

Working Paper 90

Projections of demand and supply for accessible hotel rooms in London

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Executive summary

London is one of the most visited cities in the world, with 19.1 million international visitors, spending around £11.9 billion in 2016¹. London needs to ensure that it can provide suitable accommodation that meets the needs of all those that visit, including those with accessibility requirements. The Mayor of London is committed to supporting the disabled community. Given the need to understand better the potential room requirements for disabled visitors, this paper presents projections of the demand and supply of accessible hotel rooms in London up to 2041².

One of the main issues facing this analysis is defining an 'accessible' room. Building regulations and other legislative pieces often take a 'strict' definition whereby accessible refers to wheelchair accessibility. However, in reality, it can be broader than that and include people who are blind or have long-term illnesses for example. Given this, this paper assesses the supply and demand for accessible accommodation using both a strict, wheelchair accessible definition and a broader, more inclusive 'all accessible' definition. This can then give an idea as to the minimum and maximum possible accessible room requirement in London.

The methodology taken in this work is similar to previous work by GLA Economics that estimates the demand and supply for all hotel rooms (so, whether they are wheelchair accessible or not) in London up to 2041³. This involved primarily looking at the percentage of domestic and international visitors that might require an accessible room separately. While the former uses data from Visit Britain to estimate the percentage of disabled domestic visitors, the latter is based on three different scenarios. This included using data from the Office for National Statistics, looking at the disabled populations in London's main overseas tourism markets, and looking at the number of citizens requiring special assistance at London airports (as a proxy of disabled visitors). The share of disabled visitors can then be applied to the demand projections outlined in GLA Economics Working Paper 88 to derive estimates of the future demand for accessible rooms.

Similarly, the methodology also involved looking at the share of accessible rooms in London for the supply side analysis. This used hotel audit data and a database containing all hotel rooms in London. This is projected forwards by applying current planning requirements to the supply projections outlined in previous GLA Economics work.

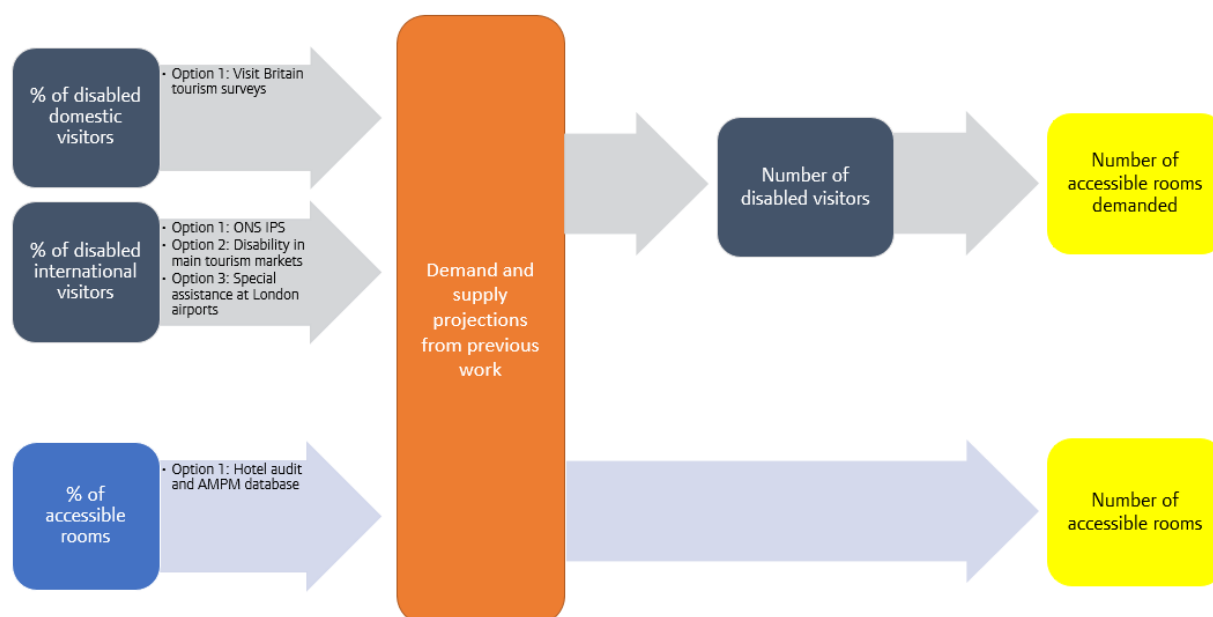
Figure 1 summarises the methodology used in this paper.

¹ ONS International Passenger Survey

² This paper also provides projections up to 2050 for comparability with other work.

³ Van Lohuizen, A & Smith, B (2017). [Projections of demand and supply for visitor accommodation in London](#), GLA Economics Working Paper 88, April 2017.

Figure 1: Methodology summary



Overall, our analysis suggests that there were between 2.7 and 3 million visitor nights by people with mobility impairments in London during 2015. That was the equivalent of 1.9 to 2.2 per cent of all visitor nights. If the wider ‘all accessible’ definition was used, this equated to between 6.8 and 8.5 million visitor nights, or 4.9 to 6.1 per cent of all visitor nights. Applying these to our demand projections outlined in Working Paper 88, by 2041, the number of visitor nights could rise to between 3.9 and 4.4 million using the mobility impaired definition or between 9.9 and 12.2 million using the ‘all accessible’ definition. Converting this into the number of accessible rooms suggest that London may need 4,000 to 4,500 rooms using the mobility impaired definition or 10,200 to 12,700 rooms using the ‘all accessible’ definition by 2041.

On the supply side, our calculations suggest that there were 4,900 accessible rooms in London in 2015. That was around 3.4 per cent of London’s total hotel room stock. Applying these to our supply projections in Working Paper 88 and assuming no changes to existing planning policies, this could increase to around 7,100 rooms by 2041.

Consequently, comparing our projections of the demand and supply of accessible rooms suggests that London would meet demand for accessible hotel rooms in 2041 when using the mobility impaired definition. However, London would require between 9.7 per cent and 14.2 per cent of all new hotel rooms to be accessible if it was to meet demand using the wider ‘all disabled’ definition.

There are, however, some further considerations around these demand and supply projections of accessible rooms. For example, it should be noted that not all people with a disability (or travelling with someone with a disability) will demand to stay in an accessible hotel room and that this analysis does not take into account any future increase in disability prevalence. Therefore, the likeliest path could lie somewhere between the mobility impaired (minimum) and ‘all accessible’ (maximum) projections.

1 Introduction

Tourism is an important sector for London's economy. London is one of the most visited cities in the world with 19.1 million international visitors, spending around £11.9 billion in 2016⁴. Given the importance of tourism to London's economy, London needs to ensure that it can meet the demands of all tourists who want to visit the capital. An important aspect of that is to provide suitable accommodation that meets the needs of all those that wish to visit, including those with accessibility requirements.

In light of this, GLA Economics was asked to investigate the supply and demand of accessible hotel rooms in London to support the development of the new London Plan. Predominantly, it seeks to investigate whether the existing London Plan policy requirement for wheelchair accessible rooms (see below) is still appropriate. GLA Economics has already produced demand and supply projections for hotel rooms in London (whether they are wheelchair accessible or not) up to 2041 and 2050 in Working Paper 88. This analysis, therefore, builds upon that work and can be considered an addendum to that paper.

One of the biggest issues with looking at the supply and demand of accessible hotel rooms is the definition of accessibility. Legislation has generally used a strict definition of accessibility by only looking at wheelchair accessibility. For example, since 2004, Part M of the Building Regulations has required hotel developments (whether new build or created by changing the use of an existing building) to achieve a level of at least 1 in 20 of their rooms being wheelchair accessible⁵. This 'strict' definition was also adopted in the current London Plan that stipulated that at least 10 per cent of new rooms should be wheelchair accessible⁶. This was based on previous analysis that suggested that there was a shortage of wheelchair accessible rooms in London, with demand exceeding supply⁷.

However, 'accessible' can be much broader than wheelchair accessibility only, such as those with long-term illnesses or who are blind; but this also brings its own issues. For example, statistics often use different definitions of disabilities or impairments, which restricts the comparability of measures. Similarly, information is often self-reported, meaning that the interpretation of terms such as 'accessible', 'disability' or 'mobility impairment' is often left to the respondent.

Given the issues with defining an accessible room, this paper assesses the supply and demand for accessible accommodation using both a strict wheelchair accessible definition and a broader, and more inclusive, 'all accessible' definition. This can then give an idea as to the minimum and maximum possible accessible room requirement in London.

This paper continues by outlining some of the previous research looking at accessible hotel room numbers in London. It then seeks to produce estimates for existing, and then future, demand and supply of accessible hotel rooms. The paper concludes by providing estimates for hotel room requirements, as well as highlighting some of the main risks to the projections.

⁴ ONS International Passenger Survey

⁵ DCLG (2015). [Building regulations, approved document M: access to and use of buildings](#), March 2016.

⁶ Mayor of London (2016). [The London Plan](#): the spatial development strategy for London consolidated with alternations since 2011, Policy 4.5.

⁷ Grant Thornton, [Accessible Hotels in London](#), March 2010.

2 Previous analysis

This chapter provides a brief overview of previous analysis considering the demand and supply of accessible hotel rooms in London.

Grant Thornton

The evidence that supported the existing London Plan policy requirement that 10 per cent of net additional hotel rooms in London should be wheelchair accessible was based on analysis conducted by Grant Thornton in 2010⁸. This used a mixed-method approach to estimate the demand and supply of accessible hotel rooms in London using both qualitative and quantitative analysis.

Focussing on the quantitative analysis, the demand for accessible rooms was also assessed separately for domestic and international visitors. For domestic visits, the former UK Tourism Survey (now Visit Britain's GB Tourism Survey) was used to estimate the percentage of disabled visitors. For international visits, it was simply assumed that the proportion of disabled visitors would be half that of domestic visitors. This was based on an assessment of the inclusive attitude towards disability in the main international tourism markets. These 'shares' of disabled visitors were projected forwards, allowing for an expected increase in disabled people consistent with current trends. Meanwhile, the supply of accessible rooms was estimated using audit data from Direct Enquiries - the Nationwide Access Register⁹.

GLA Economics Working Paper 58

In 2013, GLA Economics produced demand and supply projections for hotel rooms (whether they are wheelchair accessible or not) up to 2036¹⁰. The resulting paper specifically looked at the supply of accessible rooms in London, which was problematic given the lack of data. Acknowledging that, the analysis suggested that there were approximately 2,100 accessible hotel rooms in London. In addition, the research also showed that, despite the London Plan suggesting that 10 per cent of new hotel rooms should be wheelchair accessible, the actual proportion was around 5 per cent – in line with the historic average. However, this analysis was based on several simplifying assumptions partly due to a lack of reliable information. Consequently, the report called for more comprehensive data to be made available to enable more reliable estimates of hotel room accessibility.

GLA Economics Working Paper 88

Published in April 2017, GLA Economics Working Paper 88 sets out projections for the demand and supply of all serviced visitor accommodation in London principally up to 2041, though also including estimates up to 2050¹¹. The key findings of the paper were that London's supply of serviced accommodation (i.e. hostels, hotels, B&Bs and guest houses) in London was 145,700 rooms and that there were 31.5 million visitors to London staying for a total of 215.2 million nights. Overall, the paper concluded that current and future room capacity in London meets

⁸ Grant Thornton, [Accessible Hotels in London](#), March 2010.

⁹ <http://www.directenquiries.com/>

¹⁰ GLA Economics, Working paper 58: [Understanding the demand and supply of visitor accommodation in London to 2036](#), August 2013.

¹¹ Recently there has been a rise in room provision in the sharing economy through services such as Airbnb. However, it is not yet certain how these services will continue to grow or evolve into the future, and how regulation will impact upon the use of such services going forward. Therefore, the supply projections reported in Working Paper 88 have not been adjusted to account for the recent growth in non-serviced accommodation.

demand. The projections of demand and supply made in this paper are outlined in Table 1 below.

Table 1: Projections of demand and supply for visitor accommodation in London up to 2050

Year	Demand			Rooms (net)	Supply Rooms
	Visitor nights				
	Domestic	International	Total		
2015	30.2m	108.3m	138.5m	143,786	145,737
2020	31.7m	120.3m	151.9m	157,745	165,845
2025	35.0m	127.6m	162.7m	168,888	176,337
2030	38.4m	135.0m	173.4m	180,029	186,828
2036	42.2m	143.8m	186.0m	193,105	199,417
2041	45.2m	151.2m	196.4m	203,877	209,908
2050	50.8m	164.4m	215.2m	223,480	228,793

Source: GLA Economics

3 Demand for accessible hotel rooms

This chapter estimates the current and future demand for accessible hotel rooms in London. It involves first estimating the percentage of visitors that are disabled in 2015. This share is then applied to the demand projections for all visitors (so, whether or not they are disabled) outlined in GLA Economics Working Paper 88 (see Table 1). Consequently, this provides a projection of the number of disabled visitors up to 2041. The number of visitors can then be converted into an estimate of the number of hotel rooms demanded.

As with previous work, the demand trends for domestic and international visitors are looked at separately below.

Domestic visitor demand

Looking first at domestic visitor demand, Visit Britain collects information about domestic overnight trips and publishes the results as part of the Great British Tourism Survey (GBTS)¹². The GBTS presents the number of trips, nights, and expenditure, by certain breakdowns such as region, purpose of trips, and demographics. Since 2013, the survey has also included a question on accessibility – specifically, whether anyone in the party has a disability or impairment¹³. While this information is only available at the national level, it does provide a breakdown by type of disability or impairment (see Table 2).

Analysis of the 2015 data suggests that 16.6 per cent of domestic visitor nights involved someone with any type of disability in the travelling party. Of this, 4.7 per cent of all domestic visitor nights were by someone with a mobility impairment specifically. However, not all the disabilities or impairments included in this total would require an accessible room, i.e. someone who is deaf might prefer a standard room. Given this, it could be expected that 13.3 per cent of all domestic visitor nights could have involved someone with a preference for an accessible room¹⁴.

Table 2: Number of UK domestic visitor nights that involved someone with a disability or impairment in the travelling party during 2015

Disability or impairment	Number of nights, millions	As a percentage of total nights
Someone in the party has a long-term illness (e.g. AIDS, arthritis, cancer, diabetes)	28.2m	7.5%
Someone in the party has mobility impairment (non-wheelchair use)	16.9m	4.5%
Someone in the party is deaf/have partial hearing loss	15.8m	4.2%
Someone in the party has mobility impairment (wheelchair user)	5.2m	1.4%
Someone in the party is blind/partially sighted	5.3m	1.4%
Someone in the party has learning difficulties	6.4m	1.7%
Net disability	62.7m	16.6%
Wheelchair accessible definition	..	4.7%
'All accessible' definition	..	13.3%

Note: The 'all accessible' definition used here includes people with a mobility impairment, long-term illness, sight impairment and learning difficulties. In addition, as a separate question asks whether the survey respondent has any disability, the 'net disability' total excludes any double counting. Source: Visit Britain GB Tourism Survey

¹² Visit Britain, [GB Tourism Survey](#).

¹³ As noted in previous studies, there could be an element of double counting where two (or more) members of the same party report the disabilities of the same individual.

¹⁴ This uses the definition of mobility impairment, long-term illness, sight impairment and learning difficulties.

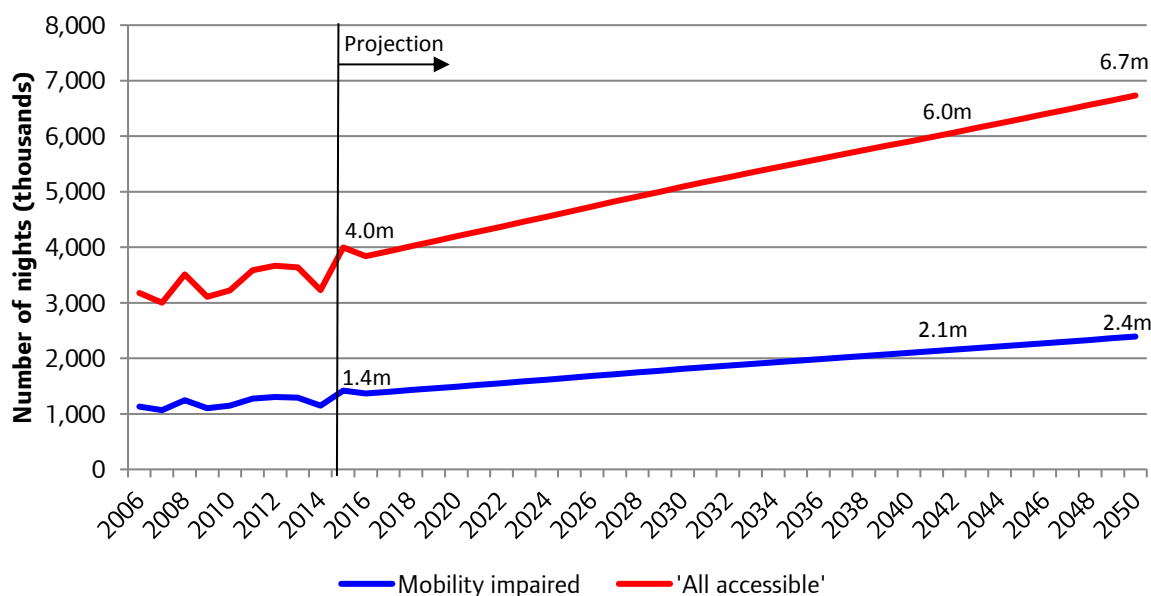
The above information refers to Great Britain as a whole; but in this paper, it has been assumed that the same trends would apply for London. Consequently, the 4.7 per cent mobility impaired and 16.6 per cent 'all accessible' shares can be applied to the domestic demand projections for London included in Working Paper 88 (see Table 1). This suggests that there were approximately 1.4 million visitor nights by people with someone with a mobility impairment in the travelling party in 2015. This rises to 4 million visitor nights if using the 'all accessible' definition. Over time, the number of visitor nights could rise to 2.1 million and 6 million respectively by 2041. This can be seen in Table 3 and Figure 2

Table 3: Number of accessible domestic visitor nights in London up to 2050, thousands

Year	All visitors	Mobility impaired (4.7%)	'All accessible' (16.6%)
2015	30,163	1,420	3,997
2020	31,657	1,490	4,195
2025	35,030	1,649	4,642
2030	38,401	1,808	5,089
2036	42,163	1,985	5,587
2041	45,178	2,127	5,987
2050	50,811	2,392	6,733

Source: Visit Britain GB Tourism Survey, GLA Economics

Figure 2: Number of domestic visitor nights in London up to 2050



Source: Visit Britain GB Tourism Survey, GLA Economics

International visitor demand

International demand for accessible rooms is more difficult to estimate due to the lack of information available in this area. The closest available data to the GBTS comes in the form of the ONS International Passenger Survey (IPS), but this does not include the same range of demographic indicators or regularly surveyed respondents about disability. Given this, three scenarios are investigated to produce a range of estimates for the number of international visitors with accessibility needs. Specifically, scenario 1 uses – albeit outdated – data from the IPS; scenario 2 is informed by the number of non-UK citizens requiring assistance at UK airports

as a proxy to the number of disabled visitors; and scenario 3 looks at the prevalence of disability in London's main tourism markets.

Scenario 1: ONS International Passenger Survey

One possibility for estimating international visitor demand is to use data from the IPS which provides information about overseas trips to and from the UK. However, unlike the GBTS it does not contain many demographic indicators and, therefore, cannot tell us about trends in visitor disability. That said, Visit Britain regularly sponsors ad-hoc questions in the survey and, in 2010, specifically asked whether visitors had a disability or impairment¹⁵. This sponsored question suggested that there were 576,000 international visits to the UK by someone with any disability in 2010.

It should be noted that the IPS asked respondents whether they had a disability themselves. This contrasts with the GBTS data used above for domestic visitors which was based on whether anyone in the travelling party had a disability. To account for this and to present the IPS information on a consistent basis, the number of disabled international visitors is multiplied with the average travelling party size. Previous analysis by GLA Economics suggested that the average party size for international visitors was 2.1¹⁶, meaning the total number of visitors with someone disabled could have been 1.2 million (576,000 x 2.1) in 2010.

Unfortunately, the IPS does not contain a breakdown of disability or impairment. Therefore, to reach an estimate of visitors who might demand an accessible room, information from the GBTS is used. However, it should be noted that disability trends for travellers in other countries may differ to the UK.

Acknowledging this, Table 2 in the previous section shows that there were 62.7 million domestic visitor nights by people with any disability in 2015 in the UK as a whole. This is 'net' visitor nights to remove any double counting from respondents who could have two or more disabilities. Instead, the 'gross' visitor nights is 77.8 million (i.e. the sum of all responses). Of this 'gross' total, 22.1 million were by people specifically with a mobility impairment (or 28.3 per cent) and 62 million were by people who met the 'all accessible' definition used in this paper¹⁷ (or 79.6 per cent). Applying these proportions to the 2010 IPS estimates above (1.2 million international visitor trips with someone disabled), approximately 342,300 international trips could have involved someone with a mobility impairment and around 963,400 trips could have involved someone with 'any accessibility' need.

Overall, the IPS reported that the total number of international visitor trips to the UK was 29.8 million in 2010. Consequently, this suggests that 1.1 per cent of all international visitor trips involved someone with a mobility impairment and 3.2 per cent involved someone with 'any accessibility' need.

These shares can be applied to the international visitor projections outlined in Working Paper 88 and shown in Table 1 to estimate how many of these may require accessible accommodation in London. This analysis implies that there were approximately 1.2 million mobility impaired international visitor nights or 3.5 million 'all accessible' international visitor nights spent in

¹⁵ Visit Britain, [Providing access for all](#).

¹⁶ GLA Economics, Working Paper 54: [Visit London's leisure tourism marketing campaigns: economic impact evaluations](#), 2012

¹⁷ See footnote 14 for the definition used here.

London in 2015. By 2041, this could rise to 1.7 million international visitor nights for mobility impaired visitors, and 4.9 million international visitor nights for 'all accessible' visitors.

Scenario 2: Special assistance at UK airports

A second scenario involves estimating international demand for accessible hotel rooms based on the number of air passengers requiring special assistance at UK airports. It should be noted that this is not restricted to people with mobility impairments, so it is more in line with the 'all accessible' definition used in this paper.

Most UK airports are required to publish information on special assistance requests as part of EU regulation (1107/2006) and this includes Heathrow and Gatwick who receive the majority of London's international visitors^{18,19}. Visitors can, of course, arrive at other airports, by sea or through the Eurotunnel, and not all arrivals at Heathrow and Gatwick have London as their final destination. Acknowledging those caveats, the percentage of arrivals at Heathrow and Gatwick Airports that required special assistance were 1.5 per cent and 0.8 per cent respectively in 2015.

It should be noted that some of the arrivals requiring special assistance will be a mix of both British (i.e. domestic) and non-British (i.e. international) people. For this analysis, only international visitors or non-UK arrivals are of interest. The proportion of arrivals that are international can be estimated from immigration statistics from the Home Office. This suggested that 41.3 per cent of arrivals were international in 2015. Applying this to the percentage of arrivals requiring assistance, approximately 0.6 per cent and 0.3 per cent of arrivals at Heathrow and Gatwick respectively were international and required special assistance.

Overall, there were approximately 75 million and 40.3 million arrivals at Heathrow and Gatwick respectively in 2015. This suggests that 448,900 and 133,000 international visitors required special assistance respectively, or a total of 581,800.

The above is measured in terms of people but, to be consistent with the other approaches in this paper, this needs to be adjusted into travelling parties (instead of individuals). As noted above, previous GLA Economics analysis suggested that the average travelling party size for international visitors is 2.1 people. Consequently, this gives an estimate of 1.2 million visits involving someone who required special assistance (581,800 x 2.1). This as a percentage of total international arrivals at Heathrow and Gatwick²⁰ is 2.6 per cent.

Assuming a continuation in this trend and applying it to the international visitor projections outlined in Working Paper 88 (see Table 1), there were an estimated 2.8 million 'all accessible' international visitor nights in 2015, which could rise to 4.2 million 'all accessible' international visitor nights by 2041.

Scenario 3: Disabled population in international tourism markets

The final option for estimating international visitor demand for accessible hotel rooms considers the percentage of disabled or mobility impaired people in countries that are the main tourism markets for London. However, it should be noted that disability definitions can vary between

¹⁸ GLA Economics analysis of CAA data shows that in March 2017, 81.3 per cent of passengers arriving at London airports landed at either Heathrow or Gatwick.

¹⁹ GLA Economics analysis of IPS data shows that 74 per cent of UK overseas visitors arrived by air in 2016.

²⁰ There were 70 million and 40.3 million arrivals at Heathrow and Gatwick Airports in 2015, a total of 110.3 million people. Given that immigration statistics suggested that 41.3 per cent of arrivals were international, this implies that the total number of international arrivals was 47.6 million.

countries and demographic statistics capturing this information can also be relatively out of date. To improve consistency, this analysis only uses Eurostat data and, therefore, only refers to European countries²¹. The latest data refers to 2011, and shows that the proportion of the European population who are mobility impaired varied from 1.9 per cent to 9.8 per cent, while for the broader 'all accessibility' definition it varied from 4.7 per cent to 20 per cent. The Eurostat data does not contain any information for non-European countries; instead the European averages of 3.8 per cent and 10.1 per cent have been used.

It should be noted that not everyone included in the disabled populations in these countries will travel to London. Therefore, an estimate of the 'propensity' or probability to travel is needed. Additionally, it is possible that the propensity to travel for disabled people is lower than the wider population. Unfortunately, there is no clear information available to estimate the different propensities to travel abroad, but there are several surveys available which give some indication. For example, looking at domestic travel in the UK, the Papworth Trust reported that disabled people travel a third less than the general public²² and Transport for London similarly reported that disabled people made 30 per cent less trips than non-disabled people²³. A 2012 study by the European Commission found that the propensity to travel for people with disabilities across the EU was 58.1 per cent for domestic trips, but only 12.5 per cent for international overnight trips²⁴. Additional Eurostat data shows that the propensity to travel internationally²⁵ among all EU citizens (disabled and non-disabled) is 30.3 per cent²⁶.

Given that the EU study relates to international trips, this information has been used to illustrate the different propensities to travel to London for disabled people in other countries. That is, disabled people are approximately 60 per cent less likely to travel than the general population [$100\% - (12.5\% \div 30.3\%)$]. This difference is applied to the disabled population shares so, for example, the European averages would instead be 1.5 per cent (down from 3.8 per cent) and 4.1 per cent (down from 10.1 per cent) using the mobility and 'all accessible' definitions respectively.

Overall, the amount of international visitor nights undertaken by mobility impaired people and 'all accessible' people were approximately 1.6 million and 4.5 million respectively in 2015 using this methodology. Applying the same shares to the projections included in Working Paper 88 (see Table 1), this could rise to 2.2 million mobility impaired international visitor nights or 6.2 million 'all accessible' international visitor nights by 2041.

Summary

From the three scenarios above, the number of international visitor nights in London by someone with a mobility impairment could vary from 1.2 to 1.6 million in 2015, rising to 1.7 to 2.2 million in 2041. If the wider 'all accessible' definition is used, then this could equate to 2.8

²¹ Eurostat has several different methods to collect disability statistics. The principle approach is a large dedicated survey called the European Health and Social Integration Survey (EHSIS) and would be the ideal data source used here. However, this dataset does not provide a breakdown by disability type which is needed to create the mobility impaired and 'all accessible' definitions used in this paper. Consequently, a different data source – the Labour Force Survey (LFS) – has alternatively been used. For more information about the different disability datasets collected by Eurostat, see the [Eurostat's disability statistics webpage](#).

²² Papworth Trust, [Disability in the United Kingdom 2016: facts and figures, 2016](#).

²³ Transport for London, [Understanding the travel needs of London's diverse communities: disabled people](#), April 2012.

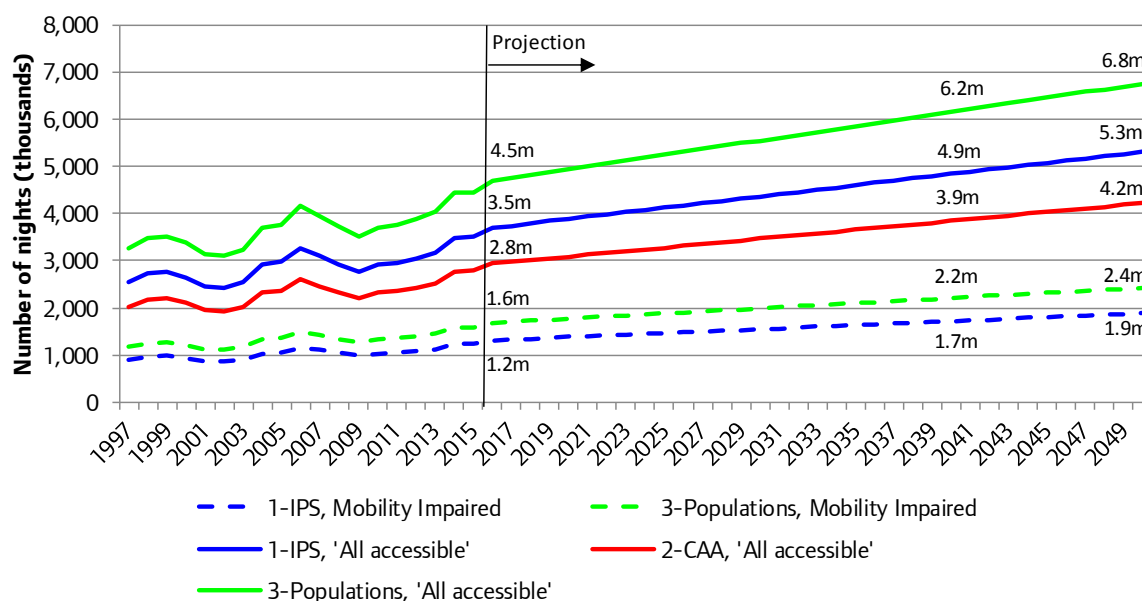
²⁴ European Commission, [Economic impact and travel patterns of accessible tourism in Europe](#), 2012, p. 75

²⁵ Eurostat defines this as having made at least one trip of at least one night for personal purposes.

²⁶ Eurostat, [Participation in tourism of EU residents \(aged 15 and over\)](#), 2015

to 4.5 million visitor nights in 2015, rising to 3.9 to 6.2 million visitor nights in 2041. This is summarised in Figure 3.

Figure 3: Number of international visitor nights in London up to 2050



Source: ONS International Passenger Survey, Civil Aviation Authority, Eurostat, GLA Economics

Total demand

An estimate of total demand can be calculated by combining the projections for domestic and international visitor nights above. Taking all the methodologies discussed above into account, the total number of visitor nights when using the mobility impaired definition is between 2.7 and 3 million (1.9 to 2.2 per cent of all visitor nights) in 2015. Meanwhile, the total number of visitor nights using the 'all accessible' definition is between 6.8 and 8.5 million (4.9 to 6.1 per cent of all visitor nights). These are summarised in the tables below.

Table 4: Shares of the London visitor population that are mobility impaired or 'all accessible'

Scenario	Domestic	International
Total visitor population	100.0%	100.0%
Mobility impaired		
1 – IPS	4.7%	1.1%
3 – Populations	4.7%	1.5%
'All accessible'		
1 – IPS	13.3%	3.2%
2 – CAA	13.3%	2.6%
3 – Populations	13.3%	4.1%

Source: GLA Economics

Table 5: Number of visitor nights by mobility impaired or 'all accessible' people in London in 2015, millions

Scenario	2015			2041		
	Domestic	International	Total	Domestic	International	Total
Total visitor population	30.2m	108.3m	138.5m	45.2	151.2	196.4
Mobility impaired						
1 – IPS	1.4m	1.2m	2.7m	2.1m	1.7m	3.9m
3 – Populations	1.4m	1.6m	3.0m	2.1m	2.2m	4.4m
'All accessible'						
1 – IPS	4.0m	3.5m	7.5m	6.0m	4.9m	10.9m
2 – CAA	4.0m	2.8m	6.8m	6.0m	3.9m	9.9m
3 – Populations	4.0m	4.5m	8.5m	6.0m	6.2m	12.2m

Source: GLA Economics

4 Supply of accessible hotel rooms

This chapter looks at the supply of accessible hotel rooms in London. This involves first estimating the existing supply of accessible rooms and then assuming future stock growth trends.

Existing supply

There is currently no existing data source with information on accessible rooms. However, limited information is available for some hotels via specific online access guides. Establishments themselves tend not to provide information on the number of accessible rooms available nor do they tend to provide comprehensive information on the design of facilities within bedrooms and bathrooms. Consequently, there can be inconsistencies as to what an accessible room is – for some hotels this can mean wheelchair accessible, whereas for others it can refer to rooms that can cater for other disabilities like blindness.

Therefore, taking a similar approach to GLA Economics Working Paper 58 (see chapter 2), the current supply of accessible hotel rooms in London has been estimated for this paper using audit information of hotels listed on DisabledGo²⁷. DisabledGo is a web-based provider of access information for disabled people in the UK. The audit included 140 London hotels listed on the website, and included hotels of all sizes from across the capital. Each hotel on the website listed the number of accessible rooms and total number of rooms, meaning a percentage of accessible hotels rooms could be calculated. This analysis suggested that, on average, 3.3 per cent of rooms in a London hotel were accessible.

It should be noted that the accuracy of this figure relies on hotel providers being able to assess what a wheelchair accessible room is in terms of current standards, requirements and equipment; and hotel providers not inflating figures to make themselves sound more ‘inclusive’ than they are.

Interestingly, the analysis indicated that the percentage of accessible rooms varied by hotel size. For example, larger hotels (i.e. those with over 50 rooms) were much more likely to have accessible rooms than smaller hotels as shown in Table 6. In fact, none of the hotels in the audit with less than 10 rooms offered accessible accommodation. This is unsurprising as Part M of the Building Regulations only require that 1 in 20 hotels rooms is wheelchair accessible; for small hotels – with less than 20 bedrooms – there is therefore no requirement to provide wheelchair accessible accommodation. To account for this trend at the London level, the percentage of wheelchair accessible rooms were weighted by the number of hotels by size. The information for the latter was taken from the AMPM database of hotels which gives a breakdown by the number of rooms in London²⁸. Overall, it is estimated that 3.4 per cent of London’s existing hotel rooms are currently wheelchair accessible. Applying this share to estimates of historic supply of serviced accommodation outlined in Working Paper 88 (see Table 1) suggests that there were 4,900 accessible rooms in London in 2015.

²⁷ <https://www.disabledgo.com/accessible-hotels-in-london>

²⁸ The AMPM database is based on planning applications, construction activity, monitoring of media coverage of new developments, and periodic verification of the status of entries in the database.

Table 6: Estimating the share of accessible rooms in London

Hotel size (rooms)	DisabledGo audit		AMPM database	Weighted average share of accessible rooms
	Number of hotels in audit	Average share of accessible rooms	Percentage of hotels in London	
0-10	6	0.0%	0.7%	0.0%
11-25	5	2.2%	4.7%	0.1%
26-50	15	0.8%	9.0%	0.1%
51-100	21	4.1%	14.7%	0.6%
101-200	48	4.1%	25.5%	1.0%
>200	45	3.4%	45.4%	1.6%
Total	140	3.3%	100.0%	3.4%

Note: hotel size bands were dictated by those used in the AMPM database. Source: DisabledGo, AMPM database, GLA Economics

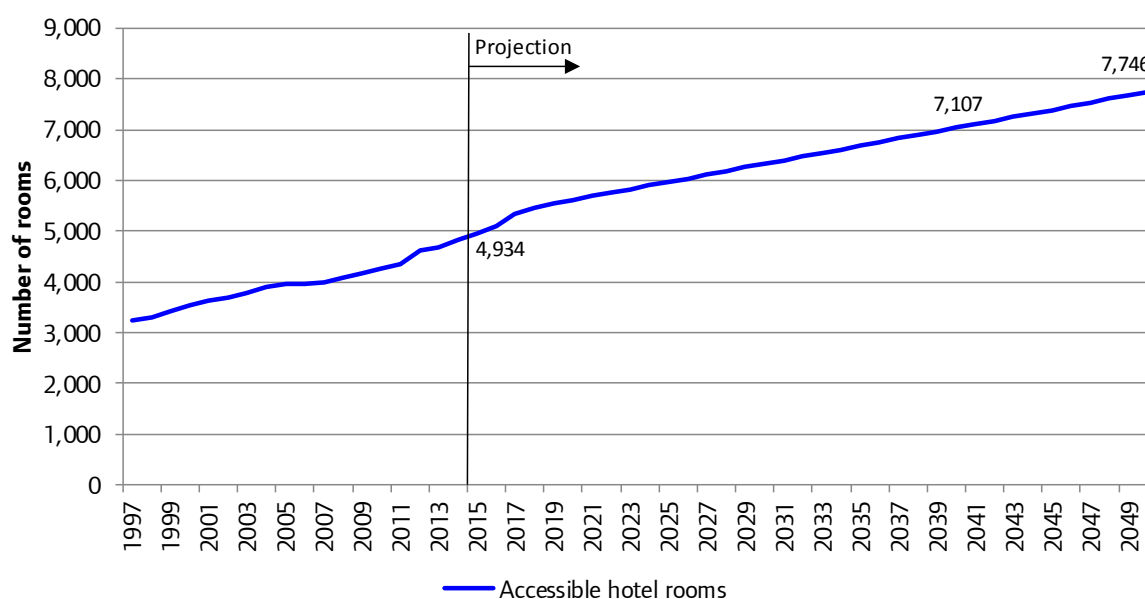
Supply projections

As stated previously, Part M of the Building Regulations require that 1 in 20 of rooms in a new hotel (whether new-build or created by a Change of Use building regulations application) should be wheelchair accessible. This paper assumes that growth of accessible hotel rooms will continue to meet the minimum standards of this regulation, i.e. that all new hotels will ensure 1 in 20 rooms are wheelchair accessible and, for those hotels with fewer than 20 rooms, no rooms will be wheelchair accessible.

In addition, analysis of the AMPM database suggested that 0.4 per cent of hotel stock is lost each year through hotel closures. This paper assumes that this holds equally true for accessible hotel rooms.

Under these assumptions, London’s serviced accommodation sector will offer 7,100 accessible hotel rooms by 2041 and 7,700 by 2050. This represents a compound annual rate of growth (CAGR) of 1.4 per cent.

Figure 3: Supply of accessible hotel rooms in London up to 2050



Source: GLA Economics

5 Projected room requirement

Throughout this paper, calculations have looked at demand in terms of visitor nights. It is now necessary to convert this into number of rooms. To do this, the ratio of the number of room nights to the number of visitor nights on a historical basis has been used. As there is a lack of data on accessible hotel rooms and visitor nights, the ratio of all hotel rooms has been used. As well as assuming the ratios are the same, this further assumes that the historic supply of all hotel rooms in London has been sufficient to cope with the existing number of visitor nights, but that there is also no serious excess supply. Based on previous GLA Economics modelling of hotel rooms generally, the ratio of visitor nights to room nights over the period 1991 to 2015 was found to be 2.64²⁹.

Based on this ratio, it is projected that by 2041 London will require 4,000 accessible rooms if using the mobility impaired definition (at a minimum) and 12,700 accessible hotel rooms if using the 'all accessible' definition (at a maximum). This is summarised in Table 7.

Table 7: Summary of projected accessible room requirement in London up to 2041

Scenario	Demand in 2015		Demand in 2041		Required percentage of new rooms to meet demand
	Number of visitor nights	Number of rooms	Number of visitor nights	Number of rooms	
Mobility impaired					
1 – IPS	2.7m	2,765	3.9m	4,009	-1.7%
3 – Population	3.0m	3,133	4.4m	4,523	-0.8%
'All accessible'					
1 – IPS	7.5m	7,782	10.9m	11,285	11.6%
2 – CAA	6.8m	7,035	9.9m	10,242	9.7%
3 – Population	8.5m	8,770	12.2m	12,664	14.2%

Note: a negative room requirement implies that supply of accessible rooms already exceeds demand. Source: GLA Economics

This can then be compared with the supply projections of accessible rooms in London, of which it is estimated that there will be 7,100 rooms by 2041. Overall, this suggests that London would currently meet demand for accessible hotel rooms when using the mobility impaired definition (between 4,000 and 4,500 rooms demanded). However, demand would exceed supply when using the 'all accessible' definition (between 10,200 and 12,700 rooms demanded). In fact, it is estimated that London would require between 9.7 per cent and 14.2 per cent of all new hotel rooms to be accessible if it was to meet demand in 2041 using the wider 'all accessible' definition.

²⁹ GLA Economics, Working paper 58: [Understanding the demand and supply of visitor accommodation in London to 2036](#), Aug 2013.

6 Risks to the projections

This chapter outlines some of the risks associated with the demand and supply projections of accessible rooms. These risks should be taken into consideration alongside the projection estimates.

Demand side risks

In 2010, Grant Thornton was commissioned by the GLA to look at the demand for and supply of accessible rooms in London. Alongside their analysis, they noted that³⁰:

“Going forward, demand for accessible rooms in London is likely to increase substantially for two reasons. Firstly, latent demand is likely to be realised as barriers disappear and/or are removed (e.g. improvements in travel by tube in London). Secondly, ageing demographics mean that the proportion of disabled people is likely to rise, as impairment is linked to age.”

There is insufficient data to accurately analyse the impact of lower barriers to travel in this paper, but it is possible to model possible changes to future demographics. The Family Resources Survey³¹, published by the ONS, collects information on a representative sample of private households in the UK. Since 2008, this survey has provided annual statistics pertaining to disability prevalence by impairment type. The survey shows that 6.9 million people in the UK had a mobility-related impairment in 2014/15 (see Table 8). Analysis of historic data shows an increase in the number of mobility impaired people in the UK year-on-year at a compound annual rate of 0.8 per cent. If this rate of growth continues, an estimated 8.7 million people could have a disability of this nature by 2041.

Table 8: Prevalence of mobility impairment in UK population between 2008 and 2015

Year	Number of people with a mobility impairment (millions)
2008	6.6
2009	6.5
2010	6.6
2011	6.9
2012	6.9
2013	6.5
2014	6.9
2015	7.0

Note: Respondents to this survey could tick more than one type of disability. Source: Family Resources Survey

On the other hand, it should be noted that not everyone with a disability (or travelling with someone with a disability) may require an accessible room. This could negatively affect the demand projections.

Supply side risks

As has already been mentioned in this report, there is no existing data source to provide definitive estimates for the supply of accessible hotel rooms in London. The analysis in this

³⁰ Grant Thornton, [Accessible Hotels in London](#), March 2010.

³¹ Department for Work and Pensions, [Family Resources Survey](#).

report therefore relies on our own audit of hotels listed on the DisabledGo website, which showed that 3.4 per cent of London's hotel rooms are currently accessible.

Grant Thornton used a similar methodology for their report in 2010. However, their audit of London's hotels estimated that only 2 per cent of London's hotel rooms were accessible. If this is the case, the 3.4 per cent accessible rooms figure found in this paper would overestimate the number of accessible rooms currently in London. This would further effect the supply projections going forwards.

7 Conclusion

This paper looks at the current and future demand and supply of accessible hotel rooms in London. One of the biggest issues in estimating London's accessible hotel rooms is the definition of what is meant by 'accessibility'. While legislation had generally been strict – looking only at wheelchair access – this paper understands that 'accessible' can be much broader than wheelchair use alone and can include many other people, such as those with long-term illnesses or the blind and partially sighted.

However, analysis is complicated by the lack of statistics in this area. The statistics that do exist often use different definitions of disability and impairment, which restricts the comparability of measures. In addition, information is often self-reported, meaning that the interpretation of terms such as 'accessible', 'disability' or 'mobility impairment' is often left to the respondent.

Acknowledging these points, this paper seeks to overcome some of these issues by defining accessibility in two ways. The first is a strict wheelchair accessible definition, while the second is a broader and more inclusive 'all accessible' definition. Ultimately, this can give an idea as to the 'minimum' and 'maximum' range of demand and supply of accessible room requirement in London.

The methodology used to estimate demand and supply of accessible rooms in the capital is principally based on that used in GLA Economics Working Paper 88 which looks at all hotel rooms in London. Firstly, demand was analysed by looking at trends for domestic and international visitors separately. This provided an estimate of total visitor nights demanded which could then be converted into an estimate of rooms. Secondly, supply was analysed by using hotel audit data from DisabledGo and the AMPM database. Thirdly, the demand and supply for accessible rooms could then be compared to see if there is adequate hotel provision or not.

Overall, the analysis found that London would meet demand for accessible hotel rooms if using the strict mobility impaired definition, but demand would exceed supply if the wider 'all accessible' definition was used instead. For example, using the mobility impaired definition, it is estimated that the number of visitor nights would reach between 4 million and 4.4 million by 2041, which translates into 4,000 to 4,500 hotel rooms. This is below the expected supply of accessible rooms which is projected to be 7,100 by 2041. In contrast, using the 'all accessible' definition, demand could be between 9.9 million and 12.2 million nights or the equivalent of 10,200 and 12,700 rooms, which is above the projected stock level. Ultimately, London would require between 9.7 per cent and 14.2 per cent of new hotel rooms to be accessible if it was to meet demand using this wider 'all accessible' definition.

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