accessible facilities throughout the capital. Website content included the results of accessibility audits of known visitor hotspots and audited hotels in the capital.
- Guidance and training for businesses: Destination London - a website that hosts bespoke and comprehensive training and guidance for London's hospitality sector, to help improve accessibility in the run up to the 2012 Games.

In addition, the project recruited a Paralympics Advisor to advise and identify appropriate resources and pragmatic ways to deliver an inclusive London 2012 experience across London, and to secure a Paralympic legacy for London.

3 CONSUMER RESEARCH

This section reports the results of quantitative research among an audience of disabled people (either disabled individuals or someone who provides support to a disabled person) undertaken by Arkenford Ltd. Research was in the format of an online survey throughout November and early December 2012.

To meet the tight timescale for the fieldwork and remain cost efficient, Arkenford used an online panel survey methodology. Online panels consist of consumers from all walks of life who are prepared to complete questionnaires on a range of subjects. The online panel we used consisted of members who stated that they have a disability, or who have a carer or support role for people with access needs. Only these members of the panel qualified to take part in the survey.

We estimated that 300-500 panel members would take part in the online survey. However we achieved a higher number using this method of recruitment. We were also keen to publicise the survey to those with access needs who were not part of the online panel. To do this we invited over 70 National and local charities, representing a wide cross section of groups with access needs, to publish a link to the survey. We would like to thank those organisations who published the link encouraging people to take part.

In total **511 online interviews** were conducted.

Please note that we have rounded- up the percentages to the nearest whole number. Some comparisons between sub-groups are based on small numbers of responses and should be treated as indicative responses.

Where possible we make comparisons with the 2009 survey.

3.1 How has consumer experience changed since 2009?

Consumer access ratings have shifted significantly across a number of aspects of the visitor journey since 2009, clearly indicating an improving experience for visitors to London.

The 2012 study achieved a more balanced response than in 2009:

- Londoners made up 11% of the collected responses (compared to 46% in 2009)
- Regular visitors to London in the last three years made up 75% of the sample (compared to 60% in 2009)
- The sample contains a better cross section of day versus staying visitors to London. In 2012 the split is 66:33 day versus staying visitors (compared to 80:20 split in 2009).

To complete the picture and understand perceptions of London as an accessible destination we collected responses from consumers who visited more than three years ago:

- In the past three years 25% of the sample hadn't visited London (compared to 17% in 2009).

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.

As with 2009, we gathered responses from people with a range of disabilities and different age groups and made comparisons where possible.

In 2012 we interviewed a sample of 511 online interviews compared to 589 in 2009. Analysis of the data breaks down response by each type of consumer and the report illustrates if there are any significant differences in response.

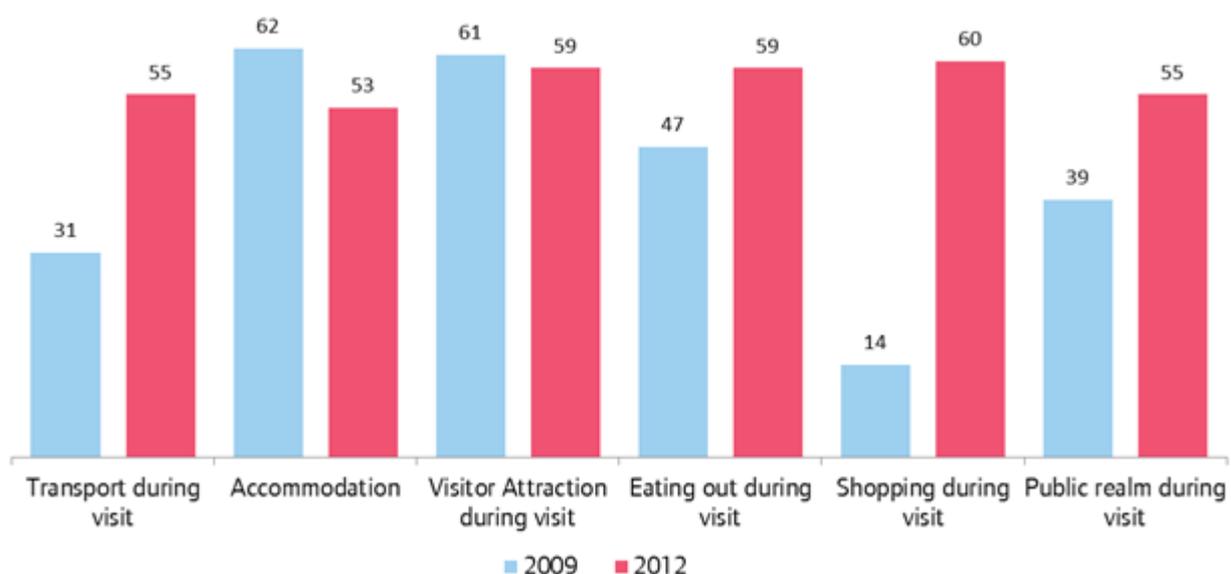
Overall we believe that the structure of the sample means that we have collected data that presents a much better reflection of the visitor journey than previously. However, we should still treat the findings with some caution.

A new question added in 2012 indicates that London is regarded as more (or at least equally) accessible than other city destinations in the UK and abroad. Much of this reflects the substantial investments made as a result of London’s host city status for the Olympic and Paralympic Games. This in itself creates significant positive promotion in relation to the media coverage about how accessible London has become (particularly for transport) which will heighten visitors’ expectations.

It is our view that while the research confirms significant improvements London still has some way to go and more work to do to ensure that the Olympics leaves a meaningful legacy in the form of an accessible city.

The chart below reflects overall access scores of key areas rated on a scale of 1 – 10 and shows the change in positive ratings – i.e. those scoring from 7 to 10 – as a comparison to 2009.

Overall Access Ratings – percentage positive (7-10)



All aspects of the visitor journey rated higher than in 2009 except for Visitor Attractions (for which the score is similar) and accommodation (-9%). These two areas already rated significantly higher in 2009.

Retail (+52%) and transport (+24%) recorded the biggest improvements. Scores for the public realm have also significantly improved (+16%).

What is apparent is that scores for all aspects of the visitor journey are within +/-7% indicating a more joined up access experience for visitors.

Asked to rank their most important access needs visitors listed their top 3 as:

- Blue Badge Parking
- Step free access onto public transport
- Staff attitude and knowledge

Comparing findings with 2009 we see that awareness of designated Blue Badge Parking is down 15%. In fact awareness of many of the access schemes, initiatives and dedicated information sources is much lower than recorded in 2009 (see table below).

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

Looking at key information sources used by visitors we see a reduction in those using specific access information sites (-12%) and specific sites run by transport providers (-12%) (This is likely to be due to the reduced volume of Londoners in the profile) and tourism bodies (-14%), with visitors migrating to more mainstream sites run by accommodation providers, attractions, retailers and restaurants.

Below we compare findings between 2012 and 2009 for all other aspects of the visitor journey.

Transport

The research recorded different patterns of travel behaviour compared to 2009:

- A similar proportion use the underground to travel around London (2012 – 64%, 2009 – 66%)
- A lower proportion use buses to travel around London (2012 – 58%, 2009 – 69%)

- The river ferry is the only mode of transport being used more for travelling around London compared to 2009 (2012 – 13%, 2009 – 9%)

The car is used more often for travelling to and around London than recorded in 2009:

- 34% used a car to travel to London (+16%)
- 25% used a car to travel around London (+6%)

In spite of the considerable investment and effort made to improve the transport network, it would appear that fewer visitors with access needs are using the facilities. This may be due to the difference in sample profile (Londoners v non-Londoners where Londoners are more familiar with using public transport). However having a higher sample of non-Londoners will increase the proportion that have a perception of inaccessible facilities and/or lack of awareness of improvements carried out.

Despite a lower % of respondents using the network, there is a significant improvement in the scores provided. As shown above, Transport receives a significantly higher overall rating than in 2009 (+24%). It also receives far higher scores in relation to certain aspects of the service:

- 49% are positive about the availability of ramps / lifts (+31%)
- 43% are positive about consistent audio / visual updates (+22%)
- 32% are positive about availability of induction loops (+27%)
- 31% are positive about the availability of tactile information panels (+25%)

There has also been an improvement in relations to staff attitude and knowledge both pre and during the visit to London:

- 55% were positive about staff attitude and knowledge pre trip (+22%)
- A similar % were positive about staff during their visit

The Transport sector needs to build on these improvements and continue to communicate them to visitors in a bid to give them the confidence to use the wider public transport system during their trip.

Accommodation

In 2012 respondents are more likely to be using mid-range accommodation more than budget hotels, a trend that is similar to 2009.

- Still a lower % of respondents using mid-range hotels in 2012 (37%) compared to 2009 (53%)
- A higher % of respondents are using B&Bs in 2012 (15%) compared to 2009 (10%)
- A lower % of respondents are using luxury hotels in 2012 (15%) compared to 2009 (24%)
- Around 10% stayed in serviced apartment / self-catering (not tested in 2009)

It's a similar position to that reported in 2009; a higher percentage consider using cheaper accommodation than the % that actually use it, indicating that this part of the sector still need to do more to meet the visitors access needs.

The Overall Access Rating for accommodation has dropped by 9% since 2009. However the overall scores in 2009 were higher than for other sectors and still remain on a par with all other aspects of the visitor journey.

The positive scores however have remained consistent across all aspects of the experience. This will in part be down to the fact that there are access schemes put in place by national tourism bodies that clearly lay out required standards for organisations in this sector.

- Pre-trip information scores are up for all aspects except for staff attitude and helpfulness
- Availability of information in alternative formats during the trip is also scored less positively in 2012

Whilst this sector has continued to offer good facilities and services to those with access needs, it cannot rest on its' laurels, and should strive to be improving all of the time especially across lower cost establishments.

Attractions

In 2012 we see a similar pattern in relation to the types of attractions in London that visitors go to. The types of attraction where the research records an increase in visitors with access needs are:

- 66% who visited London's Parks & Gardens (+3% on 2009)
- 59% who visited Heritage Sites (+20%)
- 35% who visited Zoos / Aquariums (+7%)
- The types of attraction where the research reports a decrease include:
- 65% who visited Museums / Art Galleries (-4%)
- 50% who visited West End Theatres (-9%)
- 31% who visited an Exhibition Centre (-12%)
- 28% who visited a Music Venue (-6%)

The shift in the profile of the sample, especially the balance between traditional visitors as opposed to Londoners, has undoubtedly had some impact on the change in behaviour, especially the increase in visitors to London's key visitor attractions.

It should be noted that only 13% visited an Olympic / Paralympic venue.

The overall access rating (59%) for the attractions sector was almost identical to that received in 2009 (61%).

As with the accommodation sector, attractions are in the fortunate position of having in place a national body that has invested in a Quality Rating³ scheme that covers access needs. This means that there are clear messages about what is required from attractions from an access point of view, and a way of policing and assessing quality levels through rating schemes.

The result is that we have recorded a steady set of positive ratings for the sector. Information provision and staff received the strongest ratings (and improvements) while weaker ratings are recorded for onsite accessible facilities especially the provision of Blue Badge Parking.

³ <http://www.qualityintourism.com/>

- 63% were positive about the availability of information (+8%)
- 53% were positive about information in alternative formats (+14%)
- 65% were positive about information accuracy (+6%)
- 61% were positive about staff attitude and knowledge (+7%)

Eating & Drinking

The types of Eating and Drinking establishments respondents report visiting in 2012 follows a similar pattern to that reported in 2009.

Key differences include:

- 56% of respondents who went to a traditional pub (+13%)
- 11% who visited a nightclub (-17%)

We also recorded a significant proportion who visited coffee shops and sandwich bars (47% and 46% respectively).

This sector has seen an increase of 12% in relation to the overall access ratings received (59% in 2012 versus 47% in 2009).

The sector received a high % of positive ratings across all factors. Some of the largest increases in ratings have come from factors relating to information and staffing:

- 48% were positive about the availability of information (+21%)
- 52% were positive about information in alternative formats (+26%)
- 52% were positive about information accuracy (+25%)
- 54% were positive about staff attitude and knowledge (+24%)

It is important that this sector continues to build on the fact that they have become more accessible, and these improvements must come from across the board (coffee shops through to hotel restaurants) because visitors with access needs frequent all of these types of establishment.

Shopping

Some comparisons can be made in relation to the shopping areas that visitors go to in London.

- 56% visited Oxford Street (68% visited the West End in 2009)
- 46% visited Covent Garden (57% in 2009)
- 44% visited Knightsbridge (47% in 2009)

What has become clear is that while people do shop when they come to London, retail is often not the key reason or influence behind their decision to visit. It is often a secondary activity that they undertake when they are here.

Despite this fact, retailers have collectively worked hard to improve the experience for people with access needs. This is reflected in the significant improvement recorded for the overall access rating that has gone up from 14% in 2009 to 60% in 2012.

These improvements were recorded across the board, especially in relation to information provision and staffing:

- 51% were positive about the pre-trip availability of information (+12%)
- 45% were positive about pre trip information in alternative formats (+18%)
- 52% were positive about pre trip information accuracy (+16%)
- 54% were positive about staff attitude and knowledge (+29%)

Even greater improvements were recorded for information provided during their visit:

- 55% were positive about the availability of information during their trip (+29%)
- 45% were positive about information in alternative formats during their trip (+35%)
- 52% were positive about information accuracy during their trip (+29%)

This shows that the retail sector is starting to embrace the needs of those with access needs.

Public Realm

In 2012 we tested a different set of areas in relation to public realm, putting the emphasis on key honeypot areas in Central London that visitors were more likely to have visited.

The overall access ratings for public realm have increased; 55% are now positive compared to 39% in 2009. There are specific aspects of the public realm that have improved:

- 56% are positive about accessible road crossings / dropped kerbs (+15%)
- 52% are positive about clear routes and pavements (+16%)
- 55% are positive about appropriate signage / way finding (+23%)

3.2 Key Conclusions from the Consumer Research

All aspects of the visitor journey received a higher overall access rating.

- Transport and Retail record the highest % increase in relation to overall ratings
- Restaurants and Bars and Public Realm also record an increase in ratings
- Accommodation and Attractions ratings, which were most positive in 2009, have kept to the same levels

The result is that London has seemingly become more accessible across all aspects of the visitor journey.

Key access issues for those with access needs are:

- Blue badge parking
- Step free access
- Staff attitude and knowledge

Significant improvement shows in relation to staff attitude and knowledge. There has also been a lot of investment in the infrastructure of the public transport network that has resulted in more stations

offering step free access. However, despite an increase in the % of visitors travelling to and around London by car, awareness of designated Blue Badge Parking is lower than recorded in 2009.

Another key change highlighted by the consumer research is in relation to information gathering. In 2012 we recorded less use of public transport or tourist board websites (-12% & -14% respectively) as well as lower use of specific access information websites (-12%).

Instead we find that visitors are seeking more mainstream information, preferring to go direct to Accommodation Providers websites (+10%) as well as general hotel booking websites. They are also visiting attraction, retail and restaurant specific websites relying on these for the information in relation to accessibility. Until mainstream websites provide more detailed access information there will be a need for dedicated websites.

Pleasingly this change in source has had a positive impact. Scores for the availability, content and format of information have all improved significantly since 2009 both in relation to information gathered prior to the trip as well as information gathered during the trip.

It should be noted however that since the 2009 survey, lots of improvements have been put in place as a result of London hosting the Olympic and Paralympic Games. This will undoubtedly have had an effect on the ratings recorded in 2012.

We are hopeful therefore that London will not just rest on its' laurels. Further needed improvements will only come if there is a continued will, level of investment and delivery of infrastructure to at least maintain overall access levels or improve them, moving forward, as has proved to be the case in the last 3 years.

Research figures informing conclusions

Information

91% of respondents collect information prior to their trip demonstrating the importance of getting the right information to this audience using the right channels.

Mainstream – has to be in the hands of people who manage the experience for visitors, e.g. individual business websites

Pre-Trip information accuracy shows improvement across all sectors.

- Transport 45%-63%
- Eating and Drinking 27%- 52%
- Retail 35% - 52%

Accommodation & attractions have recorded some, but not marked improvement. However the ratings they received were far higher than other sectors in 2009. We know organisations in these sectors have had more sector-specific engagement with tourist boards so support has been in place since first legislation in 1995.

Clearly, if you stand still you fall back in real terms because consumers have increasing demands.

Tools are in place that these organisations can use, but there is no channel or mechanism that enables this insight to be cascaded down from a national organisation to a local London business.

The reasons for improvement in the transport is likely to be as a result of some of the Olympic initiatives such as Journey Planner, better signage and way finding and a more joined up approach amongst organisations responsible for transport. The Games proved to be a catalyst for all of this positive activity.

We believe that the improvements recorded in the retail and eating and drinking sectors are down to consumer demand. Many of the BIDs report that retail in particular do seize market opportunities with both hands.

Stakeholders still have concerns in terms of how information is collected and how to keep it up to date on specific access information websites. The consumer research shows that there is a significant decrease in visits to these types of websites (down from 38% - 26%).

These websites have clear benefits but reach a far smaller audience than previous research has concluded. The Stakeholder findings confirm that access information should in the long term be part of mainstream websites as the majority of disabled people with access needs who want to manage their whole visitor journey primarily use these.

A good example of access information that works well on mainstream websites is Access Statements. The consumers shows an increase in awareness of these statements from 20% - 29% which coincides with concentrated effort to increase awareness and development of them by Visit England⁴ and an increase in the number of businesses writing them.

Transport

The overall access for transport has improved significantly (31% - 55%).

Public transport infrastructure received huge investment in the intervening years 2009 – 2012, e.g. London Underground installed 90 raised platform sections in stations across the capital, confirmation of continued use of manual platform ramps, a fully accessible bus fleet.

TfL states that despite this significant investment, a negative perception in relation to accessibility still exists, often driven by media coverage.

The consumer research shows that numbers who use the Underground to travel around London when they visit are in fact slightly down on 2009 (66% - 64%) and significantly lower for buses (69% - 58%).

We believe that more work is needed to publicise the investments that are being made to improve the visit experience which will help to improve perceptions of the offer and ultimately increase numbers. Stories such as those reported by Transport for All in relation to shorter times will help to reinforce the positive experiences that will encourage more use.

⁴ www.visitengland.com/accesstatements

3.3 Relevant Points

Coordination for Access

The consumer research shows greatest improvement in overall access scores for sectors that have developed a more joined up approach since 2009, .e.g. transport operators and retailers.

The Accommodation and Attraction sectors that have had a joined up approach in place since 2009 continue to receive high access scores from visitors indicating that a joined up approach can lead to longer term benefits and continued delivery of an accessible London.

Blue Badge Parking

Awareness of designated blue badge parking is lower than recorded in 2009. Furthermore, when we look at specific ratings across all sectors, the one that tends to be lowest is in relation to the availability of blue badge parking.

4 STAKEHOLDER & DESK RESEARCH

This section sums up the main findings from stakeholder and desk research. It draws on the visitor research to make observations on possible future actions.

LiveTourism conducted over 46 face to face and telephone interviews with businesses, public, private and voluntary sector organisations, a number of which contributed to the 2009 report. We sought information about progress and successes, gaps still to address and observations about ways to maintain the momentum created by the Games. A list of seven key themes emerged from common strands identified by the stakeholders.

Through desk research we identified reports, studies and initiatives developed or completed since 2009.

A point of context to the research: Many consultees voiced concern about measuring the progress for future delivery due to the challenges posed by the economic environment. Charitable organisations in particular are finding it difficult to fulfil their access agenda and having to make some difficult decisions in prioritising what is achievable. A number have amalgamated to strengthen resources and impact. In 2009 we reported concern for delivery against budget restraints but stakeholders committed to do whatever it took to ensure London delivered a seamless experience during Games time. The reality going forward is that, post 2012 and without the catalyst of the Games, it will be more difficult for stakeholders to make the case for allocating funding and resources to accessibility improvements.

The Appendices list the stakeholders we consulted and an overview of industry initiatives. We thank the consultees for their time and invaluable contributions; providing the study with informed views and comments that helped to shape the future recommendations.

NB: this study, as in 2009, focuses on the wider visitor experience across the capital. Stakeholders however invariably make references and comparisons to the experience at Games time.

Seven key themes emerged:

4.1 Games: provided a catalyst, focus and momentum for access improvements

London's ability to manage the visitor experience at Games time exceeded all expectations and every stakeholder interviewed spoke about the positive impact of the Olympic and Paralympic Games.

Pre-Games, many stakeholders, organisations and media made public pronouncements doubting London's ability to manage the visitor experience at Games time. In the lead up to the Games, the public mood bought into the idea that we couldn't do it, not realising that many organisations responsible for delivering the visitor experience (particularly transport) were determined to show that we could.

The results were impressive and unprecedented. The London 2012 Paralympic Games were the first ever to sell out; they were the best and most-talked about Paralympic Games in history.

Not only did London's stakeholders manage visitor expectations – it's fair to say from the numerous online reviews and positive media stories that the city exceeded them.

Having a catalyst created a focus for change

Friday 27 July 2012 provided a timeline, a deadline and a catalyst for improving the accessibility of London's visitor experience.

With much of the venue construction completed ahead of schedule; the Games became a catalyst for other pockets of work – many of which included access improvements. Leicester Square; one of the world's most iconic places and with over half a million visitors every weekend, one of the busiest public spaces in Europe was reinvigorated. The Oxford/Regent Street crossing, another iconic area had access integral to the design. Works included the introduction of dropped kerbs, audio crossing indications and de-cluttering of the public realm.

The South Bank Thames Walk improvement work⁵ is another high profile achievement which opened up one of the city's vibrant areas. Although recognised by stakeholders as an inspiring piece of work, the visitor research showed that only 20% of respondents had visited or considered visiting the South Bank compared to 51% for Trafalgar Square. This suggests a lack of awareness of the area. Stakeholders noted that, as there was no major launch event for the project, it represents a future opportunity.

These achievements were possible because organisations bought into the concept of the Games as an experience and committed to working differently to make it happen. The guiding mantra became 'this is how we achieve it' rather than 'we can't because....'

Only by working together could each organisation appreciate the full picture and their role in making it happen. They could plan for what they needed, allocate resource to achieve it and assist other organisations along the way. Mechanisms were in place that made sure London could react quickly and decisively which ensured the delivery of a seamless visitor journey.

Building on the momentum of improved perceptions

London's 'can do attitude' and the much-celebrated visitor welcome from the Games makers and other meet and greet volunteers created a positive experience felt by disabled people, the general public, businesses and organisations. Extensive media coverage and the use of social media have sent the positive messages far and wide.

In a BBC survey⁶ three months after the Games, 79% of people said that wider perceptions of disability had improved. A survey of 9,000 adults in 11 countries by the British Council showed 56% now have a more positive perception of how the UK views disability (Dec 2012).

The positive perceptions of London as an accessible destination were widely communicated with extensive media activity:

- In the lead up to the Games, London & Partners, VisitEngland and VisitBritain welcomed 8,600 journalists at the London media centre and hosted Games media visits with disabled journalists.

⁵ <http://www.london.gov.uk/priorities/equalities/london-2012-legacy>

⁶ <http://www.bbc.co.uk/news/uk-20693024>

- VisitEngland's Great Welcome Paralympic Lunch at the South Bank Centre featured eight accessibility champions selling accessible Britain to the media. Additional hosting of journalists included the opening ceremony, science museum and a visit to the National Theatre resulting in excellent editorial about London's visitor experience achieved around the world.

If this awareness and momentum continues it will keep access high on the agenda and encourage businesses and organisations to invest resources. The challenge is can it continue now the Games are behind us?

"Maintain that inclusive welcome, the opportunity that has come as a result of the Games – inclusive art, inclusive sport, this is a wonderful chance to open up!"

Jenny Litman, CEO, Tourism for All

Worldwide success on this scale creates a legacy and an expectation that London must manage. Games-time visitors reporting their experiences instantly to friends, family and followers on social media creates a promise. The city's reputation is currently high. If future visitor experiences don't

"London was a fantastic experience for us. Not just the Games but the city itself. The city and the people have welcomed the Paralympians and the Paralympic movement and we are confident we have given back to the city. We look forward to many more visits in the city."

Xavier Gonzales, CEO, International Paralympic Committee

match their expectations it will lead to disappointment.

A major test of London's on-going efforts will be the IPC Athletics World Championships. Announced in December 2012 the Championships will take place in July 2017 at the Olympic Stadium.

4.2 Maintaining the post Games legacy

As anticipated, the London 2012 Olympic and Paralympic Games provided a clear focus for all stakeholders involved. A backdrop of economic uncertainty, austerity measures and some negative media comment galvanised real determination to get it right never-the-less.

There was no room for fragmentation among the many organisations, decision makers and delivery agents responsible for the Games experience. Systems and operating procedures were developed and implemented to enable quick decision making, rapid responses and impact management. But post-Games stakeholders report concerns that organisations may not be taking all the lessons learned forward.

"You end up reverting to type rather than using the Games as an educational tool".

Margaret Hickish, Director Design 4 Inclusion

Examples cited by stakeholders where the quality of service has reduced post Games:

- Having additional railway staff was a major positive factor during the Games and gave disabled people more confidence and incentive to use public transport. Stakeholders acknowledged that this level of staff assistance requires balance between Games time and normal time. Yet the McNulty report of 2011 could lead to 30% efficiency savings including cutting staff on stations and trains, raising fears that normal time could mean assistance reducing to less than users need.
- Transport for London's telephone system gained many plaudits from users for the relative ease of speaking to an operator and their understanding of how to personalise a journey. Transport for All commented that the system has changed to a voice recognition system and now provides a lower quality service.

Examples of services introduced during the Games that will continue in one form or another:

- The addition of raised platforms and temporary ramps enabled disabled people to access the underground more effectively during Games time. It created an expectation that this level of access should be standard. Transport for All confirms that the installation of such facilities had a marked effect on users – cutting journey times from 90 minutes to 40 minutes in some cases. Many disabled people's organisations voiced concern about reports of their removal in the future. Following research on how best to continue the service, in January 2013 Transport for London confirmed that it will keep manual boarding ramps at the existing 16 stations and are looking at options for extending the service in 2013; an important legacy of the Games.
- An onsite wheelchair repair service at Heathrow (a specialist technician stationed at the airport to fix faults on the spot) available throughout the London 2012 period and mostly targeted at mobility equipment damaged in transit, will not remain within the airport. However, a version of the service will still be offered to airlines via a contact number; another Games legacy.

4.3 Islands of good practice need to be linked to realise their full potential

All stakeholder consultees cited examples of good practice in accessibility happening around London and covering a range of sectors.

There are a number of standout attractions and accommodation, BIDs doing public realm improvements and organisations taking innovative approaches e.g. many theatres provide assisted performances (audio described, captioned, British Sign Language) and relaxed performances ('autism friendly' performances).

However, most examples identified tend to be standalone and if the visitor cannot easily get from one to another their impact is more limited. The visitor experience does not, as yet, link sufficiently to make London the world's most accessible city.

"You need to look at the visitor journey, it makes no sense to have something accessible that you don't know how to get to or you can't get out and move to the next one."

Xavier Gonzalez, CEO, International Paralympic Committee

The South Bank improvement project is a successful example of a joined-up approach. Acting on a recommendation from the 2009 report, the South Bank improvement programme was a key GLA project. High profile and with tangible benefits for all users, the project successfully resulted in a continuous accessible route along the South Bank Thames Walk linking some of London's most iconic attractions.

4.4 Low awareness of available training and support

There are a large number of training and support resources available for improving accessibility. However awareness is low and as a result resources have been underutilised and their impact has been minimal.

VisitEngland continues to develop and kite mark training and business support resources. Since the 2009 report it has partly funded accessibility research in the United Kingdom Tourism Survey (UKTS) which provided evidence for 'At Your Service'⁷ – the business case for accessible facilities; improved the online access template tool and partnered organisations such as British Beer and Pubs Association, the Premier League and others.

However, there is no obvious route for VisitEngland to channel these resources to London businesses. Previously a route existed through the traditional tourist board structure i.e. the

London Tourist Board which had quality and development as part of its remit. And/or through London borough tourism officers that have been in constant decline (in 2012 we have identified 5 at borough level, however other destination partners are emerging which may take on this role). The traditional role of the tourism officer included business to business communication, signposting to business support and training and hosting industry networking events.

Stakeholders asked: now the trusted relationship with businesses has been lost who takes responsibility for regaining it? There are several potential options e.g. The Business Improvement Districts BIDs in many cases across London have a visitor economy role and provide face-to-face contact with the industry. There is also London Chamber of Commerce and London & Partners.

Following the recommendations in the 2009 report, the GLA developed Destination London as a London-specific resource. This is a portal for online training in accessibility for London's tourism and hospitality businesses. Feedback from staff using the programme is positive but numbers participating are low.

"Great content, good coverage of all topics, I like the exercises that get people thinking about their own venues, good that you can print out your own action plans for your own venues."

Kate Vale O2, Senior Customer Services Manager, AEG Worldwide

Most stakeholders consulted were unaware of the availability of the training programme. The GLA promoted the programme as part of the London 2012 City Operations programme but with the resources available the impact was limited; businesses do not tend to look to GLA for business

⁷ <http://www.visitengland.org/busdev/bussupport/access/>

support. Which leads to the question is Destination London hosted in the best place and what should the marketing strategy look like going forward?

While take up of the publically-funded programme has been low the consumer research identifies that staff attitude and knowledge improved for transport, accommodation, attractions and shopping with the most positive increase identified for transport during the visit rising from 35% to 55%.

4.5 Boroughs: balancing political agendas with evermore challenging funding allocations

The 2009 report identified the crucial role of the boroughs in improving accessibility to services and facilities and acknowledged the challenging environment they operate in. The situation regarding London boroughs shows little change from 2009. If anything, from the perspective of improving the visitor experience, the situation has deteriorated through lack of resources. The number of dedicated Access Officers and Tourism Officers continues to decline. These are non-statutory posts and where they remain they are increasingly part-time and restricted to a particular function, e.g. street scene improvement, assessing planning applications rather than having a wider co-ordinating role of championing improvements to benefit the visitor experience.

Many Boroughs also have responsibility for complex areas of geometry – e.g. Westminster comprises 80% conservation area plus a World Heritage Site, resulting in the planning application process being more complex.

Stakeholders understand the level of GLA influence required to improve accessibility at a borough level. In most cases they actively seek Mayoral intervention. However for many borough decision makers the focus is understandably on their residents rather than on the visitor experience. Increasingly the focus of disability related issues is social welfare, benefits and housing. This has greatest relevance in prime tourist areas.

There are examples of initiatives that have had a positive impact on the visitor experience but not the accessible visitor experience. National quality benchmark initiatives exist which boroughs aspire to attain e.g. the Association of Town Centre Managers launched Purple flag status to denote successful management of the evening economy and Keep Britain Tidy runs the Communities and Local Government Department's Green flag for quality public green spaces such as parks and community gardens.

Across London there are 264 Green flag accredited public open spaces. Camden Town recently achieved purple flag status for management of the evening economy. As yet, neither the green flag nor the purple flag criteria currently include any access related targets.

Public realm improvements

Stakeholders report inconsistencies of approach in public realm improvement and the interpretation of planning policy. As reported in 2009, boroughs still feel that they are operating in isolation when it comes to deciding best practice for accessibility.

Where there are Access Officers it is clear that inclusive design is a priority and in a small number of cases there appears to be a joined up approach between planning, street scene, public realm and

visitor information. But unfortunately in many cases – due to resources or policy – departments work in isolation. This creates an added barrier for other organisations e.g. BIDs to navigate.

Access Officers are often under pressure in respect of guideline interpretation appropriate to the location. Some Boroughs have adopted slightly different standards from the Department for Transport ‘guidelines’ e.g. for tactile paving the guidance suggests red or yellow colouring which many consider garish in a conservation area setting. As a result one borough might instead favour dark charcoal paving, while another favours ‘Battenberg’ as more appropriate. There is inconsistent use of blister paving, street tails and which one of the eight different hazard warning corduroys to apply. While accepting the desirability of a sense of place and individualism, the results can create an unsafe environment for visitors moving from one borough to another.

“The department for transport guidelines are regarded as slightly naive so people cherry pick the bits that best fit the situation and leave out some elements – it is guidance not law.”

Chris Mason, Head of Street Scene Westminster City Council.

The recent legal case, in relation to uncontrolled crossings, where the High Court ruled against Newham’s decision to depart from national guidance on the use of tactile paving mean boroughs are now revisiting their own policies. Newham’s guidance did not follow the national guidelines produced by the Department for Transport, developed in conjunction with and the endorsement of Guide Dogs for the Blind and the Royal National Institute of Blind People.

In the Accessibility Planning Policy: Evaluation and Future Direction – Final Report⁸ (commissioned by the Department for Transport) reports the following:

‘Interviews with statutory agencies suggested that staff face a stream of guidelines from a number of quarters and in this context, without particular efforts to draw attention to it, the Accessibility Planning Policy Guidance would have been lost. More generally, Accessibility Planning Officers’ efforts to engage with other statutory agencies in planning were hampered where there was not a named person in those agencies with a responsibility for accessibility, and where there were no apparent mechanisms or forums through which APOs could make appropriate contact with agencies.

Accessibility Planning Officers and Chief Executives suggest these issues reflected a lack of clarity about ‘ownership’ of and accountability for accessibility issues at a local level. Some participants in the research asserted that statutory service providers tend to view the accessibility of their services as either the responsibility of transport providers, as low priority or an afterthought in their service planning.’

Another finding was a concern that in the public realm design aesthetic can take priority over inclusive design.

⁸https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/3190/accessibility-planning-evaluation-report.pdf Atkins & CRSP

“Accessibility can be overlooked supposedly for the benefit of aesthetics.”

Alice Maynard, Director, Future Inclusion

The City of London Corporation Head of Access, Rob Oakley reports that his team spends time working with and trying to educate architects about inclusive design and why it matters. This extends to investigating the level of inclusive design awareness built into architects training and education, which he found to be minimal.

“I see architects and developers as so important – we are expected to live, work and visit their designs.”

Rob Oakley, Head of Access, City of London Corporation

Interpretation of planning

As evidenced in 2009, some BIDs report on-going difficulty with planning policy/building regulations and/or listed building consent relating to access improvements. A few state that planning policy is not flexible enough for businesses to make the financial commitment required to improve access.

For example, a Paddington hotel sought planning permission to remove a staircase and to install a lift. While the hotel had four staircases, due to the property having listed building status the only acceptable planning solution meant retaining the staircase and installing the lift in another location losing four bedrooms. As the acceptable planning solution was not financially viable this hotel – like many in the area – remains inaccessible for mobility impaired visitors.

Paddington BID reports that restrictive planning policies are preventing the upgrading of accommodation to become more accessible. This mainly impacts SMEs, often family-run hotels of 30-40 rooms. Another BID reports the installation of only two hotels lifts in the past two years.

Disabled people’s organisations also report that access can be used as an excuse to refuse planning permission to mask other agendas.

Provision of accessible toilets

The 2012 consumer research finds a big increase in levels of satisfaction; however at 48% it remains less than half.

Boroughs report that the resources needed for the upkeep and maintenance of public toilets as a whole, with funding cuts, is not sustainable. Increasingly they are seeking alternative ways of providing facilities e.g. working with private sector businesses like bars and restaurants to provide public access. In the examples drawn from this study, businesses signing up to take part receive a small fee. The uptake by businesses was initially slow however numbers are increasing. The scheme is rolling out in several boroughs.

How these partnership schemes will affect the provision, quality and availability of accessible toilets in the future is as yet unknown.

Blue Badge Parking

In common with the 2009 findings, from a visitor perspective Blue Badge Parking⁹ remains fragmented and unclear with no London wide reference source. The exception being the four central London boroughs who have a standalone website hosted by the City of London Corporation.

“I received a parking ticket because I wasn’t able to pay for a ticket – the machine was situated up a step. It must be frustrating for visitors to London.”

Alan Kerr, CEO, Artsline

The Department for Transport reviewed the Blue Badge parking scheme in 2008 yet the inconsistency of information remains seemingly unaddressed. This is despite a surge in popularity of visitors using private cars to travel to London over a similar period (from 18% to 34% between 2009 and 2012).

The availability of Blue Badge parking remains the most important transport factor for visitors to London. While showing an increase of 12% on 2009, only 36% considered the availability of blue badge parking to be good/ excellent.

Information collection

From 2009-2012 the number of London boroughs commissioning destination audits increased from 15 to 19, including four out of the six Olympic boroughs. However for visitors (who unlike local residents are less likely to use the borough website), the information often lacks prominence. Whatever level of detail these audits deliver, the information once provided to the boroughs rarely appears on mainstream information or other visitor websites.

Disabled people’s organisations expressed concern that the finances required to collect this information i.e. paid-for audits, can be a wasted resource, particularly if the information is hard to find, and in some cases not visible at a borough level and/or inaccurate/out of date. Like any data collection, information about accessible facilities requires systematic maintenance in order to be effective and trusted by the user.

Across London there are two main issues arising:

- (a) How the data is collected – the auditing process used is inconsistent
- (b) How the information is presented – concerns that it is not always accurate and up to date

4.6 Transport improvements

Transport for London continues the accessible improvement programme at a good pace in spite of severe budget restrictions limiting the scale of initially planned work and targets set for providing step-free access.

⁹ <http://www.bluebadgelondon.org.uk>

No-one wanted transport problems to be London's story for the Games. All stakeholders applaud the improvement to London's transport network since the last report while recognising that there is a long way to go. For example London Underground 66 stations out of 270 are step free (24%).

It is clear that for the period of the Games, there were notable instances of the visitor experience taking priority over other operator concerns e.g. train operating schedules, which resulted in a seamless journey. ATOC reports that during Games time, operators held the last train in the event of any delayed connecting train, so no assisted passengers were left behind. For this to happen required flexibility in franchise agreements. Stakeholders realise that this Games-related improvement is unlikely to be replicated under the current contracts.

London Underground

London Underground is 150 years old and consequently remains the most inaccessible part of the city's transport system. At the same time, it is the main visitor artery linking London's tourism experience and features in the top three priorities for London of every stakeholder consulted.

However, since 2009, massive investment has taken place; 66 stations are step free to platform (from 58 in 2009), 60 platforms at 24 stations now have level access from platform to train at step free stations (improved from 36 platforms at 16 stations in 2009), 32 raised platforms on the Victoria line alone (all new improvements), all trains now have audible announcements and visual announcement improvements are on-going. From January 2013 over 100 stations have Wi-Fi. Transport for London states that by 2013 all London Underground stations will have tactile steps and by 2016, 67% of carriages will be accessible.

There is a perception among Disabled people's organisation's that installing raised platforms is a quick and cheap means of easy access from platform to train. However Transport for London quotes a cost of £160,000 per platform versus £1,000 for a manual boarding ramp.

Change to transport infrastructure takes time which is why Stakeholders urge that the Mayor does not 'take his foot off the pedal'. They cite London's interchange gateways as a major factor for improving the overall accessibility of London underground. If the arrival gateway provides step-free access to the train from overground to underground then a wider area of the network becomes accessible. Like many areas of London, there are pockets of good practice.

London Underground staff achieve recognition for the high level of training and subsequent positive impact on the visitor journey. There is clear evidence that the training provided enables staff to distinguish the differing levels of assistance required by individuals. Inclusion of disabled people in developing the training is seen as a factor in its success. The consumer research findings support this recognised improvement with positive scores for staff attitude increasing from 33% to 55%.

Improvements to Transport for London's Journey Planner enabled disabled people to plan more effectively. The on-going development of this post Games is a positive legacy.

"It's worse to start the journey and not finish than not to start at all."

Peter White, BBC Disability Affairs Correspondent

Overground

All stations and trains on the DLR network are accessible and include level access from the platform to the train. Since 2009 the London Overground network has undergone a full upgrade which includes platform extensions and new rolling stock. All of London's original rolling stock has been replaced with a new, accessible, state-of-the-art fleet. The trains are 'roll through' or 'walk through', acting as one long compartment from end to end.

Currently 38 out of 83 stations served by London Overground trains are accessible from street to platform. Newly built stations e.g. Imperial Wharf is step free to train. Access to all trams on the Tramlink network is step free.

Major infrastructure changes continue across the rail network of mainline rail operators e.g. Southern Trains has invested heavily in 34 stations increasing waiting facilities, seating at platforms, installation of induction loops and accessible toilets.

Across the national rail network a new passenger assistance booking system is in place with a focus on disabled passengers access needs rather than seat reservations. There are plans to develop this into a one stop shop where passengers can book assistance and buy their tickets at the same time. ATOC would like to see London Underground also buy into this system to make it fully integrated.

Transport for London successfully rolled out the travel support card (a card carried by disabled people to show the level of assistance they need) originally piloted in 2009/10. Adopted by many disabled people; as of mid-November 2012 TfL had distributed around 2,370 information leaflets which include a card, and 1,950 individual cards. Downloads equate to 1,388 information leaflets and 1,824 printable cards.

A major concern expressed for the future is lack of station staff and a move towards more automated services e.g. ticket gates. If this pattern continues it could create further barriers for disabled people.

Buses

London's bus fleet led the way with the world's first wheelchair accessible service across the city, consisting of 8,500 accessible buses. Transport for London reports daily checking of each bus ramp. All buses are also fitted with audio and visual announcements.

All 24,000 bus drivers have disability awareness training and guidance provided in the 'Big Red Book', which includes advice on pulling in close to kerbs at bus stops and allowing time for older and disabled people to sit before setting off.

Despite the improved facilities and training some disabled people's organisations report frustration with the number of ramps which don't work, bus drivers not pulling into the kerb correctly or not waiting for people to take seats before setting off.

"I used 9 buses, that's 18 times getting on and off in one day and I could only use the ramp twice."

Alan Kerr, CEO, Artsline

They also report that the 'universal announcements' are often switched off, too quiet or play when there is maximum background noise. They cite lack of training as a possible reason why this occurs – there appears to be a gap between what should happen and what does happen. Although the consumer research shows a decline in numbers using the bus to get around London (from 69% to 58%) it is still a popular means of transport.

The good news is that TfL are introducing from summer 2013 new bus driver training with a key element focussing on older and disabled people.

Recent media coverage of Transport for London's new policy to prioritise wheelchair users over families with pushchairs fulfils the letter of the Equality Act but received a mix reaction from some Disabled People's Organisations.

Bus stops

Some stakeholders report that accessible bus stops are a 'postcode lottery'. Transport for London has prioritised provision of accessible bus stops (In 2012 67% are fully accessible which has doubled since 2008) but the responsibility for bus stops varies from road to road and there is a danger that the improvements made to stops are not keeping up with the pace of change on the buses. TfL report that by 2016, 95% of their stops will meet the fully accessible criteria.

Taxis

Taxi associations praised the improved facilities during the Games for set down/pick-up points for disabled visitors at Games venues showing that even in areas/time of heightened security and on one-off occasions, it is possible to change procedure in favour of a better visitor experience. Across London many designated drop off/pick up points for disabled people (particularly wheelchair users) are too far away from e.g. railway stations, theatres, attractions and are therefore of limited use. TfL is developing a taxi rank action plan for London's mainline stations. The wider geographical areas of London i.e. outside of the station perimeter also needs to be reviewed.

All of London's 22,000 black cabs are 100% accessible. Additional improvements include; colour contrast patches on seats, coloured grab handles, a swivel seat, an intermediate step, as well as an intercom and an induction loop.

River Services

The 2009 River Thames Pier Plan documents 31 piers. Of these 18 are in private ownership (13 accessible) and 13 in public sector ownership (12 accessible).

In the public sector most riverboats are accessible and most new riverboats have dedicated spaces for wheelchair users. There is a slightly more mixed picture in the private sector services; all new boats are accessible. On City Cruises wheelchair users have full access and all boats have accessible toilets. Audio facilities exist however visual announcements are yet to be implemented.

The 12 boat Thames Clipper service is fully accessible at boarding points, in the interior and in the toilet facilities. Ramps are used for passenger boarding and unloading at each pier. Plans are in place to promote this facility more widely.

London's pier owners, boat operators, borough councils and Transport for London recognised the need to work together and in 2009 signed up to a River Thames Concordat. Led by the Mayor, the concordat encourages coordinated action to improve and expand on London's river transport. The voluntary agreement commits them to work together to improve ticketing, piers and passenger information that encourage wider use of the river.

A report of the London Assembly Transport committee states that although the concordat achieves closer working relationships, the lack of strategic leadership and an overall strategic plan results in patchy improvement to river services.

Airports

As early as 2005 the BAA set up a dedicated Olympic and Paralympic planning team. It fair to say that in the lead up to the Games that Heathrow airport in particular received criticism and was under intense speculation in the national press for its lack of preparation for the sheer numbers that would be travelling through the airport; border delays resulting in long queues and staffing issues were some of the issues cited.

The two main London airports responded with increased staffing levels during Games time. For disabled travellers the improvements included amblifts, lightweight aisle chairs and an extensive range of equipment incorporated to manage reduced mobility demands. Gatwick airport invested just over £2m in further equipment resulting in 100 new wheelchairs, 36 new buggies and audio-visual information systems. The legacy is to ensure that the improvements made remain in place where possible.

Xavier Gonzales, CEO of the International Paralympic Committee said that the airports worked effectively during the Games. Heathrow is an old airport in part, and customer service and information are crucial to the accessible journey experience. Reports suggest that London Heathrow gave 110% during Games time, which isn't possible on a daily basis.

Pedestrian access

Through TfL, a large number of improvements have taken place across London in the lead up to 2012. 94% of stand-alone pedestrian crossings have either audible warnings or tactile rotating cones. In 2012 work began on rolling out Pedestrian Countdown systems (displaying how many seconds left to cross safely). Work has continued on Legible London, the Capitals way finding system and there are over 1,100 signs across 25 boroughs.

4.7 Access information is not reaching the widest audience

During the Games people opted in to receive information. A daily email presented options and advice; how to travel to venues, what to see, where to go, times to avoid etc. Post Games there is more reliance on London's visitors to find their own information.

There is no shortage of information available about London. A search engine query for “information for disabled visitors to London” returns 9.5 million websites. The Apple i-store currently lists 312 London specific apps. In fact for London’s visitors and potential visitors information overload is prevalent. The concern is that in many cases detailed and accurate information is difficult to find. This leads to knowledge gaps which may cause unnecessary delay/expenditure or result in visitors missing out on the wider London experience.

Previously we reported a position of confused, dispersed and limited accessible information. The GLA intervention to tackle this position was to work with Direct Enquiries to develop and deliver the Inclusive London website (see Appendix A for detailed evaluation). This was a positive step forward and as the official London portal, a much needed resource in the lead up to the Olympic and Paralympic Games. However, both the stakeholder interviews and consumer research show there are still issues to address. Consistently stakeholders and disabled people want to see access information in mainstream provision, whether electronic or otherwise.

The 2009 consumer research showed that mainstream websites were the primary source of information for disabled people. In 2012 that is unchanged: 44% use tourist board websites. In comparison, over the same period the number of disabled people using sites specifically created for a disabled audience has decreased from 38% to 26%. Awareness of these specific resources remains low.

Inclusive London prompts a mixed reaction. Some users find the information helpful – removing the ‘stress and guess’ – others highlight concerns over collection methodology and accuracy.

There are two prominent providers of pan disability access information (Inclusive London and DisabledGo) and several smaller providers. Some stakeholders expressed confusion over the various auditing methods used and concern and frustration that the information is sometimes inaccurate and not up to date. Sharing with other stakeholders is limited.

Another finding is the challenge to meet the needs of people who don’t see themselves as having a disability. A number of stakeholders (ODA, SOLT, ATOC, and DisabledGo) cite this as a key issue in information provision and a factor in attracting older people to events and productions.

“There is a growing issue of trying to engage people who are getting older who don’t consider themselves disabled, so aren’t aware of our assisted performances. You can’t market to them as disabled – but they would really benefit from it.”

Lucinda Harvey, Society of London Theatres

The Games also experienced the challenge of communicating with those who don’t consider themselves to be disabled. It was a key objective to get the message across, so pre-arrival information focussed on facts and advice that allowed visitors to plan their own experience e.g. the distance to walk between ‘set down’ and venue. Concentrating on the distance and not the disability is an

example of addressing the social model of accessibility, identifying the barriers and not individuals' impairments. This approach means that the information is relevant to a wider cross-section of visitors.

The challenge is how to maintain this approach to information provision. The DIY chain B&Q introduced a range of products primarily aimed at older and disabled customers but not branded as such. Called 'Can Do - Daily Living Made Easy', the range flew off the shelves. London's information providers can learn from this example. The target audience is disabled people/older people but the marketing message reaches a much wider audience through adapting terminology.

5 CONTEXT: THE CHANGING LANDSCAPE SINCE 2009

London is no longer an Olympic City in waiting; six months after the closing ceremony of the Paralympic Games there is much to celebrate and more to achieve to continue the legacy.

It would be remiss not to set the context of the above findings against political, legislative and structural change since 2009. This section considers those changes which could have an impact on the future direction of accessibility and inclusion.

5.1 Nationally

The launch of the Equality Act 2010

The Equality Act came into force in October 2010, consuming the Disability Discrimination Law (DDA) 1995. As stated by Government: ‘providing a modern single framework, with clear streamlined law, to more effectively tackle disadvantage and discrimination’.

Stakeholders including the Equality and Human Rights Commission state that disability is losing prominence within the confines of the Equality Act. This is stated as having an impact at Borough level.

‘Disability has certainly been lost at borough level; disability is now a ‘subset of absolutely everything’.

quote anonymous

5.2 Regionally

Lack of a quality development role for London

In 2009 London had a Regional Development Agency. The London Development Agency (LDA) was a functional body of the GLA and had a comprehensive tourism remit with overall responsibility for the development and promotion of tourism; focussing on:

- skills
- business support
- product development
- quality and the visitor welcome

To ensure pan-London delivery, the LDA created tourism manager posts covering North, South, East, West and Central. These five area managers supported boroughs in the capital. It appears no organisation has a remit comparable to the previous role of the LDA.

As an example of development work in 2007 the LDA created the first pan London accommodation database with additional data records for the attraction and hospitality sectors and capable of covering the whole visitor journey spectrum. For three years every planning application and building conversion/change of use was logged and cross-checked on the ground, resulting in over 42,000 data updates. Maintenance of the database ceased in 2010. The GLA is assessing the future demand for

hotel supply over the next 30 years, including accessible accommodation, with a gap in knowledge of what the current supply is.

Among many decision makers there is an assumption that tourism requires minimal specialist intervention; London's visitors will come anyway. Organisations such as the Tourism Management Institute, Tourism Society and British Hospitality Association continue to lobby for the return of a dedicated Tourism Minister knowing that without this focus at a national level, there can be a negative impact on regional and local tourism development.

London & Partners is the official promotional organisation for London. Promotion is only one aspect of the visitor journey; without a focus on quality development we are in danger of overpromising and under delivering. So who is championing the visitor?

Major stakeholders in tourism such as VisitEngland see the gap in business engagement/business support in London.

“Business engagement is key; it is vital London's tourism bodies engage with businesses to promote the key tools and resources from VisitEngland and others, ideally talking to them one-to-one, to help them address visitor access needs.”

Ross Calladine, VisitEngland

The GLA does not have a specialist Tourism Advisor. Given the importance of tourism to London, stakeholders identified this as a key need. Without an advisor, championing access and inclusion becomes more challenging.

5.3 At borough level...

Declining numbers of specialist access officers and forums

The number of London borough access officers declined by seven between 2003 and 2009. The number in 2012 isn't clear and believed to be 11. Budget constraints and altered priorities means there is a freeze on recruitment for access officer posts when they leave or another role consumes the remit.

The London Access Forum has become more fragile because of the lack of funding at a local level resulting in the loss of borough access forums (around 10 in 2009, down to 6 in 2013).

“Local access groups aren't financially supported or supported by planning in most boroughs; many disabled people have become frustrated and have decided to put their energy into something they can be successful with.”

Peter Lainson London Access Forum

Increasingly major planning initiatives require input from a disability consultative group. It takes both time and resources to create such a group and carries three particular risks; lack of expertise across the full spectrum of disability; stretching already over-stretched access groups and taking advantage of a voluntary resource.

Stakeholders noted the crucial requirement for this consultative group to contain the right technical experience and wider holistic appreciation to make a meaningful contribution to the process.

5.4 At local level....

Growing numbers of Business Improvement Districts (BIDs)

In the 2010 Nationwide BID survey there were 13 BIDs formed in London and there are now 25. A number of these are now starting their third terms and are presenting themselves as well-established and mature organisations. The localism agenda has focussed minds on local areas and a number of BIDs in the honey pot areas are investing heavily in the visitor experience, including public realm improvements, street scape studies and the visitor welcome. Working with the BIDs is important to the accessibility agenda.

We interviewed four BIDs as part of this study – New West End Company, The Heart of London (managing Leicester Square and Piccadilly) and the Paddington Waterside Partnership. A key theme emerging is that their investment needs to link to the priorities and investments of other organisations to ensure that the pockets of funding join up the visitor experience across London.

"The challenge we seek, whether exiting an underground tube station or navigating the streets of our city, is to ensure that the customer experience is complete and enjoyable from start to finish. It is therefore important that we connect the dots along the journey so the same standard of direction, orientation and customer reassurance is experienced at all levels.

Robin Hibbert NWECC

The New West End Company reports that based on the results of the consumer research in this study it will work with retail industry to highlight any issues.

6 CONCLUSIONS

In reaching these conclusions the consumer research findings must take the lead in determining how organisations and businesses respond to visitor needs. However the stakeholder findings create the foundations upon which to build the visitor journey. It is the underlying strategic focus and operational improvements of the many organisations and businesses managing the visitor experience, which will bring about further improvements in positive access ratings.

Taking the consumer research and stakeholder findings together the following conclusions are drawn:

6.1 The Games fulfilled a major role for access improvements

The London 2012 Olympic and Paralympic Games created heightened expectation of the city's accessibility both for stakeholders and visitors. The Games provided a catalyst for pockets of work that improved the disabled visitor experience in many parts of London e.g. improved accessibility to transport and public realm improvements such as the South Bank and Leicester Square. In this time consumer access ratings have positively increased across the visitor journey, indicating that these types of improvement have a significant impact on the disabled person's experience. To increase the numbers of disabled people choosing London as a place to visit and stay longer consumer's need effective promotion and communication of these improvements.

Organisations spoke of the clear need for political leadership to continue the good practice achieved in the lead up to and during the Games. The GLA has a responsibility to lead and influence by example; encouraging other organisations and partnerships to follow in developing more accessible places to experience.

More linkage of the main accessible tourist sites in London is needed. Using the South Bank as a model, the capital needs to identify all the positive interventions and connect them.

Stakeholders are willing to make linkage but require a mechanism to enable that to happen easily. The result – a joined-up visitor experience rather than islands of good practice – is in everyone's long term interest.

Hosting the Games created a common goal. Enabling accessibility to move forward to the next level – to make London the most accessible city – requires organisations responsible for managing the visitor experience continually to work together, to share best practice and communicate on a regular basis.

The key is getting the balance of effort right between 'Games time' and 'normal time'. It shouldn't mean that organisations go back to what they were doing before the Games or that they can continue to ride on the success of achievements solely intended for the period of the Games. For the long-term benefit of the visitor experience all organisations need to take forward and share with stakeholders the lessons learnt.

What is apparent is that the consumer scores for all aspects of the Visitor journey are within +/-7% indicating a more 'joined up' access experience than reported in 2009.

6.2 Greater coordination delivers success

London organisations are working to provide a more accessible city. The capital's businesses, boroughs, public sector, charities and dedicated individuals contribute and deliver enormous amounts of work. Unfortunately post Games there is the absence of an overall coordination role.

“What we are seeing is individual places making a difference but there is not the overall approach because there isn't a coordinating role.” Mark Dyer, ODA until January 2013.

Bringing organisations together doesn't happen by chance; it needs managing by an organisation with an individual to facilitate a joined-up approach and to prevent what has been achieved losing momentum or slipping back.

6.3 Inconsistency between Boroughs causes confusion for visitors

The competing demands of limited resources continue to affect London Boroughs ability to improve accessible facilities and services for visitors. However the inconsistency of information provision, lack of a joined up approach in blue badge parking and differing approaches to public realm improvements causes confusion for visitors

6.4 Access information is not reaching the widest audience.

The 2009 report recommended the development of an existing mainstream website already known to the visitor i.e. VisitLondon.com. The development of dedicated sites such as Inclusive London currently reaches a small proportion of the potential audience. Wider promotion and a change in terminology used to promote the service could see the facility appeal to a wider audience. Private sector specialist sites will continue meeting the needs of disabled people without public sector intervention. Public sector promotion of them however is essential. The consumer research continues to show that access information placed in the main London tourism website is a better option. In the long term integrating access information into the main stream visitor sites will reach a wider audience including those people who don't see themselves as having a disability.

6.5 London's access improvements need wider promotion

The GLA's access improvement projects on the South Bank and the development of London Photo Routes lack wider awareness which suggests limited promotion or marketing. Attracting higher numbers of disabled, older people and families – the visitors who benefit from these changes – required wider awareness.

Marketing the many accessible places, venues and events to disabled people should be a key priority for London & Partners.

6.6 London's moving forward

The good news is that all sectors score more positively across all criteria and the concerns of consumers are not as deep as the stakeholder findings. From a low base in 2009 the positive rating scores in 2012 show improvement into the 60% range. There is still room for improvement however as the positive ratings equate to an average of 56% across all sectors. In reality a business achieving just over 50% satisfaction rates would consider there is still much to do to improve the customer experience.

Staff attitude and knowledge featured in the top 3 most important access needs. All sectors except accommodation showed improved positive ratings for this area. Transport showed a marked improvement (up 20%) demonstrating that when there is a training focus and a defined channel to the audience there is greater impact on the visitor experience.

Summary

Taking all of these conclusions together highlights the essential role of adopting the visitor journey principles of putting visitors at the heart of accessible improvements. The changing motivations and priorities driving what visitors need are more important than what stakeholders, organisations, businesses and the GLA think is important to visitors.

The previous study required the identification of a series of baseline measurements to adopt to measure progress. Three years on our opinion is that these measurements are quantitative rather than qualitative. They reflect change but not necessarily visitor priorities e.g. there are more step free stations on the network however South Kensington, feeding several of London's must see attractions, is still not one of them.

Asking consumers how the many access initiatives and improvements are affecting their visitor experience overall is the only way to measure the added value benefit and economic impact.

7 RECOMMENDATIONS FOR CHANGE

In 2009 we reported concern for delivery against budget restraints but stakeholders and the GLA committed to do whatever it took to showcase London during the Games. The reality going forward is that, post 2012 it will be more difficult for all businesses and organisations to make the case for allocating further funding and resources to the accessibility agenda.

Without fail all stakeholders cited the need for a co-ordinating role and spoke of the clear need for political leadership to continue to progress the good practice achieved. To meet the Mayor's vision of using the Games as a springboard for transforming London into one of the most accessible cities on earth (see <http://www.london.gov.uk/accessiblegames>) it is essential that there is a continuing drive to deliver the accessibility agenda with a defined action plan.

In the absence of resources for one organisation to take on the London wide co-ordination role the following eight recommendations are made:

7.1 Create an Accessible Visitor Experience Concordat with major stakeholders representing every sector of the visitor journey to help continue a coordinated approach to improving London's accessibility

London needs more linkage between the main accessible tourist sites. A city wide concordat with an overall perspective of what is happening across London, coordinated by e.g. the GLA or London & Partners, would enable the many stakeholders and accessible projects to work together around the single focus of delivering a seamless visitor experience. The Mayor's river concordat provides a good example where all parties work together, knowledgeable of what each other will deliver, support and can add.

Some of the key issues to address are:

- Identify and work with those organisations that have direct responsibility or an influencing role in the visitor journey e.g. BIDs, and keep abreast of organisational changes
- Establish a communication channel for training and business support. London & Partners for example could effectively host and promote the Destination London training programme.
- Lobby Transport for London to continue their investment programme in step free access and other access improvements. Prioritising upgrades in line with their impact on key areas of the visitor economy e.g. transport options to leading attractions would help ensure that some of the main 'attractors' to London were accessible.

7.2 Actively promote London as an accessible visitor destination and promote the improvements made to London's accessibility

London's businesses, boroughs, public sector, charities and dedicated individuals are delivering enormous improvements and making London more accessible for visitors. This should be widely promoted in London, nationally and internationally, helping to make substantial contributions to the city's visitor economy (International visitors to England with a health condition spend over £300¹⁰ million each year). Many stakeholders voiced opinion that disabled visitors remain unaware of

¹⁰ Estimate based on doubling of 6 month provisional figures from International Passenger Survey 2010

London's recent improvements and upgrades to the facilities and services that the city offers. Without consumer awareness a vicious circle ensues; the disabled visitor doesn't come and businesses find it hard to justify making further improvements. All businesses and organisations have a role to play in promoting accessible London led by London & Partners as the official promotional organisation for London.

7.3 Review and consolidate consumer information provision

To reach the widest audience access information needs to be presented and available to visitors, including those who don't consider themselves to be disabled. Working with the main private sector providers of dedicated accessibility sites to improve the prominence of the information collected, will go some way to addressing this.

Some of the key issues to address are:

- Review criteria for information collection and agree a common standard of detail - A number of different commercial and not-for-profit organisations carry out access audits. They use different criteria and terminology which cause confusion and mean disabled people don't get the information they need
- Encourage London businesses to include more access information (access statement) on their own websites

7.4 Encourage boroughs to adopt a consistent approach

Visitors don't recognise boundaries, and inconsistent approaches leave them confused. Inconsistency between boroughs is a dominant finding of the stakeholder interviews. The boroughs need to recognise that visitors don't recognise boundaries and can't be expected to know which postcode to use when researching a visit. To gain consistency requires intervention at different levels within the borough through elected members and officers. This requires further consideration. How do you get policy makers to appreciate better access for local residents equates to better access for visitors?

Some of the key issues to address are:

- Blue badge parking and public toilets are particular issues and received some of the lowest positive scores in the consumer research. To gain consistency and availability will require intervention at different levels within boroughs.
- Champion a focus on disabled visitors in borough access agendas - In tourism honey pot boroughs a refocus on access and inclusion issues in balance with the wider remit of the Equality Act will simultaneously benefit both visitors and residents.
- Showcase best practice standards in the public realm - London requires a more consistent approach across boroughs to eliminate issues ranging from visitor confusion to legal challenge. Undertaking more South Bank type public realm improvement schemes that link up 'islands of good practice' will help to achieve a more joined-up accessible visitor experience and will help to demonstrate best practice particularly in challenging environments such as London's historic areas. Stakeholders spoke of needing a best practice template for London which could have a potential additional benefit of buying consortium to achieve best value on purchasing materials and availability, similar to what the City of Manchester has set up. From stakeholder interviews, we understand that David

Bonnet Associates has completed work in this area and could provide a starting point for this recommendation.

7.5 Set up an official London-wide access advisory panel

The Olympic Delivery Authority's Built Environment Access Panel was very successful in helping to deliver accessible venues for the Games. This group continues to work with the London Legacy Development Corporation helping to ensure that the new development in and around the park maintain high standards of accessibility and inclusion. A similar official panel of 'access and inclusive design professionals' that has a London wide role could deliver the technical knowledge and experience required for access projects that is often too demanding for volunteer groups. With the demise of many local access groups and the reduction in the number of borough access officers, this recommendation becomes increasingly vital. Peter Lainson chair of the London Access Forum wrote a paper on the development of such a model and this could be the starting point to understanding the requirements of this set of professionals. A feasibility study would establish its financial viability and sustainability.

7.6 Share access officer resources across boroughs

The decline of access officers is a continuing trend and with more funding cuts at borough level, this is unlikely to change in the short-to-medium term. More widespread and faster sharing of information and resources across boroughs would help maintain access to specialist skills as well as steer decision making. Across the country there are examples of boroughs sharing a staff resource to maintain access to specialist skills and experience. An access officer helps to steer decisions across all service areas for the benefit of inclusive design and the visitor experience. An appropriate lead on this would be London Councils.

7.7 Re-commission London's accommodation database

Disabled and older visitors should have a choice of accessible hotel accommodation in terms of location, price and facilities. Having an accurate picture of London's accessible accommodation and the number of rooms available helps to monitor the GLA's existing planning policy and would assist the hotel demand study. Re-commissioning the London Development Agency's comprehensive accommodation database would be the most effective way of taking this forward and will also assist in providing information on the number of accessible hotel bedrooms in London. (In 2010 the London Development Agency accommodation database, representing 3 years of detailed data record maintenance, became defunct. Payment of the licence fee could resurrect the database. Who would then assume responsibility for maintenance e.g. London & Partners is open for discussion).

7.8 Repeat consumer research to monitor progress

The most powerful monitor for change is the customer experience. Comparison between 2009 and 2012 results shows the areas of greatest impact and improvement to the visitor experience. The research clearly demonstrates e.g. that the investment in transport has had a major positive impact on perception of London's accessibility as well as the reality of the experience. The consumer research could extend in both the format and timescale to engage with as many disabled visitors as possible. Repeating this research every three-four years will allow a continued monitor of progress against established baselines.

8 MAPPING PROGRESS – MONITORING BENCHMARKS

In 2009 we identified a series of baseline measures against which to monitor future progress. As we pointed out then, this is not an exact science; many variables affect the quality and data. In 2012 the availability of publically available pan-London data continues to diminish, as noted below there are a number of baselines that we have been unable to establish in 2012 for a number of reasons e.g. change in collection method, change in organisational structures and responsibilities. There is also a legitimate concern that in some cases measuring the benchmark figure has little impact on the visitor experience. For example the number of assisted performances may increase but not the audiences attending requiring them. It is for this reason that we recommend future benchmarking should be in the form of visitor research – as this is the only way to monitor real progress against the target of improving London’s Accessibility.

	Baseline Measure	Date and Figure 2009	Date and Figure 2012	% change	Source / Notes
1	London accommodation premises participating in the National Accessible Scheme	January 2010 5 premises	November 2012 7 premises	+ 40%	VisitEngland
2	Number of London businesses using VisitEngland access template	Unknown. Data available from April 2010	39 Used 14 Completed & downloaded		VisitEngland
3	Accessible hotel rooms measured by the number of rooms audited using for example the Direct Enquiries template developed for the LDA audits in 2008/9.	December 2009 1349 hotel rooms	November 2012 457 businesses		North = 66; East = 38 Central – 227; South = 76 West = 50 Unable to gain room numbers from Direct Enquiries

	Baseline Measure	Date and Figure 2009	Date and Figure 2012	% change	Source / Notes
4	Number of on street Blue Badge car parking spaces available to the public i.e. not restricted to residents.	March 2010 4327 total for London (1727 for five inner boroughs)			Unable to obtain accurate data as comparison to 2009
5	Step free underground stations (i.e. step free to platform) on London Underground	January 2010 58 stations	November 2012 66 stations	+ 13.8%	Transport for London
6	Number of platforms with level access from platform to train at step-free stations on London Underground	January 2010 36 platforms at 16 stations	November 2012 60 platforms at 24 stations	+ 67% platforms + 50% stations	Transport for London
7	Number of tube lines carrying visible announcements	January 2012 4 lines	November 2012 6 lines	+ 50%	Victoria and Metropolitan joined District, Jubilee, Northern and Piccadilly
8	Number of London Network Rail stations (on the TravelCard network) where there are step free routes between every platform	2009 Survey of all ATOC stations. London data can be extracted			Requested data from ATOC

	Baseline Measure	Date and Figure 2009	Date and Figure 2012	% change	Source / Notes
9	Number of accessible public toilets. Data for London (with a subset for the inner boroughs and a subset for RADAR toilets).	March 2010 1065 toilets with disabled facilities in London of which 864 are RADAR toilets. (170 are in the 5 inner boroughs of which 136 RADAR toilets.)			Unable to obtain accurate data as comparison to 2009
10	Number of Changing Places in the capital	Dec 2009 13 facilities	November 2012 27 facilities	+ 108%	www.changingplaces.org
11	Number of assisted performances in London Theatres (signed, captioned or audio-described).	2009 460 performances	2012 450 performances		
12	Number of accessible restaurants in the London boroughs audited by DisabledGo	January 2010 859 restaurants			Requested data from DisabledGo
13	Users of Visit London website access pages: page visits	Data for 6 months ending 2009 All visits: 54,414	Data for 6 months ending Nov 2012 All visits: 54,648		

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 নিচের ফোন 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 ταχυ-
δρομικά στην παρακάτω διεύθυνση.

Urdu

اگر آپ اس دستاویز کی نقل اپنی زبان میں
چاہتے ہیں، 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 ਫੋਨ 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.

