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HOTELS

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Blue Badge Access Awards


H G E M



CONSUMER SURVEY INSIGHTS
ACCESSIBILITY IN HOSPITALITY

Blue Badge Access Awards

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FOREWORD

Lies, damned lies, and statistics

Let's leave the first two to our prime minister and just concentrate on the statistics, because they tell quite a tale. The statistics in this report shock, embarrass and intrigue in equal measure. More importantly they make you realise that what is currently normal is not acceptable. We must establish a new normal and erase years of historic insouciance on accessibility.

Read on please and gauge the level of moral and commercial change that is required. Then mark in the 'imperative, must embrace' part of your to do list.

Robin Sheppard



President, Bespoke Hotels | Founder Blue Badge Access Awards (BBAA)

About HGEM

HGEM works closely with hospitality companies to measure and improve their guests' experience.

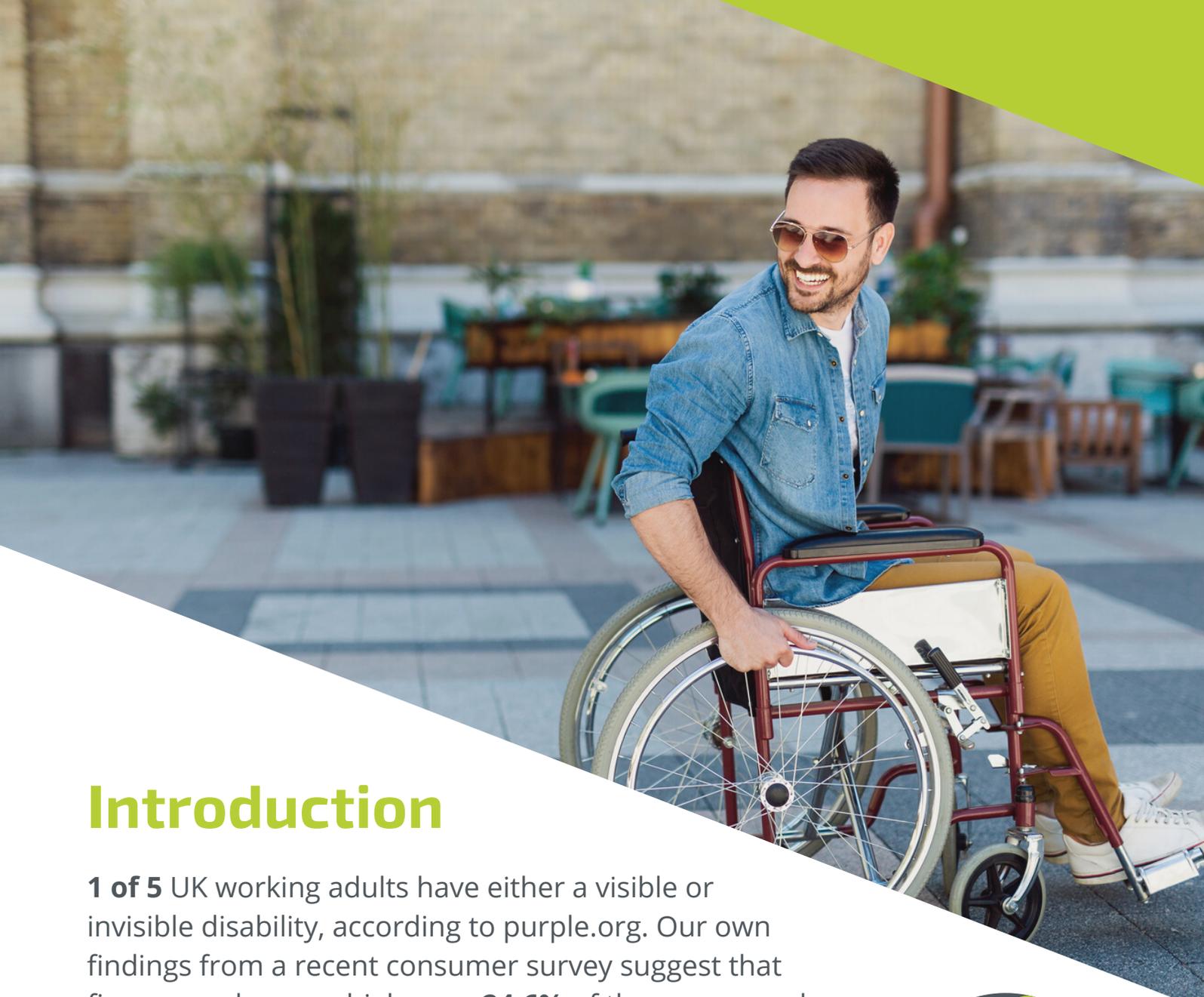
Their core services include mystery guest audits, building highly customisable feedback sites, online review management, measuring product ratings, and bringing all the data together into one, award-winning Guest Experience Management platform – **The Hub**.

TOPICS COVERED

- How do customers perceive accessibility in hospitality?
- Are businesses doing enough? Sector analysis.
- Risks of losing custom due to lack of accessibility
- Effect of disabled workers on customer experience

*Addendum: Perceived Covid safety in hospitality venues





Introduction

1 of 5 UK working adults have either a visible or invisible disability, according to purple.org. Our own findings from a recent consumer survey suggest that figure may be even higher, as **24.6%** of those surveyed reported having a visible or invisible disability.

The spending power of disabled people and their households in 2020 was estimated to be worth **£274 billion** per year to UK businesses, and Purple states that various hospitality sectors lose out on **163 - 274 million pounds** per month, by ignoring the needs of disabled people. It's a substantial market, often unrecognised.

We've partnered up with BBAA to shed some light onto accessibility from a consumer's perspective, hopefully this will make for an insightful read, and help bring your business closer to your customers, both abled and disabled.



**CONSUMERS HAVE A
VISIBLE / INVISIBLE
DISABILITY**

£274 bn
PER YEAR LOST



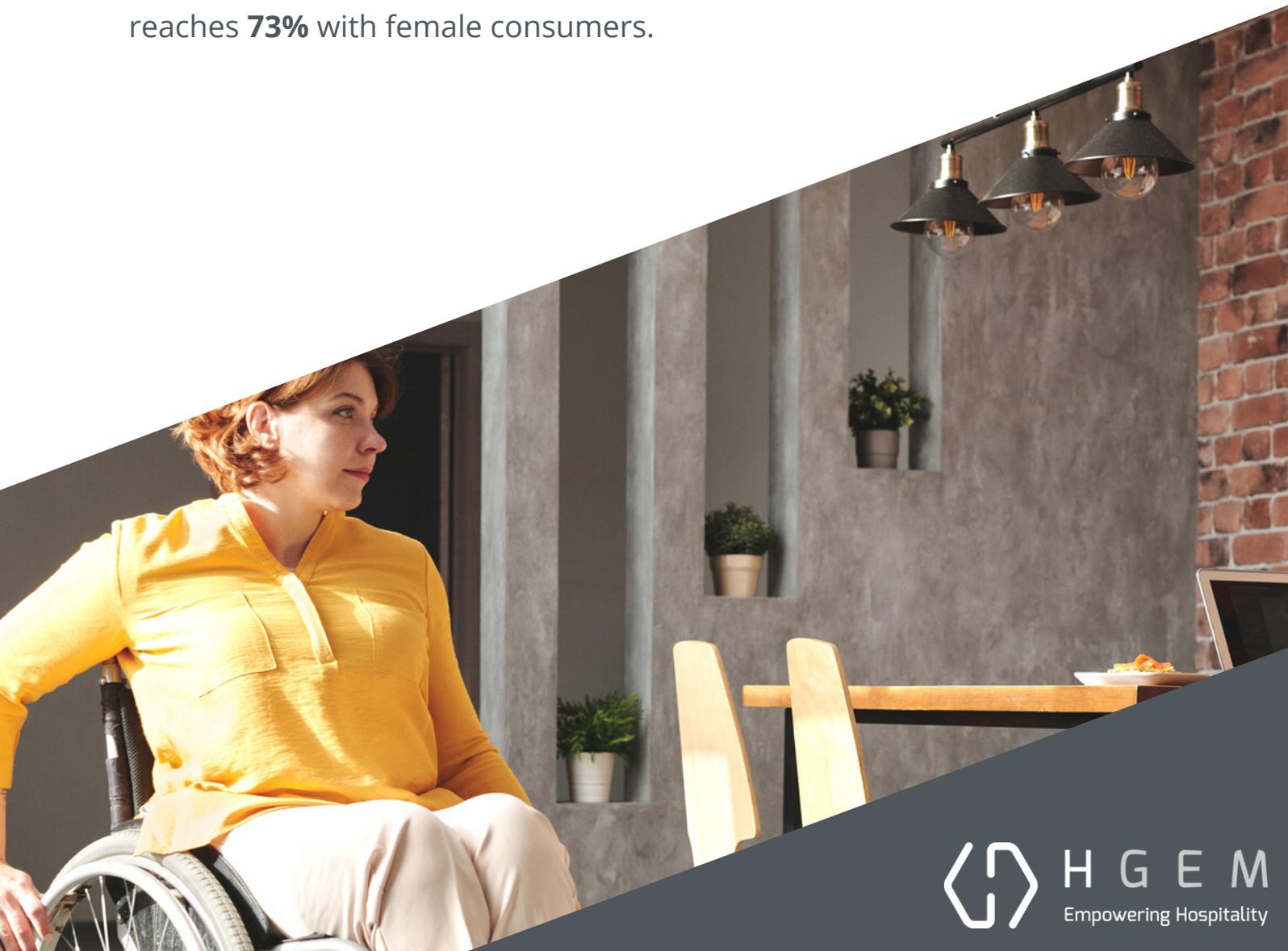
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Is hospitality doing enough?

Based on our findings, a large majority (**71%**) of customers say that there isn't currently enough attention brought to accessibility in the hospitality industry.

In terms of demographics, the sentiment is in direct correlation with age – it seems to become more important to people as they get older: **62%** of Gen-Z responded that not enough attention is brought to accessibility, and this percentage increases in a linear fashion, parallel with age, rising to **73%** in the 66+ age category.

There is a distinct split in opinion from a gender perspective, too. In contrast to women, only **62%** of male respondents suggested not enough attention is brought to accessibility, however that number reaches **73%** with female consumers.



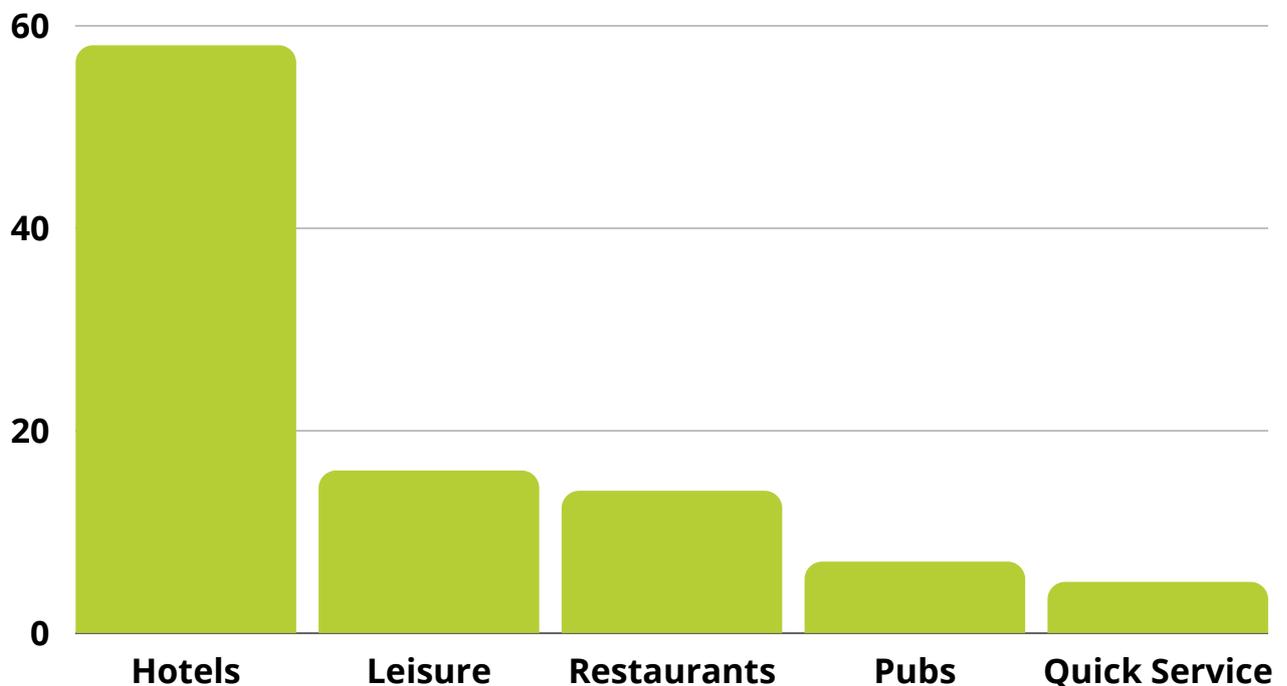
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Sector Analysis

We also performed a sector analysis, to reveal which sectors consumers consider taking accessibility most seriously, and the results are as follows:

1. Hotels – **58%**
2. Leisure – **16%**
3. Restaurants – **14%**
4. Pubs – **7%**
5. Quick Service – **5%**

Results from our survey reveal that hotels have a good reputation for keeping the needs of disabled in mind, however there is a stark difference between hotels and every other sector.





Are you losing custom?

We can see from Purple's research that vast amounts each month are lost due to the needs of disabled people being ignored – but as accessibility is being talked about more within the consumer landscape, do businesses risk losing custom from abled customers, if they ignore the needs of the disabled?

We asked our consumer panel (including both abled and disabled people) whether they would leave a venue if access for disabled was inadequate or not as described, and a almost a third of consumers (**30%**) said yes, which is notably higher than the percentage of disabled people within the survey (**25%**). Roughly a third (**33%**) abstained from the question, and another third (**37%**) said they would not leave.

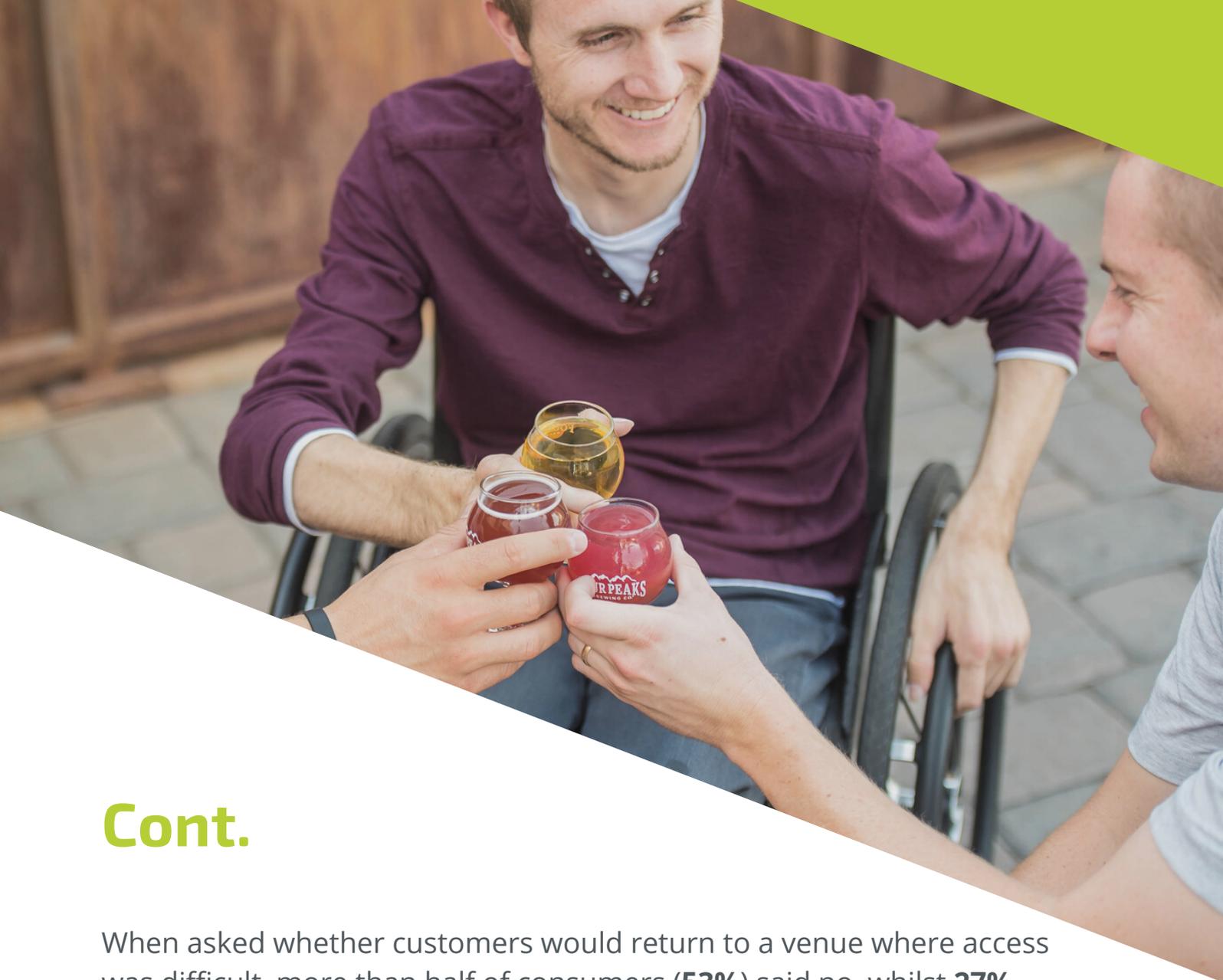


**1/3 WOULD LEAVE IF
DISABLED ACCESS
WAS INADEQUATE**

 We hypothesise that the large number of abstentions in this section of the report are due to abled consumers (75% of total respondents) being unsure of how they would react in these scenarios.



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Cont.

When asked whether customers would return to a venue where access was difficult, more than half of consumers (**53%**) said no, whilst **27%** abstained and **20%** said yes.

We also investigated whether customers would return if staff were unaware of the needs of a disabled person, and 2 out of 5 (**43%**) would not, another **41%** abstained and **15%** said they would return.

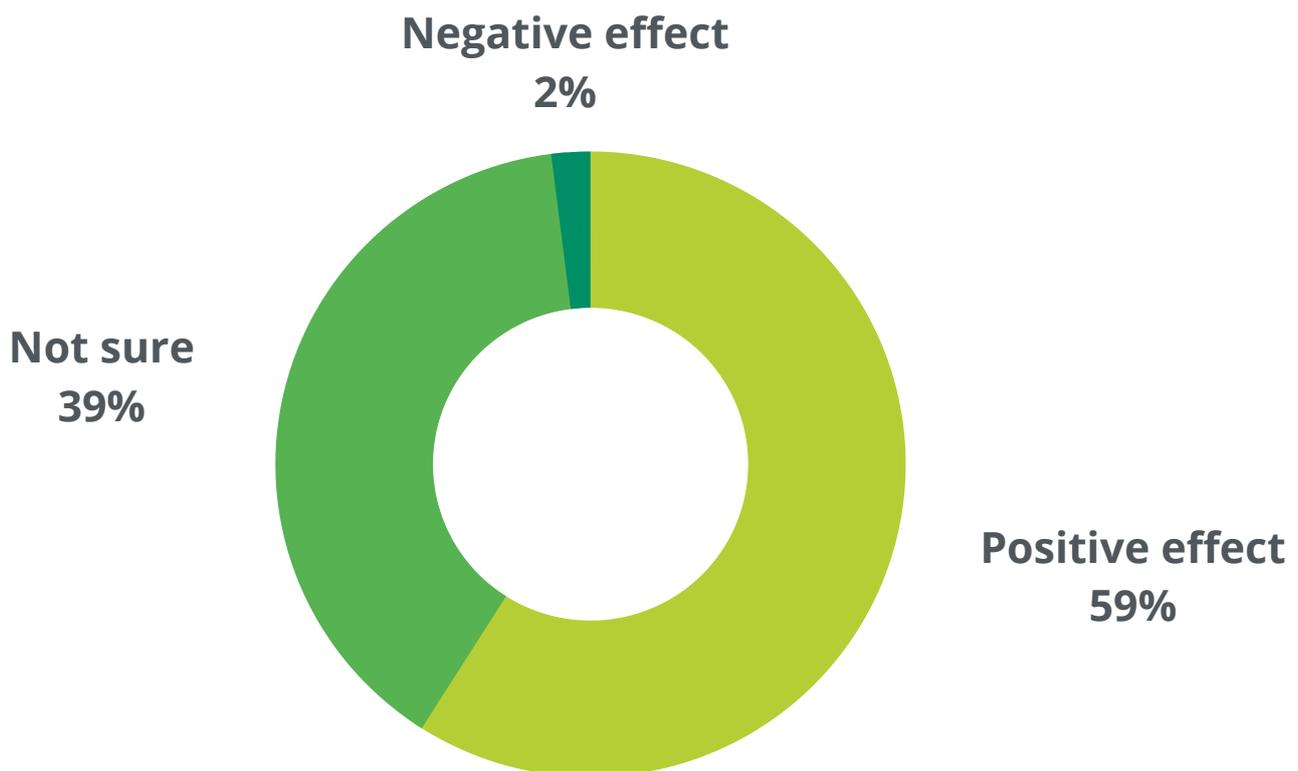
From a gender perspective, men appear to be more resolute than women, as a markedly higher percentage of men said they would **a)** leave a venue **b)** not return if accessibility was problematic, and **c)** they would not return if staff were unaware of the needs of the disabled.

In terms of age, standing out from other age groups are the millennials (**26-35**), who responded far less critically than any other age group to all three questions (i.e. least affected by lack of accessibility), whilst no clear pattern emerges regarding the most critical age group.

Effect of disabled staff on Customer Experience

How would a customer react to a disabled person being employed at a venue? **59%** said it would impact their experience positively, **39%** abstained, and **2%** said it would impact their experience negatively.

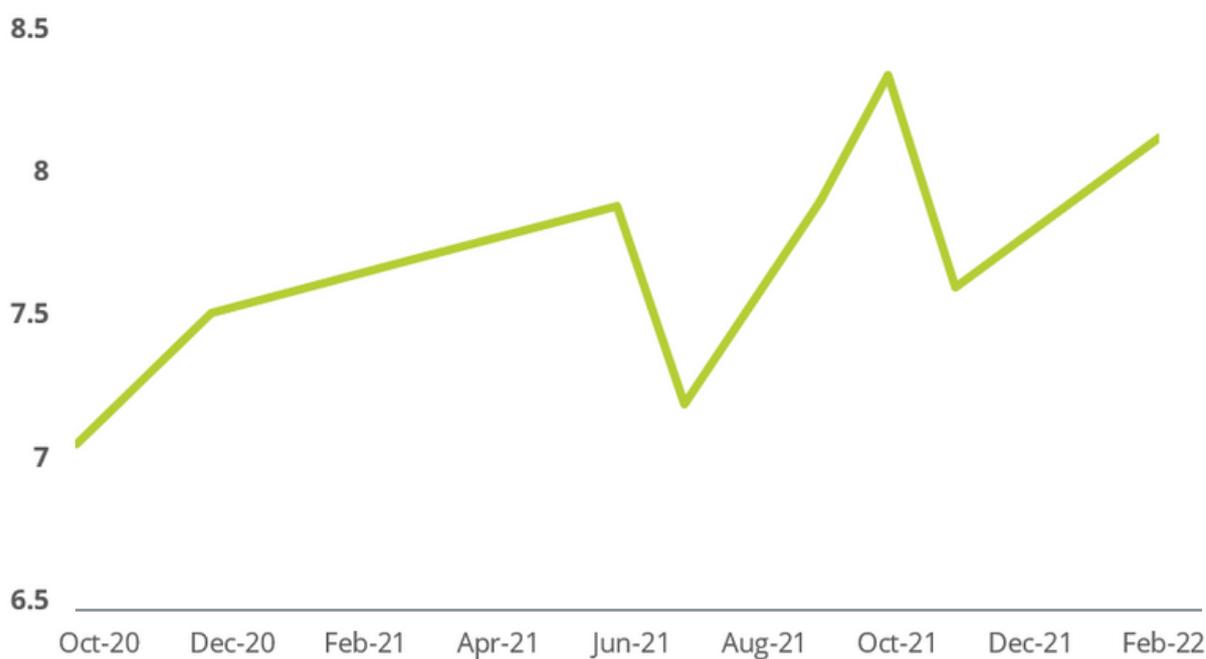
Women seem to be affected positively by a disabled person serving them far more (**66%**) than men (**38%**), a majority of whom abstained (**58%**). Shockingly, **4%** of men said their experience would be affected negatively by a disabled staff member, whereas there were no women who responded they'd be affected negatively.



Perceived Covid-19 safety

We have been keeping track of how safe our panel of consumers feel at the idea of going out into hospitality venues, and the most recent results show that consumer confidence has recovered significantly since the Omicron wave hit UK in December.

The average safety score is now **8.1** out of 10. In October 2021, confidence was at its highest since the beginning of the pandemic, at **8.34**, and during Omicron it dropped all the way down to **7.6**. It will be interesting to see whether consumer confidence will have a record-breaking month (since the pandemic) in March / April.



HGEM Products

Mystery Guest Audits
Guest Feedback Sites
Review Management
Product Ratings

SUMMARY

As the disabled market is much larger than many businesses realise, it's important to keep accessibility in mind when designing a new venue. Many consumers indicate that accessibility isn't getting enough attention within the industry, and there is a risk that the worst offenders, such as companies within the Pub and Quick Service sectors, might be losing out on custom not just from disabled people and their families, but also people with no disability who protest against "historic insouciance on accessibility", as Robin Sheppard put it.

Some evidence of that can be found in our data, as we can see that there are more people who would leave a venue and not return due to accessibility issues than there were people who reported to have a disability.

It may also be worth considering how you could incorporate disabled staff into venues as our statistics show most people would respond positively.



Statistics corner

For those of you who care more about facts and less about opinions; here's pure statistics for you.

GEN Z (18-25)

- 31% have a visible / invisible disability
 - 62% don't believe enough attention is brought to accessibility in hospitality
 - 69% indicate hotel sector takes accessibility most seriously; 23% indicate restaurants and 8% indicate leisure.
 - 31% would leave a venue if access for disabled wasn't appropriate / as described; 46% would not leave.
 - 62% would not return to a venue if access was difficult; 23% would return.
 - 54% would not return to a venue if staff were not aware of the needs of disabled; 15% would return.
 - If a venue employed a disabled person, 62% say it would impact their experience positively.
 - Average sentiment rating for Covid safety in hospitality on a 10-point scale: 7.7
-

MILLENNIALS (26-35)

- 16% have a visible / invisible disability
 - 67% don't believe enough attention is brought to accessibility in hospitality
 - 51% indicate hotel sector takes accessibility most seriously; 19% indicate leisure; 18% indicate restaurants; 10% indicate pubs and 2% indicate quick service
 - 20% would leave a venue if access for disabled wasn't appropriate / as described; 47% would not leave.
 - 43% would not return to a venue if access was difficult; 28% would return.
 - 25% would not return to a venue if staff were not aware of the needs of disabled; 25% would return.
 - If a venue employed a disabled person, 55% say it would impact their experience positively, 2% say it would impact negatively.
 - Average sentiment rating for Covid safety in hospitality on a 10-point scale: 8.55
-

GEN X (36-45)

- 18% have a visible / invisible disability
- 70% don't believe enough attention is brought to accessibility in hospitality
- 64% indicate hotel sector takes accessibility most seriously; 14% indicate leisure; 11% indicate restaurants; 7% indicate pubs and 4% indicate quick service
- 39% would leave a venue if access for disabled wasn't appropriate / as described; 39% would not leave.
- 57% would not return to a venue if access was difficult; 20% would return.
- 45% would not return to a venue if staff were not aware of the needs of disabled; 18% would return.
- If a venue employed a disabled person, 61% say it would impact their experience positively
- Average sentiment rating for Covid safety in hospitality on a 10-point scale: 8.3

Statistics corner cont.

GEN X (46-55)

- 33% have a visible / invisible disability
 - 78% don't believe enough attention is brought to accessibility in hospitality
 - 51% indicate hotel sector takes accessibility most seriously; 18% say leisure; 16% indicate restaurants; 12% say quick service and 4% indicate pubs.
 - 35% would leave a venue if access for disabled wasn't appropriate / as described; 29% would not leave.
 - 53% would not return to a venue if access was difficult; 18% would return.
 - 41% would not return to a venue if staff were not aware of the needs of disabled; 14% would return.
 - If a venue employed a disabled person, 63% say it would impact their experience positively, 2% say it would impact them negatively.
 - Average sentiment rating for Covid safety in hospitality on a 10-point scale: 8.12
-

BOOMERS (56-65)

- 23% have a visible / invisible disability
 - 70% don't believe enough attention is brought to accessibility in hospitality
 - 65% indicate hotel sector takes accessibility most seriously; 16% say leisure; 12% say pubs; 5% indicate restaurants and 2% say quick service.
 - 30% would leave a venue if access for disabled wasn't appropriate / as described; 33% would not leave.
 - 54% would not return to a venue if access was difficult; 18% would return.
 - 58% would not return to a venue if staff were not aware of the needs of disabled; 5% would return.
 - If a venue employed a disabled person, 61% say it would impact their experience positively, 2% say it would impact them negatively.
 - Average sentiment rating for Covid safety in hospitality on a 10-point scale: 7.77
-

BOOMERS (66+)

- 34% have a visible / invisible disability
- 73% don't believe enough attention is brought to accessibility in hospitality
- 58% indicate hotel sector takes accessibility most seriously; 19% say leisure; 15% say restaurants; 4% indicate pubs and 4% say quick service.
- 31% would leave a venue if access for disabled wasn't appropriate / as described; 38% would not leave.
- 58% would not return to a venue if access was difficult; 19% would return.
- 42% would not return to a venue if staff were not aware of the needs of disabled; 15% would return.
- If a venue employed a disabled person, 54% say it would impact their experience positively.
- Average sentiment rating for Covid safety in hospitality on a 10-point scale: 7.88

Statistics corner cont.

WOMEN

- 24% have a visible / invisible disability
 - 73% don't believe enough attention is brought to accessibility in hospitality
 - 58% indicate hotel sector takes accessibility most seriously; 17% say leisure; 12% indicate restaurants; 8% say pubs and 5% indicate quick service.
 - 29% would leave a venue if access for disabled wasn't appropriate / as described; 37% would not leave.
 - 52% would not return to a venue if access was difficult; 18% would return.
 - 42% would not return to a venue if staff were not aware of the needs of disabled; 15% would return.
 - If a venue employed a disabled person, 66% say it would impact their experience positively
 - Average sentiment rating for Covid safety in hospitality on a 10-point scale: 8.12
-

MEN

- 24% have a visible / invisible disability
- 62% don't believe enough attention is brought to accessibility in hospitality
- 58% indicate hotel sector takes accessibility most seriously; 20% say restaurants; 14% say leisure; 4% indicate pubs and 4% say quick service.
- 34% would leave a venue if access for disabled wasn't appropriate / as described; 40% would not leave.
- 58% would not return to a venue if access was difficult; 26% would return.
- 48% would not return to a venue if staff were not aware of the needs of disabled; 18% would return.
- If a venue employed a disabled person, 38% say it would impact their experience positively, 4% say it would impact them negatively.
- Average sentiment rating for Covid safety in hospitality on a 10-point scale: 8.10