

Country study

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CALYPSO STUDY ON SOCIAL TOURISM THE CZECH REPUBLIC



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1. SUMMARY

Social tourism in the Czech Republic is a relatively new and not very well known area. Although the term occurred for the first time in governmental documents a few years ago, the first initiatives to support and promote this idea are just about to start. The main actors in the area of the social tourism, including the overall coordination body – the Ministry of Regional Development and its tourism agency, together with a few NGOs dealing with some of the target groups, represent rather diverse group with various focus, legal status and scope of the competence. Their profiles and roles are briefly described in Chapter 4.1. Nevertheless, none of the bodies can be seen as a very active promoter of the social tourism.

In general, the availability of various sorts of statistical data regarding tourism is not a problem. Quite substantial data, including more than 100,000 responses, monitoring length of stay, visited region, travelling and satisfaction of tourists, are publicly available (<http://monitoring.czech-tourism.cz/>). However, much less is available in relation to the four target groups, which are subject of the social tourism. This area is relatively new and the first initiatives occurred only recently.

A few studies have been conducted, which partially covered some of the social tourism issues. In this respect the group of seniors is relatively well described. The size of the target groups of seniors and the disabled is about the same, however, based on the statistics the overlap should represent about one third of both groups. These two groups have the voluntary umbrella bodies protecting their interests, which could be quite influential due to the large membership base. Both of the groups prefer off season periods and quite often use spa resorts. The group of young people is somewhat bigger but very diverse, as it includes students as well as employed and unemployed people, thus the interest, timing and financial possibilities regarding holidays would vary a lot. Equally, the group of families facing difficult circumstances is very heterogeneous and their preferences will change depending on the age of the children (school age), see section 3.2.

In all cases, it is assumed that the main obstacle to travel is the financial situation followed by health problems and no interest. None of the groups is entitled to any specific support but all of the groups can benefit from various discount systems provided by the service providers, although none of them was specifically designed to support social tourism. Only a few of the systems can be also used in some foreign countries.

No international exchanges were reported in the country. Despite of this, the first activities to promote social tourism have been implemented and the first governmental support to social tourism is just to be launched. The grant scheme of the Ministry of Regional Development should be implemented to provide financial support for those who would like to adapt their facilities (access without barriers, kids corners etc.), more detailed description of the support is provided in the following chapter.

2. FOCUS ON EXPERIENCES ON AND MECHANISMS FOR INTERNATIONAL EXCHANGES

No examples of international exchange could be identified in Czech Republic. Nevertheless, the first efforts to establish the base for the development of social tourism have been successfully implemented. One of the Regional Counselling and Information Centres in Moravia-Salesia region (Kazuist), in wide partnership with other institutions and NGOs from the region, implemented an innovative project co-financed from the EQUAL sources. The project entitled "Beskydy for all" was focused on social entrepreneurship and barrier free travelling.

The target groups of the project were the disabled, seniors, families with children and other groups with limited mobility and orientation. The activities of the project focused on the physical accessibility of tourism for all. The project team elaborated the first methodology in the Czech

Republic for the assessment of the accessibility of different tourism facilities (food and accommodation services), developed criteria and created and registered the label "Barrier free", which was subsequently awarded to more than 20 tourism facilities in the region. In addition, the project team published three editions of the Travel Manual, which provides information on numerous tourism facilities, including their location, contact data, accessibility, suitability of the accommodation for the disabled people, information about the local places to see and services provided for the tourists; and prepared and made accessible the first information database of the facilities taking into account specific needs of the people with a mobility, visual or hearing disability. The database and further information is available on the newly created web portal www.jedemetaky.cz. The project activities included training programmes to increase the competencies of the staff and management of the facilities in communication with the disabled clients and provision of special services. The follow up project "Moravia-Salesia region for all", extended the database, which at present includes over 100 facilities.

The Centre as the former leading company of the project "Beskydy for all" is now implementing a new project focused on the exchange of experiences with the European partners associated within the European Network for Accessible Tourism (ENAT)¹. The knowledge gained during the project should be used for the creation of the methodology to be applied during the elaboration and operation of the information systems in the area of the barrier free travelling. The project aims to prepare a guide, an electronic library of the European information systems, and best practise examples of barrier free travelling. The social tourism part of the project continues in the effort to make the outdoor walking paths accessible for the disabled people. The tourism facilities have been subject to the assessment carried out by disabled people, judging their degree of accessibility. The information will be published on the website and in an information brochure for disabled. One of the project activities is to prepare, coordinate and put into effect exchange stays for disabled children.

Some attempts to support tourism for families with children (not specifically those facing financial difficulties) were implemented within the cross-border project Austria/Czech Republic, which introduced so called Family passports. The members of the club can benefit from various discounts for services in the Czech Republic, Austria but also Slovakia.

3. ANALYSIS OF THE FOUR TARGET TOURISM MARKETS

3.1 Structures and players

The main stakeholder in the field of social tourism is **the Ministry of Regional Development**, which is the overall coordination body in the area of tourism. Its main task is the establishment of the legal framework in order to create conditions for tourism development. It should also set clear rules to achieve better protection of consumers and determine the rules for the operation of tourism offices and agencies. The first initiative of the Ministry in the area of social tourism is just about to start.

The primary role in the promotion of the Czech Republic and its tourist destinations at home and abroad was entrusted to **the CzechTourism**, which is a state agency established by the Ministry of Regional Development. In addition to PR activities, it also prepares various research studies on tourism, gathers statistics and promotes destinations, activities and numerous events all over the country, in cooperation with regional governments, being responsible for the tourism development in their respective regions, and other relevant actors. Statistical data are mostly gathered through **the Statistics Office of the Czech Republic** but the agency is also conducting its own research studies and polls/ monitoring with different focus, namely to map the market, identify the requirements of the tourists and possible gaps in the provision of services. The research activities and studies are also supported by the academic sector, represented by **the Department of Tourism from the University of Economics in Prague**, which cooperates with all the institutions involved in tourism in the Czech Republic, including the Ministry of regional development, professional organisations and tourism businesses.

¹ Kazuist is the contact institution of ENAT for the Czech Republic since 2009

The role of the non-governmental organisations in relation to social tourism has been rather weak so far. The relevant stakeholders are either NGOs associated with the individual target groups, or bodies focused on tourism activities - associating tourists or tourism businesses. No other institution focused solely or mainly on social tourism could be identified. The relevant actors thus have different objectives, interests and target groups, which are occasionally overlapping.

The most important voluntary associations in terms of the target groups are those representing the substantial number of seniors and the disabled. The umbrella organisation associating seniors, **the Council of seniors**, was established in 2005 as a confederation of 18 seniors' organisations with half a million members². Similar institution for the disabled is the **National Council of the disabled** representing 113 organisations and associations of the disabled all over the country³. Both of the associations have been focused on general support for their targets. Their first activities related to social tourism, mostly in the form of conferences, took place only recently or are planned in the near future. No relevant body has been identified to cover the interests or needs of the families facing difficult circumstances or the rather heterogeneous group of young people.

One of the important actors in the field of tourism is also the **Czech Tourist Club**, which was founded in 1888 and associates those who are interested in and practice tourism/ walking. The association is today the biggest walking club in the Czech Republic with more than 40,000 members, almost 10,000 of them active in youth groups, which associate young people from 6 to 18. Main activities are focused on the way-marking and maintenance of footpaths, cycling and skiing trails in the Czech Republic⁴. Social tourism is the main topic of the club for 2010 and the members will focus on the adjustment of the tourist's footpaths for the wheelchairs. Special attention is also paid to the seniors as this group creates about 15% of the members. The Club has also members belonging to the group of the disabled. These are grouped in special teams, which prepare special agenda for its members reflecting the sort of disability.

A few NGOs were a part of the wide partnership, which implemented the project "Beskydy for all" within the Commission Initiative EQUAL. The project was led by **the regional counselling and information centre Kazuist**, which is the initiator of the barrier free travelling idea. The centre initiated the creation of the Central European platform for the integration of the disabled people (comprising Czech, Slovak and Polish partners and associated partners from Sweden and Turkey, www.megfi.eu).

The suppliers form an important part of the tourism market. A few associations represent this part of the market, e.g. Association of hotels and restaurants, Association of the tourism agencies, Association of the tourism offices and agencies or Association of the entrepreneurs in the catering and accommodation services. Unfortunately, none of them were willing or able to participate in the study, which does not prove the high interest of these institutions in the social tourism activities.

3.2 Segmentation profile

The brief description of the four target groups is based on the responses of the above mentioned bodies and information from other published documents.

Senior citizens	
User profile (socio-economic profile, travel habit demographics)	Seniors over 65 create about 10% of the total population in the Czech Republic and their number is growing. In next 10-20 years this proportion is expected to grow even faster, but seniors are likely to be more physically active, healthier, more educated (languages, computers) etc. The typical features of this group are a

² www.rscr.cz

³ www.nrzp.cz

⁴ www.kct.cz

	<p>higher occurrence of health problems, and no work obligation leading to the possibility to leave for holidays also off season. The current pensioners are family oriented and although with low income they are supporting their families, taking care of grandchildren etc. They have much lower pensions in comparison with their previous salaries. The average pension is ca 400 EUR, but about half of the retired seniors have lower revenue. Their travelling is therefore limited mainly due to the financial constraints but also because of language barriers and reduced mobility. According to a study⁵, about 50% of seniors in Prague go on holiday in the country or abroad (29% regularly). For the remaining part, 30% mentioned financial constraints and health problems (12%) as the main reason for no holiday traveling, but figures change depending on the age group and income. The profile of the future Czech seniors is likely to resemble the European average. They will go for holidays more often, stay longer and will be seeking for more active way of holidays.⁶ The tour operators report an increase of clients among seniors; while 10 years ago no seniors were travelling abroad, in 2008 about 8% of the clients were seniors and this number is expected to grow quite significantly.⁷</p>
Organisation responsible for support	<p>The Ministry of Labour and Social Affairs pays the pensions through its Social Security Administration-: in 2008 the overall number of the pensioners was 2.1 million. Voluntary, non-financial support for the seniors is in general provided through the Council of Seniors and its member organisations (NGOs).</p>
Duration of stay	<p>Typical domestic tourism for the seniors means spending holidays in their own (family) facilities, with the duration up to 4 weeks. Visiting a spa usually means a 3 weeks stay in the country, paid from the national health funds. If it is a stay, which is not fully covered by the health funds but requires the clients' own financial contribution, duration is shortened to 2 weeks. When travelling abroad, an average stay is 10-12 days long. Preferred periods are the off season, mainly spring and autumn. For the spa tourism it is whole year round, except during the peak season, July and August. Seniors make use of the off-season lower prices.</p>
Main holiday destinations	<p>Most of the Czech seniors, in particular those from the cities often visit their country houses/cottages with their families, which is a special feature of domestic tourism. Due to the lower income, they prefer this sort of domestic tourism. Based on the information from tour-operators, seniors represent some 10-15% of the sold package tours abroad and about 50% of the home guests of spa facilities. Most of them are thus quite frequent visitors of the spa regions (West Bohemia) but also cultural monuments in South Bohemia. The most favourite countries in outbound tourism are, as for the rest of the population, Croatia, Slovakia and Hungary (spa). The tour operators mentioned Croatia, Egypt, Tunis, Turkey and Spain.⁸</p>
Average spending during holidays per year	<p>As reported by some of the tour-operators, when travelling abroad the seniors spend on average about 600 EUR for 10-12 days long stay.</p>
Holiday participation statistics	<p>The pilot research showed that seniors prefer travelling in couple, with grandchildren or friends. They are travelling in groups when</p>

⁵ <http://www.rscr.cz/prispevky/Studie.pdf>, Pernes, Z. et al., 2008, [2.2.2010]

⁶ <http://www.czechtourism.cz/media/trendy-a-zajimavosti/svetove-trendy-v-cestovnim-ruchu-9-dil-cestovani-senioru.html>, Vogelova, M., Travelling of seniors, Czechtourism, 2009, [26.1.2010]

⁷ It should however be noted that the definition of "senior citizens" differs between the stakeholders: whereas seniors' discounts are offered by the travel agencies to people aged 55 and older, people retire earliest at the age of 60. Thus, not all the senior citizens are pensioners.

⁸ <http://www.novinky.cz/cestovani/147158-na-zahranicni-zajezdy-jezdi-stale-vice-duchodcu.html>, 2008, [26.1.2010]

	trips are organised by "senior houses/clubs" or parishes. The pilot research of the University showed that seniors who have not been flying yet, have a problem with this way of transport. Concerning accommodation facilities they prefer hotels or boarding houses, (standard, 3 stars), half-board and activities during the stay (facultative half or full-day trips, visits, evening programme).
Barriers and reasons for non-participation	Generally due to the age, seniors have problems with the mobility (arthritis, rheumatism etc). Based on the experience it can be said that one of the main reasons why they do not go for holidays are financial difficulties, but also accessibility/distance, or problems with the mobility.

Young people	
User profile (socio-economic profile, travel habit demographics)	This target group represents 14% (1,5 million) of the population. About half of this age group are students with no official income. The number of unemployed in the group up to 25 years in 2009 reached 9.9% ⁹ . This target will be declining due to the demographic development in the country. With the exception of the unemployed, almost all young people go for holidays.
Organisation responsible for support	It can vary depending on the status. Ministry of Education, Youth and Sports is generally responsible for students; the unemployed are receiving support through Labour Offices supervised by the Ministry of Labour. Unofficial support is provided through numerous interest groups and NGOs but one representative umbrella organisation for the group does not exist.
Duration of stay	Very frequent are either the (extended) weekend activities for 2-3 days, or holidays with an average duration of 15 days.
Main holiday destinations	The most favourite destinations of this target group in the Czech Republic are regions with natural attractions (with mountains and rivers or lakes). Abroad the destinations offering studies of languages, "work and travel" programmes, or study programmes, such as Leonardo da Vinci, Erasmus, etc. The Czech Republic belongs to the top 20 most visited countries by the young foreign visitors and in the so called "backpackers" category it is ranked as 9th. ¹⁰
Average spending during holidays per year	According to the pilot study, the average spending of students is about 400 EUR unless they do not have their own income. This is much less in comparison with the world data reporting about 2 000 EUR average spending per trip for this target group. ¹¹
Holiday participation statistics	About 90% of young people travel alone or with friends, only a minority goes on organised holidays. Independent travellers use all means of transport with special price reductions, low cost airlines, accommodation in hostels, camps and 2-star hotels, but they have to be clean and generally with access to internet. They often use ISIC bonus cards (International Student Identity Card). This group likes adventure type of holidays and often visits various unusual destinations and use numerous international exchange programmes. Although there are no relevant statistical data, it is assumed that the young people who do not go for holidays are the unemployed.
Barriers and reasons for non-participation	Over 3% of the overall population of young people is formed by the young disabled. They are overcoming the barriers for traveling much better than other target groups.

⁹ <http://finance.bleskove.net/clanek/nezamestnanost-mladych-lidi.html>

¹⁰ http://www.czechtourism.cz/files/statistiky/clanky/26_09_08_mladi_cestovatele.pdf , [26.1.2010] Sindelarova, L., Young tourists, Czechtourism, 2008

¹¹ ibid

Families facing difficult circumstances	
User profile (socio-economic profile, travel habit demographics)	The Czech Republic has no definition for families facing difficult social circumstances and therefore no statistics regarding this group are available. The research study of the Economic University determined a definition based on the "living minimum" which is e. g. for the average family of two parents (adults) and two children (below 15 years) 900 EUR income. The group thus consists of the families with low revenue, single-parents, large families or unemployed parents. No estimates are available but the University assumes that the number of such families should not exceed 9% of the total number of families. The holidays in such families are following the same pattern as for the seniors. They spend it with their relatives (friends) or have their own summer houses/ cottages. For financial reasons these families often face difficulties to send their children to summer camps or camps in nature organised by schools as part of the educational programme. Some NGOs or parishes occasionally organise such camps for these children.
Organisation responsible for support	Ministry of Labour and Social Affairs pays the any forms of social benefits through its Social Security Administration -. No association has been identified as the voluntary NGO representing the interest of this group.
Duration of stay	If they can afford any holidays, it is a short break for 3-4 days.
Main holiday destinations	Most favourite places are local regions with nature attractions (rivers, lakes, mountains) but they cannot afford to travel abroad.
Average spending during holidays per year	No relevant data are available but the pilot research of the University showed that in case they go for holidays the average spending of the family is about 250 EUR.
Holiday participation statistics	Based on the other indicators it is expected that about 10% of these families can afford to go on holiday. The timing depends on the children's age. Families with school age children go for holidays in July and August, during the main school holidays and additional one week school holidays are planned in February or March. The families usually go on holiday alone (more than 90%) unless the school or youth houses organise the holidays in groups. The grandparents are very often taking care of their grandchildren, especially during the school holidays. The specific needs are focused on discount rates for services, multiple rooms in accommodation facilities or availability of kitchen, animation programmes for children, children's corners (au-pair service), etc. Hygiene in all facilities is very important. The offer of tourism services for families in general is very large, as families are very important segment of customers. The offer includes a lot of special discounts (children for free).
Barriers and reasons for non-participation	Families facing difficult social circumstances can hardly afford any tourism services. There are no measures/ supports provided to enable these families to go on a holiday. Occasionally some individual support might be provided by NGOs or parishes to a specific family, most likely in case they face combination of disabled child/ren, unemployed parents and low revenue.

Adults with disabilities	
User profile (socio-economic profile, travel habit demographics)	The Czech Republic has in total over 1 million disabled people (9.87 % of the population. Most significant proportion of the disabled is among seniors, of whom 26% have a disability. Most frequent form is the disability caused by the civilization diseases (37%), followed by physical, mental, visual and hearing impairment. Nearly 63 % of the disabled have a limited mobility; only less than 13% of them work and 71% are unemployed; 20% of

	the job seekers are disabled; 88% of the disabled receive some type of a social benefit, of which less than one third receive the full disability pension (in 2008 average pension was 359 EUR) ¹² . Only 5% of the disabled live in barrier free houses. ¹³
Organisation responsible for support	Ministry of Labour and Social Affairs pays the social benefits and pensions through its Social Security Administration. The National Council of the Disabled is the national NGO representing the main body protecting the interest of this group.
Duration of stay	No statistics available.
Main holiday destinations	No statistics available.
Average spending during holidays per year	No statistics available.
Holiday participation statistics	No statistics available.
Barriers and reasons for non-participation	The major problem for the disabled is the accessibility. The legal barrier for the people with a limited mobility and orientation is the lack of unification of ID cards for the handicapped and thus limited ability to utilise the facilities for the handicapped when being abroad.

3.3 Existing support systems and/or mechanisms

Based on the responses of relevant stakeholders we can conclude that no specific (financial or other) support mechanisms concerning social tourism have been established for any of the target groups. What is generally applied, are various discounts offered by the services providers. Wide offer of discounts is available to the seniors, which are considered to be very important clients in the near future. Discounts are traditionally offered, by most of the suppliers, to the families with children. One of such activities, entitled Family passports, was initiated within EU supported cross-border programme Interreg between Austria and the Czech Republic. The members are entitled to various discounts in the range of 5 to 50%, which are provided by the tourism facilities, shops, services including the leisure time activities in the Czech Republic, Austria and Slovakia.

Discount systems are also widely applied for the seniors by transport providers. The international students' cards have the same advantages for the students in relation to transport, entrance tickets, accommodation, etc. All of the above systems are commercial systems and have not been formed to support social tourism or any of the target groups. Despite that, they can serve as an incentive to utilise certain services.

3.4 Demand drivers

Senior citizens	
Constraints	Until recently, the majority of seniors preferred to spend their holidays at home or at their weekend house. They felt more comfortable and safe, and it did not cost much. They could afford it and spend time with their families. Currently the preferences are changing. The current seniors are in better physical shape, are used to travel and seek for active holidays often abroad. Most likely the financial constraints will not play such an important role, due to increased savings.
Needs and expectations	Data not available.

¹²<http://www.risy.cz/index.php?pid=202&sid=1855&mid=1295#o6>

¹³ <http://panda.hyperlink.cz/cestapdf/pdf08c6/novak.pdf>, Novak, J., Kalnicka, V., [25.1.2010], Šetření zdravotně postižených osob zaplnilo další bílé místo na mapě české statistiky, Czech Statistics Office, Prague, 2008

in terms of destination	
Types of accommodation	The most frequent requirements are short distance to the beach, comfortable access to the sea, lift in the hotel, barrier free access, antiskid floors, rooms in the silent part of the hotel and diet food.
Activities	The most popular activities are walking, rehalibilitation and some sport activities.
Specific equipment	Data not available.
Sensitivity to price	Data not available.
Seasonality aspects	Seniors very often use off-season (spring, autumn) periods because of several reasons: lower cost/ discounts, facilities are not overcrowded, it is quiet, and from the health point of view it is more convenient to visit the place when it is not extremely hot.

Young people	
Constraints	The data are not available but it can be assumed that the only reason can be the financial constraint.
Needs and expectations in terms of destination	Data not available.
Types of accommodation	Preferences are given to the less comfortable, cheap but clean places.
Activities	Generally, outdoors activities and adventures are the most popular activities of this group.
Specific equipment	Data not available.
Sensitivity to price	n.a.
Seasonality aspects	In general, the students go for holidays during the school holidays in July and August, which is the peak season in the summer. During the winter time it varies depending on the time of the school holidays.

Families facing difficult circumstances	
Constraints	The main issue is the financial problem.
Needs and expectations in terms of destination	Most favourite places are local regions with nature attractions (rivers, lakes, mountains) but they cannot afford to travel abroad.
Types of accommodation	Data not available.
Activities	Data not available.
Specific equipment	Data not available.
Sensitivity to price	The income of the families is rather low, which is the most limiting factor regarding holidays.
Seasonality aspects	Depending on the age of children, limited if they attend the school.

Adults with disabilities	
Constraints	No exact data available but most probably financial and accessibility constraints.
Needs and expectations in terms of destination	Data not available.
Types of accommodation	Barrier free
Activities	Data not available.
Specific equipment	The requirements differ according to the type of disability.
Sensitivity to price	The income (full disability pension) is slightly less than the average income of the seniors. Moreover, the special needs of the disabled because of their health status can require higher expenditures (drugs, rehabilitation, assistant, special gadgets).
Seasonality aspects	Most likely not so important, preference could be given to the same periods like for the seniors.

4. ANALYSIS OF THE TOURISM SECTOR

4.1 Market trends

The Czech Republic does not belong to the typical tourist destinations in Europe, but it is constantly developing its potential and services, and has a capacity to attract more tourists in the future mainly due to the history and nature, but also thanks to the spas. The country can offer 12 historical monuments on the UNESCO Heritage List, over 200 castles, chateaux and monuments, more than 40 protected historical towns, 36 spa towns and resorts, 80 golf courses, four national parks and 25 protected landscape areas, eight mountain ranges, as well as facilities for walking, cycling, skiing and horse riding. Overall data refer to 7705 collective accommodation facilities (41 five-star and 360 four-star hotels, 4082 other hotels and boarding houses, 509 tourist campsites, 941 holiday chalets and hostels for tourists) with the capacity of 466,832 beds.

The tourism sector in the Czech Republic was continuously growing until 2008 when its stagnation was observed due to the economic recession. Nevertheless, in 2008 it was visited by 6,653,053 foreign tourists mostly from Germany and the UK, followed by Russia, Italy and Poland. Foreign visitors spend on average four days in the Czech Republic. The most visited place was Prague, which welcomed 4.1 million tourists, representing 61% of all the foreign tourists coming to the Czech Republic. High numbers of tourists visited Karlovy Vary (Carlsbad, spa) and South Moravia.¹⁴ Share of tourism receipts on GDP is 3.5% and share of tourism receipts on service receipts represents 34.7%.

The main reasons for visiting the Czech Republic for foreign tourists were recreation and entertainment (52.4%), visiting friends and relatives (22.1%) or business trip (20.7%). Foreign tourists most often stayed in a hotel or motel (65.5%). 24.8% of foreign tourists used some kind of unpaid accommodation (e.g. stayed at friends or relatives), 4.4% of foreign tourists stayed in paid private accommodation (rented flat or room), 3.8% of respondents chose other collective accommodation establishments and almost 1.5% of foreign tourists stayed in tourist campsites. Total expenditure of foreign visitors, per person and day, was 88 USD, and 108 USD for one-day visitors. Majority of visitors comes during the summer May - August while off season months with the lowest number of visitors are January and February.¹⁵

The analysis of the tourism sector has certain limitations that should be taken into account when interpreting the results of this study. First of all, the availability of relevant and reliable data was not sufficient. The complex or partial study at the national level estimating the potential of the social tourism market is missing. The businesses therefore suffer from the lack of the knowledge and motivation and other involved actors are not motivated to change their attitude. Without any research or forecast of the future development, the study gathered the general views and expectations of the relevant tourism stakeholders to indicate possible trends. Therefore it is based on these opinions, rather than hard data and facts.

As already mentioned the tourism industry in the Czech Republic was growing fast until 2008, when the economic crises caused its decline. Further expectations in the near future are positive and based on the available information, a specific attention will be paid mainly to the seniors, disabled people and sustainable development issues.

The demographic prognoses indicate that the number of seniors will grow substantially. When compared to the current pensioners, the perception of their future is quite different. In the future senior citizens are expected to be in better physical and mental condition, with better financial back up, and to live more actively (including travelling). Problems with reduced mobility should not prevent them from travelling. Moreover, this

¹⁴ <http://www.czechtourism.com/eng/uk/docs/press-centre/studies-and-statistics/articles-commentary/statistiky2009.html>, 2009, [23.1.2010]

¹⁵ http://www.czechtourism.cz/files/statistiky/28_07_09_statistiky_letak2008_eng.pdf, 2008, [23.1.2010]

group will most likely appreciate mild weather instead of the heat in the top season and most of the seniors will be able to travel during off-season.

The general findings also indicate that the requirements for barrier free tourism services are likely to improve. This will thus enable more client-oriented and comfortable services for the seniors and the disabled. The trend can be emphasized by the general effort of the society to increase the participation of the disabled people in the public life and in decision making processes, thus supporting their integration and social inclusion into the society.

The quality of services is becoming more important. The Czech Ministry of Regional Development has just introduced a system of quality (certification) and innovation in tourism - CzechQuint. The system should increase competitiveness and enable simple access to and selection from the offered services. The access to information is generally improving.

The future trends also mention so called "responsible tourism". The future development has to be planned and to take into account the local specificities, history, traditions, which should be respected by the businesses as well as the tourists. This attitude should thus minimise the negative externalities of the mass tourism on both nature and the society.

4.2 Supply of services

Unfortunately, the approached bodies representing the supply of services were not willing or able to provide any relevant answers or data. The questions were considered too detailed, complicated and the answers, according to them, would require in-depth studies, which have not been conducted.

Nevertheless, in general we can conclude that the existing products are convenient for the social tourism, namely for the groups which have only financial limitations e.g. young people or families. The businesses would certainly welcome some clients namely in the off season period. As regards the seniors and the disabled, most of the existing facilities would also be convenient, or only small changes would be required, to satisfy their needs. This was proved during the implementation of the project "Beskydy for all" where most of the certified facilities did not have to carry out any changes to comply with the certification criteria for the Barrier free label. The most needed support for the facilities included the training of staff.

A concept resembling social tourism was widely applied before 1989 when most of the tourism activities could take place solely within the country. All of the companies and institutions used to have their own tourism (trade union) facilities, which were offered to the employees for very moderate prices. The difference was paid by the employer and support was provided for all employees, including the retired ones.

The tourism products are currently available with various discounts. These are usually targeted to certain groups. In general, airlines offer reduced rates for children, students and quite substantial number of low costs flights. Rail and bus companies in the country also offer reduced price for the seniors and students, occasionally also some family tickets. The disabled have discounts for any transport. However, most of the discounts can be claimed with some special ID card/permit/certificate and therefore foreign tourists would not be able to use it. The availability of such services will thus depend on a unification of rules or compensation of such expenses by the local responsible institution.

The provision of the lower rates during the off season is already widely used by the seniors. As reported by the Association of the pensioners their institution as well as its regional offices organise numerous holiday trips for their members in the country and abroad mainly in the spring and autumn. In case of the local trips they contact the providers directly and negotiate the discounts for the whole group, the foreign trips are organised through the tour operators.

The main obstacle in relation to social tourism in the Czech Republic is the lack of clear commitment to support it from the government level. The commitment would require systemic measures in relation to the target groups, most likely in the form of financial contribution. At the same time, an awareness raising campaign targeted towards the service providers, in order to remove the information barriers and promote positive attitude towards these clients, would be helpful.

The tourism businesses still perceive the target groups as a minor group on the market and the staff is not prepared to deal with these types of clients. Moreover, due to the lack of information some are afraid that barrier free facilities are equipped like hospitals and would be very disturbing for the other clients. An information campaign explaining the potentials of social tourism, its specific features and some studies mapping the situation on the market, could be very helpful. Supporting investments provided through grant schemes would contribute to spread this idea. All these activities should introduce social tourism as an important economic activity and ensure that the tourism businesses (service providers as well as intermediaries) can reveal its important development potential.

Coordination efforts would be needed both at the international and the local level. One of the examples where evident lack of coordination can be demonstrated is the certification process. There are several individual projects or initiatives in the area of tourism, dealing with the certification of products and services, where coordination might bring more significant synergy effects. Currently ongoing certification efforts include for example the certification Hotelstars Union, which started in 2010 and is supported by the Association of hotels in Austria, the Czech Republic, Germany, Sweden and Hungary, as well as the certification of various marks/ labels like Green Pub, Barrier free, Children friendly facility, Eco hotel, etc.

4.3 Supply of services from a European point of view

No reason was identified why the existing services could not be available or suitable for the social tourism of the European population. The way how the support system is applied can determine its use: i.e. provided that the financial support is reimbursed in the home country it should not influence travelling abroad, whereas in case vouchers are used, mutual agreements have to be negotiated on how to settle the payments etc.

The most attractive places for the seniors and the disabled during the off season period, could be spa resorts, which are fully equipped for the provision of services for these targets. The young people would enjoy a stay in Prague while the families with children and seniors could use many facilities in the countryside. During the peak season, the most convenient would be some small countryside facilities in the mountains, quite often nearby the lakes/ ponds, which could ensure attractive services for all target groups.

Although there is no operator specialised in this area, the creation of the market supply is the issue of the demand. As soon as there is such a request, there should be no problem to identify the convenient service facility.

4.4 Sustainable tourism aspects

The Strategy document on the governmental policy in the area of tourism for the years 2007 – 2013 discusses also the sustainability issues of tourism. It refers to the sustainable use of the natural potential of the country as an inevitable pre-condition to increase its attractiveness for tourism. The priorities of the strategy refer to the increased accessibility of cultural and natural landmarks attractive for tourists and their maintenance, and development of the environmental friendly forms of tourism for sustainable development (mainly, but not only) in the environmentally important areas.

The main aim of the policy is to minimise the impact of tourism on the environment and to seek for suitable instruments, which would eliminate negative effects of tourism. The activities

undertaken in the previous period have not been considered sufficient as they were mostly restricted to the impact assessment studies EIA or SEA. In 2004, the Czech Republic joined the EC initiative (started in 1992) on certification of ecologically friendly tourism services. The agency of the Ministry of Environment, Czech Environmental Information Agency CENIA, assists with this voluntary certification process of products and services.¹⁶ So far, the label - flower – has been granted to 10 tourism facilities and should guarantee that the facility and its services have minimal negative impact on the environment.

Although the issue of sustainable development occurs more often in strategic documents than in systemic measures in reality, some of the local examples show that it is well understood and occasionally implemented. This is demonstrated on the example of the first Czech destination awarded a special title. The European Commission launched a competition in 2006 entitled European Destination of Excellence. In 2009 the international jury decided to award this title to the Czech Switzerland. According to the jury this area (national park) was able to develop tourism in the nature protected area in a way, which enabled to emphasize the distinction of the area and was fully compliant with the principle of sustainable development.¹⁷

4.5 Feasibility of social tourism

As already mentioned, the main barriers for the development of social tourism can be thus summarised as insufficient governmental support, lack of information and knowledge, and readiness of the staff. Once the businesses are aware of the social tourism, more can be said about their (un)willingness or readiness to provide such services. The operation of social tourism will be dependent on the final set up of the support system. The demand can grow quickly if the state is able to remove the main barrier on the clients' side, which is the financial constraint, and is able to motivate the providers through the creation of a mutually beneficial system.

With the exception of the main identified barriers, no other potential obstacles preventing the development of social tourism, from the side of the tourism industry, have been identified. The experiences from the pilot interventions show that the businesses (the operators as well as service providers) are open to new initiatives. However, the service providers need to know that there exists a group of potential clients to target their marketing activities and they need to know their specific needs, to take the necessary measures to satisfy them.

5. LEGISLATIVE PERSPECTIVES

When discussing the legislative support concerning social tourism, it can be seen that up to now, the whole issue has been reduced to the support provided for one of the target groups – the disabled, which can also overlap with the group of seniors (up to limited extent it can also concern the young people and families facing difficult circumstances). In general, the existing legal framework does not fully cover the issues concerning the accessibility of services for all. Moreover, the public awareness is still low.

There are some efforts to adopt legislation, which would support the development of social tourism indirectly but its implementation in reality takes a long time, quite often due to financial constraints or technical possibilities. One of the existing pieces of legislation, which are not fully implemented/ respected, is the Order on general technical requirements ensuring the use of the buildings for the people with limited mobility and orientation. Another example is the amended Act on railway, which was adopted in 2009 in order to strengthen the rights of the disabled when travelling. It specifies the necessity of the technical equipment enabling the access of the handicapped to the trains, and the ways of the purchase of tickets by electronic means. These could demonstrate the efforts enabling the development of social tourism although as mentioned, their implementation is lagging behind.

¹⁶ [http://www.cenia.cz/web/www/web-pub2.nsf/\\$pid/MZPMSFGIR00](http://www.cenia.cz/web/www/web-pub2.nsf/$pid/MZPMSFGIR00), [25.1.2010]

¹⁷ <http://www.czechtourism.cz/mezinarodni-projekty/eden-european-destination-of-excellence/prvni-evropskou-destinaci-nejvyssi-kvality-v-cesku-se-stalo-ceske-svycarsko.html>, 2009, [25.1.2010]

The education of the public administration in relation to the specific needs of the target groups is also not sufficient and education programmes or other forms of such trainings are missing. The idea to support the unemployed to go on holiday would hardly be accepted by the general population. Therefore it is unlikely to expect any supporting measures from the side of the government or public administration. If such supports are to be provided soon, it would be an initiative of the private suppliers. Recognising the potential, they might be trying to attract any possible clients mainly during the off season period and use reduced prices as the first incentive.

Overall, it can be summarised that from the legal point of view, indirect support to social tourism is provided mainly in relation to the disabled. It is, however, unlikely to expect similar legal measures for the other target groups. The primary limiting factor is the financial situation but there are several other constraints, which will persist (language, fear, etc.).

One of the limiting factors emphasized by the handicapped is the incompatibility of the identification and labelling for the disabled people. Those who travel abroad thus have difficulties to understand different labelling as well as can not use (are not entitled to) some of the discounts because of differing identification systems. The unified norms and standards in relation to the accessible environment for the disabled are missing.

6. DEVELOPMENT OF PRODUCTS FOR SOCIAL TOURISM

Due to the very initial stage of the social tourism development in the Czech Republic we can make the reference to the only one implemented project. The results of the project are removing several barriers for the travelling of the disabled, such as the information barrier, the psychological barrier in communication between the staff and the clients, and they also motivate the businesses to purchase the necessary equipment (access ramp, menu in braille) or to do small building conversions.

Any of these results can be applied elsewhere. The existing information portal can be extended and its English version can be used by the foreign visitors. Further dissemination of the training courses for the staff and certification process may require some financial support, and the motivation of businesses to carry out the necessary adjustments is to be supported through the grant scheme of the Ministry of Regional Development. So far, no direct support to the target groups is considered and very little is known about it, which indicates that the social tourism as such has not attracted sufficient professional and political attention yet.

The demand/supply side will most likely be balanced on the commercial basis and provided that the businesses are able to adapt their services and offer affordable prices (at least for some of the targets), social tourism can grow significantly. The spa tourism, historical places and nature have the potential to attract foreign tourists.

As the amount of information provided on behalf of the suppliers is more than limited, any further consideration about the future development, potential, challenges or opportunities would be a pure speculation.

7. WEB PORTALS

The only platform, which is summarising and offering the available events, services and facilities, including more detailed indication of their convenience for different groups of disabled (according to the type of disability - mobility, visual, hearing), has been prepared within the project "Beskydy for all" and is accessible as the social observatory web portal at

<http://www.jedemetaky.cz/> in both, Czech and English language. It provides information for the clients, who can also book the services, as well as for the suppliers who can learn more about the possibilities to cooperate and apply for the special label (criteria). The portal includes the third edition of the travel manual with further details of facilities for barrier free traveling.

Social observatory

Accessibility of the region for disabled tourists

We recommend the following certified facilities:

Hotel and conference centre Malenovice, Malenovice	Sepetná Recreational Centre, Ostravice	Hotel Grůň, Mosty u Jablunkova	Cyklobar restaurant, Dobrá	Verdi Pizza Restaurant, Vendryně	U Ski Areálu Guest-House, Mosty u Jablunkova	BEN Guest-House - restaurant, Ostrava - Polanka	Hotel STEEL, Třinec

Home

I want to visit you

I want to co-operate

Useful links

Contact

Accessible tourism practically

22.09.2009

On 23. 10. 2009 there will take place a workshop about travelling for people with specific needs within the frame of the MEDICAL FAIR in Brno.

HANDICAP DAY, DAY WITHOUT BARRIERS 2009

01.09.2009

Everybody to Český Krumlov!

Project 'No-barriers' again in Karlovy Vary!

02.06.2009

Good news for film fans - 44th INTERNATIONAL FILM FESTIVAL KARLOVY VARY which will take place from 3th to 11th July is barrier-free again!

Barrier-free travelling with Travel Manual

02.06.2009

Updated - the 3rd edition of travel guide is here for you!

Position of the sector – type of disability:

1. Visual

2. Hearing

3. Mobility

Colour of the sector – suitability of the facility for the disability concerned:

suitable

 partially suitable

 unsuitable

Anketa

How important factors...

Bezbariérové cestování

I want to co-operate

I want to visit you

The web page of the project <http://www.projekt-beskydy.cz/> includes some further materials, e.g. the basic rules for the staff on how to communicate with the clients with special needs etc.

<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>7. Penzion Koliba</p> <p>Penzion v Komorní Lhotce v klidném prostředí mimo ruch civilizace. Součástí je restaurace s tradičními jídly i mezinárodními specialitami. V létě možnost venkovního posezení. K dispozici sauna, vířivka, bylinkové koupěle, masér. Ve vedlejším objektu vyhlášená sauna. Ubytování: 6/2, apartmá, 4/2 vč. soc. zařízení</p> <div style="display: flex; justify-content: space-between; font-size: x-small;"> Komorní Lhotka 315, 739 54, tel.: 558 696 866, 739 051 531, www.ubytovani.net/koliba </div> </div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>10. Turistický hotel Sántis</p> <p>Turistický rodinný hotel se nachází v obci Komorní Lhotka na konečné zastávce autobusu. Na přání možnost pořádat rodinné nebo firemní akce: sál do 50 osob, banketka 16 osob. Nekouřičské prostředí. Ubytování ve 2 – 4 lůžkových pokojích s vlastním sociální zařízením. Na pokojích k dispozici televize. Ubytovací kapacita 20 osob.</p> <div style="display: flex; justify-content: space-between; font-size: x-small;"> Komorní Lhotka 160, 739 53, tel.: 558 696 850, www.santisotel.cz, info@santisotel.cz </div> </div>
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>8. Hotel Godula</p> <p>Hotel se nachází v samotném středu obce Komorní Lhotka. Součástí hotelu je restaurace, salonek a sál. V obci je vyhlášená sauna a bylinkové koupěle. Rekreační centrum oblasti. Ubytování: 2/2, 2/3, 2/4, 1/5, 2/6</p> <div style="display: flex; justify-content: space-between; font-size: x-small;"> Komorní Lhotka 17, 739 54, tel.: 558 694 914, 777 186 554, www.godula.wz.cz, capcama@volny.cz </div> </div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>11. Horská chata Na Prašivě</p> <p>Chata je na vrcholku hory Prašivá (706 m n. m.), 6 km od centra obce Vyšní Lhoty. Na přilehlém palouku je dřevěný kostel sv. Antonína z roku 1640. Součástí památkově chráněné chaty je rozhledna se zastřešeným ochozem. Ubytování: 1/2, 1/3, 2/6, 1/3+3, 1/4+2</p> <div style="display: flex; justify-content: space-between; font-size: x-small;"> Vyšní Lhoty 200, 739 06, tel: 558 438 084, 724 252 852, www.prasiva.komornilhotka.cz, prasiva@atlas.cz </div> </div>
<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>9. Hotel Premier</p> <p>Hotel v Komorní Lhotce, při úpatí hory Ropčice (1082 m n. m.). Hotel je 2patrová budova, restaurace, bar, společenský sál. U objektu je venkovní bazén, říšské, uvnitř vířivka. Pohyb vyhlášená sauna a bylinkové koupěle. Ubytování: celkem 100 osob ve dvou, tři a čtyřlůžkových pokojích.</p> <div style="display: flex; justify-content: space-between; font-size: x-small;"> Komorní Lhotka 11, 739 54, tel.: 558 694 224 602 786 565, fax: 558 695 359, www.hotelpremier.cz, info@hotelpremier.cz </div> </div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <p>12. Horská chata Na Hotoši</p> <p>Horská chata (800 m n. m.) se stylovým interiérem a terasou, nádhernými výhledy na Beskydy (Travný). Chata leží na hraniční mezi chatou na Prašivě a na Ropčicích. Dojezd z Morávky pro ubytované, pro pěší trasy z Morávky a Komorní Lhoty. Ubytování: 1/3, 2/5, 2/7, 1/8</p> <div style="display: flex; justify-content: space-between; font-size: x-small;"> Morávka 373, 739 05, tel: 558 647 424, www.kotac.komornilhotka.cz </div> </div>

No platform presenting the demand has been identified. The individual organisations providing support for the target groups have not specified their requirements in relation to the social tourism. It is likely to expect that this topic will be more often discussed in the near future.

ANNEXES

LIST OF INTERVIEWEES

Name of the interviewee	Position	Organisation	Type of organisation	Interview date
Alena Hellerova	Director of Trade, Tourism, Transport and Communications Statistics Department	Czech Statistical Office	public	22 January 2010
Iveta Franzova	Civil servant	Ministry of Regional Development	public	25 January 2010
Vaclav Krasa	Head	National Council of the Handicapped in the CR	NGO	25 January 2010
Zdenka Petru	University lecturer	Economic University	public	26 January 2010
Mojmir Novacek	Organisation manager	Czech Tourists Club	NGO	26 January 2010
Hana Fojtachova	Head of the Market Research and Trends Department	CzechTourism	public	29 January 2010
Ilona Ostruzzkova	Project Manager	Kazuist	private	29 January 2010
Zdenek Pernes	Chairman	Council of seniors of the CR	NGO	2 February 2010
Hana Nemcova	Vice-Chairwoman	Association of pensioners of the CR	NGO	3 February 2010

LIST OF DOCUMENTS

- <http://www.czechtourism.com/eng/uk/docs/press-centre/studies-and-statistics/articles-commentary/statistiky2009.html>, 2009, [23.1.2010]
- http://www.czechtourism.cz/files/statistiky/28_07_09_statistiky_letak2008_eng.pdf, 2008, [23.1.2010]
- <http://www.rscr.cz/prispevky/Studie.pdf>, Pernes, Z. et al., 2008, [2.2.2010]
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- <http://www.novinky.cz/cestovani/147158-na-zahranicni-zajezdy-jezdi-stale-vice-duchodcu.html>, 2008 [26.1.2010]
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- <http://www.risy.cz/index.php?pid=202&sid=1855&mid=1295#o6>
- <http://panda.hyperlink.cz/cestapdf/pdf08c6/novak.pdf>, Novak, J., Kalnicka, V., [25.1.2010], Šetření zdravotně postižených osob zaplnilo další bílé místo na mapě české statistiky, Czech Statistics Office, Prague, 2008
- [http://www.cenia.cz/web/www/web-pub2.nsf/\\$pid/MZPMSFGRIR00](http://www.cenia.cz/web/www/web-pub2.nsf/$pid/MZPMSFGRIR00), [25.1.2010]
- <http://www.czechtourism.cz/mezinarodni-projekty/eden-european-destination-of-excellence/prvni-evropskou-destinaci-nejvyssi-kvality-v-cesku-se-stalo-ceske-svycarsko.html>, 2009, [23.1.2010]

GOOD PRACTICE DESCRIPTIONS

Barrier free travelling for the disabled in the Czech Republic			
Name of the expert conducting research	Dagmar Gombitova		
Country	Czech Republic		
Respondents/informants	Ilona Ostruzzkova, Kazuist s.r.o., - private consultancy company, Husova 401, 73961 Trinec 1, Czech Republic, tel. +420 558 335 479, www.kazuist.cz ostruzzkova@kazuist.cz		
Target group involved:	Disabled with any type of disability - mobility, hearing, or visual, no further specification regarding income or social situation		
Description of exchange:	The project entitled "Beskydy for all" was implemented as one of the European Social Fund projects. The initiation of the idea and leading role of the project was taken by the private consultancy Kzuist s.r.o. The support of various activities was provided by the numerous cooperating partners (local government, NGO). The project activities were not focused international exchanges. The main purpose was to make information accessible for the disabled as well as to identify barrier free facilities and in cooperation with the private tourism facilities to create and implement a certification system and a label for barrier free services.		
Handling of target group needs:	The activities of the project focused on the physical accessibility of tourism for all. The project team elaborated the first methodology for the assessment of the accessibility of tourism facilities in Czech Republic (food and accommodation services), developed criteria, created and registered the label "Barrier free", which was subsequently awarded to more than 20 tourism facilities in the region. Additionally, the project team published three editions of the Travel Manual, presenting basic information about the tourism facilities including information about their convenience for various types of disabled, and prepared and made accessible the first information database of the facilities taking into account specific needs of people with mobility, visual or hearing impairment. The database and further information is available on the newly created web portal www.jedemetaky.cz. The project activities included training programmes to increase the competencies of the staff and management of the facilities in communication with the disabled clients and provision of special services.		
Description of support mechanisms	The support is based on the provision of information for both the potential clients, through the web page informing about possible services, and for the businesses providing info about certification and training. The project was carried out by the private consultancy Kazuist, while the cooperating partners had some minor roles ensuring access to information, assisting with supporting studies, specifying the needs/ requirements etc. These involved Association of businesses, Regional Development Agency, Business Development Institute, NGOs dealing with the handicapped and unemployed, parish, Regional Council etc.		
Description of funding mechanisms:	EU funds and state cofinancing	-	-
Lessons learned	The creation of an international information network requires a good partner in the country and carrying out a good information campaign to let the people know where to seek for information.		

	Any support for such activities from the government level would be the most welcome.
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