



MIND

A row of five golden silhouettes representing diverse people: an elderly person with a cane, a family of four, and a person in a wheelchair.

THE ACCESSIBILITY GAP!

C O N F E R E N C E

Re-thinking Accessible Tourism in Europe

Mapping and Performance Check of the Supply of Accessible Tourism Services in Europe

“The Supply Study”



Introduction

- Study Team
- Background
- Approach
- Accessibility information Schemes
- Performance Analysis – Industry Survey
- Case Studies
- Accessible Tourism Register
- Conclusions
- Recommendations

Study Team

Funded by
DG Enterprise





EU Tourism 2020 Strategy >>>

EC Studies in Accessible Tourism (AT), 2012-2014

1. Demand

- Current market needs, size, distribution, gaps, trends
- Forecasts of demand for AT

Policy recommendations

Future Actions

1. EU-wide actions to monitor the demand for AT

2. Skills needs

- Job requirements & skills catalogue; curricula, tools
- Best practice case studies

Policy recommendations

2. EU-wide actions to support training in AT

3. Supply & Performance Check

- Current status of AT supply
- Performance indicators, EU-wide benchmarking

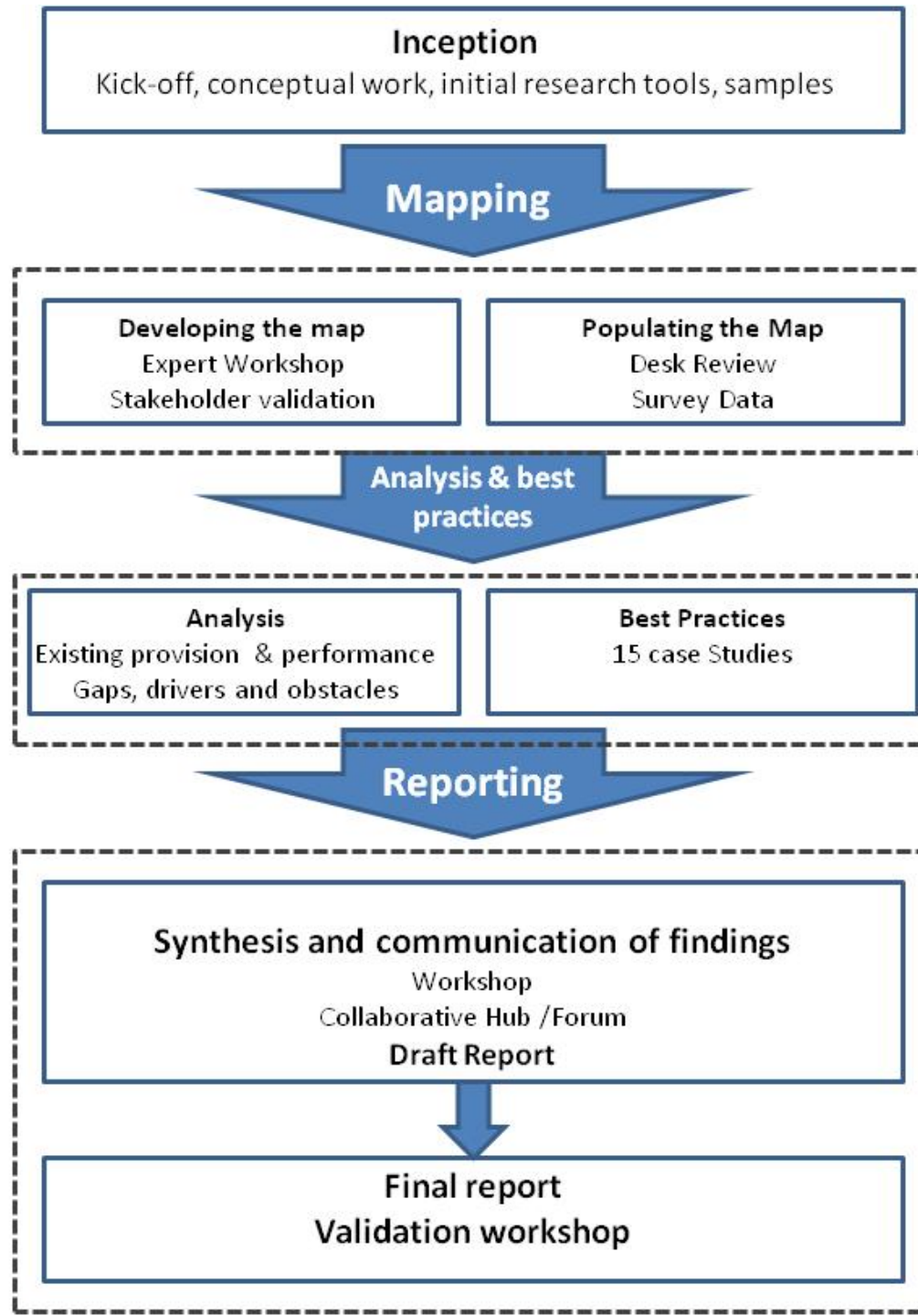
Policy recommendations

3. EU-wide actions to improve AT supply & quality

>>> EU-28 Policies and Practices



Study phases



Approach

1. Inventory of Accessible Tourism Services and Facilities

- Mapping of existing Access Information Schemes
- Industry survey
- Customer Survey

2. Design and implement the *EU Tourism for All Register*

- EU Directory of Accessible Tourism Suppliers: Pantou.org
- Supply chain analysis

3. Performance Check

4. Case Studies

5. Conclusions

6. Recommendations

Conceptual approach

Small businesses at the centre of the study

- SMEs – the backbone of European tourism
 - Infrastructure, Services, Staff training, Offers
- Tourists: people with different kinds of access needs, including
 - ✓ Mobility, sensory impairments;
 - ✓ Learning difficulties;
 - ✓ People with allergies / asthma;
 - ✓ Families with small children, etc.
 - ✓ Multiple disabilities, long-term health conditions
- The supply chain
- The destination

Register of Accessible Tourism Suppliers

- 85 national / regional accessibility schemes in Europe
- Many definitions - lack of consensus on what "accessible tourism" means
- Pantou is the Greek word for "everywhere"

www.pantou.org

Pantou

Performance Check

The concept of **performance criteria** relates to the general idea of **planned accessibility**. This assumes that people with disabilities can participate in tourism activities in an inclusive way, as long as the right physical conditions, equipment, information and services have been carefully prepared and put in place. By this logic, better adherence to access criteria and standards will lead to better accessibility and greater user satisfaction.

This is at best only partly true, as each (disabled) person's prior experience of accessibility over time, ("**lived accessibility**"), together with societal expectations, demands and constraints, (so called "**epiaccessibility**"), shapes their perceptions of performance.

So what is adequate for one person may be inappropriate, undignified or even insulting to another.

Performance Check

Performance criteria for accessibility – How can SMEs respond?

- **Planned accessibility:**
 - What tourism SMEs need to know and prepare for
- **Lived accessibility:**
 - Staff training in customer care, awareness of disabilities and visitors' access needs
- **Epiaccessibility** : the need for (European) society to develop new norms and codes of conduct, “raising the level” of services for everyone
- **Tourism** is uniquely placed to enhance the accessibility visitors enjoy, as people move between cultures, experiencing different levels and types of access in environments and services.
- Travel enriches lives! It should be made accessible and inclusive for all citizens, in safety and comfort.

Accessibility Information Schemes Review

The study team has carefully examined *85 accessibility information schemes* which are currently in use in European countries.

- Data will be available in a separate report

Out of 85 identified information schemes:

54 are national schemes,

22 are regional schemes,

9 are schemes at European or international level.

Only 3 EU Member States appeared not to have any AIS

- Studies in these countries will continue (by ENAT)
- Hungary, Lithuania, and Slovakia.

AIS review

Only 3 EU Member States appear not to have any AIS scheme
Hungary, Lithuania, and Slovakia.

7 countries do not have an “official” national scheme
(managed or endorsed by the National Tourist Authority).
These include: Austria, Croatia, Italy, Iceland (outside EU),
Luxembourg, Netherlands and Slovenia.

However, several of these countries - and many others - have
schemes that are managed by regional authorities or cities
and other destinations. Patchwork coverage ...

AIS Review

- **7 EU Member States do not have an “official” national scheme** (i.e. managed or endorsed by the National Tourist Authority).
- These include: Austria, Croatia, Italy, Iceland (outside EU), Luxembourg, Netherlands and Slovenia.
- However, several of these countries - and many others have schemes that are managed by regional authorities, cities and other Destination Management Organisations (DMOs).
- A “Patchwork” coverage of AISs in Europe.

Types of Venues, types of information

- Physical venues such as **hotels** are in the majority
- Other services, such as **theatres, cinemas and events, restaurants and bars, toilet facilities, outdoor activities** are less frequently described or formally assessed
- Some schemes (for example, UK Accessible Scheme, Tourism Flanders “A” mark, Village 4 All inside) are based on a sophisticated auditing system with detailed checklists and information including measurements of rooms, spaces and provided services, while others merely use symbols and pictograms to indicate a general “level” of accessibility

AIS: How much, and to what standard?

The cost to suppliers of being a member of an accessibility information scheme varies from zero to several hundred euros.

Few (less than 10) schemes take **national accessibility standards** as the benchmark for their accessibility information:

e.g. Belgium (Flanders), Denmark, France, Iceland, Germany and Romania

AIS Review – information types and sources

- Schemes differ in using photos, drawings (room-plans), physical measurements, or a combination of these
- Accessibility information may be gathered:
 - **by professionals** (e.g. architects, trained auditors, such as in Flanders, Spain-PREDIF and UK Accessible Scheme), or
 - **self-assessed** by owners or managers, using different checklists
- Some AIS use “**Access Statements**” as an information tool, giving customers a detailed description of all aspects of the facility and focusing on access in various aspects.
 - Useful as add-on to marketing information.

AIS Review – information types and sources

- Very few schemes incorporate **user feedback** on the performance of suppliers;
- Newer variations of AIS include the various tourism and way-finding **Apps** that focus on gathering and presenting accessibility information for people with disabilities.
- Apps are usually very local in scope and have limited coverage of certain disability needs
- Some apps rely on crowd-sourced data gathering while others are based on “big data”, volunteers or professional audits.
- Crowdsourcing websites are appearing with user-generated content providing the information about accessibility (rating scales, photos, videos), e.g. www.wheelmap.org

Performance criteria in Accessibility Information Schemes

Three basic approaches:

- 1. Venues, facilities or services are measured against specific performance standards** for one of more sets of disability requirements to see if they comply or do not comply with the standards. An example of this is the information scheme in Denmark which uses a national Accessibility Standard (DS) as its reference, however, the DS Standard is not legally binding;
- 2. Venues, facilities or services are measured and described in detail, based on audits or self-assessment.** Results are given in the form of actual measurements or descriptions.
- 3. Venues, facilities or services are given a “rating” evaluated by a user or by self-assessment.** This is the method more often used by “crowdsourcing” websites.

Example AIS www.godadgang.dk Denmark



godadgang.dk

Wheelchair users

Reduced mobility
Arm and hand impairments

Sight impairment

Hearing impairment

Asthma and/or allergy

Mental disabilities

Reading disabilities

Menu

- > Find accessible places
- > Search requirements
- > About the label
- > Introduction film


You are here: Godadgang.dk > SearchResult

Search Result

Click on the place name for more information.

Quick Search:

OK

Labelled service providers (2)									Reviewed
	Zoologisk Have - Indgang og parkering Roskildevej 32, 2000 Frederiksberg								0
	Zoologisk Have - Løve stisystem Roskildevej 32, 2000 Frederiksberg								0

Venues, facilities and services are measured against specific performance standards.

Example AIS: Access in London (Guidebook)

Access in London

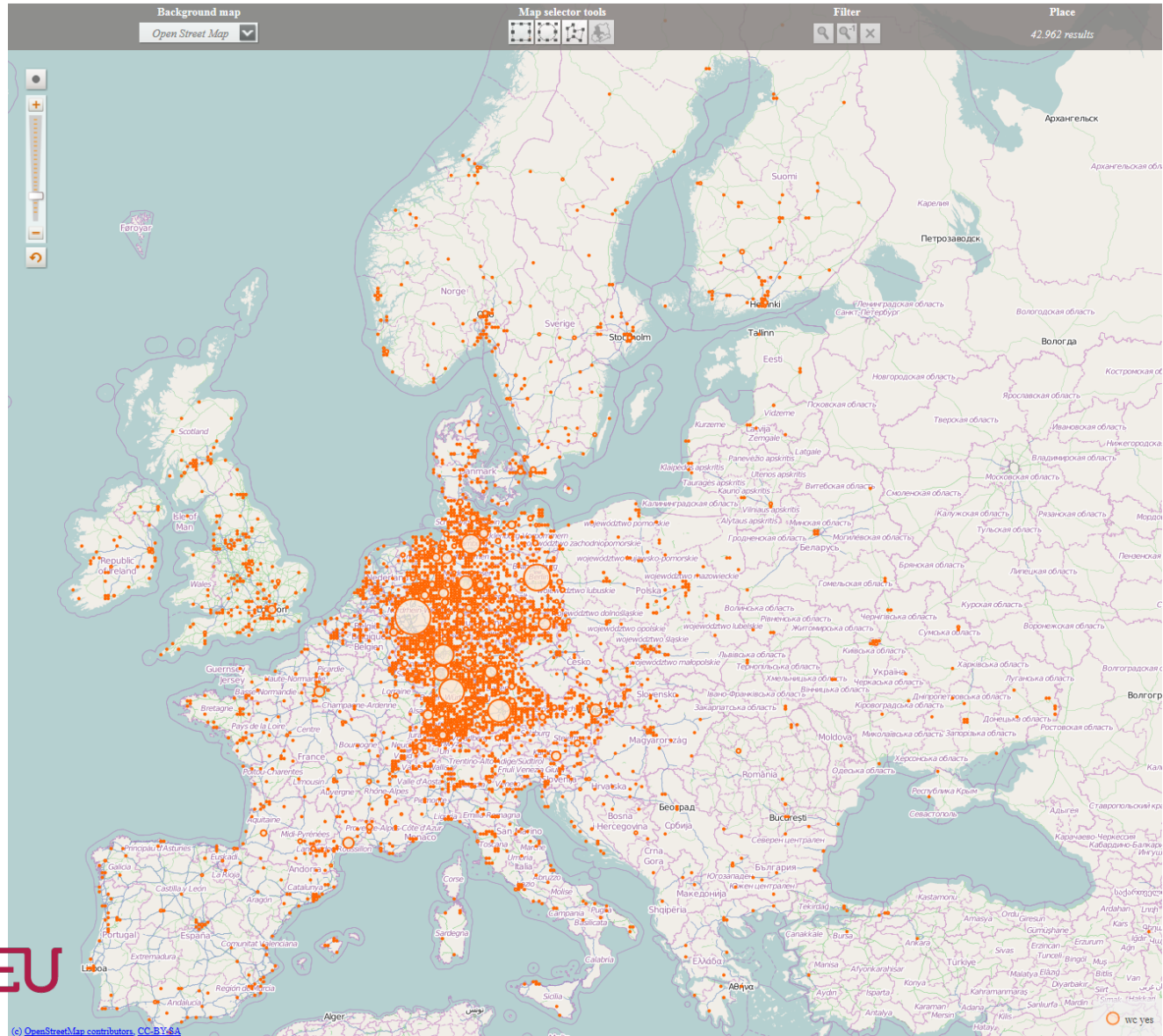
Essential information for anyone who has difficulty getting around

[Home](#)[About us](#)[Accommodation](#)[Getting around](#)[Major sights](#)[Sports grounds](#)[Shops](#)[Entertainment](#)[Good loo guide](#)[Itineraries](#)[Updated information](#)[Methodology](#)[Contact us](#)

Venues, facilities or services are measured and described in detail, based on audits by trained experts and users

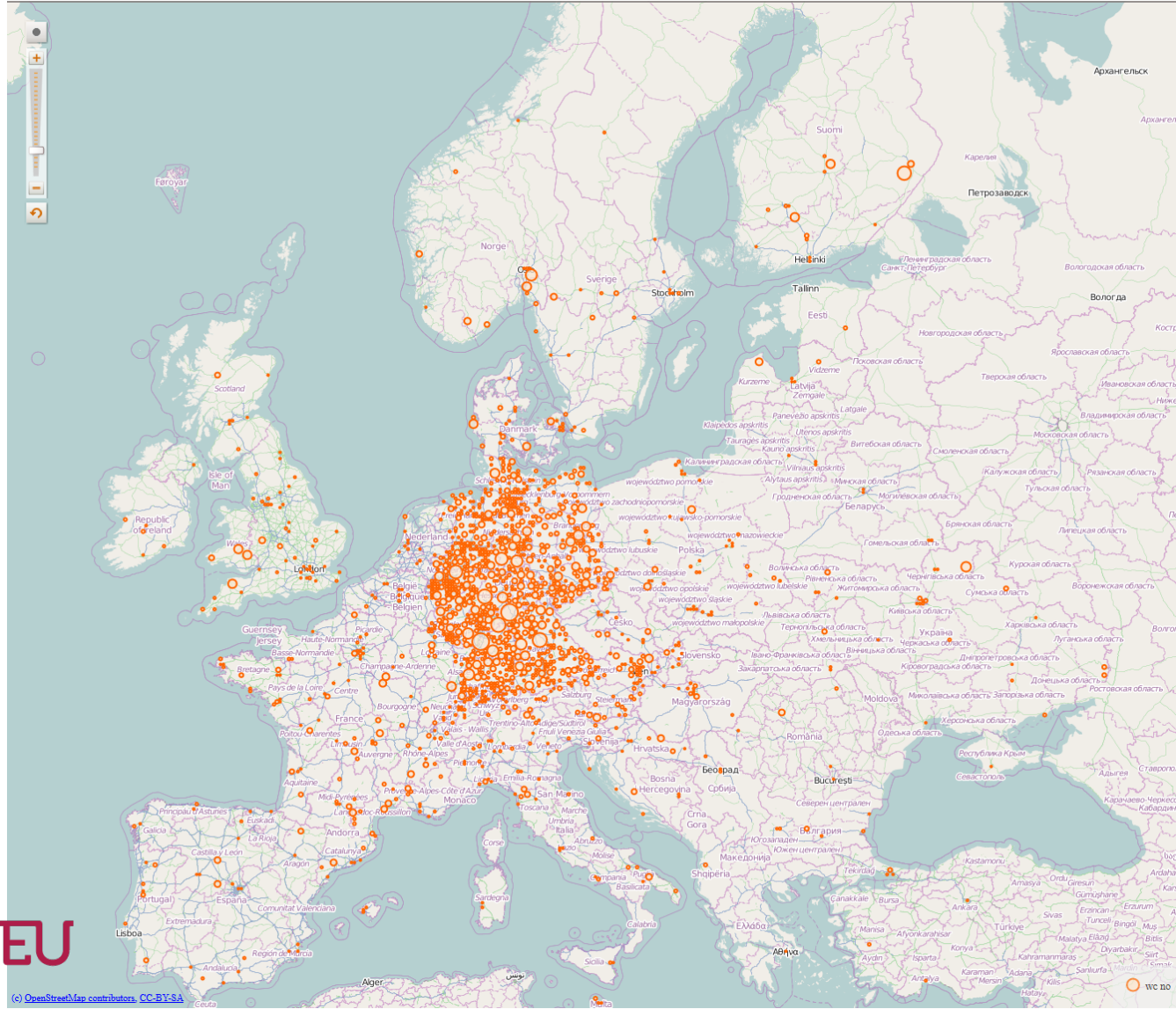
Wheelchair access to shops - YES

Venues, facilities or services are “rated” by many users (crowd-sourcing)



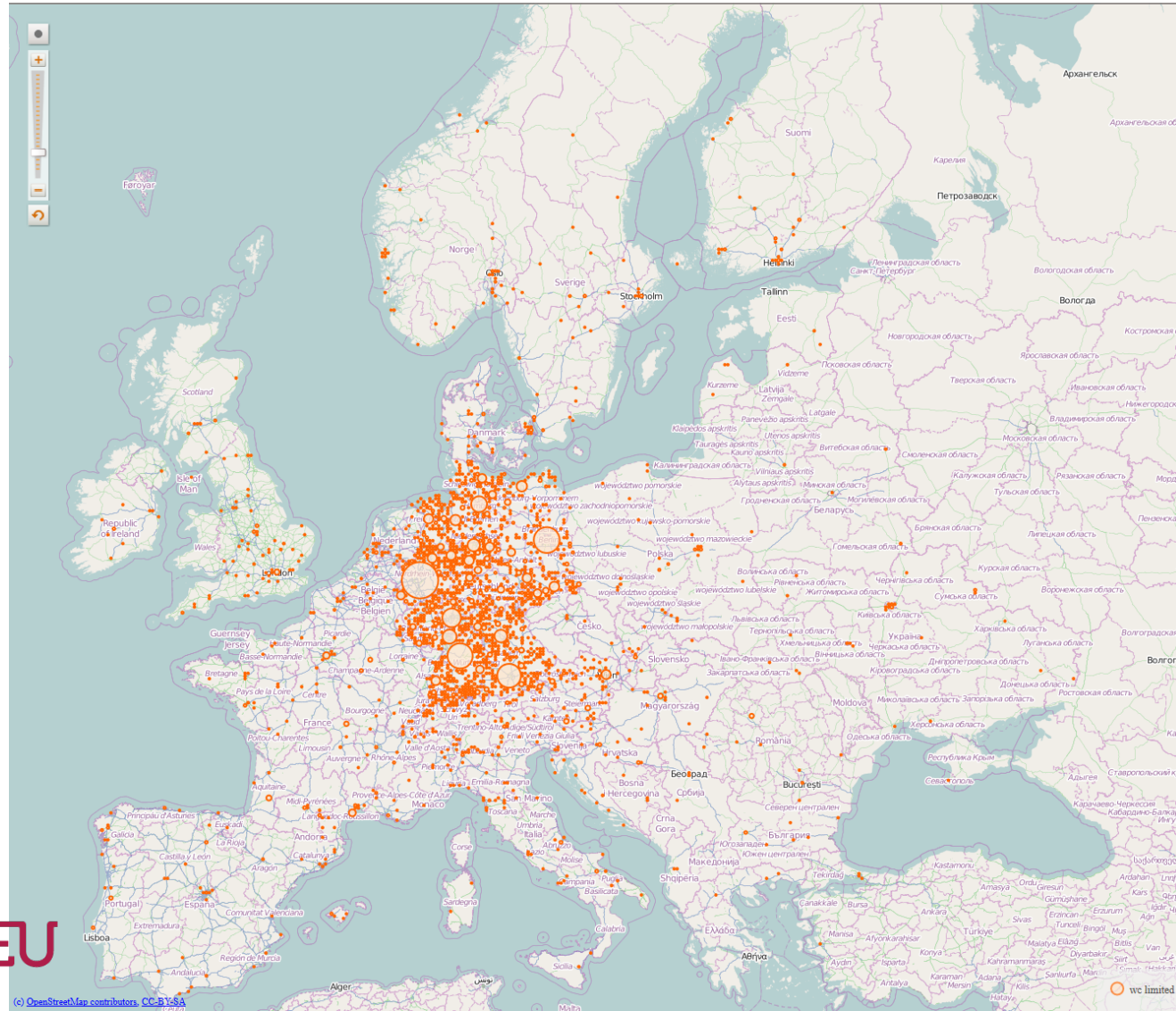
Wheelchair access to shops - NO

Venues, facilities or services are “rated” by many users (crowd-sourcing)



Wheelchair access to shops – Limited

Venues, facilities or services are “rated” by many users (crowd-sourcing)



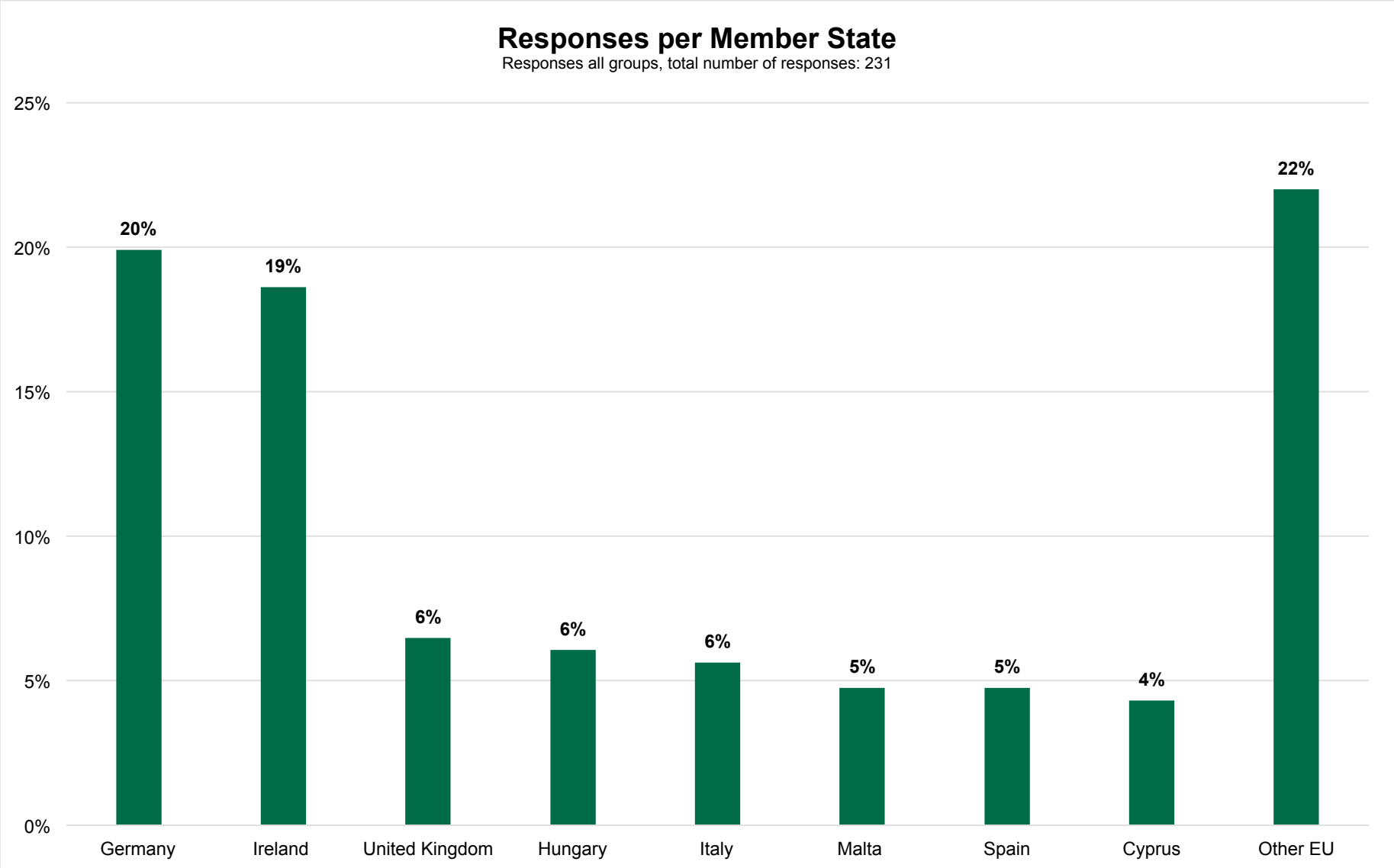
Performance analysis: Industry survey

Group 1: Businesses catering exclusively or mostly for the accessible tourism market;

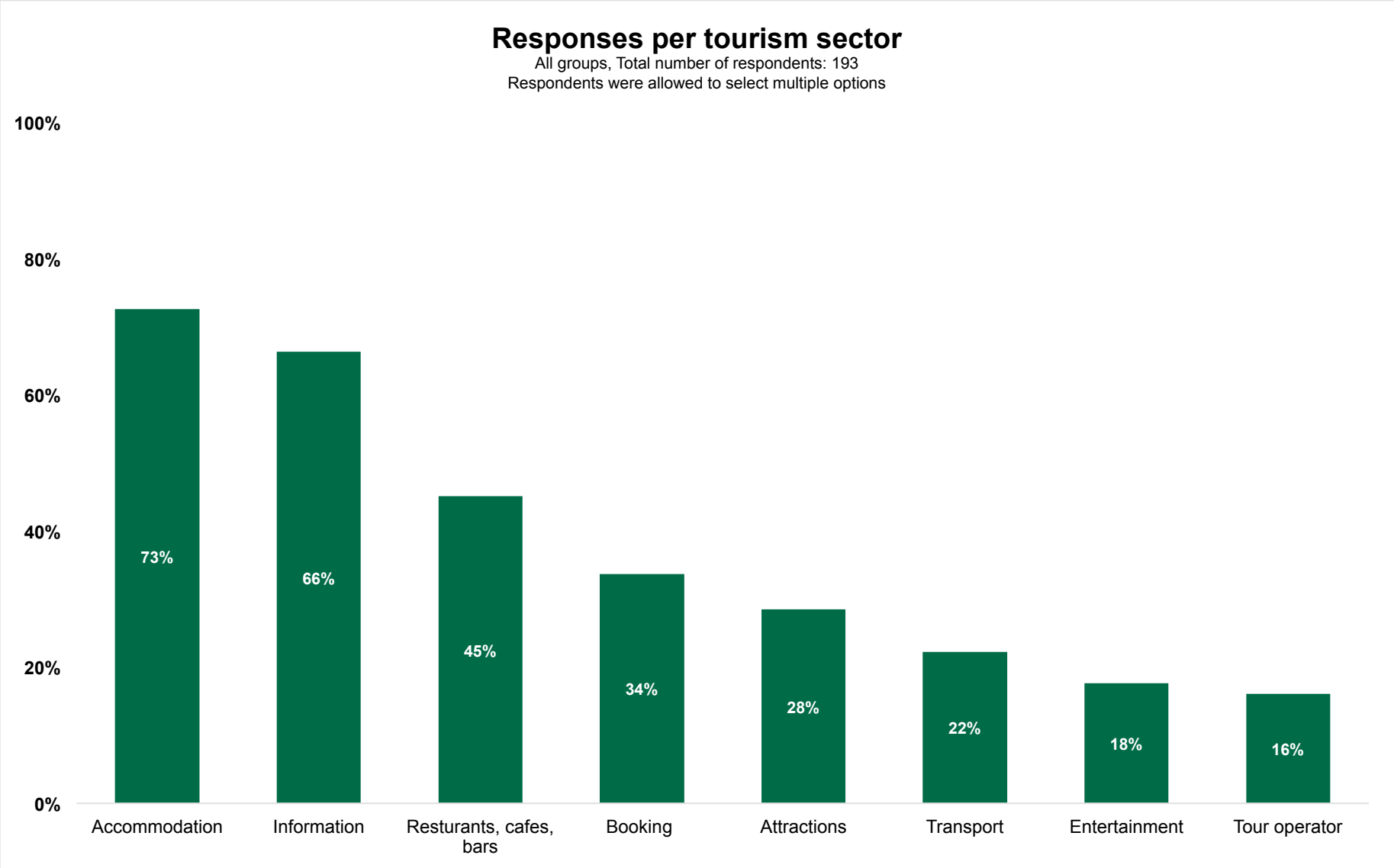
Group 2: Mainstream tourism providers with some provision for accessible tourist; or

Group 3: Mainstream providers without any special provisions for tourists with access needs.

Industry responses by Member State



Industry responses by sector

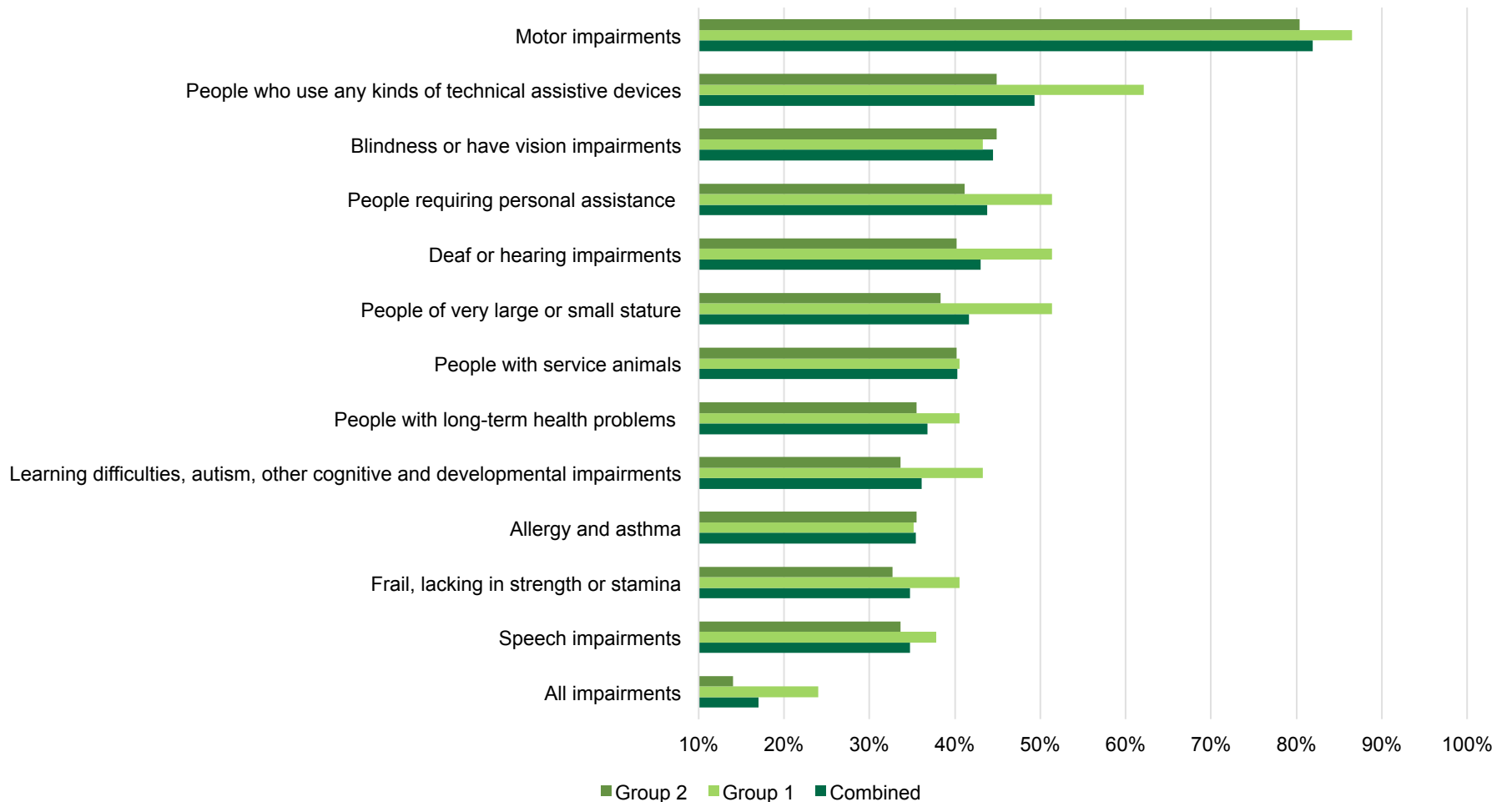


Access requirements catered for

Accessibility requirement catered for

Total responses: 144

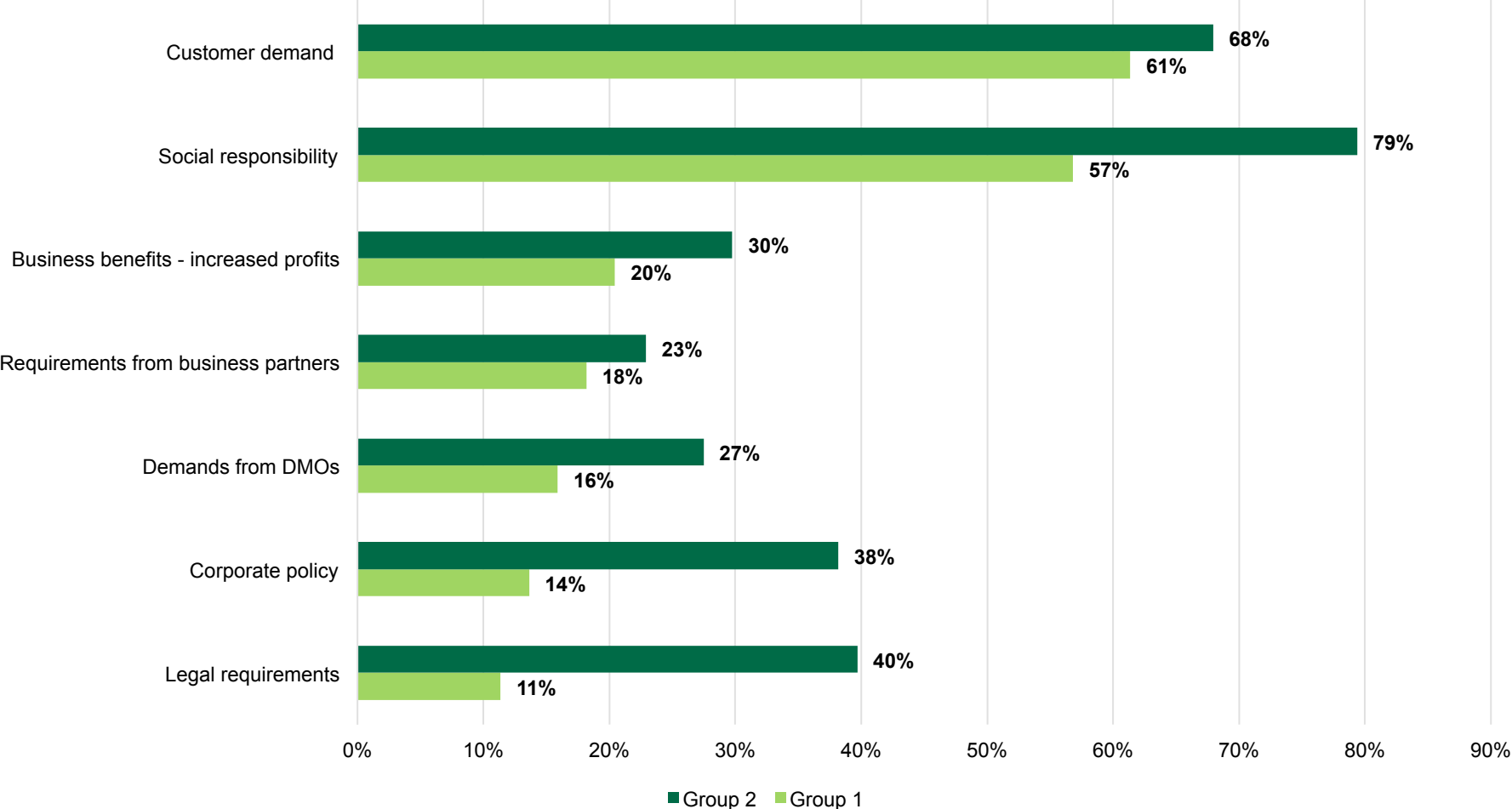
Respondents were allowed to select multiple options



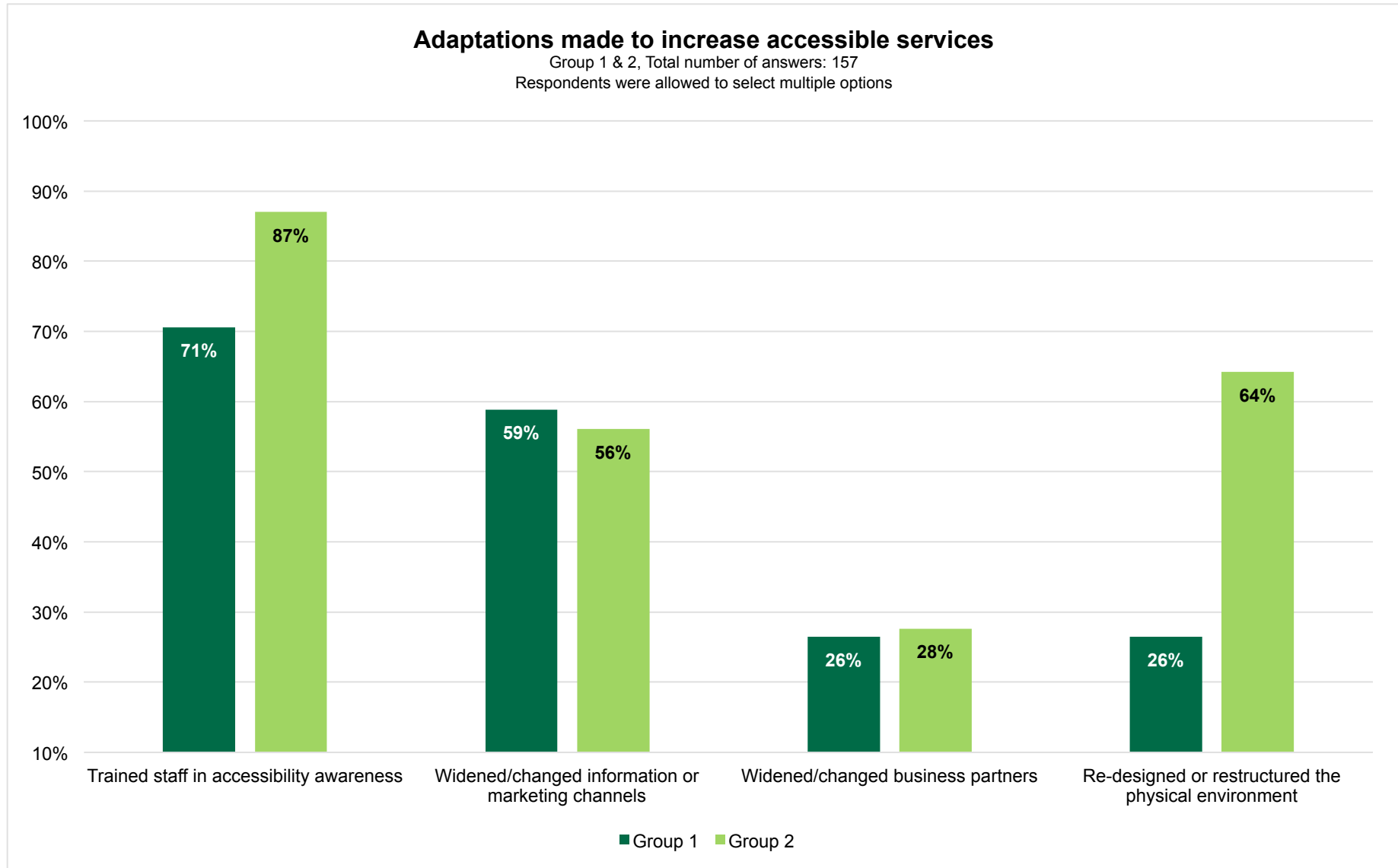
Reasons for providing accessible services

Reasons for providing accessible services

(Group 1 & 2) Total number of respondents: 175
Respondents were allowed to select multiple options



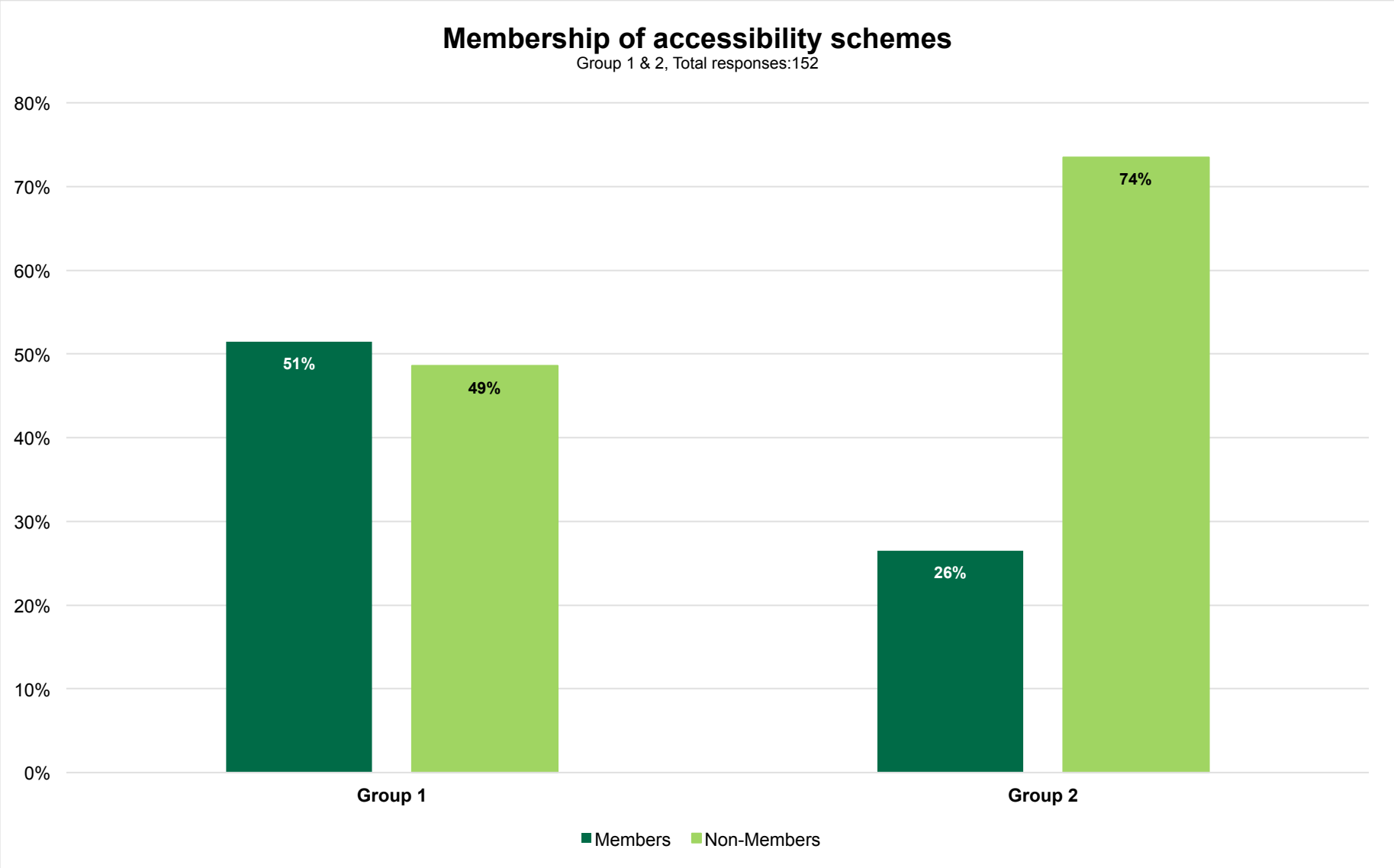
Adapted business practices & environment



Providers and Customers

- Tourism Suppliers: hotels / accommodation, restaurants, transportation services, equipment suppliers, etc.
- Tourists: People with different kinds of access needs, e.g.
 - ✓ mobility/vision/hearing impairments;
 - ✓ people with learning difficulties;
 - ✓ people with allergies;
 - ✓ families with small children etc.

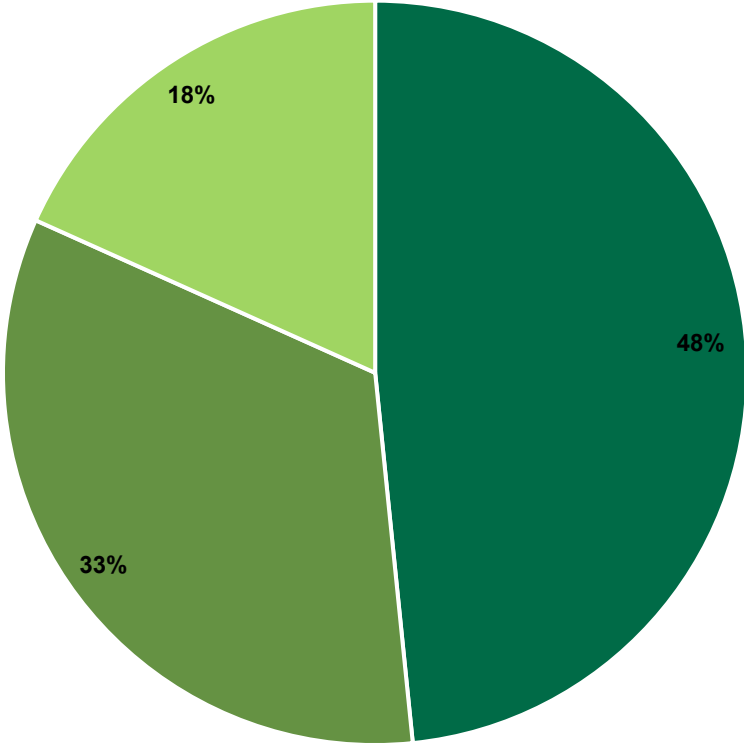
Membership of Access Info Schemes



Disabled tourists affect biz profitability?

Importance of disabled tourists or those with other access requirements to business profitability

Only Group 2, Total responses: 93



■ Neutral ■ Important ■ Very Important

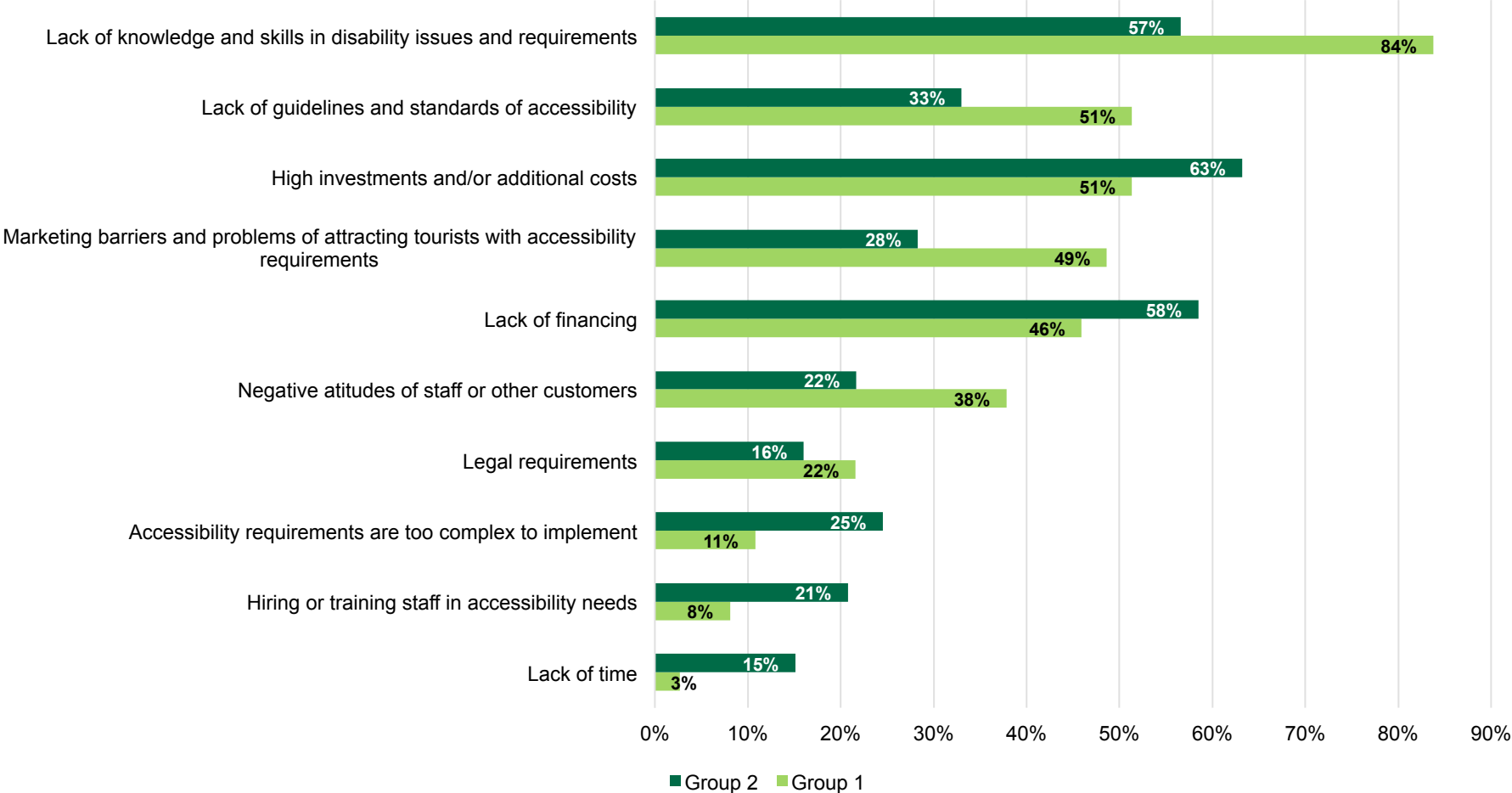
Creating Business Opportunities

- The business case for improved accessibility must be made on the basis of **opportunity** rather than a strict cost-benefit analysis.
- The key to encouraging the development of more accessible services will be not be through individual businesses alone but is most likely through the combined efforts of DMOs, tourist boards and associations representing tourism businesses.

Perception of barriers inhibiting AT

Perception of barriers inhibiting accessible tourism services

Group 1 & 2, total responses: 143
Respondents were allowed to select multiple options



Case Studies

To Assess the effectiveness of existing best practices and tools to foster tourism accessibility

1. Focus on destinations
2. Identify good practices – what works
3. Show gaps and weaknesses where appropriate
4. Produced evidence-based recommendations for policy.

Case Studies

To assess the effectiveness of existing best practices and tools to foster tourism accessibility

15 case studies

- 3-5 interviews (60+ interviews in total)
- Desk research on specific projects or on different parts of the tourism value chain
- Demonstrating good practices
- Identifying where possible “gaps” or sub-optimal performance may occur
- Lessons learned > feeding into Final Recommendations.

Case Studies – Types of Supply

- Accommodation (hotels, B&B, farmhouses, camping, etc...)
- Food and beverage (restaurants, cafés, fast foods, bars etc...)
- Entertainment, recreation, attractions (museums, galleries, sports, leisure activities, shopping areas, etc...).
- Transportation at final destination (taxis, trains, buses, car-rentals etc...). More specifically, the means of transport likely to be used by the traveller with special access needs to reach the accommodation, restaurant, entertainment, cultural, leisure activity etc...at the place of holiday destination.
- Travel services (travel agencies, tour operators, tourists' info points, etc...)

Case Studies

Different segments of the tourism supply (information, booking, transport, accommodation, entertainment/leisure, culture, etc...)

Different types of barriers (physical, operational system, information and social norms)

Solutions which have addressed a cross - impairments approach

- mobility, sensory, hidden impairments
- implementation of "Universal Design" principles

Case Studies – Focus on Destinations

Mapping the supply chains, not only the suppliers

- Innovation
- Relevance
- Transferability
- Efficiency and Effectiveness
- Sustainability

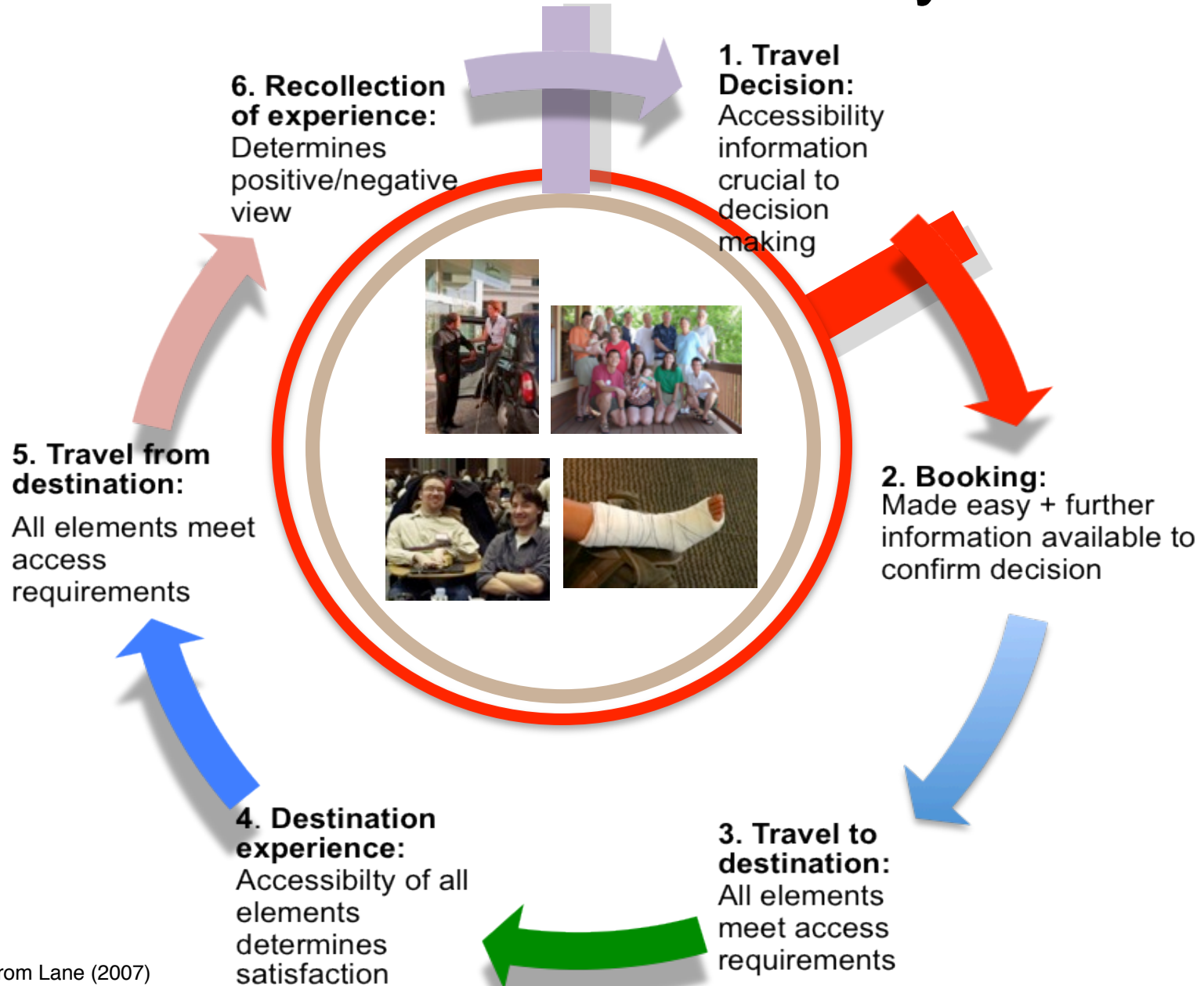
Case Studies

Case	Country	Destination
1	UK	London
2	Germany	Frankfurt
3	Spain	Arona - Tenerife
4	Sweden	Stockholm
5	Portugal	Lousã
6	France	VisitParis Région
7	France	Disney Corporation
8	Slovenia	Slovenia NTA, ŠENT NGO and Premiki destination development
9	Czech Rep.	Moravia-Silesia and Tešín
10	Greece	Athens
11	Italy	Trentino
12	Austria	Schloss Schönbrunn / Vienna
13	France	Hérault, le Languedoc
14	Spain	Barcelona – Accessible Cruise Port
15	Finland	Rovaniemi

Conclusions

- **Physical barriers** remain a challenge
 - in public realm and
 - in businesses – each require sustained actions
- **Legislation** has spurred accessibility improvements in some EU Member States
- **Negative attitudes** towards disability cannot be legislated against - challenge traditional stereotypical views of disability that may exist within destinations and tourism businesses
- **Better information accessible information** – NTOs and business benefits and opportunities
- **Increase business and user engagement** in standards-development
- **Availability of training provision** of appropriate training is also key to follow this initial engagement.

The Accessible Visitor Journey



Accessible Tourism Building Blocks

1

- National Strategy
- Vision / Aim

2

- Legislation & Standards
- Framework

3

- Research & Education
- Business Case

4

- Destination Management
- Delivering Accessible Tourism

Recommendations (Short term)

- **Make funding available** through EU funding mechanisms for initiating accessible tourism initiatives, but also for expansion and improvement of services where these exist.
- **Guidance/ references** should be included in the call as to technical standards/ services and aids available for different types of disability.
- Aim to encourage a **cross-disability provision**.
- Disseminate a “**Best Practices Toolkit**” to Tourist Boards and other Destination Management Organisation (DMOs) on how to encourage accessible supply chains.
- **Awareness-raising** through industry associations around cost-efficient measures to make services and facilities increasingly accessible.
- Encourage **investment in training of staff** in accessible customer service, e.g. funding tourist businesses or available training programs or individual professionals to gain further qualifications. Such training courses are already available in certain countries or across countries (EU Skills Study)

Recommendations (Medium-term)

- Encourage Member States to develop **national action plans** aimed at mainstreaming accessible service provision across the tourism supply chain.
- Promote the development of **market research** into customer needs, travel patterns and habits at a local and European level.
- Aid the development of **networks and partnerships** which aim to promote understanding of accessible tourism as a business development opportunity, taking into consideration local and sectoral strengths/opportunities and weaknesses in the tourist economy.
- Ensure that **research partnerships** are strongly tied with businesses and products are disseminated widely to tourist stakeholders.

Recommendations (Long-term)

- Accessible tourism should become a **mainstream dimension** in **EU tourism development strategies**, in line with the EU2020 strategy for growth and social inclusion, and the EU Disability Strategy 2010-2020, (and potentially an EU Accessibility Act)
- Encourage active steps for implementation of accessible tourism in **tourism satellite accounts and other reporting mechanisms, e.g. sustainable tourism** – in Member States.
- Continue to strengthen partnerships between disability organisations and industry associations to share knowledge and best practices.

Thankyou



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