

SPARC

**MEETING TOURISM NEEDS FOR PEOPLE WITH
DISABILITIES IN SOUTH PEMBROKESHIRE
- A MARKET OVERVIEW**

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This study was commissioned by SPARC in November 1999. Campbell Associates were charged to investigate “the demand for holidays for the disabled visitor” within South Pembrokeshire — and to make appropriate recommendations as to how market needs can be effectively addressed. The study adopted three approaches towards the investigation:

- i) To identify and consider general issues of disability within the context of tourism - and to relate these to South Pembrokeshire.
- ii) To examine and establish the tourism needs of people with disabilities - and to evaluate variants of demand.
- iii) To assess current resource provision regarding accommodation, recreation and visitor attractions for people with disabilities, within South Pembrokeshire.

Primary and secondary research was carried out to meet study objectives. Methodologies are outlined in Chapter 3. Limitations placed through time constraints of the study (12 weeks, which included an elongated Millennium break) resulted in a less detailed investigation than the authors' feel is required. Conclusions and Recommendations present a broad overview and yet give a realistic direction as to 'the way forward'.

With European Union funding through the LEADER Programme, the South Pembrokeshire Partnership for Action with Rural Communities (SPARC) was established to improve the social and economic well being of the people and enhance the environment of rural South Pembrokeshire. Funding for this study has been provided by the European Union Rural Wales Objective 5b (ERDF) Programme, Pembrokeshire County Council and the Wales Tourist Board.

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CHAPTER 1

INTRODUCTION - 'EXPLORING THE ISSUES'

1. According to the Office of Population Census and Surveys (1999) there are 6.2 million people with disabilities who live within the United Kingdom. In more specific terms the nature of those disabilities are as follows:

Disabled	with mobility difficulties	4.3 million
	with problems in reaching and stretching	1.2 million
	with impaired dexterity	1.7 million
	with visual impairments	1.7 million
	with hearing impairments	2.6 million
	with problems communicating	2.2 million
	with impaired intellectual function	1.5 million
	with behavioural problems	1.3 million
	needing care help	2.5 million

Within Wales 390,000 people are registered with some form of disability (Sports Council Wales 1998). Touche Ross (1997) estimate a total of 19 million people with disabilities throughout Europe, representing some 14% of the population.

ISSUE I

The size of this market segment is significant and offers much trading potential for those businesses who are able to meet customer needs effectively. The size of the segment may be further extended when consideration is made of accompanying family members/carers/travelling companions.

Other market characteristics of this segment which are worthy of note include

- a propensity to travel/stay at 'off peak'/'out of season' times in order to avoid congestion
- a need to make reservations well in advance of normal booking patterns in order to secure required dates/times of stay/travel
- a dependency upon 'word of mouth' recommendation
- high repeat business (needs met effectively will often ensure guaranteed repeat business).

2. Before any consideration of disability can be undertaken an understanding of the term 'disability' needs to be established. Such an understanding will lead to a more accurate identification of types of provision required for this market segment.

Medical or physical factors are usually employed to determine the type and extent of disability. The Disability Discrimination Act 1995 defines a 'disabled person' as a person with 'a physical or mental impairment which has a substantial and long term adverse effect on his ability to carry out normal day to day activities'. Examples of physical or mental impairment would include amputees, cerebral palsy, visual impairment, hearing impairment, learning disabilities (formerly known as 'mental handicap'), paraplegic/tetraplegic and impairment created by heart or respiratory problems, arthritis and rheumatism, and paralysis caused by strokes, etc.

ISSUE 2

Service provision for this market segment must therefore meet the needs of particular types of disability. Needs are wide-ranging and varied. There is a stereotypical view that 'disability' means 'wheelchair user' — and as a consequence the problems of physical access are only ever addressed by service providers.

3. Definitions of disability often preclude individuals who are not normally classified as 'disabled' but who, nevertheless, experience problems of personal mobility due to reasons such as age. There are those whose personal mobility may be temporarily restricted through the effects of an accident, or pregnancy. In addition, there are the inevitable restrictions placed upon individuals by the needs of the very young, i.e., a child in a pushchair presents problems of access not dissimilar to those of an adult in a wheelchair. In essence the link between accessibility and individuals classified as 'disabled' is too restrictive.

ISSUE 3

To take an extreme view, most people within the general population will experience some form of 'restriction'/personal mobility problems at some stage of their life — for some period of time. Given this supposition, all service provision should ideally be made accessible. Service environments should be arranged/designed in such a way to allow everyone, equally, to function in the most independent way possible. This can be achieved by integrating the various needs of all types of people (disabled and non-disabled) into facilities that can be used by everyone. Society works better when people are not prevented from going where they want to — an accessible environment is a prerequisite for social and economic success.

4. On 1 October 1999 statutory provisions as stated within the Disability Discrimination Act 1995 took effect. Service providers have been charged to take 'reasonable steps' to change practices, policies or procedures that make it impossible or unreasonably difficult for people with disabilities to use a service. By 2004 service providers should have changed any physical features that make it impossible or unreasonably difficult for disabled people to use a service.

ISSUE 4

Despite the impetus being created by this legislation there are few signs that the tourism industry is taking the provisions seriously. Little action has been taken and the needs of those people with disabilities are not being addressed. Research by the National Disability Council (1999) states that up to 80% of service providers feel "they don't need to make changes to their businesses" even though 70% of them have not carried out any form of disability audit.

5. Concerns have been expressed by business organisations over provisions within the Disability Discrimination Act 1995. Central to these concerns is the issue of cost — the cost of adaptations to make service environments 'accessible'. A question often arising from cost implications concerns viability "Will my business remain viable following substantial capital investment to cover the cost of adaptations?" (SCOPE 1999).

ISSUE 5

Adaptations do not have to be costly. Major capital investment is not a necessary requirement to address provisions within the Disability Discrimination Act 1995. Accessible environments may be achieved through the use of portable ramps or other auxiliary aids. Any major adaptations can be undertaken as part of long-term refurbishment or building works.

A secondary issue arising from this point indicates a general lack of awareness/understanding of the Disability Discrimination Act 1995 — businesses need to become more knowledgeable about the Act.

6. Within the United Kingdom only 17-19% of people with disabilities are born with a disability (RADAR 1999). The remainder (81-83%) acquire their disability through illness, accidents, etc. For many people, therefore, disability disrupts an already established pattern of lifestyle — which includes

leisure/tourism trip taking. Holidays for instance, prior to the onset of disability, would have been taken independently or with family or friends. There is a general public misconception that people with disabilities form a homogeneous group and require to be treated as such.

ISSUE 6

People with disabilities are a wide and diverse market segment. Problems created by disability for the most part affect people in a quite specific and individual way. The notion, therefore, that people with disabilities should be considered 'en masse' is misplaced and requires to be dispelled. The vast majority of people with disabilities (81-83%) would have experienced leisure/tourism trip taking before the onset of disability in a conventional manner — and service provision should be mindful of this fact. The needs of people with disabilities are not being fully addressed if tourism provision is founded upon the facilitation of 'groups', i.e., group travel, group accommodation and activities. People with disabilities who live within a family, for instance, would ideally wish to holiday within a family unit. Evidence from research carried out by Touche Ross (1997) would support this assertion, as only 3% of the total 'disabled tourist market' travels as part of an organised disability group.

7. Promotional Literature. As an intangible product, tourism has a heavy reliance upon the use of promotional literature to generate sales. Literature is used extensively to inform and to reassure buyers. For people with disabilities, decisions to buy are dependent upon knowledge of access and facilities — and as such tourism literature assumes an even more critical importance.

ISSUE 7

Little priority is given within much mainstream tourism literature to the information needs of people with disabilities. If information is included it has a tendency to be hidden on the inside back cover of publications. Information generally needs to be more clearly and prominently stated.

In the spirit of 'access for all', tourism enterprises should design/compose literature which will address the needs of both the able-bodied and 'disabled' tourist markets. The current practice, whilst laudable, of providing specialised literature for people with disabilities merely serves to differentiate this grouping and to reinforce stereotypical perceptions.

8. Disability Awareness. The provision/adaptation of physical facilities to accommodate people with disabilities is of key importance both to attract

visitors and to make their stay easier. A more pressing requirement however, for tourism businesses, is for staff to be trained to be able to look after such visitors — to provide the correct attitude and approach.

ISSUE 8

Many staff who work within tourism businesses lack an awareness of disability — and accordingly lack commensurate customer care skills to meet the needs of this market segment. Staff often feel uncomfortable and ‘awkward’ in service situations; sometimes appear patronising; have no real knowledge of specific needs and requirements; lack an awareness of ‘political correctness’ in addressing such visitors — and at worst display discriminatory attitudes which are often borne out of ignorance. It would appear that a training need exists for many staff within the tourism sector.

OVERVIEW

Many issues raised and considered within this section will be tested and examined further within primary research activities carried out for the purposes of this report. Further evaluative comment will be made within ‘Conclusions’.

CHAPTER 2

RESEARCH METHODOLOGY

RESEARCH EXERCISE 1 - 'INSTITUTIONS AND ORGANISATIONS'

Structured interviews (see Appendix 1) were carried out in person and by telephone with the following organisations:

Tourism For All/Holiday Care Service
Multiple Sclerosis Society
Royal National Institute for the Blind
Royal National Institute for the Deaf
Disability Wales — Sports Council for Wales
Pembrokeshire Access Group
Age Concern
Royal Association for Disability and Rehabilitation (RADAR).

Due to the sad and untimely death of Bob Donaldson (author of 'Discovering Accessible Wales') in the autumn (1999), Access Matters were unable to make a contribution to this research project. No structured interview took place.

Mencap declined to be interviewed as the organisation is currently being restructured. No staff were available.

Riding for the Disabled and Carers National Association were also unavailable for interview.

The main aim of the research was to seek the views held by organisations representing disability groups over the issues of ACCESS and PROVISION of facilities within the tourism industry. Interviews were undertaken to assess opinions as to how the industry has responded to both issues.

The term 'access' for the purposes of definition is taken to mean physical accessibility to facilities — and also accessibility to information of facilities (ie, is it available and appropriate?).

'Provision' of facilities relates to the extent to which tourism businesses have been receptive/responsive to the needs of people with disabilities.

A secondary aim of the research was to investigate perceived attitudes held by service providers towards disability. An understanding of how integration can be better achieved between people with and people without disabilities was also sought. In conclusion, organisations were asked whether people with disabilities prefer trip taking independently (to include family/friends) or in 'organised groups'.

Organisations within the survey were selected to form a representative sample of both mainstream agencies and charitable institutions. Tourism For All/Holiday Care Service were chosen because of their standing as the UK's central source of holiday information and support for people with disabilities. As such they were well placed to make comment upon issues which are tourism specific.

Structured interviews were chosen as a research technique because it allowed respondents opportunity to communicate on issues which they considered to be important — as opposed to giving responses within predetermined categories.

Information arising from these interviews was helpful to gain an understanding of market needs — and to establish more clearly 'what is required' to service the needs of this market segment more effectively.

Outcomes also formed the basis for questions to be used within RESEARCH EXERCISE 2.

RESEARCH EXERCISE 2 - 'PEOPLE WITH DISABILITIES'

A questionnaire survey (see Appendix 2) was carried out with a sample group of 20 people with different types of disability. The research exercise had two aims:

1. To identify specific tourism related needs and wants for people with disabilities.
2. To examine current patterns of tourism trip taking by people with disabilities (length and timing of stay, accommodation used, group or independent travel, destinations visited, mode of transport used, activities undertaken, levels of expenditure, methods of booking).

The size of the sample was small and was dictated by the confines of the research project. It was undertaken to gain a general 'market overview' of variables as specified by SPARC within the initial project specification.

Respondents interviewed represented a broad spectrum of disability — physical disabilities, learning difficulties, hearing and sight impairment. Interviews took place in South Wales, York and Bristol.

Profile data of the sample group is as follows:

Sex	Male	7
	Female	13
Marital Status	Single	12
	Married	8
Occupational Status	Employed	14
	Unemployed	2
	Retired	3
	Housewife	1
Age	26—34	5
	35—44	3
	45—54	5
	55—64	3
	65+	4

RESEARCH EXERCISE 3 - 'RESOURCE AUDIT'

1. A resource audit of 'accessible' tourism facilities based upon the examination of published tourism literature for South Pembrokeshire (or which covered/included South Pembrokeshire) was carried out. The audit identified the extent of provision covering accommodation, recreational activities and visitor attractions. Scrutiny of the following publications was undertaken:
 - Wales Tourist Board "Discovering Accessible Wales" Guide
 - Pembrokeshire County Council "Pembrokeshire Guide" (This is the Life)
 - Pembrokeshire County Council Website: www.pembrokeshire-holidays.com
 - Pembrokeshire County Council "Exploring Pembrokeshire Visitor Guide"
 - Wales Tourist Board "Holiday Magazine; Holiday Accommodation Guide"
 - Wales Tourist Board "Wales Self-Catering Guide 1999"
 - Wales Tourist Board "Wales Bed & Breakfast Guide 1999"
 - Wales Tourist Board "Hotels, Guest Houses & Farmhouses 1999"

- AA "Camping & Caravanning Guide Britain and Ireland"
- Farm Holiday Bureau "Stay on a Farm 2000"
- Wales Tourist Board "Wales Farm Holidays"
- Pembrokeshire County Council/Wales Tourist Board "Pembrokeshire Farm Holidays"
- RADAR "Accessible Holidays in the British Isles"
- Holiday Care Service "Customer Information for Wales"
- Further investigation of 'access' to tourism facilities was undertaken through examination of information contained within "A Guide for People with Disabilities in Pembrokeshire", produced by the Pembrokeshire Access Group.

2. Investigation into the extent and range of accessible recreational provision for people with disabilities was made through consultation with

- Royal Society for the Protection of Birds (RSPB)
- West Wales Trust
- Royal Yachting Association (RYA) Sailability
- Celtic Cycle Trail (Tourism South and West Wales)
- Pembrokeshire Coast National Park
- Sports Council for Wales
- Riding for the Disabled
- Dwr Cymru Welsh Water

and visits were undertaken to

- Stackpole Estate
- Pembrokeshire Watersports Centre
- Holgan Farm (Ian Heaps Coarse Fishing Centre)
- Carew Castle.

Investigative research was also undertaken through field visits to sites throughout South Pembrokeshire to evaluate existing resources (natural and man-made), which offer potential for use, by people with disabilities.

3. Evaluation of transportation systems regarding the extent and suitability for people with disabilities was carried out through:

- interviews held with Carmarthenshire and Pembrokeshire Access Groups
- visits to railway stations at Carmarthen, Whitland, Narberth, Tenby and Penally
- telephone enquiries made to Wales and West Passenger Trains Ltd and evaluation of customer information leaflets
- telephone enquiries made to local car hire companies (Celtic Car and Van Rental, Central Hire, Motec Vehicle Hire, Ocean Haze Vehicle Hire, Practical Car and Van Hire) and with Silcox Coaches.

CHAPTER 3

RESEARCH FINDINGS

RESEARCH EXERCISE I - 'INSTITUTIONS AND ORGANISATIONS'

A general summation of views/opinions expressed has been collated for each question.

Q1. Levels of provision and access for people with disabilities within the tourism industry. Regional variances within the UK.

Response:

General levels of provision are poor but are improving due to the Disability Discrimination Act 1995.

Variances are not so much geographic but more between large and small providers. Large organisations are more aware and are addressing issues of accessibility; small organisations are less aware and are responding less well.

Many difficulties exist with older properties — problems in adapting premises — financial considerations critically important.

Levels of provision within Wales — no better or worse than other areas within the UK.

Q2. Areas of provision/access that are generally neglected or not considered by service providers.

Response:

Little consideration is given to those with sensory impairments — few organisations, for instance, provide large print literature, induction loops, flashing fire alarms, tape guides, etc.

Physical access is always an issue — much more could be done within the design of facilities.

Q3. Adequacy of information within promotional literature concerning facilities/services provided for people with disabilities.

Response:

Many providers are not aware of the facilities which they have — and require to undertake more rigorous audits to establish the extent of their provision — and suitability for people with different types of disability.

Tourism providers do not adequately advertise their facilities for people with disabilities. Information generally needs to be clearer and more accurate. Facilities need to state if they are not accessible. In many cases disabled guests are “left guessing”.

Advertising needs to take place in more mainstream tourism literature, ie, brochures and guides which are not ‘specialised’ and directed solely to the ‘disabled market’. People with disabilities should be able to use and make decisions from standard promotional literature — rather than having to seek out specialised literature.

Large print should be available and promotional literature should state its availability.

Q4. Attitudes held by service providers towards people with disabilities. Issues of integration between people with/without disabilities.

Response

Poor attitudes/discrimination exists but is based upon ignorance/lack of knowledge/“fear of the unknown” as opposed to malice. Widespread agreement that the situation will only improve through more “disability awareness” training for all staff and more access audits undertaken by tourism organisations. Legislation will continue to influence and dispel attitudes/perceptions towards people with disabilities.

Q5. Trip taking — preferences held by people with disabilities regarding ‘independent’ versus ‘organised group’ trip taking.

Response

The vast majority of people ‘acquire’ disability as they progress through life. As such a general preference prevails for existing patterns of trip taking (i.e., with families/friends/independent) to continue.

Key issue is that people with disabilities should be given the choice — and to achieve this, ‘accessibility’ across all provision has to improve. Segregation can cause problems — enforcing the discrimination which exists through ignorance and perhaps ‘putting off’ people with disabilities who want ‘normal’ holidays. Any provision which is fully accessible should be advertised as accessible for all in mainstream — thus avoiding the possibility of being seen as a ‘disabled’ centre and actually discouraging some people from using the facility.

Q6. ‘Wish’ for the future regarding the attainment of greater equality. A selection of quotes.

“Cost of travel insurance be reduced”

“People would become more understanding and tolerant towards people with disabilities”

“Disability needs to become a more ‘upfront’ issue — and should not be hidden away”

“Integration may improve between those with and without disability”

“Knowledge levels of service providers to improve”

“Improvement to Disability Discrimination Act 1995 — travel/tourism needs to be more specifically addressed”

“That people with disabilities should have the same choices as everyone else in society”

“That (Tourism For All) could disband as everywhere had become fully accessible!”.

RESEARCH EXERCISE 2 - ‘PEOPLE WITH DISABILITIES’

Responses from the 20 completed questionnaires were as follows:

1. Do you take holidays?

Yes	85%
No	15%

2. Reasons for not taking holidays:

- cost/lack of finances
- poor facilities for wheelchair users in accommodation and attractions
- lack of carers to provide support necessary.

3. a) During which months of the year do you prefer to take holidays?

January	12%	May	18%	September	24%
February	12%	June	29%	October	24%
March	12%	July	59%	November	12%
April	12%	Aug	59%	December	6%

b) Reasons for preferences:

Those taking holidays in July/August:

- hotter
- children on holiday
- travelling with family/friends.

Those taking holidays in other months:

- cheaper
- not as crowded — therefore easier to travel with wheelchair
- to get away to the sun.

4. Length of stay:

1-3	nights 6%
4-7	nights 53%
8+	nights 53%

5. Where and why do you holiday?

Where - UK and overseas

Why - convenience - ease of travel (distance)
- suitable accommodation
- go where the family go
- to visit new/interesting places
- scenery.

6. a) Do you prefer to travel alone/with family and friends or with organised groups?

- 100% travel with family and friends
- 12% also sometimes travel alone
- 6% also sometimes travel with organised groups.

b) Which advice agencies do you use?

- 41% no agencies
- 47% mainstream travel agencies/TIC
- 6% Social Services
- 6% Spina bifida Association.

7. How do you travel to your destination?

Own Transport	82%
Bus	12%
Taxi	6%.

8. Activities:

a) walking		24%
bird watching		12%
angling		6%
visiting tourist attractions		59%
cycling		0%
horse riding		0%
sailing		12%
other	shopping	12%
	drinking	18%
	swimming	12%
	none	12%.

b) Do you like these activities to be organised?

Yes	35%
No	65%.

c) Which activities are you unable to participate in due to poor access?

- golf
- bowling
- anything with steps.

9. Which type of accommodation do you prefer?

Hotels	41%
Guest Houses/B&B	12%
Self-Catering	6%
Caravans	47%
Camping	18%.

10. Financial Budget:

- Range from - £100 to £2000 per person per week
- 'as low as possible" to "whatever is needed"
- Flexible in response to type/suitability of holiday.

	Very Important	Important	Not Very Important
Suitable accommodation	76%	18%	6%
Cost	41%	41%	18%
Public transport	24%	12%	64%
Weather	41%	53%	6%
Tourist attractions	35%	30%	35%
Activities	18%	18%	64%
Hospitable staff	47%	35%	18%
Places to eat	64%	30%	6%
Retail	30%	40%	30%
Events	12%	6%	82%
Peace and quiet	47%	24%	29%
Lively environment	30%	30%	40%
Arts	24%	18%	58%
Crafts	18%	29%	53%
Pubs/Clubs	18%		
Wheelchair Accessible	6%		

12. Do you prefer to book with provider or central booking?

Book direct	58%
Central booking	18%
Both	18%
Neither	6%.

13. Do you take holidays in South Pembrokeshire?

No	76%
Yes	24%.

Reasons for 'No':

- don't fancy it
- not offered through the holiday company they use
- always go to the same static caravan
- prefer South Devon and Cornwall
- not been there yet ... but may do
- lack of transport to get there.

If 'yes' – what do you think of:

Information	good to excellent
Public Transport	do not use
Attractions	good to very good
Accommodation	OK to excellent.

RESEARCH EXERCISE 3 - 'RESOURCE AUDIT'

1. ACCOMMODATION, VISITOR ATTRACTIONS AND RECREATIONAL ACTIVITIES suitable for people with disabilities have been identified within published tourism literature for South Pembrokeshire. Classification has been based upon the National Accessible Standard — and for the purposes of this report has been denoted by the following category numbers:

CAT 1 - Accessible to an independent wheelchair user.

CAT 2 - Accessible to a wheelchair user travelling with assistance.

CAT 3 - Accessible to a wheelchair user able to walk a few paces and up a maximum of 3 steps.

WALES TOURIST BOARD - 'DISCOVERING ACCESSIBLE WALES'

Hotels, Guest Houses and Farmhouses:

Rosedene, Hodgston, Pembroke	CAT 1
Atlantic Hotel, Tenby	CAT 3
Clarence House Hotel, Tenby	CAT 3
Greenhills Hotel, St Florence	CAT 3
Heywood Lodge Country House Hotel, Tenby	CAT 3
Highland Grange Farm Guest House, Robeston Wathen	CAT 3
Merlewood Hotel, Saundersfoot	CAT 3

Self-Catering:

Homeleigh, Red Roses, Whitland	CAT 1
Green Grove, Manorbier	CAT 3
Hanbury Lodge, Jeifreyston, Kilgetty	CAT 3
Landway Farm, Manorbier	CAT 3

Caravan Holiday Home Parks:

Saundersfoot Bay Leisure Park, Saundersfoot	CAT 1
Kiln Park, Tenby	CAT 3
Noble Court Caravan Park, Narberth	CAT 3
Pantglas Farm Caravan Park, Tavernspite, Whitland	CAT 3

Youth Hostel

Manorbier Youth Hostel	CAT 1
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Other

Stackpole Centre	CAT 1
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Visitor Attractions:

	PARKING	ENTRANCE	TOILET	CATERING	SHOP	INDOOR	OUTDOOR	RIDES	TRANSPORT
Begelly Pottery	2	2			1	1			
Colby Woodland Gardens	2	2	1	2	2		2		
Cwm Den Vineyard	2	2	3		2	2	2		
Folly Farm	1	1	1	2	1	1	2	3	
Golden Plover Studio Gallery	2	2				1			
Golden Sheaf Gallery		2			2	2			
Great Wedlock Dinosaur Experience	2	1	2	1	1	1	2		
Groveland	1	2	1	1	1	2	2	3	
Glyngoch Studios	2	2	3	2	2	2			
Hafod Hill Pottery	2	2				2			
Héronsbrook	2	2	2	2	2	2	2	3	
Manor House	2	1	1	2	2	2	2	3	
Narberth Pottery		2			1	1			
Oakwood	2	2	2	1	1	2	2	3	3
Pembroke Castle		2	1	2	3		2		
Slate Workshop	2	2			1	1			
Stepaside Craft Village	2	2	2		2	2			
Tenby Pottery Studio		2				1			
Whispering Water Valley	2	2	1	2	2	2	2	3	3

Recreational Activities

	PARKING	ENTRANCE	TOILET	CATERING	SHOP	INDOOR	OUTDOOR	RIDES	TRANSPORT
Canaston Centre Bowling	2	2	3	2		2			
Carew Castle Picnic Site (Walk)	2	2	3				2		
Mill Pond Walk, Pembroke	2	2	3				2		
Heatherton (Leisure Sports)	2	2	2	1	1	2	1		
Stackpole Centre (Leisure Sports)	1	1	1	1		1	2		
Tenby Leisure Centre (Leisure Sports)	1	1	1	1		1			

PEMBROKESHIRE COUNTY COUNCIL – ‘PEMBROKESHIRE GUIDE’ (THIS IS THE LIFE)

Hotels, Guest Houses and Farmhouses:

Rosedene, Hodgston, Pembroke	CAT 1
Greenhills Country House Hotel, St Florence	CAT 2
Atlantic Hotel, Tenby	CAT 3
Clarence House Hotel, Tenby	CAT 3
Highland Grange Farm Guest House, Robeston Wathen	CAT 3
Merlewood Hotel, Saundersfoot	CAT 3

Self-Catering:

Landway Farm, Manorbier	CAT 3
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Caravan Holiday Home Parks:

Croft Holiday Park, Reynalton, Kilgetty	CAT 1
Manorbier Country Park, Tenby	CAT 1
Pantglas Farm, Tavernspite	CAT 1
Saundersfoot Bay Leisure Park, Saundersfoot	CAT 1
Swallow Tree Gardens, Saundersfoot	CAT 1

Visitor Attractions/Recreational Activities:

No visitor attractions/recreational activity providers listed with information for people with disabilities.

PEMBROKESHIRE COUNTY COUNCIL - 'WEBSITE: www.pembrokeshire-holidays.com (Disabled Friendly Accommodation in Pembrokeshire)

Hotels and Guest Houses:

Rosedene Guest House, Hodgeston	CAT 1
Greenhills Country House, St Florence	CAT 2
Atlantic Hotel, Tenby	CAT 3
Merlewood Hotel, Saundersfoot	CAT 3

Caravan Holiday Home Parks:

Pantglas Farm Caravan Park, Tavernspite)	
Rowston Holiday Park, Tenby)	no categories concerning
Saundersfoot Bay Leisure Park, Saundersfoot)	levels of accessibility
Swallow Tree Gardens, Saundersfoot)	listed

Self-Catering:

Landway Farm, Manorbier	CAT 3
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PEMBROKESHIRE COUNTY COUNCIL - 'EXPLORING PEMBROKESHIRE VISITOR GUIDE'

No information regarding levels of accessibility is listed for specific visitor attractions/recreational activities.

On page 7 of the guide a section 'Help for the Disabled' lists organisations which can provide information and advice. All organisations were contacted — outcomes from enquires made were as follows:

- PIPPA — provided helpful information regarding equipment hire (wheelchairs, bathing equipment, etc) and availability of local support services.
- Age Concern Pembrokeshire — no service provided/available for visitors.
- Blind Society — telephone number published is incorrect.
- British Rail Disabled Bookings — customer information available regarding booking procedures, railcards, railway policy towards “disabled passengers”
- British Red Cross Society — open between 2— 4pm Monday to Friday. Equipment loan services available.
- Riding for the Disabled Association — person at listed telephone number no longer involved with Riding for the Disabled Association and unaware of number being published.
- St John’s Ambulance Brigade — County Commissioner was unaware that her home telephone number had been published. St John’s loan equipment (wheelchairs, bathing equipment, etc) but requests should go through Head Office — Cardiff telephone number should be published.
- WRVS — County Cars/Volunteer drivers not available for visitors (residents only).

WALES TOURIST BOARD - 'HOLIDAY MAGAZINE: HOLIDAY

ACCOMMODATION GUIDE'

Hotels, Guest Houses and Farmhouses:

Greenhills Country House Hotel, St Florence	CAT 2
Atlantic Hotel, Tenby	CAT 3
Clarence House Hotel, Tenby	CAT 3
Heywood Lodge Country House Hotel, Tenby	CAT 3
Highland Grange Farm Guest House, Robeston Wathan	CAT 3
Merlewood Hotel, Saundersfoot	CAT 3

Self-Catering:

Prescelly View, Llawhaden	CAT3
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Caravan Holiday Home Parks:

Saundersfoot Bay Leisure Park, Saundersfoot CAT 1

Swallow Tree Gardens Holiday and Leisure Centre, Saundersfoot CAT 2

WALES TOURIST BOARD - 'WALES SELF-CATERING GUIDE 1999'

Saundersfoot Bay Leisure Park, Saundersfoot CAT 2

Green Grove, Jamestown CAT 3

Park Farm, Manorbier CAT 3

WALES TOURIST BOARD - 'WALES BED & BREAKFAST GUIDE 1999'

Clarence House Hotel, Tenby CAT 3

Highland Grange Farm Guest House, Robeston Wathan CAT 3

WALES TOURIST BOARD - 'HOTELS, GUEST HOUSES & FARMHOUSES 1999'

Clarence House Hotel, Tenby CAT 3

Hammonds Park Hotel, Tenby CAT 3

Highland Grange Farm Guest House, Robeston Wathan CAT 3

Merlewood Hotel, Saundersfoot CAT 3

AA - 'CAMPING & CARAVANNING GUIDE BRITAIN AND IRELAND'

Noble Court Camping and Caravan Park, Narberth CAT 1

Rowston Holiday Park, New Hedges CAT 1

FARM HOLIDAY BUREAU - 'STAY ON A FARM 2000'

No listings for South Pembrokeshire.

WALES TOURIST BOARD - 'WALES FARM HOLIDAYS'

No listings for South Pembrokeshire.

**PEMBROKESHIRE COUNTY COUNCIL/WALES TOURIST BOARD -
'PEMBROKESHIRE FARM HOLIDAYS'**

No listings for South Pembrokeshire.

**ROYAL ASSOCIATION FOR DISABILITY & REHABILITATION (RADAR) -
'ACCESSIBLE HOLIDAYS IN THE BRITISH ISLES'**

Hotels and Guest Houses:

Rosedene, Pembroke	CAT 1
Atlantic Hotel, Tenby	CAT 2
Greenhills Country House Hotel, St Florence	CAT 2
Milton Manor Hotel, Milton	CAT 2

Self-Catering:

Green Grove Holiday Cottages, Jamestown	CAT 3
Harriet's House, Tenby	

Other:

Manorbier Youth Hostel, Manorbier	CAT 2
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HOLIDAY CARE SERVICE - 'CUSTOMER INFORMATION FOR WALES'

Hotels and Guest Houses:

Cleddau Bridge Hotel, Pembroke Dock	CAT 2
Rosedene Guest House, Hodgeston	CAT 2
Atlantic Hotel, Tenby	CAT 3
Greenhills Hotel, St Florence	CAT 3
Heywood Lodge Country House Hotel, Tenby	CAT 3
Highland Grange Farm Guest House, Robeston Wathan	CAT 3
Merlewood Hotel, Saundersfoot	CAT 3
Milton Manor Hotel, Milton	CAT 3

Self-Catering:

Green Grove, Manorbier	CAT 3
Hanbury Lodge, Jeffreyston	CAT 3
Landway Farm, Manorbier	CAT 3
Smugglers Cottage, Saundersfoot	CAT 3

Caravan Holiday Parks:

Saundersfoot Bay Leisure Park, Saundersfoot	CAT 2
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Youth Hostels:

Manorbier Youth Hostel, Manorbier	CAT 1
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Other:

Stackpole Centre	CAT 1
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Visitor Attractions:

No listings for South Pembrokeshire.

PEMBROKESHIRE ACCESS GROUP - 'A GUIDE FOR PEOPLE WITH DISABILITIES IN PEMBROKESHIRE'

Levels of access have been listed using the European Standard — not the National Accessible Scheme criteria. The guide is extensive and covers all types of **service businesses** — only those relating to food and beverage provision, visitor attractions and recreational providers have been listed below.

Food and Beverage:

Wavecrest Cafe, Angle	Hibernia Inn, Angle
Old Point House, Angle	Carew Inn, Carew
Brewery Inn, Cosheston	Atlantic Hotel (Restaurant), Tenby
Baytree Restaurant, Tenby	Broadmead Hotel, (Restaurant), Tenby
Clarence House Hotel (Restaurant), Tenby	Fecci & Sons, Ten by
Fourcroft Hotel (Restaurant), Tenby	Giltar Hotel (Restaurant), Tenby
Imperial Hotel, Tenby	Royal Gatehouse Hotel (Restaurant), Tenby
Tenby House (Restaurant), Tenby	Buccaneer Inn, Tenby
Crown Inn, Tenby	Five Arches Tavern, Tenby
Hope and Anchor, Tenby	Lifeboat Tavern, Tenby
Prince of Wales, Ten by	Lamb Inn, Tenby
The Normandie, Tenby	Three Mariners, Tenby

Chives Tea Room, Manorbier
 Castle Hotel & Beer Garden, Manorbier
 Bush Inn, Llandissilio
 Milton Brewery Inn, Milton
 Old King's Arms, Pembroke
 Woodhouse Restaurant, Pembroke
 Dial Inn, Lamphey
 Waterman's Arms, Mill Bridge
 Crown Inn, Penally
 Cambrian Hotel, Saundersfoot
 Cwmwennol Country House Hotel, S'foot
 Captain's Table, Saundersfoot
 Mulberry Restaurant, Saundersfoot
 Bramley's Tea Room, St. Florence
 Cartwheel Restaurant, Amroth
 Temple Inn, Amroth
 Queen's Pantry, Narberth
 Angel Inn, Narberth
 Begelly Arms, Begelly
 Kilgetty Fish Bar, Kilgetty
 Llawrenny Arms, Llawrenny
 Swanlake Tea Rooms, Manorbier

Lydstep Tavern, Lydstep
 Jeifreyston Inn, Jeifreyston
 Milton Manor Hotel, Milton
 Brown's Restaurant, Pembroke
 Pembroke Tea Room, Pembroke
 Ye Olde World Cafe, Pembroke
 St. Govan's Inn, Bosherton
 Penally Abbey Hotel, Penally
 Peacock Inn, Penally
 Cavalier Restaurant, Saundersfoot
 Rhodewood House Hotel, Saundersfoot
 St. Bride's Hotel, Saundersfoot
 Gower Hotel, Saundersfoot
 Hean Castle Hotel, Saundersfoot
 Armstrong Arms, Stackpole
 Amroth Arms, Amroth
 Contented Sole Fish & Chips, Narberth
 Welsh Kitchen, Narberth
 Ivy Bush Inn, Narberth
 Boar's Head Inn, Begelly
 Cresselly Arms, Cresselly
 Wiseman's Bridge Inn, Wiseman's Bridge

Visitor Attractions/Recreational Providers:

Carew Castle and Tidal Mill
 Upton Castle Grounds, Cosheston
 Silent World Aquarium, Tenby
 Tenby Leisure Centre, Tenby
 Llawhaden Castle, Llawhaden
 Slate Workshop, Llangolman
 Pembroke Castle, Pembroke
 'The Rosalind' (fishing boat), Saundersfoot
 Dinosaur Experience, St. Florence
 Colby Lodge, Amroth
 Heron's Brook, Narberth
 West Atheston Farm (fishing), Narberth
 CC2000 (tenpin bowling), Canaston Bridge
 Cwm Den Vineyard, Martletwy
 Craft Village, Stepside
 Animal and Bird Park, Stepside
 Giltar View, Tenby
 Harriet's House, Tenby

Cosheston Pill, Cosheston
 Martello Tower Museum, Pembroke Dock
 Manorbier Castle, Manorbier
 Base Camp, Llawhaden
 Pembroke Leisure Centre, Pembroke
 Penally Pottery, Penally
 Heatherton, St. Florence
 Manor House Wildlife Park, St. Florence
 Stackpole Centre, Stackpole
 Wilson Museum, Narberth
 Narberth Mill Ponds, Narberth
 Folly Farm, Begelly
 Blackpool Mill, Canaston Bridge
 Oakwood, Canaston Bridge
 Kingsmoor Common Nature Trail, Kilgetty
 Victorian School Museum, Stepside
 Stackpole Centre, Stackpole

2. RECREATION PROVISION ASSESSMENT

Bird Watching

West Wales Wildlife Trust	No hides or specially adapted viewing areas in South Pembrokeshire.
RSPB	No reserves in South Pembrokeshire with facilities for people with disabilities. Nearest reserve suitable for wheelchair users is Ynys Hir, Ceredigion.
Stackpole Estate	One accessible bird hide on edge of Bosherton Lily Ponds.

A number of easy access viewpoints with parking are located at:

Amroth, Wiseman's Bridge, Saundersfoot Harbour, The Ridgeway (Penally), Manorbier Dak lay-by, Manorbier Camp, Broad Haven South, Freshwater West, West Angle Bay, Angle Bay, Hobbs Point, Cleddau Bridge, Llawrenny picnic site, Picton Point.

These, together with many other sites, offer opportunities for bird watching.

Walking

Pembrokeshire Coast National Park	<p>Eleven 'easy access' routes suitable for people with limited mobility have been developed throughout South Pembrokeshire — ranging in length from 600 metres to 3 miles.</p> <p>Saundersfoot to Wiseman's Bridge Castle Hill, Tenby Penally to Tenby South Beach Lydstep Head Skrinkle Haven (Manorbier) Carew Millpond Stackpole Estate St. Govan's Head Green Bridge of Wales and Stack Rocks Angle Bay to Popton Fort Pembroke.</p> <p>Easy access beaches are located at Amroth, Wiseman's Bridge, Saundersfoot, Tenby, Manorbier, Freshwater East and West.</p>
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	The National Park is able to organise walks and talks for groups in 'easy access' locations — themed to specific requirements.
Stackpole Estate	Lakeside route to Eight Arch Bridge (wheelchair user with companion). Lodge Park Wood trail (suitable for unaccompanied wheelchair user).
SPARC	Landsker Borderlands Trail, South of the Landsker Trail, Miner's Walk, Ritec Walk, Lampeter Vale Walks & Narberth Country Walks, All Saints Walk. Walking trails require to be assessed to identify 'barriers to access' for people with disabilities. Existing accessible walks for wheelchair users are at Milton and Carew.
<u>Fishing</u> Holgan Farm — Ian Heaps Premier Fisheries and School of Angling (Coarse and trout fishing)	Three 2 acre lakes; wheelchair access around all lakes; purpose built pegs on all lakes for wheelchair users; adjacent car parking to each lake. Bed & Breakfast accommodation suitable for ambulant visitors — plans to build 3/4 accommodation units with full access.
West Atheston Farm, Narberth (coarse fishing — carp)	Level access to 1.5 acre lake; adjacent parking available; guide dogs welcome.
Llys-y-Fran Reservoir (coarse and trout fishing)	Facilities for people with disabilities include 'adapted' boat for use free of charge to wheelchair users; adjacent parking; paths; rest benches; accessible toilets.
Stackpole Estate (coarse fishing)	Fishing from pegs along accessible path at Bosherton Lily Ponds.
'The Rosalind', Saundersfoot	Deep sea fishing boat accessible by ambulant visitors.
Sea angling opportunities at selected 'easy access' locations around coast (as stated in previous section).	

Horse Riding

Pembrokeshire Riding Centre,
Hundleton, Pembroke

Riding for Disabled Centre; facilitates riding for guests at Stackpole Centre; hourly/A day sessions available; provision for wheelchair users.

Dunes Riding Centre, Martletwy

Not able to facilitate riding for wheelchair users, but can accommodate ambulant visitors.

Cycling

The Celtic Trail is due to open in June 2000. Within South Pembrokeshire, the trail will follow a route from Amroth through to Saundersfoot, Tenby, St. Florence and Pembroke Dock, before crossing the Milford Haven Waterway into Central Pembrokeshire. Tourism South and West Wales consider that the off road route between Wiseman's Bridge and Saundersfoot will be 'Accessible For All'. The suitability of the trail will depend upon individual requirements. The trail links with cycleway routes developed by SPARC (Landsker Cycleways). Once again suitability of both 'on' and 'off' road routes depends upon the individuals ability. There are no bike hire facilities, within South Pembrokeshire, offering bikes suitable for use by people with disabilities (trikes, tandems, etc).

Sailing

Pembrokeshire Watersports,
Pembroke Dock

All watersports can be tailored to meet individual needs — specialist equipment available for all types of disability; all facilities are wheelchair accessible — but are not all accessible for sensory impairments.

Stackpole Centre

Sailing undertaken using 'adapted' sailboats berthed at Neyland Marina.

Neyland Yacht Club

Boats are owned by Stackpole Centre, Princes Trust and Neyland Marina.

RYA Sailability is the UK development organisation for disabled sailing. Sailing clubs are accredited to the organisation if they meet RYA Sailability criteria — clubs are required to be fully accessible with trained people and suitable boats supporting regular sailing opportunities. Towy Boat Club, Llansteffan, is the nearest accredited club to South Pembrokeshire. Sailing takes place on Saturdays and Sundays and is free of charge to people with disabilities (boats used: Challengers and Wayfarers). Saundersfoot and Tenby Sailing Clubs are seeking accreditation. It is hoped that both Clubs will be able to offer sailing support/facilities to people with disabilities in the near future.

Activity Packages

Stackpole Centre
in conjunction with
Base Camp, Narberth

Outdoor activities for people with disabilities include canoeing, coastering, sea level traversing, climbing, abseiling, hill walking, mountain biking, fishing, horse riding. Indoor activities include art, music, theatre, film studies — with an indoor climbing wall being added in the near future.

Facilities at the centre (all category 1 accessible): hydro pool, gymnasium sauna, steam room and Jacuzzi.

Golf

Tenby Golf Club and Trefloyne Golf Club in Tenby welcome Golfers with disabilities. The Welsh Golfing Union is supportive of initiatives to encourage the use of facilities by people with disabilities (01633 430830).

3. TRANSPORTATION SYSTEMS - Key findings from research

Railways:

- Information is difficult to obtain from the rail companies (Wales & West; Great Western). Staff have little knowledge of policy and procedures and refer to information contained within customer information leaflets. These same leaflets suggest to customers to ring helpline numbers to obtain further information — in the course of carrying out research for this project, it was not possible to obtain any further information. Information received from two separate enquiries was different and in variance with each other.
- Advice given was ‘at odds’ with field research carried out. “Toilets on trains are accessible for people with disabilities” — doorways are in fact too narrow to accommodate a wheelchair. “Space is available for one wheelchair user on each train” — with old rolling stock, no space was identified.
- Passengers with disabilities are requested to contact rail companies 24 hours in advance if assistance is required. For assistance at ‘smaller’ stations 48 hours notice is required. In a controlled experiment 4 passengers with disabilities rang to book assistance. They were told it would be provided and that seats would be available. The outcome was quite different. The guard knew nothing of the assistance required — and the train could only accommodate one passenger with disabilities (wheelchair user).
- No induction loops are provided on trains. Unless rail staff are informed, customer announcements will not be heard.

- Ramps are not provided on Great Western trains. For wheelchair users wishing to leave the train at unmanned stations (such as Whitland) difficulties will exist. Two Great Western trains per day stop at Whitland Station.
- Obtaining information concerning the extent of accessibility at railway stations is made difficult because telephone numbers for stations are not listed in public directories. Information is available from a central advice line.
- For wheelchair users, access at some railway stations is poor. At Whitland Station passengers can only exit from the platform (west bound) by trespassing through private property before reaching the main road. At Tenby Station, the only means of exit is by crossing the railway line at the risk of incurring a fine.
- Railway Stations across South Pembrokeshire offer varying standards of customer service. Some are isolated with no staffing, lighting or limited shelter (Kilgetty). Some stations are remote from connecting bus services.

Bus Services:

- Silcox Coaches (contracted operators for the provision of bus services in South Pembrokeshire) have no low floor buses to facilitate wheelchair access/access for people with limited mobility. Silcox Coaches may “possibly” introduce some low floor buses into the fleet this year — “will definitely” do so next year.
- Pembrokeshire County Council produces bus timetables. According to Silcox Coaches they are not available in large print.

Taxi Services:

- There are two ‘wheelchair accessible’ taxis in South Pembrokeshire based at Haverfordwest.

Private Hire Cars:

- No hire car companies contacted (5 were approached) had cars available for hire with special adaptations for people with disabilities).

Ferry Services:

- Vessels operated by Irish Ferries between Pembroke Dock and Rosslare are fully accessible for people with disabilities.
- Stena Line also operates fully accessible vessels between Fishguard and Rosslare.

CHAPTER 4

CONCLUSION

Issues raised in Chapter 1 of this report formed the basis — and provided direction — for much investigative endeavour within all research activities. Outcomes were broadly consistent with conclusions drawn from other commentaries, yet were able to be set within a much more localised context.

Claims made by the National Disability Council (1999) that tourism businesses have been slow to respond to the needs of the 'disabled market' would appear to be justified. There are few listings of accommodation providers, accredited by the National Accessibility Scheme, in published tourism literature for South Pembrokeshire. Reasons for this may relate to a lack of knowledge about both the needs and importance of this market segment — or more simply, because suitable facilities do not exist (or are perceived not to exist).

National Accessibility Scheme information published in mainstream guides/literature is based upon physical access. Classification of information is made under 3 categories and relates to wheelchair accessibility. Businesses are accorded a category of classification from assessments carried out by accredited inspectors. Judgements made by inspectors are helpful, but visitors would better understand suitability of access if information was presented in a 'descriptive format'. Such is the range and diversity of disability, that decisions require to be made by the visitors themselves as to whether levels of access are suitable or not.

The issue surrounding the diversity and complexity of disability gives rise to difficulties concerning homogeneity. 'The disabled' are not a homogeneous grouping. They are individuals with very different and specific needs (arising from sensory impairment, physical disability, learning difficulties, etc). To devise 'packages' for 'the disabled' is, therefore, problematic and other approaches for attracting such visitors to South Pembrokeshire need to be considered.

Such approaches should embrace a philosophy of equality — based upon a strategy of integration between people with and without disabilities. In essence, the philosophy is the underlying principle of 'access for all' — but should also be concerned with 'access to everything' (to include facilities, information and customer service).

For 80% of people with disabilities, disability is acquired. Only a small proportion of individuals is born with disability. Research findings, from interviews conducted, again underline the preference that individuals do not want to be segregated into groups — or to form part of any 'group tours'. Given the choice,

individuals want to take holidays with family or friends and want to follow similar lifestyle patterns as experienced before disability occurred.

To satisfy this preference, tourism agencies should strive to offer choice across all elements of the ~tourism experience'. The reason that only 34% of all registered people with disabilities take holidays (ETC 1999) is probably due to the fact that choices are limited. 66% of a total market segment of 6.2 million (registered disabled) should be motivation enough for tourism agencies/businesses to address this challenge.

Disability Wales (1999) presents the view that people with disabilities are reciprocants of tokenism — that efforts made on their behalf are often empty gestures in response to a certain moral mentality. Investigation into information presented within the Pembrokeshire County Council 'Exploring Pembrokeshire' guide ('Help for the Disabled') would seem to support this opinion. The publication of so much inaccurate and outdated information (ref. p.21 of this document) presents a poor first impression to prospective visitors, and erodes confidence in the purchasing decision.

82% of respondents questioned in Research Exercise 2 travelled by car to tourism destinations. In Wales, 84% of all holiday travel to destinations is undertaken by car (VVTB 1999). This broad consensus underlines the predilection towards independent travel, and further challenges the adequacy of public transport provision.

It has to be recognised that problems exist for passengers with disabilities who wish to travel by rail. Policy and procedures leave much to be desired; facilities and suitability of access need to be improved. Realistic expectations should, therefore, be held over the contribution that the rail network would have in conveying visitors to South Pembrokeshire.

More encouraging, however, is the news that Silcox Coaches are considering investing in low floor buses for next year. This would certainly improve internal mobility within the region and create benefits for providers and users alike. Costs of coach conversion to low floor access is estimated by the Department of Transport to be in the region of £2000 - £3000. It would appear to be prudent investment given the potential for additional usage by the elderly (who by tradition have a strong preference for bus/coach travel).

Provision of fully accessible taxis is limited. Two vehicles to cover South Pembrokeshire are based in Haverfordwest. Users within the Tenby region, or to the east of the county, incur additional fare costs, as distances travelled from Haverfordwest 'to collect' are excessive.

Valuable resources for recreational pursuits and activities exist within the region and are a key motivation for visitors to take holidays in this part of Wales.

Walking, cycling, riding, watersports, golf, fishing, bird watching are all well established; visitor attractions are both numerous and diverse. In respect of all recreational provision, however, a clear need exists to undertake much more assessment regarding levels and suitability of access across all activities. Existing information is generally deficient in specific detail, and is of little help to people with disabilities as to whether they can participate or not. Locations where activities/pursuits have potential for participation (such as for bird watching) also need to be identified.

With the Celtic Trail due to open in June 2000, cycling presents a marketing opportunity — but current literature does not specify accessible sections of the route (such as between Wiseman's Bridge and Saundersfoot); the Landsker Cycleways literature also lacks information for cyclists with disabilities.

Walking trails are well established throughout South Pembrokeshire but lack interpretation to indicate their suitability for access (ie, stiles, type of terrain/path surfaces, inclines, path widths, etc).

Fishing has some suitable facilities for people with disabilities, mainly in 'purpose built' settings such as Holgan Farm, West Atherton Farm, Stackpole — but in land waterways and coastal locations could offer additional opportunities for participation.

Bird watching takes place throughout South Pembrokeshire but few accessible hides exist (Stackpole only — West Wales Trust/RSPB have no knowledge of any others). Many locations at 'easy access' viewpoints (Pembrokeshire Coast National Park) and at estuary sites provide observation opportunities, but are not highlighted in mainstream tourism literature.

Horse riding provision for people with disabilities has been affected over recent years through Health & Safety legislation/Moving and Handling regulations/high insurance costs — and an ever-increasing fear of litigation over any accidents which may occur. The Pembrokeshire Riding School is the only Centre which can accommodate riders with severe disabilities (and are used by Stackpole); other Centres can accommodate those with sensory impairments and less severe levels of disability. Increased operating costs cannot be 'passed on' to customers for fear of discrimination.

According to figures from the Royal Yachting Association, 1.75% of all people with disabilities participate in sailing activities. Translated into actual participants the number is 108,000. Pembrokeshire Watersports offer excellent facilities for people with disabilities to sail; adapted boats for 'disabled use' are also available at Neyland Marina. The RYA is encouraging all sailing clubs to attain 'Sailability' accreditation which will ensure that suitable boats and trained staff will be available at all sailing venues.

For the severely disabled visitor participation in many of these recreational activities can be facilitated through packages offered by the Stackpole Centre. The Centre is much used by disability organisations and charitable institutions, but usage is not exclusive to such groups despite general market perceptions. These perceptions, whilst strengthening the appeal towards disability groups, lessen the appeal to individuals and families — as not everyone is keen to spend time within “perceived” group environments. Some attention needs to be given to this issue if the full trading potential of Stackpole is to be realised.

Visitor attractions listed in the WTB ‘Discovering Accessible Wales’ guide cite levels of accessibility (under National Accessibility Scheme). Scrutiny of all other mainstream tourism literature/guides covering South Pembrokeshire failed to find any meaningful information/classification about accessibility for people with disabilities. This observation reinforces previous concerns raised over availability of information — and over the segregation of this market segment.

Respondents questioned in Research Exercise 2 favoured booking direct with accommodation providers; considered hospitable staff to be ‘very important’; and cited budgetary considerations, good weather and ‘peace and quiet’ as important influences when purchasing a holiday. Length and timing of stay is dependent upon marital status and stage in the family life cycle. For those with young dependants, holidays require to be taken according to the school calendar; for those without such limitations, the shoulder months are seen as preferred months as congestion and ‘overcrowding’ are reduced (making access easier). Length of stay is dependent upon income. As many people with disabilities fall into low income/unemployed categories, low budgets dictate a preference towards short breaks in serviced accommodation; long stay in self-catering accommodation.

Given the product strengths of the area — and given an opportunity to address issues raised within this research project - South Pembrokeshire would appear to be well placed to satisfy market needs effectively.... and profitably.

CHAPTER 5

RECOMMENDATIONS

SPARC/South Pembrokeshire should seek to establish a position within the market place as a destination area which is 'disabled friendly'. Given the range and extent of its accommodation, recreation and visitor attraction base it has much potential to develop trading opportunities with this market segment.

To achieve this objective, consideration should be given to recommendations listed below.

- SPARC should produce a South Pembrokeshire brochure/guide using descriptive text to supplement National Accessibility Scheme criteria. Suggested format/layout as follows:

Princes Gate Priory and Gardens

Woodland gardens surround the remains of a 12th Century priory and are home to a collection of rhododendrons and azaleas. Walled Garden. Interpretative centre tells the story of the priory site.

Parking Uneven surface with some potholes. Car park some distance from site but visitors may alight within priory by arrangement (telephone beforehand).

Priory Ruins Step free circular route around ruins. Surface uneven which may become muddy and rutted through wet weather. Steps to priory undercroft — portable ramp available.

Toilet Accessible toilet in car park. Approached via ramp. Fixed handrail; lateral transfer not possible.

Interpretative Centre Ramped approach. Level access throughout. Induction loop in audio/visual area.

- Access audits be carried out with all tourism businesses to establish type and adequacy of facilities. Information also to be used for guide (as above).
- Accommodation providers with suitable access/facilities for people with disabilities should be persuaded to promote through the Holiday Care Service (the UK's central source of holiday and travel information for people with disabilities) and RADAR (Accessible Holidays in the British Isles).

- Tourism businesses within South Pembrokeshire should be encouraged to attend Disability Awareness Seminars to gain an understanding of issues which impact upon service providers. Requirements of the Disability Discrimination Act 1995; economic importance of market segment; principles of “access for all” considered.
- Audits and assessments require to be carried out to establish levels of accessibility/suitability of facilities regarding current recreational provision within South Pembrokeshire. Evaluation should also be made of sites/locations which present potential opportunities for development.
- Walking trails within South Pembrokeshire should be modified to meet Countryside for All criteria.
- SPARC to register all Landsker Borderland trails as part of the B.T. Millennium Miles initiative (500 B.T. Millennium Miles will be registered throughout Wales; trails will receive significant promotion throughout the UK; grant support may be available for modifications (convert pathways — upgrade uneven surfaces, remove barriers, etc). Contact Fieldfare Trust on 0114 270 1668.
- Walking trail leaflets should be produced with detailed criteria (to cover inclines, stiles, surfaces, barriers, etc), to allow more informed decisions to be made regarding participation.
- Accessible bird hides should be constructed and sited in appropriate locations.
- Accessible fishing pegs be sited in appropriate locations.
- Saundersfoot and Tenby Sailing Clubs be encouraged to achieve RYA Sailability accreditation.
- Themed literature should be produced under generic titles.... to give greater understanding and choice to visitors. Examples such as:

South Pembrokeshire “Peace and Quiet” — citing easy access viewing points, scenic locations, accessible picnic areas, bird watching hides, locations for observing ‘nature’, details of accessible walks, easy beach access points, fishing activities, details of ‘passive’ activity opportunities and packages (eg, painting, creative writing, crafts, aromatherapy, culinary courses, etc). Accredited accommodation providers listed (National Accessible Scheme and descriptive information).

South Pembrokeshire “Action and Adventure” — citing activity centres (Base Camp/Stackpole), mountain biking, cycling, surfing, windsurfing, diving, sailing, abseiling, climbing, coastering, kayaking, power boating, canoeing, paintball adventure games, golf, horse riding, ‘white knuckle’ theme parks (Oakwood), Ritec Valley Buggies, CC2000, leisure centres, etc. Accredited accommodation providers listed (National Accessible Scheme and descriptive information).

South Pembrokeshire “Heritage and Gardens” — using the National Botanic Garden as a magnet to attract ‘garden lovers’.... citing Colby Woodland Gardens, Upton Castle, garden centres/nurseries (operators giving ‘added value’ talks/presentations), heritage sites Carew Castle, Pembroke Castle, Llawhaden Castle, Manorbier Castle, Lamphey Palace, St. Govan’s Chapel, Tudor Merchant’s House, etc. Accredited accommodation providers listed (National Accessible Scheme and descriptive information).

South Pembrokeshire “Family Fun” — citing suitable visitor attractions such as Dinosaur Park, Folly Farm, Heatherton, Oakwood, Heron’s Brook, Manor House, Narberth Children’s Festival, Queen’s Hall, Tenby Arts Festival, theatres and cinemas, beach activities, National Park activities (family fun days), recreational activities. Accredited accommodation providers listed (National Accessible Scheme and descriptive information).

- Cycle route literature should be produced with detailed criteria regarding topography/suitability of access. Liaison with Kirsty Morris, Tourism South and West Wales, to ascertain how opportunities may be developed from the Celtic Trail (Tel no: 01792 781212).
- Contact should be made with Pedal a Bikeaway, Forest of Dean (Tel no: 01594 860065), to investigate recreational cycle provision for people with disabilities. The company addressed needs effectively and may be regarded as an example of ‘good practice’.
- Local bicycle hire businesses should be encouraged to invest in bikes/trikes suitable for people with disabilities (Bro Bikes, Tenby 01834 844766; Mike’s Bikes, Haverfordwest 01437 760068) in readiness to meet demand from the Celtic Trail.
- To raise awareness of South Pembrokeshire’s commitment to meeting the recreational needs of people with disabilities, a sports event should be organised to create publicity. Initiatives such as ‘Sport for All’ and ‘Ability Counts’ have gained momentum throughout the UK. The timing of such a promotion would seem to be appropriate. The event could be organised through the Stackpole Centre and Sports Council for Wales.

- The Stackpole Centre should review the use of the word 'centre' in its name. The word has 'institutional' connotations and may discourage some visitors from booking.
- Ireland should be considered as a potential market. Accessibility for people with disabilities is not as advanced in Ireland as in the UK. Facilities and provision are poor. Irish Ferries and Stena Line provide routes into Pembrokeshire on 'fully accessible ferries'.
- Businesses should be encouraged to publicise services provided by Tripscope (Tel no: 0345 585641) within promotional literature. Tripscope is a free transport information service for people with disabilities and the elderly.
- Access audits should be carried out at all railway stations. Suitability of facilities should be assessed regarding heights of information boards, lighting available, shelter, etc. An information sheet with detailed descriptive criteria should be produced for all stations in South Pembrokeshire — and made widely available.
- Efforts should be made to persuade taxi companies to invest in accessible taxis — in the hope that at least one taxi could be introduced for service within the Tenby area. Taxi companies to be invited to Disability Awareness Seminars — to be made aware of the Disability Discrimination Act 1995 and potential economic benefits.
- Bus and railway timetables should be made available in large print — to satisfy the needs of those with visual impairments.
- All tourism businesses should ensure that guides/promotional literature/menus are available in large print.
- Audiocassette tapes should be produced and made available for people with visual impairment. SPARC to produce a "South Pembrokeshire — **a Picture in Sound**" tape. Distribution to relevant organisations and agencies, and made available from Tourism Unit, SPARC.
- To meet the needs of those with hearing impairment, a video of South Pembrokeshire should be produced using sign language. Contact Deaf Access Wales (Fax no: 01352 751201) for further information.
- Tourism businesses should be encouraged to employ people with disabilities. Critical information about accessibility/suitability of facilities will be gained from employee feedback. There can be no better way to ascertain how visitor needs may be met effectively.... and no better way to present a credible impression to the marketplace.

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English Tourism Council "Welcoming Disabled Travellers" 1999

Department for Culture, Media and Sport "Tomorrow's Tourism" 1999

HMSO "Disability Discrimination Act 1995"

National Disability Council "Disability Discrimination Act 1995"

Office of Population Census and Surveys 1999

SCOPE "In Good Company?" 1999

Sports Council for Wales "Willing and Able: The Provision of Sports Opportunities for Children with Disabilities" 1994

Touche-Ross "Profiting from opportunities — A new market for Tourism" 1997

STRUCTURED INTERVIEW SURVEY

NAME OF ORGANISATION: _____

NAME OF RESPONDENT: _____

DATE OF INTERVIEW: _____

I am carrying out a tourism research project that is investigating the **needs** and requirements of people with disabilities. Levels of provision and access are being assessed within the area of South Pembrokeshire.

To underpin these research findings, I am keen to explore and identify general issues surrounding provision and access i.e. to examine attitudes of service providers towards this sector; to evaluate 'common difficulties' faced by people with disabilities; to consider dependent/independent trip taking; discrimination and other associated topic areas.

Because of the role of your organisation and your level of expertise/involvement in facilitating trip taking by people with disabilities, I would be grateful if you could consider and respond to the following questions.

Many thanks for your time.

1. In your view, how do you rate general levels of provision and access for people with disabilities within the tourism industry?
2. Are there any regional variances within the UK? Yes/No
3. How does provision rate within Wales?
4. Which areas of provision/access are generally neglected by service providers — or are not considered?

5. It has been said that many tourism providers do not adequately advertise their facilities and services for people with disabilities. Do you agree with this statement?

Yes/No

6. Is advertising an area which tourism providers could improve upon? How?

7. What are your views on the attitudes held by service providers towards people with disabilities? (Does discrimination exist to any extent?)

8. How can better integration between people with and people without disabilities be achieved within the tourism industry? (Is legislation the only answer?)

9. What are your views/thoughts on independent versus organised group trip taking — in your opinion what do people with disabilities prefer?

10. If you had one wish for the future, what would it be?

Jo Campbell, DipCOT, SROT.

QUESTIONNAIRE

I am currently carrying out research into holiday provision in South Pembrokeshire for people with disabilities. I would be grateful if you could answer the following questions. All information will be completely confidential.

1. Do you take holidays? Yes/No

2. If 'no', why not?

3. a) During which months of the year do you prefer to take holidays?
Please ring all relevant months.

January/February/March/April/May/June/July/August/September/October/
November/December

b) Please state the reasons for your preferences.

4. What length of holiday do you usually take? Please ring all relevant responses.

1-3 nights
4-7 nights
8+ nights.

5. a) Where do you take your holidays?
Please state geographical area.

b) What are the reasons for your choice of destination area?

6. a) Do you prefer to travel alone/with family and friends/with organised groups?

b) if you travel alone/with family and friends, which advice agencies do you use? E.g. Accessible guides, Tourism For All, etc.

c) If you travel with organised groups, please state name of organisation used, e.g. Red Cross, Ramblers Association, etc.

7. To travel to your holiday destinations do you use
Own transport / Bus / Train / Private Hire Vehicles / Other?

8. a) Which activities/interests do you participate in on holiday?
Walking / Bird Watching / Angling / Visiting Tourist Attractions / Cycling /
Horse Riding / Sailing / Other _____

b) Do you prefer these activities to be structured/organised? Yes/No

c) For reasons of poor accessibility, are there any activities which you feel
unable to participate in?

9. Which type of accommodation do you prefer to stay in on holiday? Hotels /
Guest Houses/B&B / Self Catering / Caravans / Camping / Other

10. What financial budget do you set for your holiday?

11. How important do you consider each of the following aspects of your
holiday?

	Very Important	Important	Not Very Important
Suitable accommodation			
Cost of holiday			
Proximity to public transport			
Weather			
Tourist attractions to visit			
Recreational activities to participate in			
Hospitable staff/host community			
Suitable places to eat			
Proximity to retail areas			
Locally organised events/festivals			
Peace and Quiet			
Lively environment			
Arts/Culture/Heritage			
Local crafts			
Other _____			

12. When booking your holiday, do you prefer to book direct with provider / use central booking service?

13. Do you take holidays in South Pembrokeshire Yes/No

a) If 'yes', please comment on the standards of provision of: Information

Public transport/Private hire vehicles

Visitor attractions/General activities

Accommodation

b) If 'no', why not?

14. Details of respondent

Male/Female

Age 0-18 / 19-25 / 26-34 / 35-44 / 45-54 / 55-64 / 65+

Place of domicile _____

Nature of any disability _____

Occupation _____

Marital Status _____

Many thanks for your time.