

but about the lack of *affordable* accessibility services and infrastructures. Moreover, 32% of seniors, 49% of people with limitations and 61% of people who travel with children had to pay more than the standard price for accessible services at least sometimes with similar proportions mentioning they had to switch to a more expensive product or service because they needed them to be accessible. These results point towards issues with the price of accessibility.

Turning to satisfaction, the accessibility-related items with the highest scores are the accessibility of restaurant and booking services. Several other accessibility-related items get lower scores, but for some of them, this is linked to high proportions of respondents saying these do not apply to them: health treatments, medical help, the availability of specific services or products, accessible sports equipment, and the destination being adapted to specific groups of people. The last three items are least frequently mentioned when respondents are asked which aspects they have experienced barriers with. In contrast, medical help and health treatments both get low satisfaction scores and are mentioned fairly frequently as barriers. Other accessibility-related aspects often mentioned as barriers are the availability of information about accessible services and accessible locations. Turning to buildings, satisfaction is the lowest for alarm systems, types of access and access to services other than accommodation, although many people feel these do not apply to them.

It is also important to note that 61% of people aged 65 and over, 36% of people who travel with children and 42% of people with limitations say they did not experience barriers with any of the trip aspects mentioned. This is consistent with the results of the focus groups, where few participants reported issues when travelling. Some participants pointed out that they simply adapt to local circumstances and issues as they arise.

H19. The survey confirms that people with access needs are not a uniform group: their types of access needs and personal characteristics have an influence on their behaviour. The survey results are different on most questions for the three sub-groups (people who travel with children, people aged 65 and above and people with limitations), although some overall trends apply to all three. Besides, looking at results for people with limitations by type of limitation (e.g. sensory, mobility) also shows important differences between groups. Another difference impacting behaviour is the country of origin, with differences appearing on most questions between countries.

H20. The survey asked a number of questions related to expectations and changes to the accessible tourism offer with results pointing towards possible behaviour changes if accessibility conditions were improved. Around one third of people aged 65 and above and almost half of the two other groups would consider increasing their travel budget in the next 12 months if barriers were removed. Besides, over 80% of people who are satisfied with the accessibility conditions of their last trip are likely to return to the same destination in future. Results are less clear-cut regarding the travel frequency if better accessible services were offered: 36% of people aged 65 and above, 51%

of people with any limitations and 62% of people who travel with children would be likely to travel more often in these circumstances.

Looking at the aspects that could be improved, 64% of people who travel with children, 58% of people with limitations and 32% of people aged 65 and above selected at least one item they would use when travelling out of a list of equipment and services. Seniors and people with limitations most often mention medical help and menus for special dietary needs. These items are also mentioned often by people who travel with children, together with equipment and activities for children. In terms of building accessibility, the aspects seen as most important by all three groups are accessible toilets, accessible parking spaces and the ease of use of lifts.

4.2.8 Inbound markets – Overall results

A total of 423 interviews were conducted in four inbound markets following the same methodology as the main European Union survey: Brazil, China, Russia and the United States. The main results of this survey are presented below.

4.2.8.1 Travel behaviour

Travel behaviour among seniors and people with limitations in the inbound markets is overall in line with the results of the EU surveys, particularly in terms of travel companions, accommodation and transport.

Reasons for not travelling in the past 12 months are close to the EU survey results: 58% of people with any limitations and 57% of people aged 65 and above mention financial reasons, followed by personal preference with respectively 25% and 35% of answers.

People with any limitation most often mention travelling over the summer and off-season (both 54%), which is also the case of people aged 65 and above with 56% mentioning off-season holidays and 51% mentioning the summer.

In terms of travel companions, partners are mentioned most often, by 63% of people with any limitation and 54% of people aged 65 and above. Other family or household members come next with respectively 47% and 45%. People with any limitation also mention often friends, with 44% of mentions.

Turning to destinations, 85% of people with any limitations and 88% of people aged 65 and above mention travelling within their home country in the past 12 months, while respectively 96% and 95% of the two surveyed groups mentioned travelling to the EU in the past 12 months.¹

A majority of respondents mentions staying in a hotel or Bed & Breakfast – 77% of people with any limitation and 75% of people aged 65 or above. These figures are respectively 36% and 33% for the second highest mention, staying with family or friends.

Looking at transportation means at destination and to and from one's destination, the main mentions among people with any limitations are airplanes and cars (both 73%) while people aged 65 and above most often mention the car (74%) followed by airplanes with 65%.

In terms of activities, the main mentions across both groups are natural visits (68% for people with any limitations and 69% of people aged 65 and above), sightseeing (both 64%), cultural visits (respectively 61% and 64%), shopping (respectively 64% and 52%) and dining out (respectively 51% and 50%).

4.2.8.2 Decision-making and booking

Travel agencies and tourism providers play a more important role in the booking process in inbound markets than in the EU, while respondents in inbound markets are more likely to mention issues with information about accessibility conditions.

People with any limitation most often mention family, friends or colleagues as an information source when planning a trip (59%), followed by tourism websites (54%) and travel agencies (46%). People aged 65 and above mention the same sources, with respectively 60%, 48% and 45% of answers.

Turning to booking channels, a majority books through an agency (75% of people with any limitation and 65% of people aged 65 and above). Only 32% of seniors book through an institution or group, while 54% of people with any limitations do so. There are limited differences between telephone, in person and Internet booking, although people with any limitations are more likely to book in person or through the Internet than the elderly.

63% of people with limitations and 51% of people aged 65 and above check accessibility conditions before travelling. Among these, the majority think there is enough information and that this information is reliable and accessible. Still, these aspects seem to be an issue for minorities in both groups: 20% of people with limitations and 28% of people aged 65 or above do not think there is

¹ Respondents were interviewed online and people who did not wish to travel at all were not invited to complete the survey – these figures are therefore higher than could be expected for the overall population of people with limitation and/or aged 65 and above in the four target countries.

enough information; 20% of the first group and 22% of the second think this information is not reliable; and respectively 8% and 18 of the two groups do not think that this information is accessible.

4.2.8.3 Experience

Respondents in the inbound markets have a slightly different profile than EU respondents in terms of barriers and the importance of and satisfaction with trip aspects.

Looking into the trip aspects that are considered important, safety comes first for all (with average scores of 4.7 out of 5 for both groups), while nature comes second (with 4.4). People with any limitations also give a 4.4 score on average to the general value for money of a destination.

Respondents were asked about their satisfaction with the same aspects during their most recent trip. Safety and nature come first, with average scores of 4.5 among people aged 65 and above, and average scores of 4.4 among people with limitations.

Shopping opportunities and health treatments (both 3.8) received the lowest scores among people with limitations, while health treatments (3.6) and accessible sport equipment (3.7) score the lowest among seniors.

Turning to building accessibility, people with any limitations find the ease of use of lifts (with an average score of 4.3 out of 5) and mobility within the room (4.1) most important. People aged 65 and above give the highest scores to the ease of use of lifts (4.2), mobility within the room and the ease of use of the furniture (both 3.9). People with limitations also find access to services other than accommodation more important than people aged 65 and above.

Satisfaction with these aspects is highest for the ease of use of lifts, ease of use of the furniture and accessible toilets and bathroom (all 4.1 out of 5 on average) among people with limitations. People aged 65 and above are most satisfied with the same aspects: the ease of use of lifts (4.3), the ease of use of furniture and accessible toilets and bathrooms (both 4.2). People aged 65 and above are more satisfied with the ease of use of the lifts than people with limitations.

In terms of barriers, the main mentions for people aged 65 and above are information available once at destination (16%), food and drinks available at destination (14%), and the general value for money of the destination (13%), although 52% say they have not experienced any barriers with any of the aspects mentioned. Among people with limitations, the availability of information about accessible services is the main issue with 22% of answers, followed by transport once at destination (20%), food and drink available at destination (19%) and the availability of services in a language you understand (17%). 33% of people with limitations answered 'None of these.'

59% of people with any limitations and 44% of people aged 65 and above mention they have to pay more than the standard price for accessible services or products at least sometimes. Besides, respectively 49% and 36% of the two groups say they have to switch to a more expensive product or service at least sometimes for them to be accessible.

4.2.8.4 Expectations & future

People in inbound markets seem more likely than EU respondents to mention they would change their behaviour if accessibility conditions changed.

79% of people with limitations and 69% of people aged 65 and above say they would increase their travel budget if barriers disappeared. Besides, among people who are satisfied with the accessibility of locations during their most recent trip, respectively 85% of people with limitations and 80% of people aged 65 and above say they are likely to go back to the same destination in future.

When asked which items they would use if available at destination, people with any limitations most often mention a sign-language interpreter (28%), help to get on board, leave or change transport type (25%) and medical help (25%). Among people aged 65 and above, 45% did not pick any of the items, while 22% mentioned help to get on board, 19% medical help and 18% a sign-language interpreter.

If they were offered better accessible services, 69% of people with limitations and 55% of people aged 65 or above would be likely to travel more often.

5 Task 3 – Evaluation of the tourist experience across different tourism sectors

5.1 Task 3a - Case-studies

3a: Supply: To examine good practice/success stories in the supply of accessible offerings which act as enabling factors affecting the quality of the tourist experience of people with access needs

5.1.1 Methodology

The aim of the analysis of case-studies is to confirm or to refute the hypothesis stated in section 5.1.4. The following activities were conducted for this task:

- Hypothesis formulation
- Provisional criteria to identify case-studies were established
- List of potential cases has been analysed
- List of study cases has been discussed with the other project team in Avila during the IV. International Congress of Tourism for All.
- Submission of the provisional list to the EC
- Approval of the list with a suggestion for an amendment
- Contact with the cases
- Reception of documentation from cases
- Writing of cases
- Analysis and conclusions from the study-cases

A set of criteria have been defined to select the appropriate study cases. These criteria follow consultation with the team carrying out the other studies. The provisional criteria were as follows:

- They should be cases from all sectors of the tourism chain
- The cases should present evidence of business improvement (number of clients, employees, investment return, popularity, etc.) as the aim of this study is to provide evidence of the economic impact of Accessible Tourism and therefore we should present cases where the accessibility improvements were followed to some degree by business success
- Where measurements of client numbers are possible, figures about tourists will be presented generally, as only a small proportion of impairments is visible (i.e.: an hotel manager can recall how many wheelchair users or blind clients have been received, but may not know if a guest has an artificial limb, allergies or many other limitations – as

Scandic hotels states, 70% of disabilities are invisible).¹

- They should target the general public (as business opportunities are not only based on targeting people with access needs, and the ethical and political will is integration, not segregation).
- As much as possible the cases are selected from different countries or concern the reception of tourists from different EU countries and abroad to ensure a wide representation of the EU.
- They should be transferable to other locations or sectors
- As far as possible, the cases are drawn from both the private sector (SMEs and large companies) and the public sector.

Following definition of the criteria a provisional list of cases was defined and later amended and confirmed by the EC.

Tourism for All can be implemented in many ways. Various experiences across Europe have shown that in spite of different approaches, certain factors emerged which positively influence the development of a Tourism for All approach. These are the 7 Interdependent Success Factors (ISF), which have to be taken into account in order to ensure successful and satisfactory implementation.^[1]

Case studies from all over Europe have shown that there is a strong link between the success of projects or initiatives and the simultaneous presence of all 7 ISF. If one or more ISF is missing or disappears, there is a high risk of the project not reaching its expected goals or results.

These ISF are:

1. Decision-maker commitment: The decision to start and follow the process should be taken at the highest level.
2. Coordinating and continuity: A responsible person should be in charge of the process and guarantee the continuity if key players change.
3. Networking and participation: The internal and external stakeholders should be identified and should be involved in the process.
4. Strategic planning: Actions should be carefully planned in advance and all critical aspects should be defined.

¹ <http://www.scandichotels.com/Always-at-Scandic/Special-needs/>

^[1] Aragall/Neumann/Sagramola 2008, ECA for Administrations, European Concept for Accessibility Network, www.eca.lu . Neumann/ Pagenkopf/Schiefer/Lorenz 2008, IDZ 2009

5. Knowledge management: Considering both the internal knowledge development and transfer, and the knowledge derived from involvement in external networks.
6. Resources: Devoting the appropriate human, technical and economic resources to the actions planned.
7. Communication and marketing: Both in the sense of external communication in the usual dissemination tools but also acknowledge the contribution of all stakeholders.

In order to collect the information about the cases in a comparable way it was decided to use the Seven Interdependent Success Factors (7 ISF) to be used in the recommendations chapter.

An additional reason for using 7ISF is because our experience and experience of cases already collected from other sectors have demonstrated that to succeed in putting Design for All principles into practise none of the Interdependent Success Factors should be neglected. We also aim to validate or refute this hypothesis by finding out if there is a successful case that has disregarded any of the factors.

After this a questionnaire with open questions was designed and sent to the cases after personal, telephone or e-mail contact.

The completed questionnaires and the complementary information received have been used to write the case studies and the conclusions. For the questionnaire see Annex K.

5.1.2 Preliminary results and hypotheses

Our working hypotheses are:

H21: In mainstream tourism services investment in accessibility result in an increase in clients.

H22: Destinations that take account of accessibility are usually focused on quality of service in general.

H23: The successful accessible destinations show evidence of a degree of cooperation among service providers.

H24: At least some destinations succeed in including accessibility, comfort and services in their branding.

One of the most challenging aspects of the case-studies will be to track the investments made at a touristic destination and to obtain data about the economic outcomes of a project. This type of data is likely to be available for the suggested case-studies and will be requested from the key stakeholder, particularly if it is not otherwise available.

The case-studies have been selected to represent a range of tourism chain sectors and our suggestion is indicated on Figure 118.

The selected cases have been confirmed by the expert team and the EC.

Figure 118 – Case studies

Case-study	Type	Country
City of Erfurt	Destination	Germany
Accessible Poland Tours	Travel agency	Poland
Chateau des Ducs de Bretagne	Heritage	France
St. Martin Wine Cellar	Entertainment and shopping	Luxembourg
Berlin	Destination	Germany
Barcelona Metro	Transport	Spain
Scandic Hotels	Accommodation	Sweden
GVAM Mobile Guides for All	Assistive Technologies	Spain
Restaurant Monnalisa	Food and beverage	Italy
Restaurant Girasoli	Food and beverage	Italy

5.1.3 Case studies

5.1.3.1 Case Study: The City of Erfurt

Erfurt, the capital of the federal state of Thuringia (Germany) with 203,485 inhabitants (31 December 2012) has a medieval city centre with many points of historical interest. C. 11.2 million guests visit Erfurt every year, on average spending 45.20 € per day. The city centre and its principal places of interest are, in general, not particularly accessible. However, Erfurt is considered to be one of the most famous accessible destinations in Germany. The wide range of barrier-free offers of the Erfurt Tourism and Marketing Board includes:

- Guided tours or sightseeing tours by bus/ tram with access for disabled people
- Inclusive packages
- Accommodation
- Culinary specialities
- Events and visits to the many places of interest
- Offers in German Sign Language

Monitoring of the success factors reveals the following findings:

1. Commitment of decision-makers

- Accessible tourism is located at the top of the tourism hierarchy. The CEO of the tourist board (Erfurt Tourismus und Marketing GmbH) is responsible for the subject.
- Political supervision does exist, but politics does not control the tourism board. The decision to prioritise accessible tourism derives from marketing needs.

2. Coordination and continuity

- The tourist board has worked since 1999 on accessible tourism.

3. Networking and participation

- On a local scale, a network of service suppliers from different tourism sectors and other associated sectors like transport meets regularly with associations of disabled people.
- Since 2008 Erfurt has been a member of the association “Barrier-free destinations in Germany” (www.barrierefreie-reiseziele.de). This is an association of eight German regions particularly committed to the concept of accessible tourism for all. Its members include the Eifel region, the city of Erfurt, the Franconian Lake region, the city of Magdeburg, East

Frisia, the Ruppiner Land region, Saxon Switzerland and Lower Lusatia. The group thus works on a national and inter-regional level.¹

- On a national and international scale, the head of the Erfurt tourist board is often invited to speak at congresses and meetings. International contacts also exist.

4. Strategic planning

- The Erfurt Tourism & Marketing Board is responsible for strategic development.
- Accessible tourism is part of marketing plans and strategic planning
- Many offers for disabled guests have been developed; accessible tourism is widely understood as tourism for disabled guests.

5. Qualification and knowledge transfer

- The management and the service team are trained in accessibility in general. Some members of the staff have obtained further knowledge, e. g. in sign languages, or have attended seminars on guiding tours for blind guests. Furthermore, co-operation with local disability NGOs is strong. A constant exchange between guests and service providers is assured, and clients' suggestions are welcomed.
- City guides have been trained
- Special training for service suppliers has been offered
- Exchange of knowledge is assured within the association "Barrier-free Destinations in Germany"
- Member of the new German Project "Entwicklung und Vermarktung barrierefreier Angebote und Dienstleistungen im Sinne eines Tourismus für Alle in Deutschland". The project, commissioned by the German Ministry for Economics and conducted by the German Seminar for Tourism (DSFT) and the National Coordination Centre for Tourism for All (NatKo), aims to implement a German-wide system to validate and label accessible offers in tourism.

¹ The catalyst that brought six of these eight destinations together was their selection as test subjects for the ongoing study entitled "Success factors and measures to improve quality in barrier-free tourism for all in Germany", commissioned by the Federal Ministry of Economics and Technology. The qualitative data for the study was collected from these six model regions with their successful approaches and projects in barrier-free tourism. The charter of the Barrier-free Destinations in Germany Association was signed at the ITB trade fair in 2008. The association closely cooperates with the German Tourism Board (DZT) and other important players in tourism like German Railway (Deutsche Bahn).

6. Communication and distribution

- Website is highly accessible, including for example easy language and videos with sign language (www.erfurt-tourismus.de)
- Special-interest brochure "Erfurt erlebbar für Alle" lists accessible offers for different target groups (guests with walking difficulties, wheelchair users, sight and hearing impairments, mentally handicapped guests).
- On a national scale, accessible offers are promoted through a marketing cooperation within the association "Barrier-free Destinations in Germany".
- On an international scale, offers are promoted by the German Tourism Board (DZT).
- Offers are promoted by the German Railway

7. Improvement of resources and capabilities

- Low-floor buses and trams
- Offer:
 - City guides for disabled guests
 - Arrangements for disabled guests
 - Guidebooks for guests with sight impairments
 - Offers presented in German Sign Language

Drivers & Obstacles

Drivers

- Constant personal engagement of stakeholders was the main driver of accessible tourism in Erfurt
- Motivation of many service suppliers was often achieved by a social approach
- The number of guests taking part in guided tours increased and Erfurt has an increasing number of individual guests with disabilities. The accessible rooms in the hotels are heavily booked.
- Accessible tourism leads to positive outcomes in internal marketing

Obstacles

- The level of necessary investment is higher than expected, especially in time and human resources
- Projects for disabled guests are sometimes rather expensive and need support from public bodies, usually from the Ministry for Social affairs in Thuringia
- Constant personal engagement of stakeholders is needed

- Financial investment is currently low in this sector and it can be difficult to motivate partners to invest in common marketing projects

Further comments

- Erfurt won the award „Willkommen im Urlaub - Familienzeit ohne Barrieren“ 2003
- Erfurt has been nominated for the German Tourism award 2013 for barrier-free projects

Figure 119 – Official logo of Erfurt tourism board



5.1.3.2 Case Study: Accessible Poland Tours

The licensed tour operator “Accessible Poland Tours” has offered services since 2009, when the company was the first travel agency strongly focussed upon services for disabled people in Poland. Most clients are severely disabled people with mobility problems such as wheelchair users or slow walkers and guests with intellectual impairments such as Down syndrome. The offered services consist of:

- Incoming and outgoing tourism
- Package tours 1-6 days within Poland and abroad
- Arranging accessible hotels
- Arranging accessible transport: buses, air travel, taxis, trains
- Tailor-made tours for individuals and groups: NGO organisations
- Organising accessible routes, including accessible toilets and tourist attractions
- Booking tickets to tourist attractions, theatres
- Arranging local guides with multi-language skills
- Arranging special rehabilitation equipment.

Monitoring of the success factors reveals the following findings:

1. Commitment of decision-makers

- The founder and managing director has a disability herself and therefore is strongly committed to the ideas of accessible Tourism for All
- Where possible, the managing director conducts the tours personally guaranteeing a consistent implementation of accessibility in all its offers

2. Coordinating and continuity

- The company started in 2009 and has been managed by the same committed person since that time
- The founder and managing director usually works on her own and is always seeking constant improvements

3. Networking and participation

- “Accessible Poland Tours” is a member of the European Network for accessible Tourism (ENAT)
- Strong and enduring links with NGOs of people with disabilities would be highly desirable

4. Strategic planning

- The project has not been planned
- Methods and strategies gleaned from each tour experience, changes and improvements were introduced progressively

5. Qualification and knowledge transfer

- The managing director is herself disabled and brings an insider’s knowledge of the needs of the target groups
- The managing director also completed the required training to be a tour guide, but had no special educational background when starting the business

6. Communication and distribution

- Website (www.accessibletour.pl), which is also available in English due to the high importance of foreign markets
- Brochure is also available in English
- Congresses and meetings (often abroad)

7. Improvement of resources and capabilities

- Each tour is unique and demands an individual approach to the range of differing client needs
- The company is reactive to users' requests; for example, the need for a higher than normal bed, a special diet or piece of equipment or the assistance of volunteers, since guests frequently travel without a carer

Drivers & Obstacles

Drivers

- Personal engagement and idealism of the managing director
- Extended knowledge about guest's needs of the managing director from her own experience
- Growing interest in the company's work, mainly from abroad
- Encouragement of satisfied guests

Obstacles

- No financial or institutional support; the main problem running the business is that it is much more expensive than expected. Only between three and six groups with mostly few participants take place per year, which is not sufficient to cover costs
- Lack of accessible rooms for those on limited budgets and lack of accessible means of transport in Poland
- People with disabilities in Poland would like to travel, but often do not have the financial means
- NGOs, as potential clients, avoid using the services of the company and try to organise the trips themselves in order to save money

Further comments

- The motivation to run the business was from experienced during an organised trip to Australia
- Due to the disappointing financial situation, the business activities may be suspended or the business transformed into a Foundation

Figure 120 – Official logo of Accessible Poland Tours



Figure 121 – English version of the flyer

ACCESSIBLE POLAND TOURS

THE INTERNET TRAVEL AGENCY FOR DISABLED PEOPLE

We are the first registered Polish travel agent specializing in accessible tourism services for people with special needs and we cater for:

- ✓ travelers with any disabilities (also available for visually and hearing impaired travelers)
- ✓ slow walkers and elderly people
- ✓ any tourists needing special care.

Our offer:

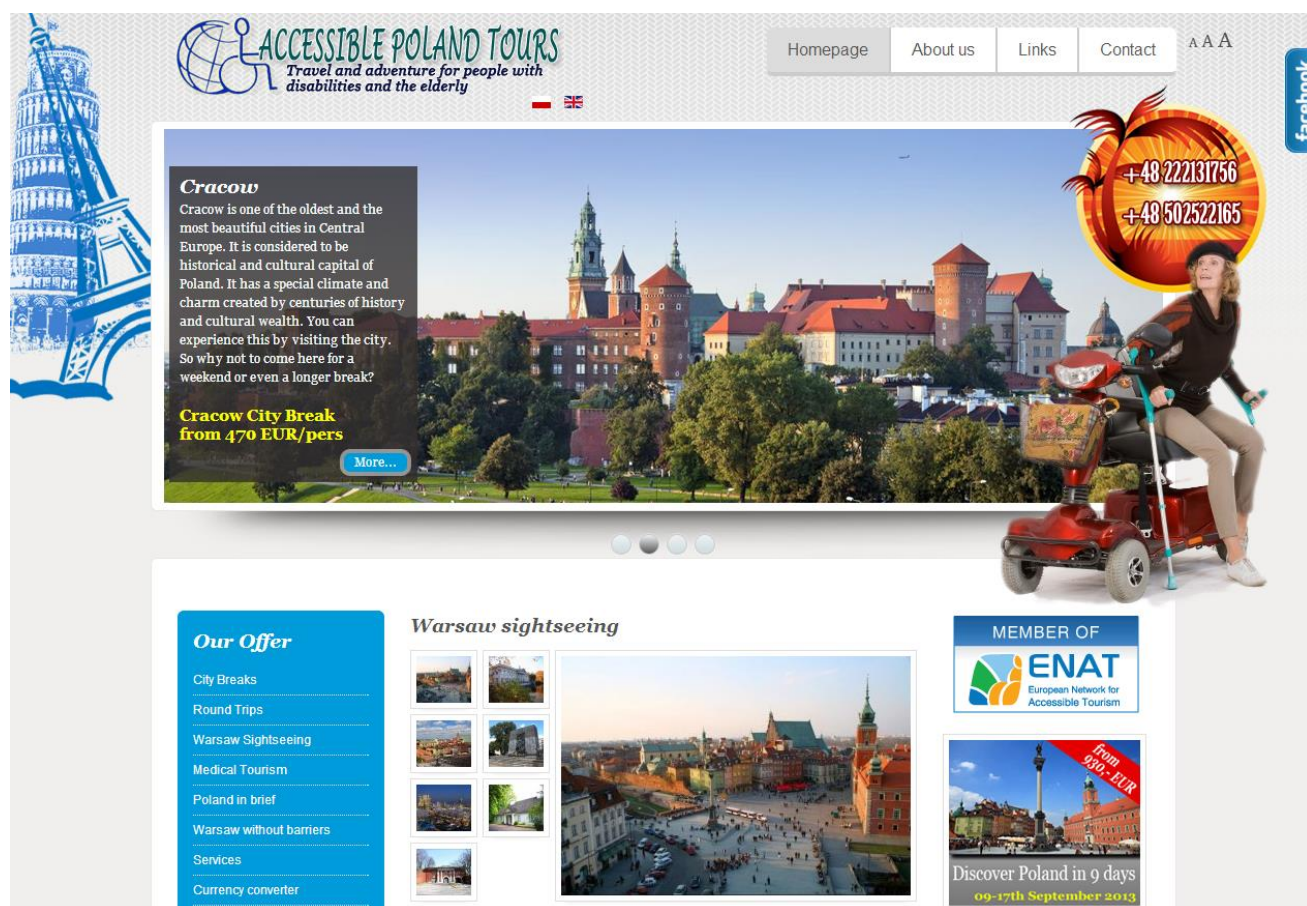
- ✓ transfer in an accessible van or a regular car from the airport or station to the hotel
- ✓ general or themed tours
- ✓ booking of all kinds of accommodation, ranging from budget hotels to luxury hotels
- ✓ arrangements for personal assistants & rental of rehabilitation equipment
- ✓ local attractions & special events; reservation of tickets to tourist attractions
- ✓ Spa resorts and rehabilitation stays
- ✓ **City Breaks**

Dear Friends!
Being disabled myself I am fully aware of requirements which the disabled need. I believe that my activity enables to promote Poland throughout Europe(not only) as a friendly and accessible country. We operate mainly from Warsaw, but our services can be extended to the rest of Poland on request. Accessible Poland Tours do their best to provide you with professional and accessible tourist services during your travels in Poland and to make your trip an enjoyable and unforgettable experience.

Margaret Tokarska

office@accessibletour.pl / www.accessibletour.pl
 Tel. + 48 222131756 / mobile. + 48 502522165 Fax: + 48 222131985

Figure 122 – Example of the official website „http://www.accessibletour.pl”



5.1.3.3 Case Study: Château des Ducs de Bretagne

A witness to the history of Nantes and of Brittany, the Chateau of the Dukes of Brittany is a site of exceptional heritage. The mediaeval fortress encloses the 15th century ducal residence, built by Francis II and his daughter Anne of Brittany. A restoration programme, lasting a number of years, has recently been completed by the City of Nantes. It enables the creation of a modern museum, the Nantes history museum, labelled *Musée de France*.

At the forefront of contemporary museum design, with a number of multimedia features, the Nantes history museum occupies 32 rooms of the 15th century former ducal residence and displays more than 850 items from its collection. This “portrait of the city”, from its origins as the dukes’ favoured residence through to the modern city of today, covers a considerable range of European and world history, from the Edict of Nantes, the colonial period and the slave trade right through to the major upheavals of the 20th century.

Every type of disability is catered for:

- Visitors with a motor disability: 28 out of 32 rooms are accessible. The ramparts are partly accessible and reached by a lift. Free wheelchair loans.
- Sight-impaired visitors: touch and sound devices are provided around the museum, with special audio guides, visit booklets for the exhibitions...
- Visitors with learning disabilities: specific assistance at the visit, large print colour cards, fun areas in the exhibitions....

Monitoring of the success factors reveals the following findings:

1. Commitment of decision-makers

- The city of Nantes, proprietors of the Chateau of the Dukes of Brittany, re-opened the chateau for visitors in 2007 after 15 years of renovation.
- The museum advertises its commitment to inclusion for everyone.
- Nantes has a long-standing commitment, both political and practical, to improving facilities and services for disabled people across various aspects of city life. Among French accessibility professionals is, together with Grenoble, one of the more accessible cities in France.
- In 2013, Nantes obtained *the Access City Award* (European prize), just behind Berlin.
- The Chateau of the Dukes of Brittany operates a visitor policy based on four main principles: to promote the pleasure of discovery, to respect the spirit of the place, to communicate the knowledge object, and to develop subjects for further reflection. They declare that they aim to create *facilitating* environments.
- It offers a diversified range of visits, events, educational and learning initiatives, cultural programs aimed at people with little or no familiarity with the world of museums and heritage.
- The approaches offered are both interactive and multidisciplinary, making the Castle a place of exchange and encounter, inviting its visitors to build a long-term relationship with it.
- The low-floor tram system provides a good connexion with the city centre.

2. Coordinating and continuity

- There is a manager responsible for development and visitor policy who coordinates staff activities under the municipal structure.

3. Networking and participation

- The City has adopted a Disability Action Plan. Therefore, the manager worked with technical staff from the municipality and with the Nantes Council of Disabled People. Associations of disabled people also participated in the project.

4. Strategic planning

- It was been a planned project since the beginning aiming to devise innovative approaches for all visitors.
- Finance, time and human resources planned from the beginning.
- The restoration program cost 51,530,000 €. The finance for the restoration programme comes from : 58% the municipality ,2% the metropolitan area,7% the department of Loire-Atlantique,10% the Pays de la Loire region and 10% European Regional Development Fund.
- The chateau does not have specific budget allocated for improvements to meet the needs disabled people. Each project integrates financially the needs of disabled people.

5. Qualification and knowledge transfer

- The process was based on trial and error through the engagement of users. Disabled people tested the infrastructures until a suitable solution was found.
- An important network including among others museums, associations and design schools also contributed to improvements
- Vocational training has been provided to the staff.

6. Communication and distribution

- The chateau website.
- Brochures.
- Information directly shared with a network of associations

7. Improvement of resources and capabilities

- Visitors with a disability are welcome at the Chateau of the Dukes of Brittany. Tours and features adapted to specific disabilities as the following offer summarises:
 - Sensory tours open to everyone: these visits allow visitors to discover some of the

topics covered by the museum and its exhibitions through the use of objects, as well as sound, visual, olfactory and tactile experiences.

- Accessible exhibition spaces: visitors can use rest areas and borrow wheelchairs or folding stools.
- Guided tours: Visitors with physical disabilities can follow general or themed guided tours, family tours (museum and exhibitions) or the museum's short tours series
- Audio guide tactile tour of the museum: using both a special audio guide (only available in French) and different tactile and sound features available throughout the museum, the visit is made accessible to visitors with visual disabilities
- Exhibition booklets and guides: in Braille, embossed or in large print
- Guide dogs are welcome
- The ticket-front desk has induction loops available
- The multimedia terminals are subtitled and interactive.
- Leaflets summarizing the content of certain films are also available.
- Visual descriptions in French Sign Language (FSL) are available all year round in order to allow visitors with hearing disabilities to discover the museum and the chateau, whether on their own or accompanied. Tours in FSL linked to exhibitions are also on offer.
- The Internet site offers practical information and a presentation of the site in FSL.
- A booklet and educational materials designed for visitors with developmental or learning disabilities: a selection of objects in a dozen or so rooms is highlighted in a booklet and educational materials, for example commentaries, treasure trails, the use of magnets and associations of ideas.
- Different materials allow visitors to discover the museum at their own pace:
 - Colour maps depicting Nantes in a simplified fashion down through the ages.
 - Multimedia features (films, terminals, interactive maps) provide information on a variety of subjects.
 - The exhibitions include interactive spaces.
- Group tours:
 - With a guide, by reservation only: a variety of bespoke visits have been designed based on a sensory approach, observation, the handling/touching of objects and participation, such as: the castle down through the ages: architectural tour that includes the handling of materials and models; monsters and stone animals: tour of the castle followed by a modelling workshop inspired by the castle's decorative, sculpted features; sailors and sea monsters: tour of the museum followed by a modelling workshop; and the contours of the city: an interactive tour to enable

visitors to better understand the city's development and transformation down through the ages.

- Without a guide: the group leader may make use of the booklet and educational materials, available free of charge, at the front desk.

Drivers & Obstacles

Drivers

The most important factors are commitment at the highest level within the City to improved accessibility and a clear and continuing link between the City at political and operational levels and citizens with a disability and older citizens.

The Chateau of the Dukes of Brittany is a core feature of the cultural, economic and tourist development of Nantes and its estuary. Their refurbishments, with the creation of the history museum, and its artistic events program running throughout the year, have enhanced the site's interest and appeal.

As of early 2013, six years after the museum reopened to the public, more than 7,500,000 people have visited the castle. The museum and the exhibits have received more than 1,100,000 visitors.

In the museum, people with a disability represent 1.7% of the visitors (those who identify themselves as such when obtaining free entrance) - 68% of them are individual visitors and 32% in a group.

The geographical distribution of the national disabled visitors is as follows:

67% come from the surrounding department of Loire-Atlantique

7% come from the Brittany region

6% come from the Paris region

4% come from Pays de la Loire region

10.5% come from other regions of France

5.5% disabled visitors are foreign visitors. They are mainly European.

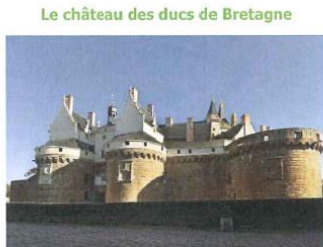
The museum team estimates that 6% of those visiting the Castle have some kind of disability that impacts their daily lives.

In 2008, the Castle received the "Museums for everyone" award from the Ministry of Culture, in recognition of its accessibility policy.

In 2011, the castle obtained the label «tourism and disability» for the 4 impairments, mobility, visual, audio, and mental.

The Castle has made accessibility and Design for All a core priority.

Figure 123 – Château des Ducs de Bretagne



5.1.3.4 Case Study: Cave St Martin Winery – Remich, Luxemburg

<http://www.cavesstmartin.lu>

The Caves St Martin winery is based in the municipality of Remich, one of the most picturesque and frequented by tourists village on the left bank of the Moselle river, a few kilometres from the border triangle between Luxembourg, Germany and France.

Monitoring of the success factors reveals the following findings:

1. Commitment of decision-makers

- From the Beginning of the family business on, attention was paid to the clients` needs. So that the decision to care for accessibility has been for the family a matter of fact pertaining to the internal policy and way of doing business.

2. Coordinating and continuity

- The goal of the Caves St Martin has been to be accessible for everyone, so every generation of the family made improvements, according to the technical state of the art. Improvements take place with the help of new equipment, especially in the area of sanitation.

3. Networking and participation

- Since 2009 the Cave St Martin Winery has held the EureWelcomeLabel. The EureWelcome label is recognized in the Grand Duchy of Luxembourg as well as in six neighbouring regions of Belgium, the Netherlands and Germany. In Luxembourg the Ministry of the Middle Classes and Tourism is responsible for the delivery of the EureWelcome, showing a strong will from the government to include accessible tourism in the mainstream of touristic offers. The label is awarded to service providers in the fields of tourism and recreation for their special efforts in terms of accessibility and welcoming everyone including people with disabilities. The philosophy of EureWelcome label is increasingly orientated to the concept of "Design for All". This means that the quality of accessibility is not only the convenience for

disabled people, but also for society in general.

The accessible premises are brought to the attention of potential customers and visitors via the website www.welcome.lu as well as via brochures and links to nationally and internationally reputed as cultural and tourist sites.

4. Strategic planning

- Different offers for guests have been developed, such as guided tours through the cellars accessible for wheelchair users, with the possibility of having explanations in simplified language. The guided tour lasts about 45 minutes. On demand, it is also possible to have a guided tour in German sign language through the integration service from the city of Luxembourg.

Tasting experiences are offered for different target groups: wine for adults and grape juice for children.

- Accessible tourism is mainly understood as tourism for disabled guests.

5. Qualification and knowledge transfer

- Management and staff are trained in accessible tourism and have personal experiences with guests with special needs. Communication with guests is ensured, management and staff are ready to learn from the suggestions of their guests.

6. Communication and distribution

- Info about the accessibility condition of the winery is available in the EureWelcome Label website (www.welcome.lu), but only in French. Other languages are likely to follow soon.
- Communication about accessibility is mainly due to the word-to-mouth way among visitors.

7. Improvement of resources and capabilities

- Designated parking place for people with disabilities.
- Entrance door and internal route without threshold, steps and obstacles.
- An adapted toilet is available next to the visitor reception.
- Guided tour in simplified language and with the help of gesture.

Drivers & Obstacles

Drivers

- Constant personal engagement was the main driver of being accessible for the winery owners.
- The winery owners feel that the loyalty of their clients, disabled or not, is proving that they are working in the right way and that they are providing the visitors what they need and look

for.

- According to <http://www.wine-pages.com/features/luxembourg-wine.htm> they receive 30,000 visitors per year.

Obstacles

- Constant engagement is needed.

Figure 124 – Parking place and entrance to the Winery (Photo: www.welcome.lu)



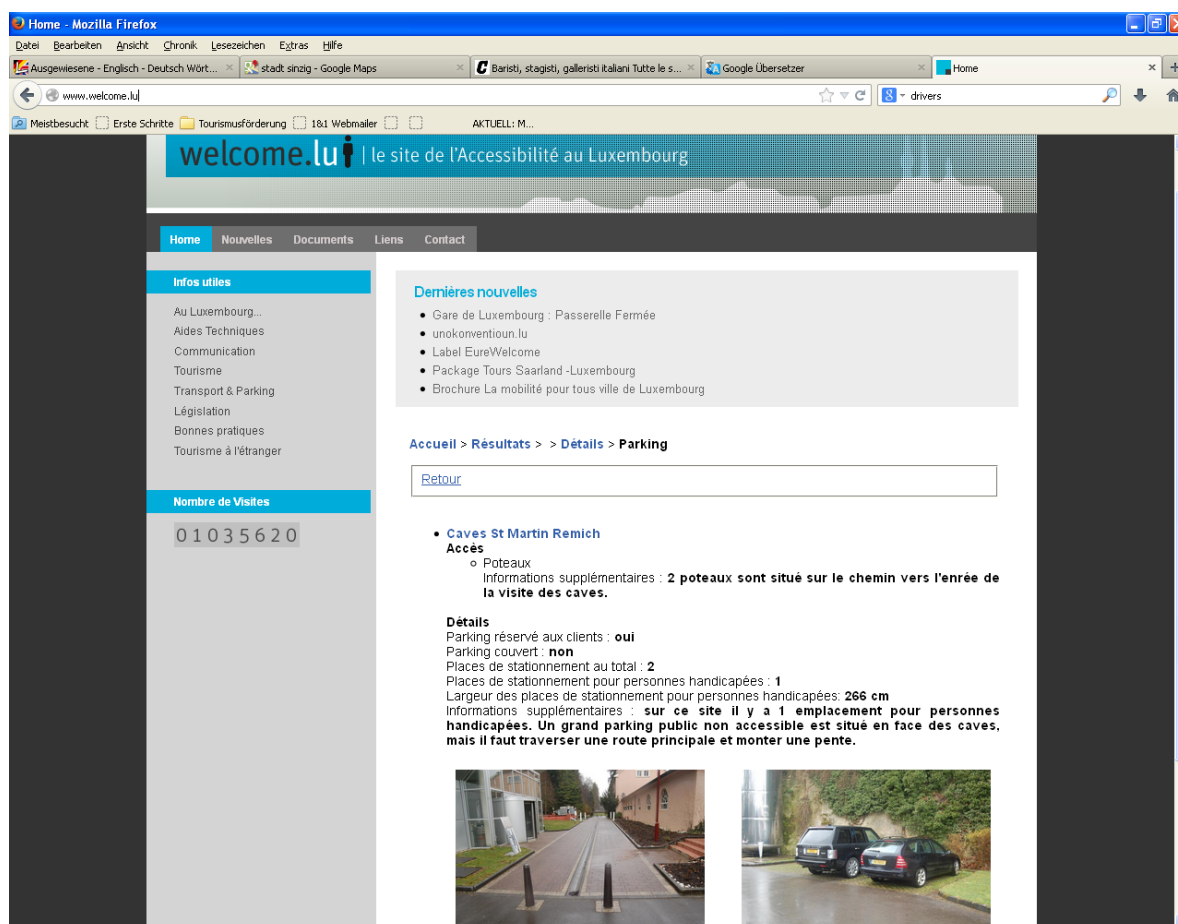
Figure 125 – The Eurewelcome label at the Winery entrance door (Photo: NeumannConsult 2013)



Figure 126 – The wine cellar (Photo: NeumannConsult 2013)



Figure 127 – Webpage www.welcome.lu



5.1.3.5 Case Study: Berlin City, Germany

Berlin, the capital of Germany, covers an area of about 890 square kilometres (nine times bigger than Paris), with 3.5million inhabitants, including over 494,400 residents with foreign passports. People from more than 185 nations are long-term residents in the city making Berlin the most multicultural city in Germany.

Berlin has 175 museums, 3 UNESCO World Heritage Sites (Museum Island, the Prussian castles and gardens, Berlin modernist housing estates). About 44 per cent of its area consists of parks and woods, or rivers, lakes and waterways (over 180 kilometres of these are navigable).

The city's public road network is about 5,400 kilometres long, lined with more than 400,000 trees. The metro, tram, S-Bahn and bus lines already cover about 2,300 kilometres.

Tourism in Berlin is booming. In 2012, almost 11million people visited Berlin, with a growth in arrivals and overnight stays of about 12% (Source: <http://www.visitberlin.de/en/plan/city-info/numbers-facts>).

Since 1992, the City of Berlin is developing accessibility offers through the entire service chain, with the Motto: 'Berlin for disabled people: the city is prepared.' To honour the efforts of Berlin, the city has been rewarded with the Access City Award in 201. Monitoring the success factors reveals the following findings:

1. Commitment of decision-makers

- The tourism board is committed to Accessible tourism
- The Accessible Tourism strategy is supported by political authorities
- All catering establishments opened since 2006 have been required to be accessible following a City legal disposition
- Within the round table Berlin "barrier-free city", under the leadership of the Senate Department for Urban Development and Environment, stakeholders from government, companies and associations merged. The aim of the cooperation is the pooling of initiatives and the expansion of Berlin as a barrier-free city

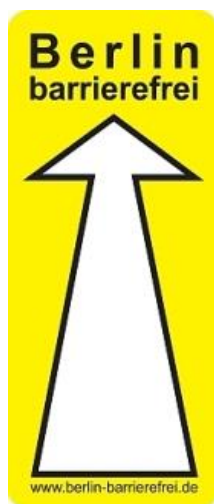
2. Coordinating and continuity

- Since 1992 the city of Berlin has followed a policy of accessible organisation and design of the city itself, from pedestrian crossings, public infrastructures and means of transport, buildings and open spaces. The goal is to allow the citizens and tourists equal participation in all aspects of life in Berlin, social, economic and cultural.
- Round table as a guarantee for continuity (see below)

3. Networking and participation

- The responsible staff member of the Berlin City Senate is a contributing member of the federal state's tourism boards working group on accessible tourism
- Berlin is a member of the Eurocities Working group on accessibility
- Berlin has established links and ongoing co-operation with its twin city Moscow on accessibility
- The label "Berlin barrierefrei" has been developed through collaboration between representatives from industry, trade, tourism, culture and science, people with disabilities and their organisations, advisory boards, administrations and other institutions. This label displayed on a door or shop window, on a metro lift or a public toilet says that all people, including those with disabilities, can clearly get in and have support, where needed. Moreover, the label offers business people the opportunity to advertise themselves as barrier-free premises and thus to attract new customers.

Figure 128 – Label "Berlin barrierefrei" (Source: www.berlin.de/lb/behi/barrierefrei/signets/index.html)



4. Strategic planning

- According to the city Senate Resolution of 7 June 2011, the guidelines for the development of Berlin as an accessible city should be transposed and implemented in terms of Design for All
- The Senate Department for Urban Development and Environment of the city of Berlin has developed a draft for the concept of a Round Table "City without barriers/accessible city". Within the Round Table, Accessible/Tourism for all represents a development task, in

connection with the accessibility of infrastructures of the city itself. This should require a coordinated effort on team working between the Senate and public administrations with organisations and initiatives from civil society

- "Accessibility of Destination Berlin" - is a basic empirical investigation of the EBC Hochschule Berlin which was initiated by Visitberlin. This study is a comprehensive analysis of the situation and represents the status quo in Berlin, making also a comparison with Brandenburg
- Berlin's further steps towards a more accessible city and tourist offers will be:
 - Creating more accessible packages,
 - Strengthening co-operations and communication
 - Web marketing, fairs participation, Advertisement und Media campaign,
 - Standardising labelling of barrier free offers for all Germany
 - Developing of quality standards
 - Training of staff within the tourism service chain
 - Working closely with political decision makers

5. Qualification and knowledge transfer

- Knowledge stems from internal capacities, engagement and qualification
- Staff of Berlin's transport system gets regular training in services for disabled guests
- Berlin takes part in many working groups like the federal state's working group on accessible tourism, the Eurocities Network and twin cities partner programmes, all meant to transfer know-how and knowledge

6. Communication and distribution

- On the website www.visitBerlin.de there is a great deal of information about offers of accessible tourism. The site works closely in joint working groups with different partners in order to formulate offers responding to the requirements of the different target groups. The offers cover the entire service chain: arrival, mobility on site, accommodation, food and drink, entertainment and departure.
- Information about accessibility issues: <http://www.berlin.de/tourismus/infos/1730823-721039-barrierefreies-berlin.html> <http://www.visitberlin.de/en/plan/city-info/accessible-berlin> <http://www.berlin.de/lb/behi/barrierefrei/>
- Mobidat provides an important database on tourism and accessibility in Berlin

- <http://www.mobidat.net/links/tourismus/>
- The "Berlin Special Guides" guide people with and without disabilities in the Reichstag, through the "Mitte" city quarter, or to Potsdam. In special tours of Berlin's past historical episodes are described, as well as providing a wealth of information and background on the topic "barriers and disabilities"
- Cross-border cooperation with Potsdam / Brandenburg is continually being expanded and deepened in joint projects
- The issue of "accessibility" is also integrated in the work program of "service in the City".

7. Improvement of resources and capabilities

- Qualification of individuals (e.g. continuing training programme of staff of Berlin's public transport system)
- Networking and collaboration with the main service providers of the city
- The wide range of barrier-free offers in Berlin includes:
 - Guided tours or sightseeing tours by bus with access for disabled people
 - Accessible accommodation, restaurants and shops
 - Inclusive packages
 - Events & visits to the many places of interest
 - Offers in German Sign Language and in Braille, audio-guides, experiences for the senses of smell and touch

Drivers & Obstacles

Drivers

- Constant engagement
- Accessible tourism leads to positive results in marketing
- Access City Award 2013 as an additional motivation for stakeholders and politicians

Obstacles

- Large investments needed
- Constant engagement of stakeholder is needed.

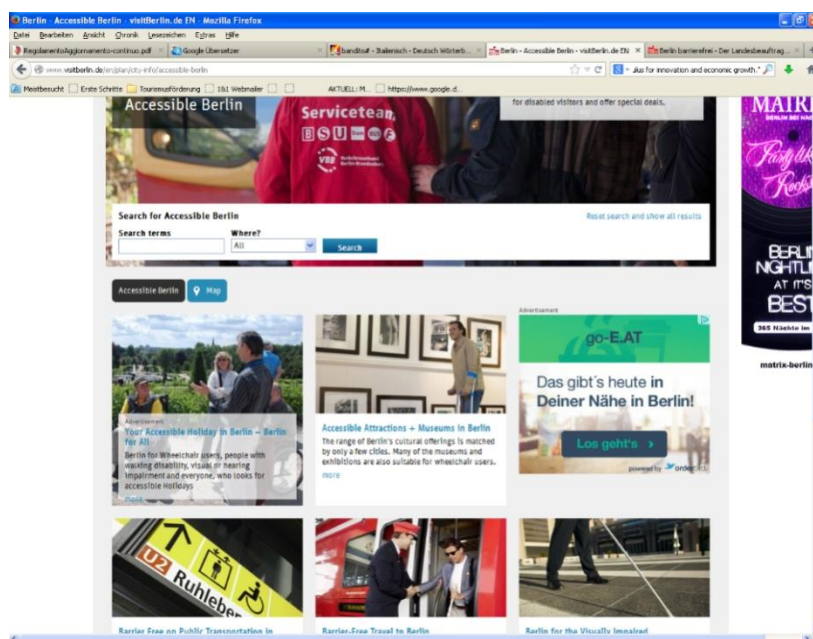
Further comments

- In the third edition of the European Commission Access City Award 2013, the Award was given to Berlin. The Access City Award recognises and celebrates cities of over 50,000 inhabitants in EU which have put into action exemplary initiatives to improve accessibility in the urban environment, allowing people with disabilities to participate fully in society and to enjoy their fundamental rights on an equal footing with others.

The award covers four key areas of accessibility:

- built environment and public spaces
- transport and related infrastructure
- information and communication, including new technologies
- public facilities and services, and the city must also demonstrate that it is committed to continued improvements in accessibility in a sustainable way, so that it can act as a role model and encourage the adoption of best practices in all other European cities.
- Berlin was selected on the basis of its strategic policy and inclusive approach to disability. In fact, massive investments have been made to transform the city into an accessible and barrier-free environment (for instance transport system and reconstruction projects to facilitate the access of people with disabilities).

Figure 129 – Website www.visitberlin.de



5.1.3.6 Case Study: Barcelona metro

The Catalan railways (FGC) transport more than 80 million passengers every year. FGC operates some of the Barcelona commuter rail network. There are two distinct (and separate) systems: the Metro del Vallès and Línia de Balmes are standard-gauge lines, while the Metro del Baix Llobregat and Línia Llobregat-Anoia are metre-gauge lines.

The check of the success factors reveals the following findings:

1. Commitment of decision-makers

- Since late eighties when Catalan society become aware of the need to improve the city for the organisation of the 1992 Olympics and Paralympics Games the top management of the company has supported the constant accessibility improvements.

2. Coordinating and continuity

- The company's management staffs have been always aware that accessibility and Design for All are key elements of the service quality.
- Design for All principles have been transmitted in a "viral" way among all company department, from planning and design to service provision, information, public relations, ticketing, etc.

3. Networking and participation

- Since FGC was aware of the need for improving accessibility has been in close contact and consultation with administrations and NGOs dealing with the People with Reduced Mobility but also with experts.
- They have a close collaboration with the other metro company and transport authorities to guarantee the easy navigation of passengers along the different transport networks.
- They have actively participated in public transport international organisations and have also been invited to lecture at international events dealing with Design for All.

4. Strategic planning

- All the improvements made have been accurately planned and budgeted over the years.
- Assessment of accessibility conditions considering the typical accessibility aspects but also lighting, loudspeakers, etc.
- Satisfaction survey and constant contact with customers' representatives (disabled or not disabled) bring new improvement opportunities.

5. Qualification and knowledge transfer

- Personnel training is also included in the planned activities (for example a course on how to communicate with deaf customers)
- Staff aware of Design for All and provided with appropriate training

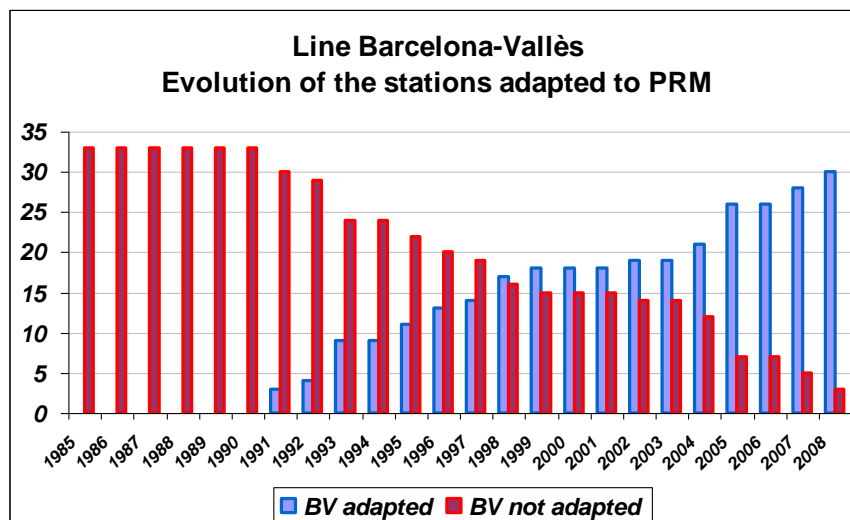
6. Communication and distribution

- Website www.fgc.cat , which is also available in English.
- Brochure and maps also available in English
- Website indicates which client offices can deal with deaf clients and the accessibility facilities for each station.

7. Improvement of resources and capabilities

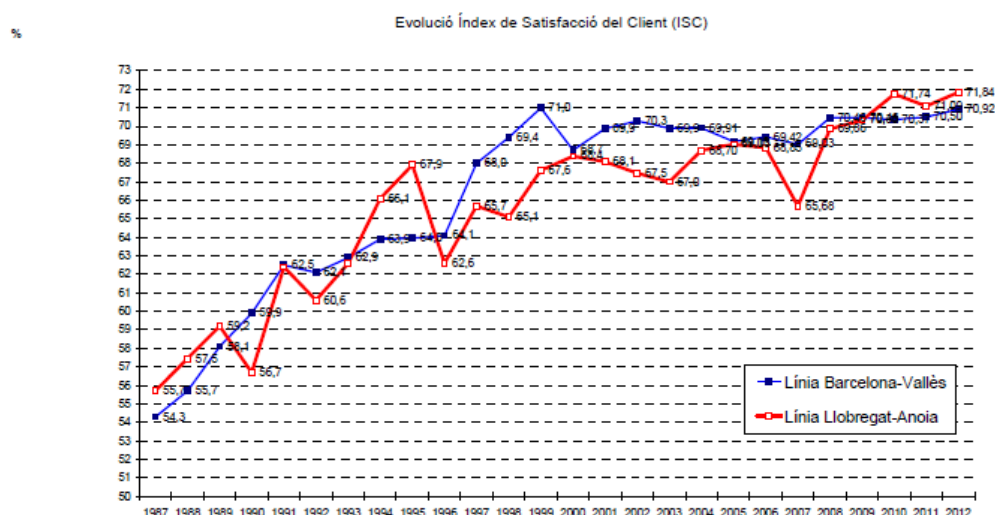
- 95% of their stations are accessible. The cumulative investments in these stations were 17.1 M€.

Figure 130 – Evolution of the adapted stations



- Accessibility is one of the aspects evaluated in the Clients' Satisfaction Index that is constantly improving

Figure 131 – Evolution of the client satisfaction index



It should be underline that, although other factors (like mobility trends, tourism and immigration, etc.) have intervened in the overall mobility data, while population have increased 5.3% in the period 1997-2006, the number of journeys have increased by 69%. Comparing it with the other metro company who started the accessibility improvement later, in the period 2001-2006 TMB increased the number of passengers by 16% while FGC increased its number of customers by 23%.

Although FGC attributes this increase to quality improvements in general (including accessibility) their own analysis concludes that renovation to make a station accessible increases the number of passengers at a station by 16%.

Accessibility is not an isolated issue but a component of the overall quality of the service provided.

No evidence exists for a direct relationship between the level of investment and the number of customer journeys, but we can observe a continuous increase in the number of passengers in the period 1997-2006 where the improvement in accessibility was constant (important changes like the integration of tariffs in the Metropolitan Area did not dramatically affect the rate of progress).

Obstacles

- The main obstacle at present is the dramatic economic restrictions in the public sector that delay further improvements and involvement in international networks.

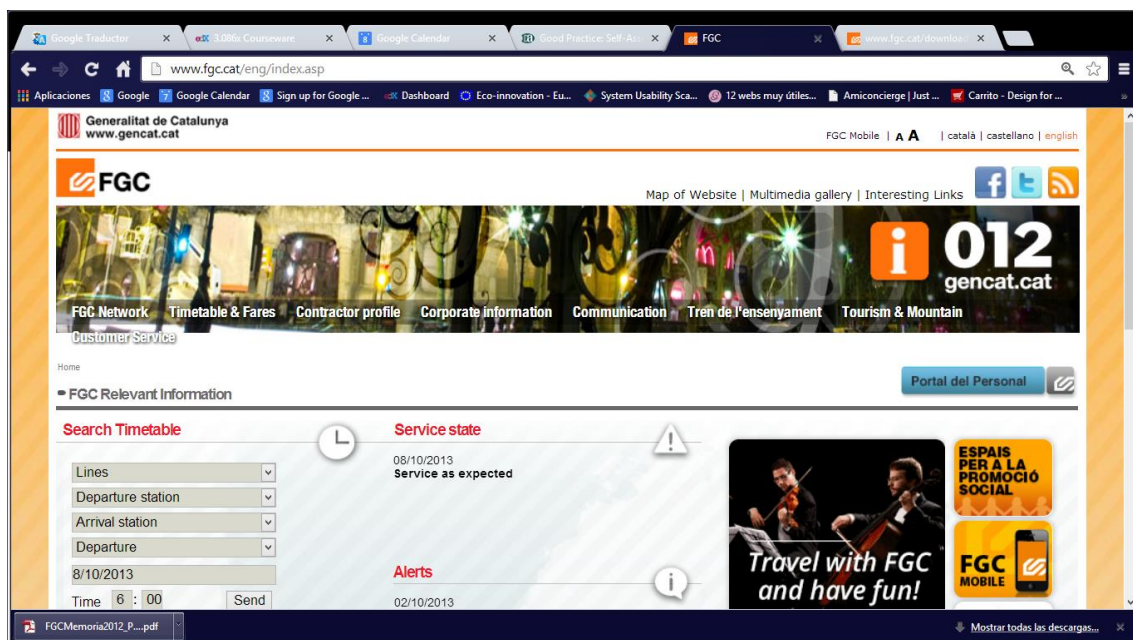
Further comments

- Although it is not the object of this case study FGC manages five ski stations and their premises (ski facilities, hotels, restaurants, etc.) and also manages the transport systems (cable car, funicular, mountain train) in Montserrat, one of the most outstanding religious tourism destinations with more than 2m visitors/year. The same Design for All criteria are also applied to these other services.

Figure 132 – Official logo of the FGC



Figure 133 – Website of the FGC



5.1.3.7 Case Study: Scandic Hotels

Scandic Hotels is a hotel chain operating in Sweden, Denmark, Finland, Norway, Germany, the Netherlands, Belgium and Poland.

The first hotel was established in 1963 and now they have 155 hotels in operation with 29,696 rooms and they plan to open three new hotels soon. They have 7,500 employees.

Their offer is aimed at companies, families, couples and events.

Around 500 hotel rooms have been adapted to meet the requirements of people with some kind of disability.

All the 155 hotels are working with Scandic's own accessibility concept which is their Accessibility Standard. The standard has grown over the years and today it contains 110 check points to follow. 81 of these points are mandatory for all hotels and for new hotels all points must be considered. This standard works as a checklist and template for the hotels.

Scandic offers:

- Rooms for disabled people (equally well-designed as any other room)
- Full accessibility information online – every Scandic Hotel has its own page with unique information about the hotel and its facilities. They also provide a general information page about accessibility such as recommended hotels in different cities, tips and advice, useful links and more
- Public areas at the hotel that are adapted for people with special needs, such as a lowered reception desk for wheelchair users, a hearing loop in conference facilities, vibrating alarm clock and more.
- Food & Beverage - No allergenic garnish on the buffet breakfast, Gluten- and lactose-free bread at breakfast
- Guide dogs are always welcome at the hotels

Monitoring the success factors reveals the following findings:

1. Commitment of decision-makers

- The Scandic Group Executive Committee is responsible for any action carried out about accessibility, the Disability Ambassador report directly to them.

2. Coordinating and continuity

- The accessibility commitment started in 2003. Since then Magnus Berglund, now appointed as Accessibility Director at Scandic is responsible for this activity.

3. Networking and participation

- Magnus Berglund is member of ENAT
- They work continuously with disability organizations, hotel guests and team members

4. Strategic planning

- Its strategy is to include accessibility and Design for All in all operations of the company.
- A check list is applied to any new hotel and renovation.
- Staff education has been included as a planned strategy.

5. Qualification and knowledge transfer

- To increase constantly their own knowledge and listen to the clients is the key factor for qualification.

6. Communication and distribution

- The Scandic group use their website, marketing material, PR, internal communications and lectures, for instance at accessibility conferences to advertise their business.

7. Improvement of resources and capabilities

- As the accessibility improvements are included in the general budget there is no need for any special resource.

Drivers & Obstacles

Drivers

- A former employee of Scandic suggested using accessibility to gain a competitive advantage after being affected by a long term illness.
- Their goal is that everyone should be welcome at Scandic regardless of whether they have a disability or not.
- A high level of satisfaction feedback. Some of their guests said they weren't able to stay at a hotel until they started to work with disability.
- Already 2005 they could see that they sold 15,000 more room nights in Sweden due to that they can offer rooms for disabled.
- They can see increased business every year in all countries.
- Many of their investments have been repaid in less than one year.

Obstacles

- No specific obstacles were mentioned by the stakeholder

Further comments

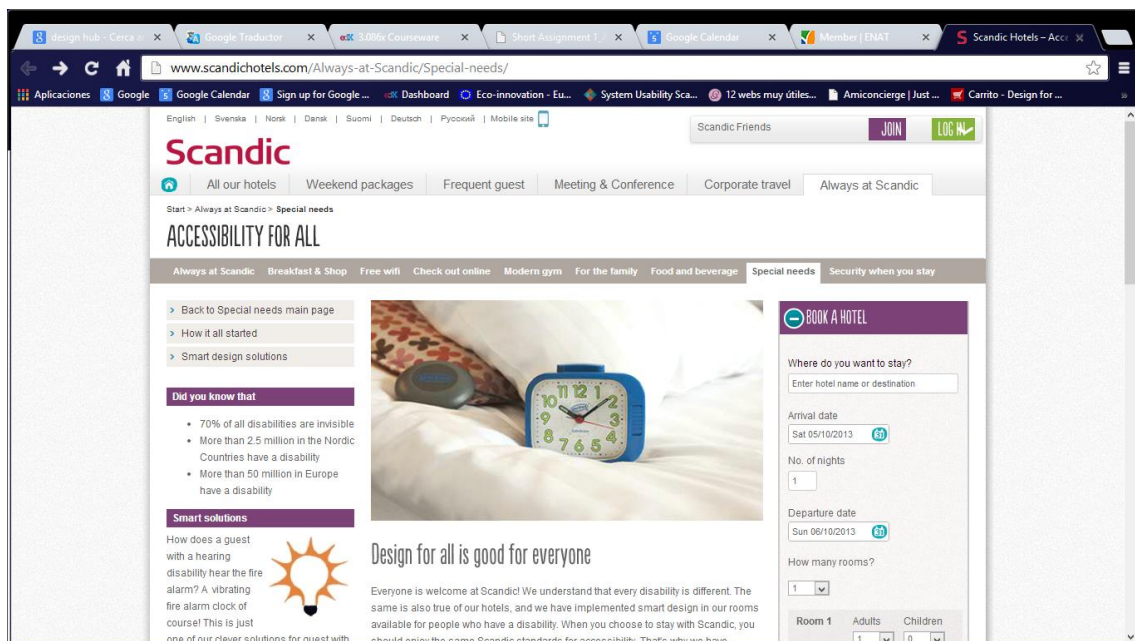
There is a critical issue in order to succeed: Service providers need to combine business knowledge with knowledge of special needs.

www.scandichotels.com/specialneeds presents their approach to Tourism for All.

Figure 134 – Official logo of Scandic

Scandic

Figure 135 – Scandic webpage



5.1.3.8 Case Study: GVAM

GVAM was created in 2007 with the aim of reinventing the concept of a guided tour. Their aim was to provide the best educational and emotional experience when exploring cultural and tourist areas. Their business model is based on focussing on people. They consider accessibility as synonymous of good design and good performance. Their aim is that their technologies are and will always be easy to understand, simple and cost-effective implemented.

The team consists of professionals from the world of graphic, industrial and interactive design, computer engineering, social communication, international marketing and research.

They offer accessible mobile apps made with GVAM, an online system for creating and publishing audio tours and multimedia guides on major mobile platforms

GVAM was conceived as a universal guidance system including people with disabilities.

The check of the success factors reveals the following findings:

1. Commitment of decision-makers

- Culture must be accessible for all. That was the main idea of founder partners since beginning.
- It is not only a rewarding point but a responsible attitude before society.

2. Coordinating and continuity

- The company started as a partnership between Dos de Mayo SL (multimedia and web production), Universidad Carlos III de Madrid (R&D&i), ONCE (Spanish blind people main NGO) and CESyA (Spanish Centre for Audio description and subtitling) , CNSE and FIAPAS (both federations of associations of deaf people, one with a more sign language approach and the other with a more oral one)) and with the support of the Real Patronato sobre Discapacidad (Official Spanish organisation dealing with disability). Although they maintain excellent relations the company is run by their staff independently.

3. Networking and participation

- The service was launched with the advice of national associations of people with disabilities and the National Administration and they still keep strong links.

4. Strategic planning

- The process was planned since the beginning but improvements have been made in order to benefit customers from the latest technology and user's requests.

5. Qualification and knowledge transfer

- GVAM have in its team external advisers about special access needs although internal knowledge grows day by day.

6. Communication and distribution

- Their own web site, Apps (can be downloaded in Apple Store the ones for Museo Lázaro Galdiano, Alcázar, Museo Sorolla) and brochures.
- Speeches in professional museum and accessibility events.

7. Improvement of resources and capabilities

- The requested investments for initial R&D&i were planned from the beginning but not the ones related to technical evolution. The investment pay back for the start-up was 3 years.
- They are really proud of GVAM as the only accessible guiding system in the market, as they claim. It was a good investment for society because they consider that we all have special accessibility needs. Although their clients are increasing they don't know if the number of museums' visitors increased but they perceive that all enjoy richer experiences with no extra costs.
- The published Apps are compatible with the native accessibility features in iOS and Android, such as VoiceOver and TalkBalk.
- They claim that visitors of all ages, abilities and languages may use the guides thanks to the advanced editing tools that incorporate:
 - Automatic audio-navigation for the visually impaired.
 - Subtitled voiceover speeches and automatic full review online editor.
 - Sign language videos.
 - Easy reading texts and pictograms.

Drivers & Obstacles

Drivers

- Social Responsibility and detection of a lack of communication about accessibility in cultural premises.

Obstacles

- The critical issues are institutions in charge of incorporating accessible products or services. They have no knowledge about what to do and they are afraid of costs and technologies.

Figure 136 – GVAM webpage

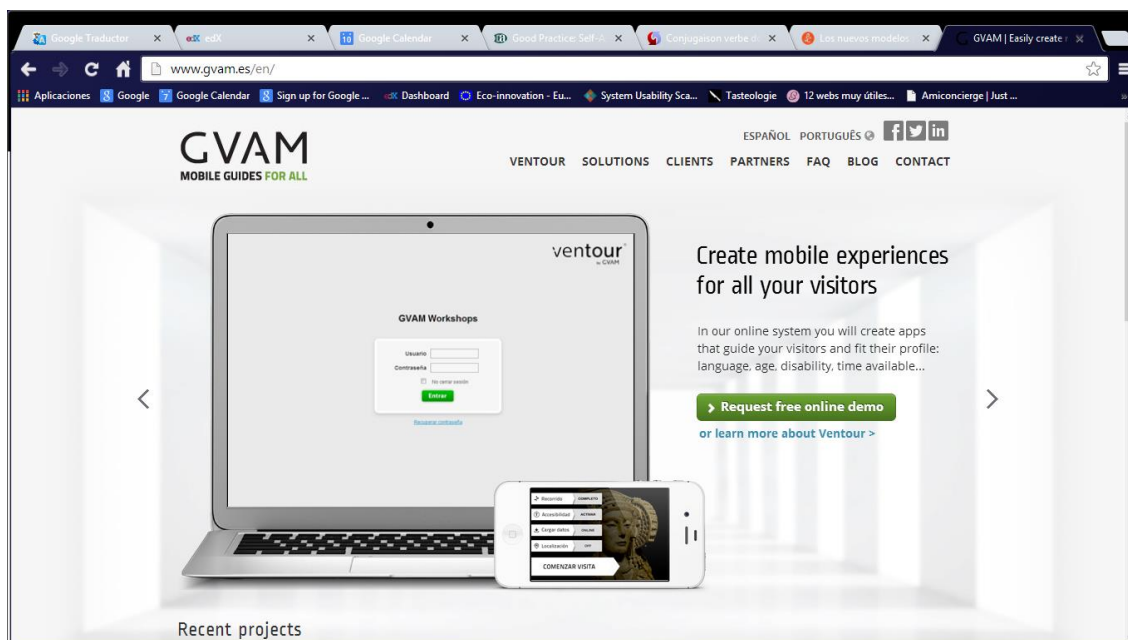


Figure 137 – Official logo of SGVAM



5.1.3.9 Case study: Restaurant Monnalisa Beach Restaurant

The Monnalisa Beach Restaurant is situated inside the Holiday Village Florenz in Lido degli Scacchi, Comacchio (Ferrara), built in 2008 according to the Italian accessibility laws.

The menu is normally based on seafood and fish. On demand it is also possible to have meals for people with food allergies and intolerances.

The restaurant is open also to external guests and is available for special events, celebrations and parties.

Monitoring the success factors reveals the following findings:

1. Commitment of decision-makers

- The property owner are aware of Accessible tourism and committed to it

- The propriety decided in 2006 to arrange in an accessible way the facilities within the Holiday Village. In this perspective, some bungalows and holiday flats had been built and furnished in a way that could fit the needs of as many guests as possible; moreover the restaurant Monnalisa was built barrier-free to allow every guest (internal and external) to fully enjoy the time within the Holiday Village.

2. Coordinating and continuity

- Since 2006 the internal policy of the propriety has started to develop the accessibility organization and design of the Holiday Village, from car parks, to paths leading to the facilities, to the restaurant and to the beach, toilets and to the restaurant itself. Moreover, the staff is also specifically trained to meet the needs of guests with disabilities. They have the idea to developing it always consistently further, for example, for the next season it is foreseen to install some fittings for people with visual impairments and also to have menus in Braille.

3. Networking and participation

- The Restaurant Monnalisa, being in the Holiday Village Florenz, belong also to the Network Village4All, a Quality Brand Hospitality for All, that provides accessibility survey and makes the info freely available in the own website.
- The property has regular exhibits at the tourism Fair “Gitando”, since its inception.

4. Strategic planning

- The property’s commitment to accessibility is based on both social and business reasons.
- It carries out careful and constant promotion activities on its website and through specific sporting events and tourist promotions.
- The further steps towards more accessible offers will be:
 - Creating more accessible packages and providing more fittings and facilities for guest with different disabilities
 - Increase Web marketing, fairs participation, Advertisement and Media campaigns

5. Qualification and knowledge transfer

- Staff have been trained in services to fulfil the needs of guests with disabilities

6. Communication and distribution

- Through the link www.campingflorenz.it/eng/village/camping-for-disabled.php it is possible to find out much information about the accessibility of the Holiday Village.
- Info about the accessibility condition are also available here: www.villageforall.net/en/italia-emilia_romagna-lido_degli_scacchi_comacchio_ferrara-campeggio_villaggio_accessibile-holiday_village_florenz/

7. Improvement of resources and capabilities

- Website improvement
- Networking and collaboration
- It is possible to rent a wheelchair to move within the Holiday Village and also to reach the Restaurant. It is possible to have the meals delivered from the restaurant to the holiday houses within the village.

Drivers & Obstacles

Drivers

- Constant engagement
- Accessible tourism leads to positive results in marketing and business

Obstacles

- Investment is needed

Further comments

- The accessibility improvements have given to the restaurant and Village the possibility of hosting groups of people with disabilities and also to host accessible sporting events.

Moreover, the accessibility of the facilities guarantees more comfortable experiences for all the guests, who are mainly families.

Figure 138 – Monnalisa restaurant (Photo:
<http://www.campingflorenz.it/ita/servizi/monnalisa.php>)



5.1.3.10 Case study: Restaurant I Girasoli

I Girasoli Restaurant is situated within the Casa Vacanze I Girasoli in the southern part of Tuscany.

The all facilities have been built in 2000 according to the Italian accessibility laws. Everything was designed and built with a special focus to the needs of guests with mobility impairment. The Casa Vacanze belongs to AISM, (Italian Multiple Sclerosis Society), an Italian national charity on Multiple Sclerosis and it was foreseen to host the own members and families.

On demand it is possible to have meals for people with food allergies and intolerances.

The restaurant is open to external guests and is available for meetings and special events.

Casa Vacanze is fully accessible to people with mobility impairment. In this perspective, the 51 rooms and 9 bungalows, the restaurant, the paths in the surrounding park and the external areas can be fully enjoyed by all the guests (there are also 2 swimming pools with lifting equipment to access to water and a gym).

Not only the buildings, connection paths and open spaces are accessible, but the staff can propose a series of accessible service to the guests, i.e. shuttle service from and to the airports or arrival spots, accessible guided tour to the main tourist highlights of the surroundings and of the neighbour regions, wine tours and testing, educational tour with sommelier. Wheelchairs and other equipment can be borrowed free of charge. Moreover, the staff is also specifically sensitised and trained to match the needs of guest with mobility impairment.

Monitoring the success factors reveals the following findings:

1. Commitment of decision-makers

- The aim of the propriety was since the beginning to allow the members of AISM and their families to enjoy an active and relaxing holiday in the wonderful Tuscan setting. Accessible tourism for people with mobility impairment was (and still is) the goal of the propriety.

2. Coordinating and continuity

- The propriety has started since some years to become mainstream and to open up to the market, national and international. In this respect, they have already gained a lot of new tourists. To go further in this direction, they have the intention to start renovating some of the rooms in the direction of Design for All, thus maintaining the high accessibility level that they already have.

3. Networking and participation

- The Restaurant I Girasoli and the all Casa Vacanze belongs to the Network of AISM properties likehome.it.
- It is also included in the Network Village4All, a Quality Brand Hospitality for All that performs accessibility surveys and makes the information freely available on their website.
- It is also member of ENAT - European Network for Accessible Tourism (non-profit association).
- The facility is also present on booking.com, expedia.com and other national and international tourist booking internet portals.

4. Strategic planning

- The property's commitment to accessibility is based on social reasons.
- The further steps towards a more accessible offers will be:
 - Providing more fittings and facilities for guest with different disabilities
 - Re-designing in a more appealing way the accessible rooms.

5. Qualification and knowledge transfer

- Staff have been trained in services to fulfil the needs of guests with disabilities

6. Communication and distribution

- The link www.igirasoli.ar.it/ provides information on accessibility of the Casa Vacanze and the restaurant.

- Information about the accessibility of the property are available on www.likehome.it and http://www.villageforall.net/en/italia-toscana-croce_di_lucignano_arezzo-villaggio_accessibile-casa_vacanze_i_girasoli/
- They carry out promotional activities through specific events and tourist promotions.
- For some years the property has been to the national and international mainstream market

7. Improvement of resources and capabilities

- Networking and collaboration

Drivers & Obstacles

Drivers

- Constant engagement
- Opening to mainstream tourism having accessible facilities leads to positive results

Obstacles

- The house is clearly devoted to guests with disabilities. This may lead to a social segregation of guests.

Further comments

- The management has also to opened other facilities (i.e. the swimming pools) to the citizens of the surrounding area and it is also organising events open to all (aqua gym courses and other special events).

Figure 139 – Girasoli restaurant (Photos: <http://www.igirasoli.ar.it>)



5.1.4 Analysis of the case studies

To analyse the case studies the available information about organisation and actions were collected and the results grouped according to the already mentioned 7 ISF.

To render the analysis easier to understand we have grouped the case studies in a table that state whether in each case the available information tends to confirm “X” or refute “O” our hypotheses:

H21: In mainstream tourism services investment in accessibility results in increased client numbers.

H22: Destinations that take care for accessibility usually are focused on service quality in general.

H23: The successful accessible destinations show some kind of cooperation among service providers.

H24: Some destinations succeed in including accessibility, comfort and services in their branding.

In the same row the 7 ISF have been listed to show if each of the Success Factors has been well developed “X” or neglected “O” (Figure 140).

Figure 140 – Case studies and success factors

CASE	H2 1	H2 2	H2 3	H2 4	1 ISF	2 IFS	3 ISF	4 ISF	5 ISF	6 ISF	7 ISF
Erfurt	x	x	x	x	x	x	x	x	x	x	x
Acc. Poland	*	o	o	x	x	o	o	o	o	x	o
Château	x	x	x	x	x	x	x	x	x	x	x
Wine Cellar	x	x	o	o	x	x	x	o	x	o	x
Berlin	x	x	x	x	x	x	x	x	x	x	x
Barcelona Metro	x	x	x	x	x	x	x	x	x	x	x
Scandic	x	x	x	x	x	x	x	x	x	x	x
GVAM	x	x	x	x	x	x	x	x	x	x	x
Rest. Monnalisa	x	x	x	x	x	x	x	x	x	x	x
Rest. I Girasoli	*	x	x	x	x	x	x	x	x	x	x

*H21 is not applicable to these cases as they do not address mainstream tourism.

Figure 141 shows if the cases provided economic data or comments that allow an understanding of the return on investment, their approach to tourism (more mainstream oriented or disability oriented), whether they use accessibility as a marketing tool and the perceived economic results.

Figure 141 – Case study analysis

CASE	€ Data	Approach	Marketing accessibility	€ Results
Erfurt	Some	Mainstream	Yes	Good
Acc. Poland	No	Disability	Yes	Poor
Château	Yes	Mainstream	Yes	Good
Wine Cellar	Some	Mainstream	No	Good
Berlin	Some	Mainstream	Yes	Good
Barcelona Metro	Yes	Mainstream	Yes	Good
Scandic	Yes	Mainstream	Yes	Good
GVAM	Yes	Mainstream	Yes	Good
Rest. Monnalisa	Some	Mainstream	Yes	Good
Rest. I Girasoli	No	Disability/Mainstream	Yes	Good

The data analysis shows that although the initial intention was to select only cases with a mainstream orientation a closer analysis reveals that in one case, Accessible Poland, the approach is disabled guest oriented towards guests who have disabilities while in the case of the Restaurant I Girasoli they have been disability oriented although recently they are evolving to a more mainstream approach to improve their economic results. Due to the lack of orientation towards mainstream tourism the Hypothesis H21 can't be confirmed in these two cases.

In the cases of Erfurt and Berlin the lack of available economic data is understandable as the investments for improving accessibility are assumed by many public and private operators in an isolated way.

In the case of St. Martin Wine Cellar it was only possible to obtain indirect data about guests received without indication of the evolution of these numbers. We estimate that there are two reasons for this: their main activity is to produce and sell wine, the visits being a marketing tool and, on the other hand, the small investments done to improve accessibility are considered by them as valuable for all guests as they are not especially focussed on disabled guests.

Finally in the Restaurant Monnalisa case the economic data cannot be concretised as they have designed and built the property to be accessible from the beginning and therefore no special investment was made although they declare that more investment should be made without defining its amount. We have also been unable to obtain data about the increase in guest numbers.

5.1.5 Conclusions

The hypotheses status confirmed for the analysed cases:

It has emerged that the increase in guest numbers consists not only of disabled customers but of customers in general.

It has emerged that in most cases accessibility is integrated as part of the quality policy.

It is clear that cooperation with other local service providers is close success is greater although if cooperation is not close, but the provision of accessible services is assured along the tourism chain the results are also good.

In most of the cases the way of including accessibility in their advertising tools is as a characteristic or service included among others emphasising more what they offer than to whom the offer it. The style is always positive and avoiding “charity or social service” style language.

- Accessible Poland Tours is not a mainstream service. Their economic results are not good
- I Girasoli is evolving from a disabled marketing orientation to a more mainstream orientation. Their economic results are improving.
- It is more likely that a business will succeed if the management are professionals in their sector with awareness of accessibility needs rather than being disability professionals running a tourism business.
- All the cases that show good economic results and that communicate their offer efficiently have been managed well each aspect of the 7 ISF:

Although social responsibility is a motivation it does not make the company deviate from its own business focus.

The engagement and training of all the staff is a key issue that improves results.

Knowledge transfer flows more easily when the organisation is part of a number of professional networks such as Design for All.

To plan the actions and anticipate the results before starting is also a key element of success.

The importance of investment varies largely depending on the type of services provided and whether the accessibility improvements have been included since inception, have been planned or have been made in response to demand. But even in the case of the highest investment among the cases discussed, 17.1M€ invested by FGC in stations' accessibility, which resulted in an investment of 1.36€ for each new passenger in the following year, this implied a payback in less than two years, based on an increase of 16% in passenger numbers as estimated by the company. This example, together with the others from cases from which we have obtained concrete economic data, allow us to conclude that planned and reasonable investments pay back in a short period if the 7 ISF has been correctly addressed.

Finally it should be underlined that all cases that have succeed in managing the 7 ISF have validated all the working hypotheses proposed.

5.2 Task 3b - Desk research on existing barriers faced or perceived by people with access needs

5.2.1 Methodology

5.2.1.1 Desk research

The main aim for task 3b is to reach a thorough understanding of the barriers faced by people with access needs. It is important that the barriers for each tourism sector are identified in order to allow for the development of specific action plans to eliminate existing obstacles. Findings from task 3b are channelled into the recommendation section (section 7).

In order to meet the objective of Task 3b, desk research was employed. Desk research, e.g. the collection of secondary data, is a widely used research technique in market research. The systematic review of the literature on access barriers was essential to fulfil four purposes (see Figure 142).

Figure 142 – Purposes of desk research

Purpose 1: Identify and determine the extent to which past research covers the barriers faced by individuals with access needs.

Purpose 2: Conduct a comparative assessment/ examination of existing sources.

Purpose 3: Develop hypotheses to be tested

Purpose 4: Compare the existing literature with the findings from the primary data.

5.2.1.1.1 First round of desk research: Identification of secondary sources

The identification and determination of the extent of past research covering the barriers faced by people with access needs is crucial to identify gaps in the existing literature. For the identification of secondary sources (1), such as reports, studies and academic articles, the comprehensive databases provided by EBSCO Information Services¹ were used. More specifically, the Hospitality and Tourism Index² (part of the EBSCO databases) was identified and utilised as the main source as this index is the key database for academic articles and industry news from all areas of the hospitality and tourism sector. The coverage of publications in this index dates back to 1930 and contains more than 990,000 records and almost 830 publications. Most of these publications are peer-reviewed journal articles, following a double-blind review process. This ensures that the publications are of an appropriate standard, acting as a quality-insurance mechanism for the desk research conducted.

For this initial stage of the desk research, eight key words/ parameters were generated to enable the first search for reports and articles that potentially deal with the subject. These keywords/ parameters were used in various combinations as shown in Figure 143 below.

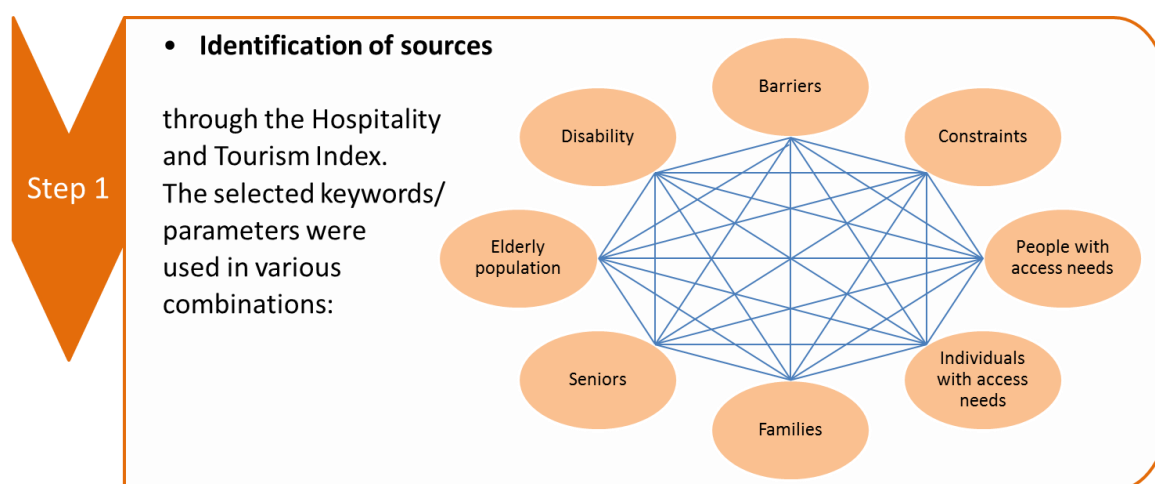
The initial results were checked to identify those sources that deal explicitly with access barriers from the demand-side, which is the overall selection criterion. Through thoroughly

¹ EBSCO is the name of a publishing service, which supplies online databases to libraries. Available via EBSCO are 375 full-text and secondary research databases, over 420,000 e-books and 355,000 e-journals and e-journal packages (<http://www.ebsco.com>).

² The Hospitality and Tourism Index includes wide-ranging publications of three internationally recognised collections, which are: the former hospitality database of Cornell University, articles in Hospitality and Tourism (AHT) (formerly co-produced by the Universities of Surrey and Oxford Brookes) and the Lodging, Restaurant & Tourism Index (LRTI), formerly produced by Purdue University. The geographical scope of the material available from the Hospitality and Tourism Index comprises Europe, Canada, Australia and Asia, offering domestic and international sources of reference (<http://www.ebscohost.com/corporate-research/hospitality-tourism-index>).

assessing the relevance of all identified sources, articles have been left out that deal for example with conceptual developments of disability studies, disability and identity or representational aspects.

Figure 143 – Keywords/ parameters used for the identification of secondary sources



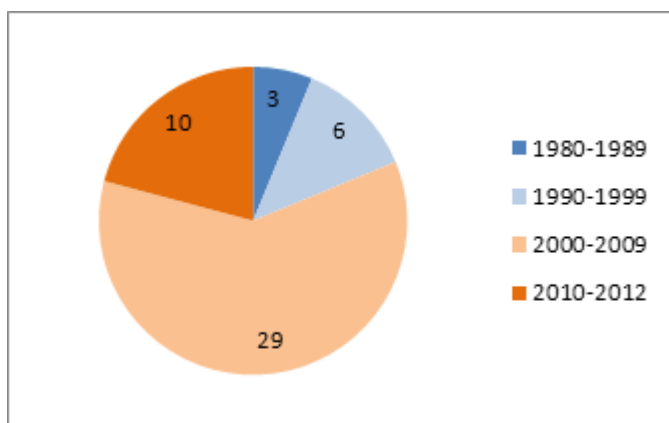
Following this methodological approach, 118 potential reports and articles were identified through the database search, with 48 suitable for analysis (Annex L). These 48 articles are all relevant in that they deal explicitly or partially with access barriers from a demand-side perspective, which represents the main selection criterion.

For any desk research, ensuring quality in terms of rigour and reliability of the sources used is crucial. This has been achieved as the majority of articles listed in Annex L are published in journals that follow a thorough double-blind review process.

The publication period of articles is a very good indicator of the importance given to a specific research topic. With regard to the subject of access barriers, the identified articles cover a time frame from 1987 to 2012. Looking at the historical development, it is apparent that the topic gained far more importance from 2000 onwards. This is reflected in the number of articles and reports identified in this later time period. The large number of articles and reports published between 2010 and 2012 is particularly noticeable. In only two years, 10 articles were published which deal with access barriers. This is almost one-third of all articles appearing from 2000 – 2009 and already more than during the time period from 1980-1999 (Figure 144). The same tendency was observed by an Italian study investigating the start date of projects related to disability/ accessibility. Findings show

that a high percentage of projects were initiated from 2009 – 2012¹, which indicates that the topic has received more attention and achieved more significance over the last ten years.

Figure 144 – Publication period of articles identified during the first search round



With regard to the nature of the research approach of the identified sources, some articles deal with access barriers in a purely conceptual manner (e.g. Smith, 1987) and relatively few articles deal with the topic from a quantitative perspective. Thus, the majority of sources focus on an exploratory, qualitative approach mainly based on interviewing people with access needs.

The qualitative nature of the data found on barriers can be explained as follows:

- Research into disability is a relatively new and evolving area in tourism and hospitality, therefore qualitative research is mainly employed to build theory which can be tested at a later stage through quantitative methods
- The focus of the research is mainly based on gaining a better understanding of individual, subjective tourist experiences which are often investigated by using qualitative methodologies²
- Due to the subjective perceptions of barriers, concepts and issues have to be defined by the people who face access constraints (qualitative methods) instead of providing definitions in advance (quantitative methods)

In summary, qualitative, exploratory research has been mostly employed in order to gain a deeper understanding of the subjective experiences of barriers in a tourism context. The information collected through this approach does not lend itself to statistical analysis as the focus is placed on

¹ Presidenza del Consiglio dei Ministri (2013). Accessibile è meglio: Primo Libro Bianco sul Turismo per Tutti in Italia 2013. Comitato per la Promozione e il Sostegno del Turismo Accessibile. Available at: http://www.unifg.it/dwn/ateneo/sportello_west/accessibile_libro_bianco.pdf

² McCabe, S., & Stokoe, E. (2009) "Have you been away?": Holiday Talk in Ordinary and Institutional Interaction. IN Richards, V. & Raguz, A. (Eds.) 3rd Critical Tourism Studies Conference. Connecting Academies of Hope: Critical Actions and Creative Vistas. Zadar, Croatia, 21.-24. June 2009.

gathering large amounts of relatively detailed information about a relatively few cases. However, a primary data collection process based on the online survey (task 2b) is used after the completion of the desk research to obtain more quantitative information related to the barriers faced by people with access needs.

5.2.1.1.2 First round of desk research: Examination/ assessment of relevant secondary sources

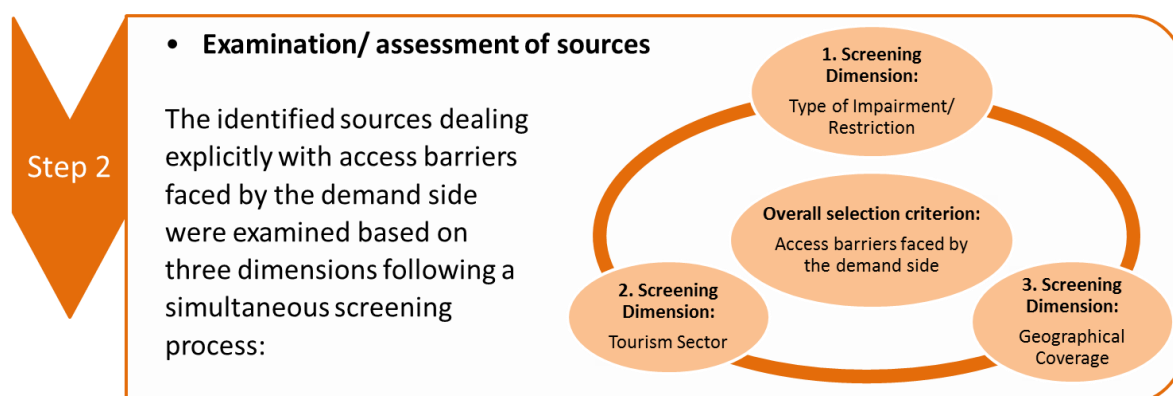
After assessing the relevance of sources, focusing only on articles that deal with access barriers faced by people with access needs, the examination/ assessment of reports and academic articles was conducted (2). This was based on following a simultaneous screening process related to three dimensions (Annex M):

Type of impairment/ restriction¹

Tourism sector

Geographical coverage

Figure 145 – Simultaneous screening process used for the examination/ assessment of secondary sources



¹ Both, 'impairment' and 'restriction' is used as people with access requirements include individuals who have impairments, such as for example mobility or sight impairments, as well as people who are temporarily restricted due to e.g. travelling with small children.

Using these screening dimensions at the same time allows for a comprehensive understanding of:

- Which types of impairment/ restriction are covered by secondary data
- Which tourism sectors are covered by secondary data
- Which countries have been investigated by existing research

The initial search enabled the first round of evaluation/ assessment providing an overview of the barriers faced by individuals with access needs. The next section provides an explanation on how the identified sources were assessed, followed by a justification for pursuing a second round of literature search.

Following the simultaneous screening process based on three dimensions (Figure 145), the identified 48 articles revealed the following subcategories which have been used for assessment:

Dimension: Type of impairment/ restriction:

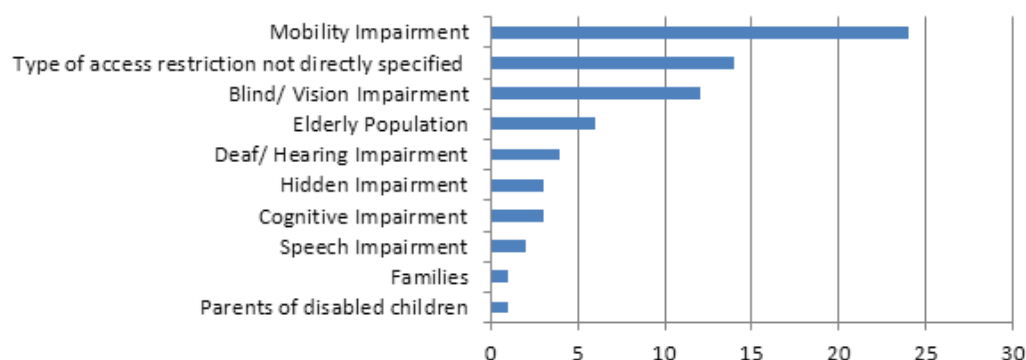
- Mobility Impairment
- Blind/ Vision Impairment
- Deaf/ Hearing Impairment
- Speech Impairment
- Cognitive Impairment
- Hidden Impairment
- Elderly Population
- Parents of disabled children
- Families

In addition to these 9 groups, a large number of sources did not explicitly specify the impairment/ restriction, leading to the establishment of an additional category labelled 'Restriction not directly specified'.

Examining the category of 'type of impairment/ restriction' covered, the majority of articles deal with barriers faced by individuals with mobility impairments, followed by articles not directly specifying the type of impairment/ restriction and people with vision impairments. Very limited research exists which deals with barriers faced by people with hidden impairments, cognitive impairments, speech impairments or families and parents with disabled children (Figure 146). These findings are in line

with research conducted in Italy, as the majority of projects were tailored towards physical disabilities (58.4%), followed by sensory disabilities (27.5%)¹.

Figure 146 – Articles dealing with access barriers by type of impairment/ restriction



Dimension: Tourism sector

The establishment of subcategories for the second dimension is based on the BMWi study² listing tourism sectors across the service chain. Given the limited and sometimes vague specification of tourism sectors in the identified reports and articles, tourism sectors have been grouped into 6 main categories representing key stages of the travel journey.

In addition, as some sources do not refer specifically to any sector, an additional category 'Tourism sector not directly specified' was added. The 7 main categories for the assessment are hence as follows:

- Pre-travel stage/ Information gathering stage
- Transit: Arrival / Departure
- Transport at destination & access paths
- Accommodation
- Catering / Gastronomy/ Food & Beverage
- Attractions/ Activities
- Tourism sector not directly specified

¹ Presidenza del Consiglio dei Ministri (2013). Accessibile è meglio: Primo Libro Bianco sul Turismo per Tutti in Italia 2013. Comitato per la Promozione e il Sostegno del Turismo Accessibile. Available at: http://www.unifg.it/dwn/ateneo/sportello_west/accessibile_libro_bianco.pdf

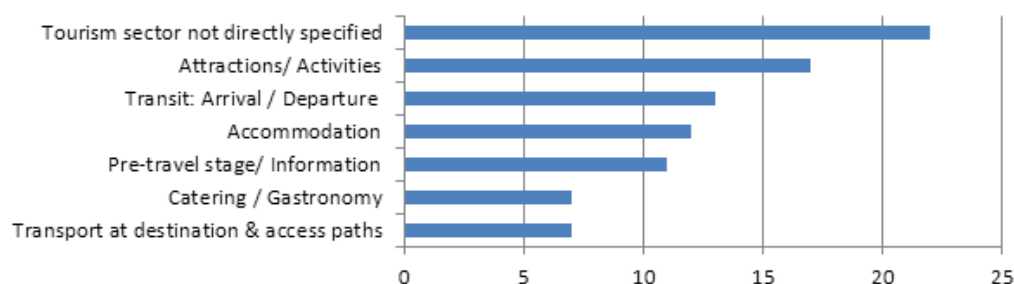
² BMWi (2004). Economic Impulses of Accessible Tourism for All, Berlin, Federal Ministry of Economics and Technology.

With regard to the coverage of different tourism sectors, the identified sources reveal that the majority of articles do not directly specify the barriers faced by people with access needs in relation to specific tourism sectors (Figure 147), which was anticipated in the proposal by the Team. The majority of sources identified in the first search round focus on the tourism context in general without referring to specific sectors. Some of these articles investigate barriers in a tourism context by focusing on specific impairments while others do not mention a particular type of impairment.

For the sources that do specify the tourism sector, the following understanding could be gained: Sectors that received most research attention include the attractions/ activities sector and the transit/ transport sector. This is not surprising, as attractions are the main reason why people travel to a destination, and transport is an indispensable element for getting to and from the destination.

Very little is yet known about barriers reported for the Food & Beverage sector (catering/ gastronomy) and transport at the destination, including access paths. Particularly with regard to transport at the destination, it is anticipated that more research needs to be conducted in this area, as isolated accessible facilities (e.g. an accessible hotel or an accessible attraction) do not add to the quality of the tourist experience if accessible access pathways between different facilities or services are not guaranteed.

Figure 147 – Articles dealing with access barriers by tourism sector

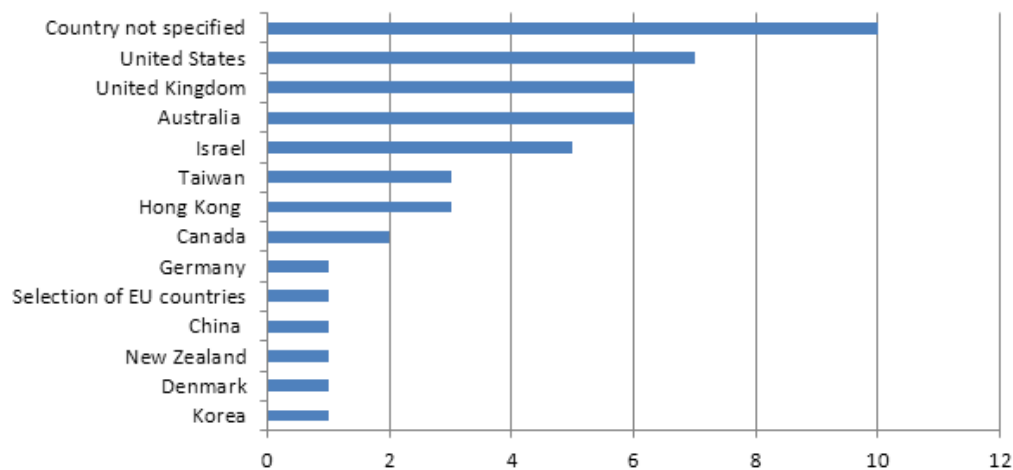


It is notable that the large majority of articles dealing with access barriers without specifying the tourism sector follow a qualitative approach to interpreting barriers and constraints, whereas articles that do specify the tourism sector are starting to employ quantitative methods.

Dimension: Geographical coverage

The third screening dimension investigates the geographical coverage of access barriers reported. As with the second dimension (coverage of individual tourism sectors), most reports and articles do not directly specify the geographical coverage (Figure 148).

Figure 148 – Articles dealing with access barriers by geographical coverage



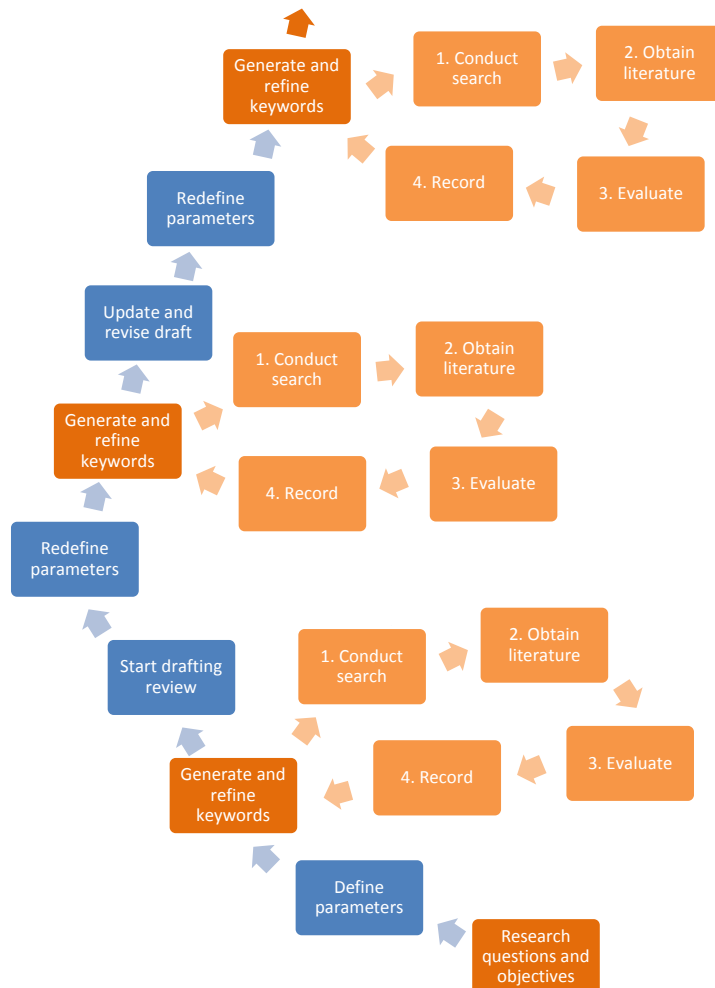
Based on the first round of the search, the top three countries covered include the United States, the United Kingdom and Australia. This might be partially attributable to the fact that English language is required for publications in highly-ranked quality tourism journals. However, given the current dominance of English-speaking countries covered in the desk research, a second round of the search¹ is necessary to specifically identify those sources that cover other European countries and other international source markets, which is explained next.

5.2.1.1.3 Second round of desk research: Identification of additional secondary sources

As is common for desk research, this initial search of the literature helps with the re-definition of more precise keywords/ parameters used to undertake further searches (Figure 149).

¹ As highlighted above and in Figure 149 this is a common procedure to ensure quality in the desk research methodology where the results of the first search (e.g. lack of sources covering European countries) contributes or informs the second round of the search.

Figure 149 – The desk research process¹



Thus, for the second round of search, the focus is placed on relevant material not identified through the first round of search following a set of different variables, such as for example keywords/ parameters in different languages and/ or geographical areas². The variables employed for the second round of search focused on expanding the source of literature and keywords/ parameters used to cover different geographical areas:

¹ Saunders, M., Lewis, P., & Thornhill, A. (2003) Research Methods for Business Studies. Harlow, Pearson Education Limited.

² Saunders, M., Lewis, P., & Thornhill, A. (2003) Research Methods for Business Studies. Harlow, Pearson Education Limited.

- Source of literature: Keywords/ parameters were employed for searching for relevant sources on different internet sites. While the internet is a useful source, attention was paid to ensure a quality control procedure. Reports were considered for inclusion if they are, for example, published by recognised disability and/ or elderly organisations or other established social institutions in the respective countries.
- Keywords/ parameters: Using keywords/ parameters in different languages:
 - To identify sources in Spanish language:
barreras/ obstáculos (barriers) ♦ restricciones (constraints) ♦ personas con necesidades especiales/ personas con discapacidades/ personas con movilidad reducida (people/ individuals with access needs) ♦ familias (families) ♦ Personas de la tercera edad (seniors) ♦ ancianos (elderly) ♦ incapacidad/ discapacidad/ minusvalía (disability)
 - To identify sources in German language:
Barrieren (barriers) ♦ Mobilitätseingeschränkte Menschen/ Aktivitätseingeschränkte Menschen/ behinderte Menschen (people/ individuals with access needs) ♦ Familien (families) ♦ Senioren (seniors) ♦ Ältere Bevölkerung (elderly population) ♦ Behinderung (disability)
 - To identify sources in French language:
Barrières ♦ (barriers) ♦ limitations (constraints) ♦ personnes handicapées/ individus atteints d'un handicap moteur (people/ individuals with access needs) ♦ familles (families) ♦ séniors (seniors) ♦ personnes âgées (elderly population) ♦ déficience/ handicap (disability)
 - To identify sources in Portuguese language:
Barreiras (barriers) ♦ restrições (constraints) ♦ pessoas/individuos com necessidades de acessibilidade (people/ individuals with access needs) ♦ familias (families) ♦ idosos (seniors) ♦ população idosa (elderly population) ♦ deficiência (disability)
 - To identify sources in Italian language:
barriere (barriers) ♦ vincoli (constraints) ♦ persone con bisogni/esigenze di accessibilità (people/ individuals with access needs) ♦ famiglie (families) ♦ anziani/senior (seniors) ♦ popolazione anziana (elderly population) ♦ disabilità (disability)

Applying different keywords/ parameters and expanding on the source of literature led to the inclusion of 75 new sources to ensure a sufficient coverage of European countries and major inbound source markets. The full list of a total of 123 sources (from the first and second round of desk research) used can be found in Annex N. Overall, the addition of these new sources contributed to:

- Substantiate or re-define the hypotheses (purpose of desk research 3)

- Enable a comparative analysis of primary and secondary data (purpose of desk research 4)

Both assisted in providing new insights that enable a better understanding of the existing barriers faced by people with access needs per tourism sector in European countries and beyond.

5.2.1.2 Development of hypotheses and hypothesis testing procedures

After the two rounds of desk research, the full set of findings represents the prerequisite for the development of hypotheses, which are essential to examine the relationships between different variables related to the barriers that people with access needs face. Important for this task is a thorough understanding that access needs do not only refer to impairments but also to difficulties encountered with daily activities and/ or travelling with children. Thus, five main categories of access needs form the basis for the analysis:

Figure 150 – Five main categories of access needs for analysis

Individuals with mobility difficulties:

e.g. walking long distances or moving in general, picking up objects, carrying, language, etc.

Individuals with sensory difficulties:

e.g. seeing, hearing or other senses, etc.

Individuals with communication difficulties:

e.g. speaking with other people or being understood, understanding complex information or concentrating, etc.

Individuals with behavioural difficulties:

e.g. fears or mental, nervous or emotional problems, learning difficulties, etc.

Individuals with hidden limitations:

e.g. allergies or intolerances to food or other substances, chronic diseases, etc.

The very few quantitative research articles that are currently available assisted in the development of hypotheses. While these articles derive from a non-European context, the developed hypotheses are essential to test relationships within a European context. Based on the information available,

hypotheses are set up to statistically test if the findings from the previous studies can be empirically supported by the primary data in the European context.

The primary data used for the testing of the hypotheses derives from the online survey (task 2b) (based on the categories of access needs outlined in Figure 150) which targets respondents from 12 European countries. The large sample size and the wide coverage of the survey data ensure that reliable results are generated. In total, 12 hypotheses are developed for task 3b, among which 9 are developed to examine the 6 identified sectors/ stages, and 3 for cross-sector comparisons. The basis of the development of the following hypotheses will be discussed in the corresponding sections of each sector.

Pre-travel stage/ Information gathering stage

- H24: The lack of information about accessible services is the most important barrier compared to other barriers (access to information before trip and at destination, and accessibility of booking services) in the pre-travel stage.
- H25: The information contained in general travel sources is more important compared to the specialised sources of information.
- H26: The information available about accessibility conditions is sufficient, reliable and accessible.

Transit: Arrival/Departure

- H27: In the transit stage, attitudinal barriers, such as how tourists with access needs are treated by service staff, are equally as important as physical access barriers, particularly in terms of assistance with getting on board, leaving or changing.

Transport at destination & access paths

- H28: Access pathways, e.g. continuous, accessible routes between facilities and services, and accessible parking spaces, are the most important aspects for people with access needs when moving around at the destination.

Accommodation

- H29: In the accommodation sector, physical access barriers, particularly related to toilets and mobility within rooms, are more important than attitudinal barriers, such as how tourists with access needs are treated by service staff.
- H30: Among the physical access barriers encountered in the accommodation sector, people with access needs are least satisfied with toilets.

Catering / Gastronomy/ Food & Beverage

- H31: The barriers faced by people with access needs in the food & beverage sector are encountered most often compared to other sectors.

Attractions/Activities

- H32: In the attraction sector, people with access needs experienced barriers most frequently with nature based activities or attractions.

Cross-sector

- H33: Across all sectors, physical access barriers are encountered more often than attitudinal barriers.
- H34: People with access needs encounter different levels of frequency of barriers across key tourism sectors (accommodation, food and beverage, attractions and transportation).
- H35: The lack of accessible toilets is the most important barrier encountered by people with access needs across all sectors.

Testing procedures

Given the types of variables in the questionnaire and the objectives of different hypothesis tests, binomial tests and paired-samples t-tests are performed. Each of the 12 hypotheses is tested against its corresponding null hypothesis. In a test, if the p-value associated with the statistic is less than 0.05, the null hypothesis is rejected. As the alternative hypothesis, the proposed hypothesis is thus supported.

If the variables related to a hypothesis are dichotomous with only two possible answers, the binomial test is used to compare the observed frequencies of these two categories with the expected frequencies. As the experienced barriers are measured by yes and no answers only, the binomial test is used to examine the hypotheses H24, H25, H26, H27, H31, H32, H33 and H34. Although the chi-square test can also be used in some cases, the sample size for each sub-category is not always above 5 which violates the minimal requirement for the chi-square test. Therefore, the binomial test is employed for a consistent and comparable result.

For the variables measured by Likert scale, the paired-samples t-test is employed to compare the difference between the means of two variables for the same group of respondents. In the

questionnaire, respondents are asked to evaluate their perceived importance and satisfaction with a five-point Likert scale. The paired-samples t-test is thus used to test the importance- or satisfaction-related hypotheses H28, H29, H30 and H35.

The purpose of the hypothesis test is to examine the barriers encountered by people with access needs (Figure 150). To analyse the barriers by category of access needs, the respondents who experience or care for people with either permanent or temporary difficulties are regarded as the sample of the answered type(s) of access needs. To further test the barriers by destination, 15 of the most popular destinations are selected based on the sample size. In addition to the 12 countries of residence in the survey, Croatia, Germany and Greece are chosen as the representative destinations. The sample of each destination includes both domestic and international travellers. A summary of testing methods, variables and samples for each hypothesis is shown in Figure 151.

Figure 151 – Summary of testing procedures

Hypotheses	Method	Variables	Samples
H24	Binomial test	q13_17 vs. q13_16, q13_18	5 types of access needs, 12 countries of origin
H25	Binomial test	q10x1	5 types of access needs, 12 countries of origin
H26	Binomial test	q20_a, q20_b, q20_c vs. 50%	5 types of access needs, 12 countries of origin
H27	Binomial test	q13_2 vs. q13_13, q13_24	5 types of access needs, 15 destinations
H28	Paired-samples t-test	q17a_1, q17a_2 vs. q12ax1_11, q12ax3_24 (averages)	5 types of access needs, 15 destinations
H29	Paired-	q17a_3, q17a_7 vs. q12ax1_2	5 types of access needs,

	samples t-test		15 destinations
H30	Paired-samples t-test	q17b_3 vs. q12bx1_7, q12bx3_20	5 types of access needs, 15 destinations
H31	Binomial test	q13_16, q13_17, q13_18 vs. q13_13, q13_24 vs. q13_11, q13_24 vs. q13_7, q13_20 vs. q13_6, q13_21 vs. q13_1, q13_4, q13_5, q13_8, q13_19, q13_22, q13_23 (average percentages)	5 types of access needs, 15 destinations
H32	Binomial test	q13_1 vs. q13_4, q13_5, q13_8, q13_19, q13_22, q13_23	5 types of access needs, 15 destinations
H33	Binomial test	q13_2 vs. q13_1, q13_4, q13_5, q13_8, q13_19, q13_22, q13_23, q13_7, q13_20, q13_6, q13_21, q13_11, q13_13, q13_24 (average percentages)	5 types of access needs, 15 destinations
H34	Binomial test	q13_16, q13_17, q13_18 vs. q13_13, q13_24 vs. q13_11, q13_24 vs. q13_7, q13_20 vs. q13_6, q13_21 vs. q13_1, q13_4, q13_5, q13_8, q13_19, q13_22, q13_23	5 types of access needs, 15 destinations

		(average percentages)	
H35	Paired-samples t-test	q17a_3 vs. q12ax1_1, q12ax1_2, q12ax1_3, q12ax1_4, q12ax1_5, q12ax1_6, q12ax1_7, q12ax1_8, q12ax1_9, q12ax1_10, q12ax1_11, q12ax1_12, q12ax2_13, q12ax2_14, q12ax2_15, q12ax2_16, q12ax2_17, q12ax2_18, q12ax3_19, q12ax3_20, q12ax3_21, q12ax3_22, q12ax3_23, q12ax3_24, q12ax3_25, q12ax3_26, q12ax3_27, q12ax3_28, q17a_1, q17a_2, q17a_4, q17a_5, q17a_6, q17a_7, q17a_8, q17a_9	5 types of access needs, 15 destinations

Note: The definition of the variables can be found in Annex O.

5.2.1.3 Comparative analysis of primary and secondary data sources

After the empirical testing of the hypotheses, a comparative analysis of primary and secondary data has been conducted, leading to new insights into the barriers faced by people with access needs for:

- different tourism sectors
- different perceptions among individuals with different access needs
- different European countries

5.2.2 Findings

This section provides an overview of reports and articles that deal with access barriers. The comparative assessment will first focus on **qualitative evaluations**. For the very few cases where quantitative data is available this information is added, leading to the establishment of a number of hypotheses, **which are subsequently tested for people with different types of access requirements in different European countries**.

In general, articles which deal with access barriers without specifying the type of restriction focus on establishing categories of barriers. The seminal paper by Smith (1987) highlights three main barriers to tourism participation. The first category relates to intrinsic barriers, including lack of knowledge, health-related problems, social ineffectiveness and physical and psychological dependency. The second category embraces environmental barriers, encompassing attitudinal, architectural, ecological, transportation, and rules and regulations barriers. The last category refers to interactive barriers highlighting skill challenges, incongruities and communication barriers¹. A study conducted in the UK confirms that these barriers also apply to people with hidden disabilities².

Eichhorn and Buhalis (2011) also refer to three categories of barriers but focus on those constraints that can be addressed by the tourism industry. These include: physical access barriers, attitudinal barriers and the lack of information³. This coincides with other studies emphasising physical barriers (e.g. inaccessible transport and holiday resorts) as well as environmental, economic, social and attitudinal barriers. The lack of information and appropriate assistance is also highlighted in addition to stressing the problem that accessibility is not consistently defined across sectors, leading to standards and legislation not being enforced⁴.

Industry reports outline the main barriers as being low income, acceptance, marketing/ information, transport, physical environment, service barriers, and wider social and economic issues (e.g. the social exclusion experienced by people with access needs as reflected in wider society)⁵.

Figure 152 provides a summary of all categories of barriers. Overall, there is a strong consensus that interactive barriers exist throughout all sectors. These interactive barriers often relate to negative, demeaning and condescending attitudes. Together with the lack of information, these barriers have a very detrimental effect on the overall quality of the tourism experience and are overall rated as being stronger than other barriers. This is mainly because people with access needs require more detailed information before embarking on a holiday experience, with information acting as an 'enabler' to travel. Further, while it is often stated that individuals can negate physical access barriers if detailed and reliable information is available, they cannot plan for avoiding negative attitudes.

¹ Smith, R.W. (1987). Leisure of Disabled Tourists - Barriers to Participation. *Annals of Tourism Research*, 14, 376-389.

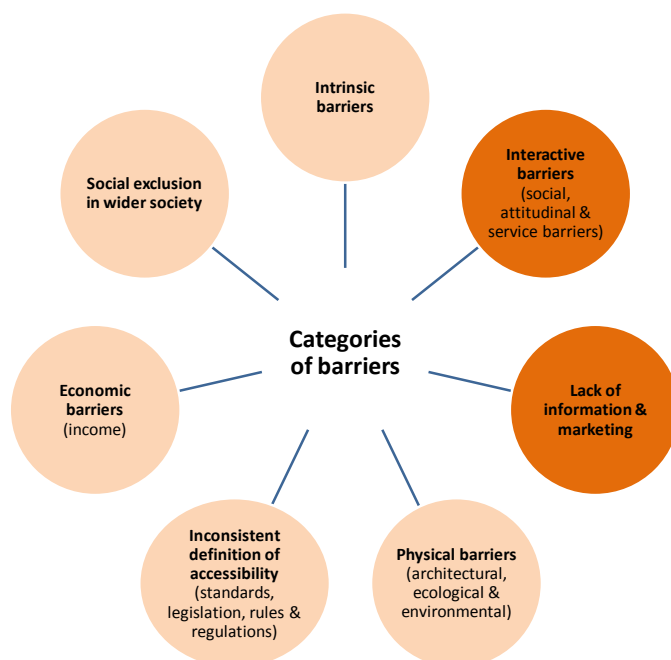
² Horgan-Jones, M., & Ringaert, L. (2001). Accessible Tourism in Manitoba. TTRA - Travel and Tourism Research Association. Niagara Falls, Canada, 14.-16. October 2001

³ Eichhorn, V. & Buhalis, D. (2011). Accessibility: A Key Objective for the Tourism Industry. IN D. Buhalis & S. Darcy (Eds.) *Accessible Tourism: Concepts and Issues*, (pp. 46-61). Bristol, Channel View Publications.

⁴ EDF - European Disability Forum (2001). EDF Position Paper: Framing the Future of European Tourism, Doc. EDF 01/13 EN, (pp. 1-10). London, European Disability Forum.

⁵ Veitch, C., & Shaw, G. (2004). Understanding Barriers to Tourism in the UK. IN British Tourist Authority (Ed.) *Insights - Tourism Intelligence Papers*, A-185, May 2004.

Figure 152 – Summary of categories of barriers



By looking at different tourism sectors, the analysis revealed the following results:

5.2.2.1 Barriers encountered in the pre-travel / information-gathering stage

The majority of articles deal with the lack of information in the pre-travel stage. Overall, this barrier exists due to the inconsistent distribution of **reliable and accurate information** about the level of accessibility of facilities and services for people with a disability^{1 2 3}. Also seniors demand high levels of information and communication and require comprehensive information before the trip⁴.

¹ Stumbo, N.J. & Pegg, S. (2005) Travelers and Tourists with Disabilities: A Matter of Priorities and Loyalties. *Tourism Review International*, 8, 195-209.

² Darcy, S. (2002) Marginalised Participation: Physical Disability, High Support Needs and Tourism. *Journal of Hospitality and Tourism Management*, 9, 61-72.

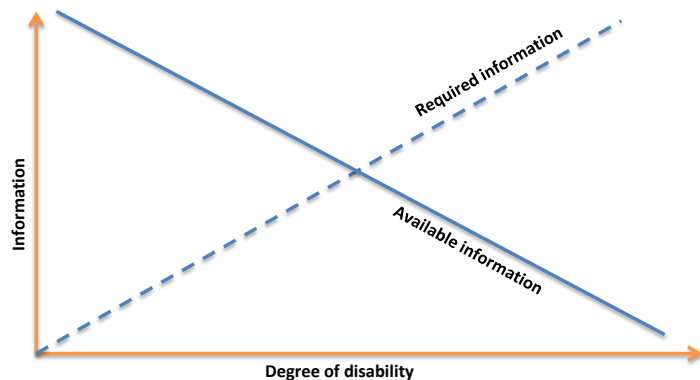
³ Darcy, S., Cameron, B. & Schweinsberg, S. (2012) Accessible Tourism in Australia. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) *Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism*, (pp. 79-113). Bristol, Channel View Publications.

⁴ Neumann, P. & Pagenkopf, K. (2011) Informieren und Orientieren IN RKW Kompetenzzentrum (Ed.) *Tourismus 50plus: Anforderungen erkennen – Wünsche erfüllen*, (pp. 14-17). Available at: http://www.dehoga-bundesverband.de/fileadmin/Inhaltsbilder/Publikationen/WifA_Tourismus_www.pdf

Reliable and accurate information is needed for all types of trips (short break, holiday or business trip) and compliance with the informational needs of people with access requirements can make the difference between winning and losing customers at the organisational or destination level¹.

Further, the lack of reliable and accurate information is recognised across all tourism sectors, including transport, accommodation, attractions and hospitality², and often represents the main barrier in the travel process. For example, in a Canadian study examining the barriers faced by senior people and individuals with a disability, it is reported that 60% of the respondents highlighted the lack of information as a primary barrier³. In a European context, 70.6% of German travellers with activity limitations highlighted that the organisation of a holiday, including the availability of information about accessible facilities, is very important. Yet, almost 40% pointed out that they experience barriers in the pre-travel stage of planning their holidays⁴. This can be mainly attributed to the imbalance of information required and information provided (Figure 153)⁵, since the higher the level of information required by people with various access needs, the lower the provision of information by service providers.

Figure 153 – Imbalance between Information Requirements and Information Provision



¹ Daines, A. & Veitch, C. (2012). Visit Britain: Leading the World to Britain. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism, (pp. 322-335). Bristol, Channel View Publications.

² Darcy, S. (1998). Anxiety to Access: Tourism Patterns and Experiences of New South Wales People With a Physical Disability, Sydney, Tourism New South Wales.

³ Horgan-Jones, M., & Ringaert, L. (2001). Accessible Tourism in Manitoba. TTRA - Travel and Tourism Research Association. Niagara Falls, Canada, 14.-16. October 2001.

⁴ BMWI (2004). Economic Impulses of Accessible Tourism for All, Berlin, Federal Ministry of Economics and Technology.

⁵ Pühretmair, F., & Nussbaum, G. (2011). Web Design, Assistive Technologies and Accessible Tourism. IN D. Buhalis & S. Darcy (Eds.) Accessible Tourism: Concepts and Issues, (pp. 274-286). Bristol, Channel View Publications.

This is confirmed by a mystery shopper study, investigating the provision of information by accommodation establishments in Austria, Switzerland and Germany. The results revealed that people with access needs were only inadequately served. It was particularly the limited supply of information specific to the individual's needs and demands that caused dissatisfaction¹. This was supported by a study in Spain, reporting that a person with access needs encounters numerous difficulties in obtaining the right information. Very few service providers offer the information that people with access needs require and as a consequence, individuals often have to contact the provider numerous times, which adds to levels of stress and anxiety in the travel planning process². As a result of these information deficiencies, a number of projects have been initiated in Italy to improve the information provision for people with access needs³.

The limited availability of information is one of four recurrent themes⁴ in the discussion about informational barriers for people with access needs:

1) Lack or limited availability of information

E.g. service providers not making information about the level of accessibility for people with different access needs available

2) Lack of accuracy of information provided

E.g. service providers claim that the hotel is fully accessible but hotel restaurant contains steps to gain entry

3) Low levels of detail of the information provided

E.g. lack of objective measurements, such as the width of the door

4) Format of the information provided

¹ Deutsches Seminar für Tourismus (DSFT) (2007). Sonderbefragung zum Thema „Barrierefreiheit“ - MysteryCheck 2007 – das Abenteuer Unterkunftssuche. Deutsches Seminar für Tourismus (DSFT), Berlin. Available at: http://www.wissen.dsft-berlin.de/medien/PRE/pre_mysterycheck-2007_dsft-studie_barrierefreiheit.pdf

² IMSERSO (2006). El Hotel Accesible - Guía para su diseño, organización y gestión. Ministerio de Trabajo y Asuntos Sociales - Secretaría de Estado de Servicios Sociales, Familias y Discapacidad. Instituto de Mayores y Servicios Sociales (IMSERSO), Madrid, Spain. Available at: <http://www.imsero.es/InterPresent2/groups/imsero/documents/binario/hotelaccesible.pdf>

³ SL & A: Turismo e Territorio (2008). Turismo Accessibile in Italia: La Domanda e L'Offerta. Available at: http://www.turismabile.it/file/lib/files/access0_rapp_tur_acc.pdf

⁴ Darcy, S. (1998) Anxiety to Access: Tourism Patterns and Experiences of New South Wales People With a Physical Disability, Sydney, Tourism New South Wales.

E.g. Alternative ways to provided information (Braille, large sign, audio recordings) are often absent and websites are often inaccessible (e.g. not providing alternative text for images), hence not following strategies and guidelines by the Web Accessibility Initiative (WAI)¹

In examining these four access barriers, **the lack of information about accessible services (1) is often stated as the main constraint**. This is supported by a study from Italy reporting that the lack of correct and reliable information on accessibility features is the most important barrier². The general lack of information is followed by the lack of accuracy (2) and less detailed information (3).

With regard to the format of information (4), the main barrier relates to websites being inaccessible for people with access needs. This contributes to the exclusion of people with mobility, visual, hearing or cognitive impairments³. Yet, the format of the information provided affects people with different impairments differently. For example, for someone in a wheelchair, the lack of alternative text for images or alternative means to provide information might not represent an obstacle, whereas it would restrict a blind person to access certain information necessary to plan his/ her holiday.

Outside Europe, numerous studies can be identified that deal with the problem of inaccessible websites. For example, a study of businesses on the West Coast of the South Island of New Zealand found that more than half of the tourist information sites were difficult to access and navigate although claiming to be accessible⁴. Particularly with regard to the format of information provided, it is argued that so far limited insights are available that outline what the 'acceptable' formats of information provision in the accommodation sector actually are⁵. Specific to the Asia-Pacific region, inaccessible websites are also a great problem as the adoption of accessible Internet technologies remains very limited⁶.

Within Europe, studies confirm the inaccessibility of websites as a major problem. For example, in Italy it has been reported that particularly young mobility-restricted individuals rely on the internet for

¹ Web Accessibility Initiative (WAI) <http://www.w3.org/WAI/guid-tech.html>

² Minuti, M.S. (2012) Turismo sostenibile, "turismo per tutti": l'accessibilità come elemento di qualità e volano di sviluppo dei sistemi turistici territoriali. Available at: <http://www.sinergiejournal.it/rivista/index.php/slow/article/view/768>

³ Pühretmair, F. (2004). It's Time to Make eTourism Accessible. IN Miesenberger, K., Klaus, J., Zagler, W. & Burger, D. (Eds.) Computers Helping People with Special Needs, (pp. 272-279). Berlin, Springer.

⁴ Rhodda, S. (2012). Accessible Tourism in New Zealand. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism, (pp. 114-123). Bristol, Channel View Publications.

⁵ Darcy, S. (2007). A Methodology for Testing Accessible Accommodation Information Provision Formats. CAUTHE 2007 Conference 'Tourism: Past Achievements, Future Challenges', Sidney, Australia. Available at: http://www.accessibletourism.org/resources/sdarcy_2007_cauthe_conference_paper_en.pdf

⁶ Economic and Social Commission for Asia and the Pacific (2003). Barrier-free Tourism for People with Disabilities in the Asian and Pacific Regions, United Nations, New York. Available at: http://www.unescap.org/ttdw/Publications/TPTS_pubs/pub_2316/pub_2316_tor.pdf

obtaining information. Yet, often the information is misleading so that young mobility-restricted adults are forced to call the service provider to find out that the establishment is not accessible to them¹. Investigating the usability of websites for different user groups, a Swiss study found that none of the 50 websites which were tested is fully accessible for people with multiple restrictions, blind or visually impaired people or seniors². This can be supported by a study conducted in 2004 showing that none of the destination management systems and web pages of the National Tourism Boards in Europe are accessible due to not complying with the guidelines by the Web Accessibility Initiative (WAI)³. The website analysis (task 2a) has also shown that only 17% of the investigated websites are technically accessible at a high level, which causes difficulties to people with access needs to obtain the information they need to successfully plan their holiday trip. Particularly disadvantaged and excluded are individuals with visual difficulties or people with special needs. The general lack of implementing access standards also leads to navigation difficulties on other devices which affect all users regardless of their specific access needs. Thus, it can be argued that inaccessible websites still remain a major obstacle in the pre-travel information gathering stage.

Overcoming the barrier of accessible websites is of high importance as research shows that people with disabilities use the internet more than people without disabilities⁴. Further, the internet is not only used as a vital source for obtaining travel-related information about establishments and destinations, but represents also a central booking tool. In the United States, a study confirms the importance of the **internet to book holidays**. For those individuals that search for information online, 33% also booked their trips online in 2002. In 2005, half of the people who travel (51%) used the internet to book their trips. This is higher than the usage by the general population⁵.

¹ Consiglio dei Ministri - Dipartimento della Gioventù (no date). Turisti Senza Ostacoli – Indagine Sull'Evoluzione Della Domanda E Dell'Offerta del Turismo Accessibile. Available at:

http://www.unisa.it/uploads/2405/turisti_senza_ostacoli.pdf

² Zugang für alle (2007) Schweizer Accessibility-Studie 2007 - Bestandesaufnahme der Zugänglichkeit von Schweizer Websites des Gemeinwesens für Menschen mit Behinderungen. Schweizerische Stiftung zur behindertengerechten Technologienutzung, Schweiz. Available at:

https://www.google.co.uk/url?sa=t&rct=j&q=&esrc=s&source=web&cd=7&ved=0CFUQFjAG&url=http%3A%2F%2Fwww.edi.admin.ch%2Fde%2F01700%2F01707%2Findex.html%3Fdownload%3DNHzLpZeg7t%2Clnp6l0NTU042l2Z6ln1acy4Zn4Z2qZpnO2Yug2Z6gpJCDe3x3gGym162epYbg2c_JiKbNoKSn6A--%26lang%3Dde&ei=a4DEUYyvPKqF4gTn9YGwBg&usq=AFQjCNFmDdMR0mQHWD_JTRfnow1La7bc0w&sig2=Gii_coMC6jc6_CVRvsvPvw

³ Oertel, B. et al., (2004). Accessibility of Tourism Web Sites within the European Union. Proceedings of the 11th International Conference on Information and Communication Technologies in Tourism (ENTER 2004). ISBN 3-211-20669-8, Springer Verlag, pp. 358-368, Cairo, Egypt.

⁴ Huber, W. & Vitouch, P. (2008) Usability and Accessibility on the Internet: Effects of Accessible Web Design on Usability. 11th International Conference on Computers Helping People with Special Needs (ICCHP 2008). ISBN 3-540-70539-2, Springer Verlag, pp. 482-489, Linz, Austria.

⁵ Van Horn, L. (2012). The United States: Travellers with Disabilities. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism, (pp. 65-78). Bristol, Channel View Publications.

In addition to websites not being accessible, hence disallowing an efficient and effortless booking procedure, it is the existence of segregated booking systems that represents an additional barrier. This was particularly noted when analysing airline procedures, as people with access needs will need to call airlines to ensure that the airline will permit them onto the aircraft. During the phone conversation, people with access needs are often asked about their level of health, independence, equipment needs and baggage, which leads to feelings of discomfort. Further, low cost carriers have introduced 'independence criteria', which state that if a person needs assistance for putting on the oxygen mask, for example, then he/ she is required to travel with a 'carer'¹.

The same situation occurs when analysing current practices by tour operators. For example, in May 2013, Thomson/ TUI told a blind couple just two weeks before their holiday and after they had booked a package to Mallorca that they were not allowed to travel without a chaperone².

This already shows that **tour operators and travel agencies** often also represent a barrier in the pre-travel stage. For example, a study conducted in the US highlights four main difficulties for people with access needs when dealing with travel agencies and tour operators. These are:

Travel agencies and tour operators not having access to all disability-related information, which is necessary for people with access needs to plan their trip

E.g. this is the case when not all service providers that are part of the package holiday (e.g. an attraction facility) provide information about the level of accessibility

Travel agencies and tour operators not being able to provide information about ground transportation

E.g. lack of comprehensive information about ground transportation related to air travel

Not providing accurate information about accessibility

E.g. hotel and restaurants which are less than fully accessible for different access requirements

Not understanding the different needs of people with access needs³

E.g. often service providers only think about wheelchair users, ignoring the access needs of people with sight, speech or hearing impairments, for example

¹ Darcy, S. (2007). Improving Airline Practices by Understanding the Experiences of People with Disabilities. Travel and Tourism Research Association - TTRA. Charlottetown, Canada, TTRA, 17.- 20. October 2007.

² TravelMole (2013). Thomson tells blind couple they can't travel alone, May 2nd 2013, http://www.travelmole.com/news_feature.php?news_id=2006258

³ Cavinato, J., & Cuckovich, M. (1992). Transportation and Tourism for the Disabled: An Assessment. Transportation Journal 31, 46-53.

In fact, it can be argued that the lack of understanding of different needs of individuals with different access requirements triggers the inability to provide accurate and comprehensive information, which is necessary to successfully plan a holiday trip. This is supported by Stumbo and Pegg (2005), highlighting that the information provided by tour operators is often misleading and inaccurate. For example, 45% of people with a physical impairment in New South Wales/ Australia noted that the information provided by tour operators is either misleading or inaccurate¹, which often leads to high levels of dissatisfaction with travel agencies and tour operators². As a consequence, people with access needs have to rely on their own experiences and the recommendations of others with similar access needs³.

An additional barrier relates to the discrimination by travel services and operators⁴. For example in Hong Kong, a research study reported that some travel agents hold the extreme belief that travelling and having a disability are not compatible. Further, and by focusing on specific types of impairments, it is argued that the inflexible design of package holidays is seen as major problem in addition to negative attitudes on behalf of travel agencies⁵. This was highlighted by mobility and visually impaired individuals alike.

Thus, in sum, the main barriers faced by people with access needs in the pre-travel stage are summarised in Figure 154.

¹Darcy, S. (1998). *Anxiety to Access: Tourism Patterns and Experiences of New South Wales People With a Physical Disability*, Sydney, Tourism New South Wales.

² Hitsch, W. (2005). *Probleme, Risiken und Chancen des barrierefreien Tourismus*. Institut für Unternehmensführung, Tourismus und Dienstleistungswirtschaft, Fakultät für Betriebswirtschaft der Leopold-Franzens-Universität Innsbruck. Available at: <http://www.ibft.at/ibft/doc/Diplomarbeit%20-%20Barrierefreies%20Reisen.pdf>

³ Stumbo, N.J., & Pegg, S. (2005). Travelers and Tourists with Disabilities: A Matter of Priorities and Loyalties. *Tourism Review International*, 8, 195-209.

⁴ EDF - European Disability Forum (2001). EDF Position Paper: Framing the Future of European Tourism, Doc. EDF 01/13 EN, (pp. 1-10). London, European Disability Forum.

⁵McKercher, B., Packer, T., Yau, M.K. & Lam, P. (2003). Travel agents as facilitators or inhibitors of travel: Perceptions of people with disabilities, *Tourism Management*, 24:465-474.

Figure 154 – Barriers in the pre-travel stage

Sources	Barriers
Travel agencies/Tour operators	Lack of accuracy/reliability of information
	Lack of availability of information
	Lack of detailed information
	Not understanding the needs of people with access needs
	Negative attitudes
Websites of individual service providers	Lack of accuracy/reliability of information
	Lack of availability of information
	Lack of detailed information
	Inappropriate format
	Segregated booking systems

The barriers reported so far relate to mainstream sources, which triggers the need to compare the **importance of mainstream versus specialised sources**. A research study from Sweden highlights that people with access needs often do not trust the information that is provided in mainstream brochures¹. This indicates that general information sources, such as websites of individual service providers, are perceived as falling short in providing reliable information.

It is hence argued that in contrast to mainstream operators, specialised tour agencies are able to provide reliable and accurate information. For example, in France, specialised organisations exist for people with mobility restrictions (e.g. individuals with osteoarthritis) to help with information provision

¹ Müller, L. (2012). Accessible Tourism in Sweden: Experiences, Stakeholders, Marketing. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism, (pp. 157-167). Bristol, Channel View Publications.

particularly at the pre-travel stage¹. Also 'Accessible Portugal' (a specialised tour operator) stresses that the specialised organisation is able to address the main difficulties that a person with access needs might encounter².

In this context, research from Denmark emphasises that disability organisations play an important role by providing trustworthy information³, ultimately assisting in reducing informational barriers. Many of these organisations operate accessible tourism information schemes. A study investigating accessible tourism information schemes⁴ established a list of existing schemes through secondary research. With the subsequent employment of snowball sampling, 43 access schemes were identified. The geographical coverage of the schemes is shown below in Figure 155.

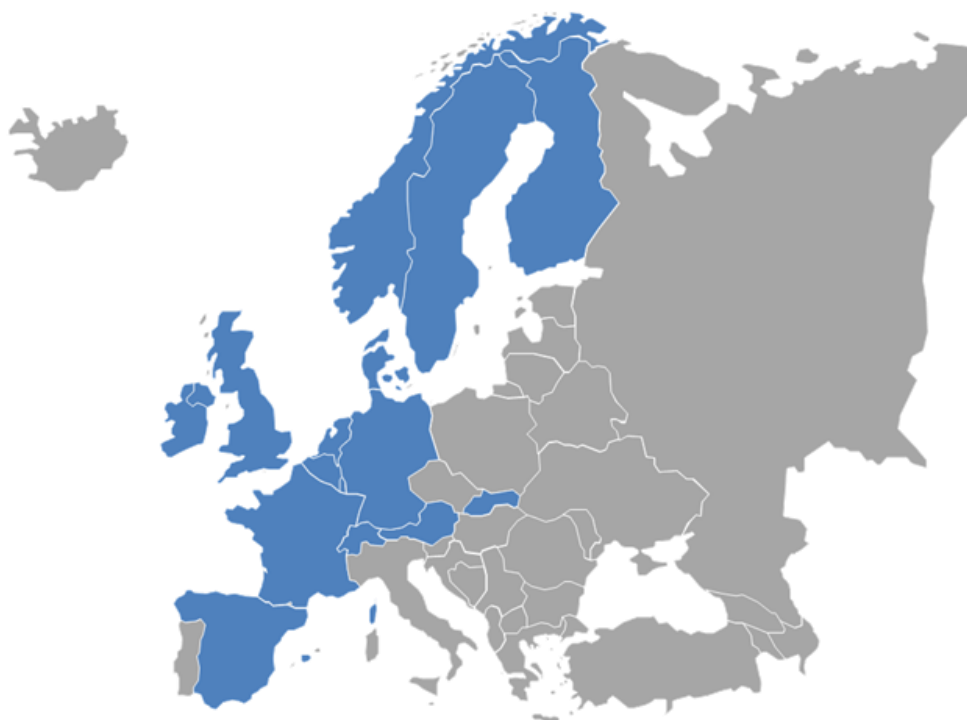
¹ Euler-Ziegler, L., & Bieganowski, G. (2004). Arthrose, Handicap, voyages et loisirs: Le regard des médecins et des professionnels du tourisme, *La Presse Médicale*, 33(9):19–20.

² Prates, J., & Garcia, A. (2009). Turismo Acessível em Portugal - O Caso do Turismo para Pessoas com Mobilidade Reduzida, *Revista Turismo & Desenvolvimento* N.º 11, pp.171-173.

³ Stilling Blichfeldt, B., & Nicolaisen, J. (2011). Disabled Travel: Not Easy, But Doable, *Current Issues in Tourism*, 14(1):79-102.

⁴ Eichhorn, V., Miller, G., Michopoulou, E., & Buhalis, D. (2008) Enabling Access to Tourism through Information Schemes. *Annals of Tourism Research*, 35, 189-210.

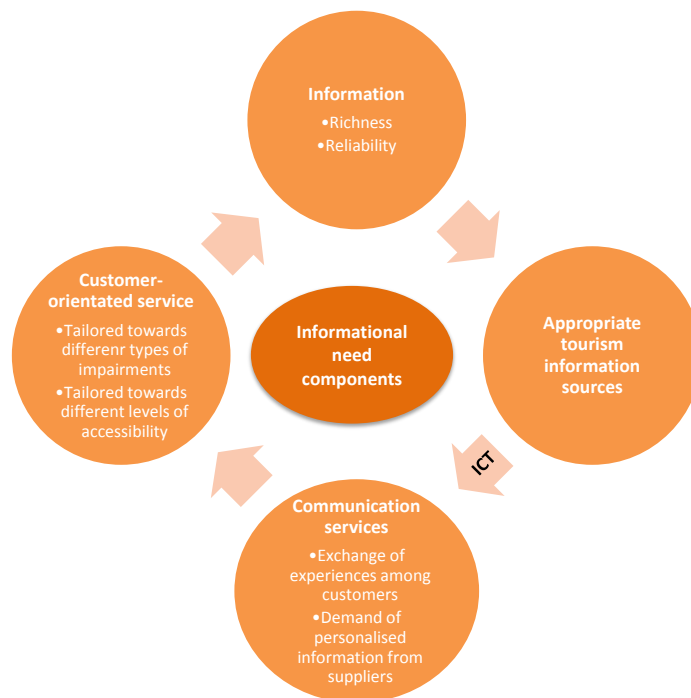
Figure 155 – Geographical coverage of analysed Accessible Tourism Information Schemes



Austria, Belgium, Denmark, England, Finland, France, Germany, Ireland, Luxembourg, Scotland, Slovakia, Spain, Sweden, Switzerland, Norway, The Netherlands, UK, Wales and Israel (not shown on the map)

The majority of these schemes were set up by charities, private or non-governmental organisations, and nine schemes were operated by governmental or public bodies. All schemes were sent a survey covering aspects such as information content, target audience, accessibility information, online and offline schemes, and accessibility criteria. All organisations operating a scheme and participating in this survey were ensured anonymity. The responses obtained from these organisations were checked against a framework of inter-related informational needs, as shown in Figure 156.

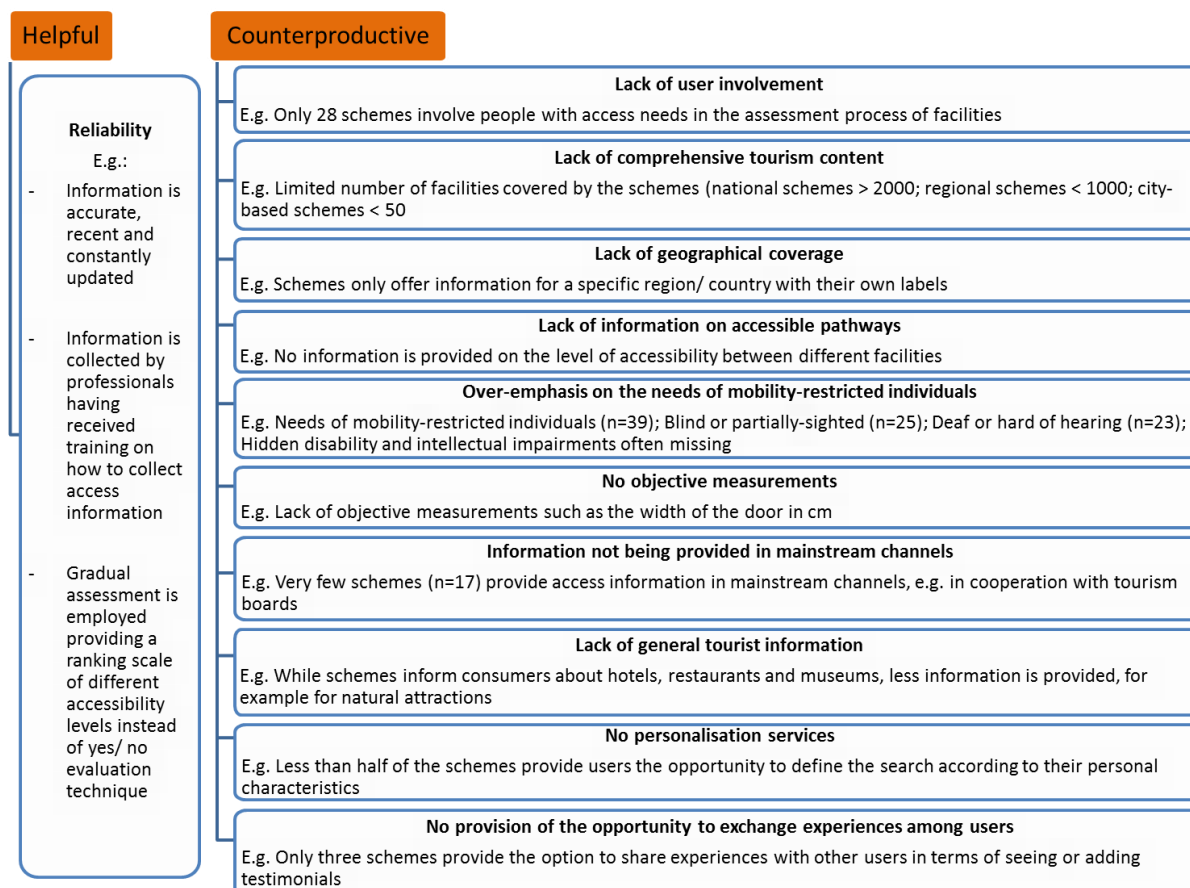
Figure 156 – Framework of interrelated information need components¹



Summarising the findings on access schemes assists in outlining the areas in which access schemes are helpful or counterproductive (Figure 157). Apart from providing examples to illustrate the positive as well as negative aspect of the 43 schemes, the evaluation contains qualitative and quantitative arguments.

¹ Eichhorn, V., Miller, G., Michopoulou, E., & Buhalis, D. (2008). Enabling Access to Tourism through Information Schemes. *Annals of Tourism Research*, 35, 189-210.

Figure 157 – Useful and counterproductive aspects of access schemes¹



While specialised organisations are able to provide accurate and reliable information, mainly due to operating access schemes, the analysis above shows that schemes are limited in number and geographical coverage. Furthermore, a study from the Rhône-Alpes region in France reports that the accessibility labelling system that was developed only offers limited economic benefits for tourism providers so far².

¹ Eichhorn, V., Miller, G., Michopoulou, E. & Buhalis, D. (2008). Enabling Access to Tourism through Information Schemes. *Annals of Tourism Research*, 35, 189-210.

² Tourisme & Handicap (2011). *Tourisme et Handicap - État des Lieux et Perspectives*. Rhône-Alpes Tourisme, Association Tourisme et Handicaps. Available at: <http://documents.scribd.com.s3.amazonaws.com/docs/23ls7j8v0g16p8cf.pdf?t=1318584308>

In addition, Norway's experience in developing an accessibility labelling system for tourist destinations highlights three main challenges in the process of standardising access criteria¹:

1. Variety of user requirements within each user group
 - *E.g. competing and conflicting interests have to be dealt with*
2. Conflicts of requirements between different groups
 - *E.g. requirements of one user group may conflict with requirements of another user group*
3. Balance between requirements of people with access needs and the requirements for designing a practical market-oriented tool
 - *E.g. the requirements of people have to be met while at the same time ensuring the industry that the tool can be implemented easily*

Given these difficulties and counterproductive aspects as highlighted above, specialised sources of information might not be able to fully overcome the informational barriers that people with access needs face. In addition, specialised operators have been criticised for restricting the individual input by people with access needs, hence limiting the flexibility with regard to changing elements of the package by the traveller him/herself². Also the higher costs for this type of travel represents a major barrier³. All these arguments have led numerous European countries to highlight the importance of mainstreaming accessibility information^{4 5 6 7}.

Based on the whole discussion on barriers encountered in the pre-travel/ information gathering stage, three main problem areas can be identified which are used for the hypotheses testing stage.

¹ Jørgensen, I.S. (2008). Norway's experience with standard for accessible tourist destinations. ISO Management Systems. Available at:

http://www.accessibletourism.org/resources/norway_accessible_destinations_standards_article.pdf

² Cavinato, J., & Cuckovich, M. (1992). Transportation and Tourism for the Disabled: An Assessment. *Transportation Journal* 31, 46-53.

³ Cavinato, J., & Cuckovich, M. (1992) Transportation and Tourism for the Disabled: An Assessment. *Transportation Journal* 31, 46-53.

⁴ Neumann, P. (2012). Accessible Tourism for All in Germany. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) *Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism*, (pp. 46-54). Bristol, Channel View Publications.

⁵ Voulgaropoulos, N., Strati, E. & Fyka, G. (2012). Accessible Tourism in Greece: Beaches and Bathing for All. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) *Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism*, (pp. 55-64). Bristol, Channel View Publications.

⁶ Müller, L. (2012). Accessible Tourism in Sweden: Experiences, Stakeholders, Marketing. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) *Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism*, (pp. 157-167). Bristol, Channel View Publications.

⁷ Sandøy Tveitan, B. (2012). VisitOSLO, Norway: Supporting Accessible Tourism Content within Destination Tourism Marketing. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) *Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism*, (pp. 297-309). Bristol, Channel View Publications.

First, the literature from European and non-European countries has highlighted throughout that the main barrier encountered in the holiday planning stage relates to the lack of information about accessible services. By comparing the importance of obtaining information versus booking procedures, it has been shown that all these elements encompass barriers, mainly due to the inaccessibility of websites. Yet, the need to first receive information about accessible services is seen as more important than the subsequent booking process. Hence, the hypothesis is:

H24: The lack of information about accessible services is the most important barrier compared to other barriers (access to information before trip and at destination, and accessibility of booking services) in the pre-travel stage.

Second, while specialised operators together with the operation of access schemes are able to provide information about accessible services, a strong need has been identified to mainstream information about accessible products and services. This has been supported by people with access needs as it is argued that tourism will not become inclusive if the information needed for planning a trip cannot be found in the same channels as used by the able-bodied population¹. Given the importance attached to mainstream sources, the hypothesis to be tested for European travellers with access needs is:

H25: The information contained in general travel sources is more important compared to the specialised sources of information.

Third, while information provided in mainstream channels is regarded as key for overcoming the barriers in the pre-travel/ information gathering stage, and ultimately for overcoming exclusion in this tourism sector, it is still important to ensure that the information used by travellers with access needs is sufficient, reliable and accessible, leading to the third and final hypothesis for the pre-trip stage:

H26: The information available about accessibility conditions is sufficient, reliable and accessible

After testing the first hypothesis H24 (The lack of information about accessible services is the most important barrier compared to other barriers (access to information before trip and at destination,

¹ Eichhorn, V., Miller, G., Michopoulou, E., & Buhalis, D. (2008) Enabling Access to Tourism through Information Schemes. *Annals of Tourism Research*, 35, 189-210.

and accessibility of booking services) in the pre-travel stage), findings reveal that the hypothesis is partially supported.

The lack of information about accessible services is the most important barrier in the pre-travel stage which confirms findings from outside Europe¹ and Italy². Statistically, information about accessible services is more important than access to information before trip and at destination, and as important as the accessibility of booking services. By comparing different types of access needs, the results revealed that for individuals with communication and hidden difficulties, information about accessible services, access to information before and at the destination and the accessibility of booking services weigh equally (Figure 158).

¹ Darcy, S. (1998) *Anxiety to Access: Tourism Patterns and Experiences of New South Wales People With a Physical Disability*, Sydney, Tourism New South Wales.

² Minuti, M.S. (2012) *Turismo sostenibile, "turismo per tutti": l'accessibilità come elemento di qualità e volano di sviluppo dei sistemi turistici territoriali*. Available at:
<http://www.sinergiejournal.it/rivista/index.php/slow/article/view/768>

Figure 158 – H24: Barriers - Pre-travel stage/ Information gathering stage by type of access need

Type of access need	Hypothesis supported	Most important barrier	Barrier experienced
Mobility	Partially*	Availability of information about accessible services	12.6%
Senses	Partially*	Availability of information about accessible services	12.2%
Communication	No**	Availability of information about accessible services	13.6%
Behaviour	Partially*	Availability of information about accessible services	13.3%
Hidden limitations	No**	Availability of information about accessible services	11.2%

Note: * The listed barrier is not always statistically more important than other barriers; ** The listed barrier is not statistically more important than any other barriers.

Particularly for people with communication difficulties, understanding the complex information entailed in booking procedures represents a major challenge, while for people with hidden restrictions, such as food intolerance and allergies, the access to information while being on holiday is also important. The lack of this information while being at the destination makes it harder to find, for example, suitable food and beverage establishments where the offer corresponds to their needs.

Given that individuals have different needs and wants, the analysis by country of origin of the respondents emphasises that people from Bulgaria experience the highest percentages of all barriers – lack of information about accessible services (17.2%), access to information before the trip and at the destination (16.4%), and the accessibility of booking services (17.2%) – compared to citizens from other European countries (Figure 159 and Annex O).

Figure 159 – H24 Barriers - Pre-travel stage/ Information gathering stage by country of origin

Country of Origin	Hypothesis supported	Most important barrier	Barrier experienced
Belgium	Yes	Availability of information about accessible services	12.3%
Bulgaria	No*	Availability of information about accessible services Accessibility of booking services	17.2%
France	No*	Accessibility of booking services	13.3%
Ireland	No*	Accessibility of booking services	10.9%
Italy	No*	Access to information before trip and at destination Availability of information about accessible services	10.0%
Lithuania	No*	Availability of information about accessible services	11.1%
Poland	No*	Accessibility of booking services	15.1%
Slovenia	No*	Availability of information about accessible services	7.1%
Spain	No*	Availability of information about accessible services	13.0%
Sweden	No*	Accessibility of booking services	8.9%
The Netherlands	No*	Access to information before trip and at destination Availability of information about accessible services	7.7%
United Kingdom	No*	Accessibility of booking services	9.7%

Note: * The listed barrier is not statistically more important than any other barriers.

Importantly, residents in Belgium perceive the lack of information about accessible services as the main barrier compared to people from other European countries where the hypothesis (H24) could not be supported. As shown in the Annex O, the percentages of the other two barriers (5.7% and 4.9% respectively) are lower than the average, which makes the lack of information about accessible services stand out as the most significant barrier for travellers from Belgium. Additionally, three potential interpretations can be provided for this result:

1. It is possible that respondents referred to the lack of information sources outside their home country.
2. If respondents referred to the lack of information sources in Belgium, then the argument can be established that Belgium has limited success in offering access information for its citizens. Accessibility analyses in 1999 and 2000 have shown that parts of Belgium need to improve their infrastructure in terms of accessible facilities together with the provision of reliable information. Particularly with regard to the latter, the lack of information has been identified as a major obstacle for people with access needs in the region of Flanders. While a number of efforts were invested to improve the situation over the years, it is argued that informational barriers still persist¹
3. Over the years, Belgium has developed various labels for accessible tourism, such as the Flemish label established by the 'Toegankelijkheidsbureau'². While labels ensure high levels of reliability, the absence of information in mainstream channels might explain why people from Belgium report the lack of information about accessible services as the most important barrier. In this case, it is not necessarily the general lack of access information but the perceived lack of this vital information as part of mainstream travel sources which is being expressed.

The previous argument leads directly into presenting the results of H25 (The information contained in general travel sources is more important compared to the specialised sources of information). After the hypothesis testing procedure, H25 is supported. The information contained in general travel sources is more important compared to the specialised sources of information when investigating the responses by individuals with different access needs (Figure 160). Individuals with mobility, sensory, communication, behavioural or hidden difficulties all

¹ Ghijssels, P. (2012). Accessible Tourism in Flanders: Policy Support and Incentives. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism, (pp. 36-45). Bristol, Channel View Publications.

² Ghijssels, P. (2012). Accessible Tourism in Flanders: Policy Support and Incentives. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism, (pp. 36-45). Bristol, Channel View Publications.

emphasise the importance of information being provided in mainstream communication sources with an almost identical percentage average of 7% to 7.1%, compared to an average of 2.6% to 3.1% for specialised sources (Annex O).

Figure 160 – H25 Barriers: Pre-travel stage/ Information gathering stage: importance of general information sources by type of access need

Type of access need	Hypothesis supported	More important sources of information	Average percentage
Mobility	Yes	General sources	7.0%
Senses	Yes	General sources	7.1%
Communication	Yes	General sources	7.0%
Behaviour	Yes	General sources	7.1%
Hidden limitations	Yes	General sources	7.0%

Equally, testing the hypothesis by different countries of origin of the respondents revealed the importance of general/ mainstream sources for the provision of information (Figure 161).

Figure 161 – H25 Barriers: Pre-travel stage/ Information gathering stage: importance of general information sources by country of origin

Country of origin	Hypothesis supported	Most important sources of information	Average percentage
Belgium	Yes	General sources	7.1%
Bulgaria	Yes	General sources	7.2%
France	Yes	General sources	7.1%
Ireland	Yes	General sources	7.3%
Italy	Yes	General sources	6.6%
Lithuania	Yes	General sources	7.0%
Poland	Yes	General sources	7.2%
Slovenia	Yes	General sources	7.2%
Spain	Yes	General sources	7.0%
Sweden	Yes	General sources	7.3%
The Netherlands	Yes	General sources	7.2%
United Kingdom	Yes	General sources	7.2%

These findings are in line with and correspond to numerous European initiatives. For example, in Germany, the need to mainstream accessibility (including the provision of information) was recognised by the ‘German Federal Government Policy Guidelines on Tourism’¹. Also in Greece recommendations have been published on how to mainstream accessible tourism and the provision

¹ Neumann, P. (2012) Accessible Tourism for All in Germany. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism, (pp. 46-54). Bristol, Channel View Publications.

of information¹. The same holds true for Sweden as providing information in mainstream channels is regarded as being of great importance². At the regional level, the presentation of accessibility content within mainstream channels is emphasised since it allows for capturing a larger and wider audience for all channel partners of VisitOslo³.

Having stressed the importance of general/ mainstream information sources, it is also vital to identify the specific sources which are used for obtaining travel-related information. By comparing individuals with different types of access needs, it is recognisable that for people with mobility and communication difficulties as well as for persons with hidden restrictions, information provided by family, friends or colleagues is the most important source, followed by the individual's own experience and tourism websites. For individuals with sensory and behavioural difficulties, tourism websites and their own experiences 'are'/ 'are almost' given equal importance (Figure 162 to Figure 166). Social media is the least important primary source and also specialised sources, such as specialised websites and specialised guidebooks rank relatively low.

¹ Voulgaropoulos, N., Strati, E., & Fyka, G. (2012). Accessible Tourism in Greece: Beaches and Bathing for All. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism, (pp. 55-64). Bristol, Channel View Publications.

² Müller, L. (2012). Accessible Tourism in Sweden: Experiences, Stakeholders, Marketing. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism, (pp. 157-167). Bristol, Channel View Publications.

³ Sandøy Tveitan, B. (2012). VisitOSLO, Norway: Supporting Accessible Tourism Content within Destination Tourism Marketing. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism, (pp. 297-309). Bristol, Channel View Publications.

Figure 162 – H25 Barriers: Pre-travel stage/ Information gathering stage: Most important source of information – Individuals with mobility difficulties

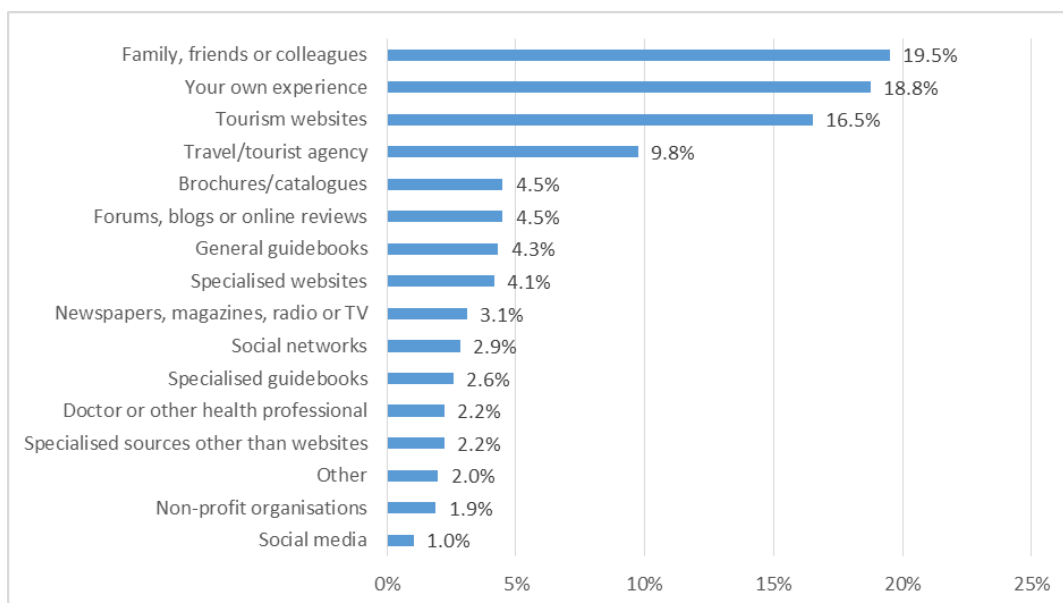


Figure 163 – H25 Barriers: Pre-travel stage/ Information gathering stage: Most important source of information – Individuals with sensory difficulties

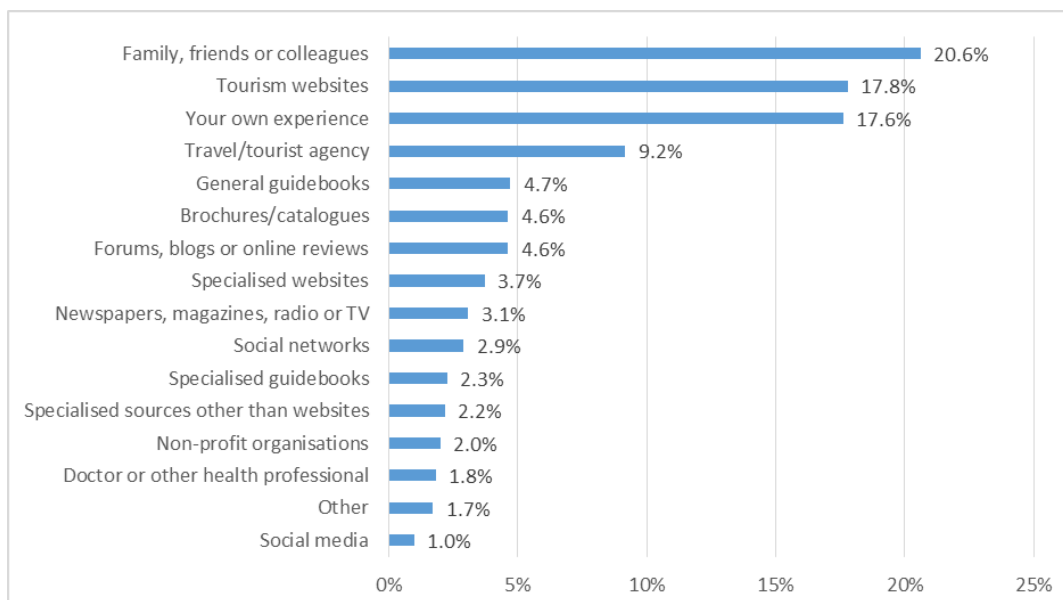


Figure 164 – H25 Barriers: Pre-travel stage/ Information gathering stage: Most important source of information – Individuals with communication difficulties

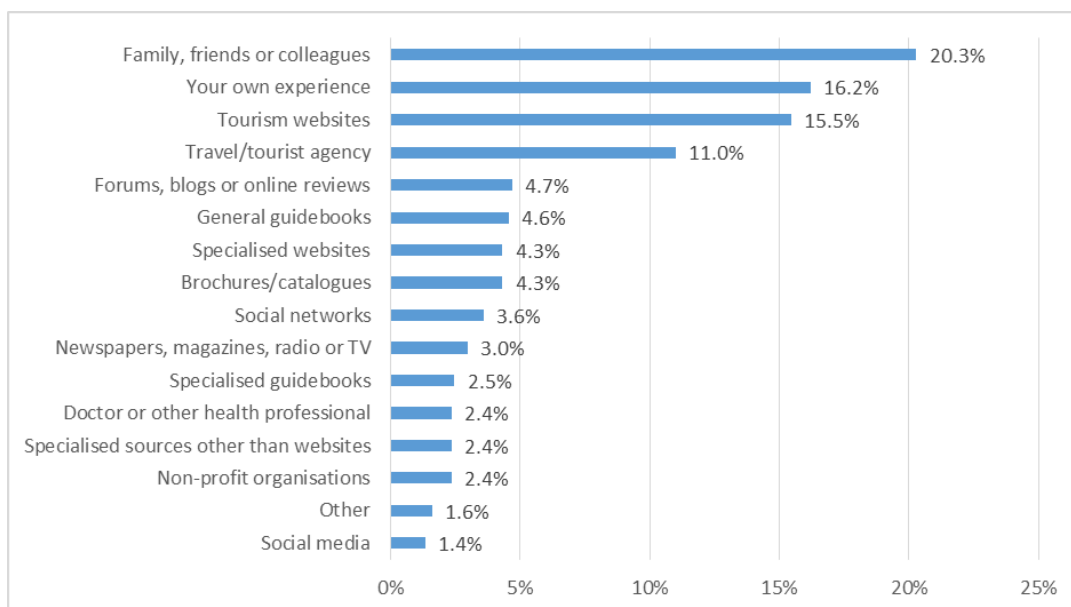


Figure 165 – H25 Barriers: Pre-travel stage/ Information gathering stage: Most important source of information – Individuals with behavioural difficulties

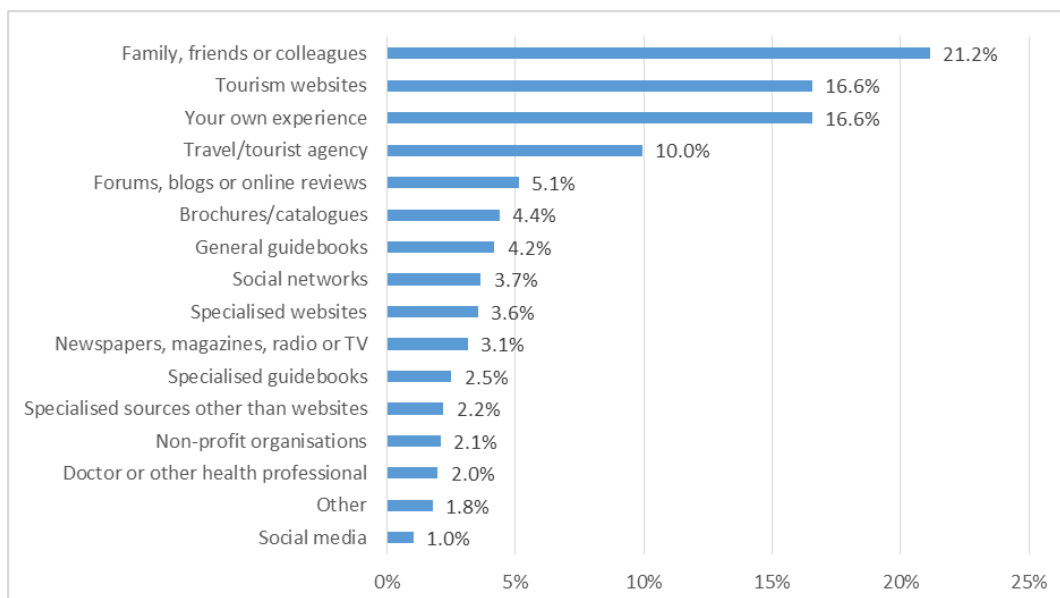
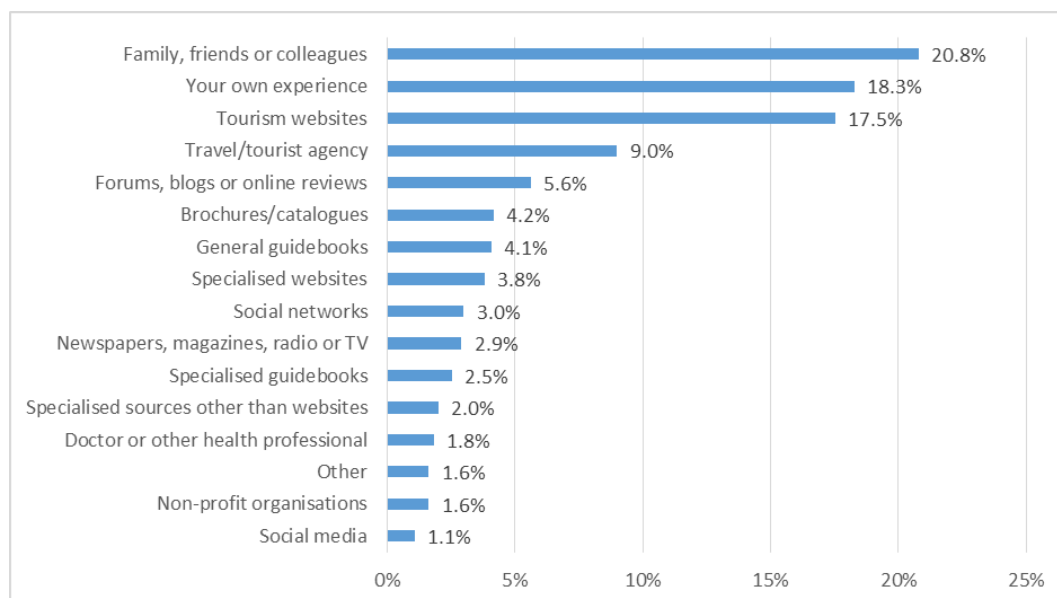


Figure 166 – H25 Barriers: Pre-travel stage/ Information gathering stage: Most important source of information – Individuals with hidden difficulties



These findings are in line with other research studies:

1st ranked source: Family, friends or colleagues

It is often argued that word-of-mouth communications are regarded as highly valued and utilised by people with access needs¹. Research in Spain has also shown that people with access needs rely on family and friends when searching for travel-related information as the main source of information. 36% said that family members and friends are 'often used' and 'sometimes used' by 36.8%². The results further reflect the situation outside Europe as 85% of American travellers with access needs highlighted that word-of-mouth is an extremely important source of information³.

¹ Ray, N.M., & Ryder, M.E. (2003). 'Eilities' tourism. An exploratory discussion of the travel needs and motivations of the mobility disabled. *Tourism Management*, 24, 57-72.

² Huesca González, A.Mª., & Ortega Alonso, E. (2005) Hábitos y actitudes hacia el Turismo de las Personas con Discapacidad Física. Available at: http://www.snr.gob.ar/uploads/TA-Otros-27-HabActhaciaelTURISMO-2da_edic-PREDIF.pdf

³ Van Horn, L. (2012). The United States: Travellers with Disabilities. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) *Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism*, (pp. 65-78). Bristol, Channel View Publications.

2nd ranked source: Own experience

The results confirm that individuals often have to rely on their own experiences when planning a holiday¹. This also indicates that people with access needs frequently return to destinations which they have experienced and tested as it ensures that the level of accessibility actually corresponds to their requirements. It is the own experience that provides the guarantee that the destination will offer an enjoyable holiday.

3rd ranked source: Tourism websites

The importance of tourism websites as a source of information substantiates the assumption that the internet is an important source for people with access needs^{2 3}. This corresponds to research findings from America, where almost half of the respondents (46%) reported that the internet is used for obtaining travel-related information⁴. Also in an European context, the Internet is stated as an 'often used' source by 20.7% of respondents in Spain⁵.

Also in line with other research is that only a few people with access needs use dedicated, specialised websites and guidebooks. In Spain, only 9% of survey participants reported that disability brochures are 'often used' and 18.3% said that they are 'sometimes used'⁶.

While highlighting the importance of general/ mainstream sources of information, it is central to investigate the reliability of the information sources consulted, which was stressed as a key aspect when discussing the barriers faced by people with access needs in the pre-travel stage. This is addressed by hypothesis **H26 (the information available about accessibility conditions is sufficient, reliable and accessible)**.

¹ Stumbo, N.J., & Pegg, S. (2005) Travelers and Tourists with Disabilities: A Matter of Priorities and Loyalties. *Tourism Review International*, 8, 195-209.

² Huber, W., & Vitouch, P. (2008) Usability and Accessibility on the Internet: Effects of Accessible Web Design on Usability. 11th International Conference on Computers Helping People with Special Needs (ICCHP 2008). ISBN 3-540-70539-2, Springer Verlag, pp. 482-489, Linz, Austria.

³ Pühretmair, F. (2004). It's Time to Make eTourism Accessible. IN Miesenberger, K., Klaus, J., Zagler, W. & Burger, D. (Eds.) *Computers Helping People with Special Needs*, (pp. 272-279). Berlin, Springer.

⁴ Van Horn, L. (2012). The United States: Travellers with Disabilities. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) *Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism*, (pp. 65-78). Bristol, Channel View Publications.

⁵ Huesca González, A.Mª., & Ortega Alonso, E. (2005) Hábitos y actitudes hacia el Turismo de las Personas con Discapacidad Física. Available at: http://www.snr.gob.ar/uploads/TA-Otros-27-HabActhaciaelTURISMO-2da_edic-PREDIF.pdf

⁶ Huesca González, A.Mª. & Ortega Alonso, E. (2005). Hábitos y actitudes hacia el Turismo de las Personas con Discapacidad Física. Available at: http://www.snr.gob.ar/uploads/TA-Otros-27-HabActhaciaelTURISMO-2da_edic-PREDIF.pdf

The results revealed that H26 is supported. The information available about accessibility conditions is regarded as sufficient, reliable and accessible as the hypothesis could be supported for all types of access needs (Figure 167).

Figure 167 – H26 Barriers: Pre-travel stage/ Information gathering stage: Information is sufficient, reliable and accessible by type of access need

Type of access need		Hypothesis supported	Percentage answered "Yes"
Sufficient information			
Mobility	Yes		83.4%
Senses	Yes		84.6%
Communication	Yes		84.1%
Behaviour	Yes		83.1%
Hidden limitations	Yes		83.8%
Reliable information			
Mobility	Yes		80.0%
Senses	Yes		81.4%
Communication	Yes		81.4%
Behaviour	Yes		80.5%
Hidden limitations	Yes		79.3%
Accessible information			
Mobility	Yes		87.0%
Senses	Yes		88.3%

Communication	Yes	87.7%
Behaviour	Yes	86.3%
Hidden limitations	Yes	86.7%

The positive results are justifiable as one's own experiences as well as recommendations by friends, family members and friends or colleagues are trusted and credible sources, which are easy to access.

With regard to tourism websites, the findings indicate that progress has been made to integrate not only sufficient but also reliable information about accessible products and services into mainstream tourism internet pages. As the hypothesis could be supported for all three aspects (sufficiency, reliability and access), it can be claimed that the general accessibility of tourism websites, which are consulted by the survey participants of this study, has also been improved. Yet, familiarity with the existing sources that have been proven to be reliable together with the tendency to go back to these specific sources does not necessarily indicate that all suppliers and destination marketing organisations have made equal progress in providing sufficient, reliable and accessible information. As this was highlighted in the website analysis (Task 2a), tourism providers as well as destination marketing organisations need to further work towards dismantling the barriers associated with inaccessible internet pages.

Taking into consideration that survey respondents most likely refer to their information sources which are already used and more importantly be tested and approved by them, the hypothesis could also be supported when analysing the responses obtained from different source markets.

Respondents stated that the information available is sufficient, reliable as well as accessible (Figure 168).

Figure 168 – H26 Barriers: Pre-travel stage/ Information gathering stage: Information is sufficient, reliable and accessible by country of origin

Country of origin	Hypothesis supported	Percentage answered "Yes"
Sufficient information		
Belgium	Yes	90.7%
Bulgaria	Yes	74.6%
France	Yes	84.1%
Ireland	Yes	84.6%
Italy	Yes	80.2%
Lithuania	Yes	72.2%
Poland	Yes	91.4%
Slovenia	Yes	88.5%
Spain	Yes	73.6%
Sweden	Yes	77.6%
The Netherlands	Yes	85.7%
United Kingdom	Yes	92.0%
Reliable information		
Belgium	Yes	84.0%
Bulgaria	Yes	64.2%
France	Yes	80.6%

Country of origin	Hypothesis supported	Percentage answered "Yes"
Ireland	Yes	86.1%
Italy	Yes	76.1%
Lithuania	Yes	81.3%
Poland	Yes	90.0%
Slovenia	Yes	83.0%
Spain	Yes	74.4%
Sweden	Yes	78.7%
The Netherlands	Yes	87.1%
United Kingdom	Yes	84.7%
Accessible information		
Belgium	Yes	89.1%
Bulgaria	Yes	83.6%
France	Yes	85.2%
Ireland	Yes	83.3%
Italy	Yes	84.2%
Lithuania	Yes	77.8%
Poland	Yes	93.5%
Slovenia	Yes	94.3%

Country of origin	Hypothesis supported	Percentage answered "Yes"
Spain	Yes	81.2%
Sweden	Yes	89.8%
The Netherlands	Yes	89.1%
United Kingdom	Yes	88.6%

5.2.2.2 Barriers encountered in the transit/ transport stage: arrival/ departure

Overall, the literature (reports and academic articles) emphasises that the transit/ transportation sector still remains largely inaccessible¹. A study conducted in the UK highlights that particularly the use of airlines represents a major area for barriers to be encountered². The top barriers faced by people with access needs at airports and the barriers encountered with airlines are illustrated in Figure 169.^{3 4}

¹ Stumbo, N.J., & Pegg, S. (2005). Travelers and Tourists with Disabilities: A Matter of Priorities and Loyalties. *Tourism Review International*, 8, 195-209.

²Yates, K. (2007). Understanding the Experiences of Mobility-Disabled Tourists. *International Journal of Tourism Policy*, 1, 153-166.

³ Chang, Y.C., & Chen, C.F. (2012). Meeting the needs of disabled air passengers: Factors that facilitate help from airlines and airports, *Tourism Management*, 33:529-536.

⁴ Darcy, S. (2007). Improving Airline Practices by Understanding the Experiences of People with Disabilities. Travel and Tourism Research Association - TTRA. Charlottetown, Canada, TTRA, 17.- 20. October 2007.

Figure 169 – Barriers at airports and airlines



With regard to the barriers experienced at airports, a ranking with regard to the importance of these barriers can be established based on frequency calculations (see Figure above). Among the top three barriers are the distance between the parking lot and the terminal (ranked in 1st position/ frequency: 70), followed by the lack of barrier-free lifts (2nd position/ frequency: 68) and the lack of barrier-free ramps (3rd position/ frequency 53). With regard to parking spaces, it can be added that help points near the car parking spaces are absent in most cases in the UK¹.

When examining the barriers experienced with airlines, Austrian travellers emphasised the lack of the secure transport of the wheelchair as the greatest barrier, which leads to feelings of social

¹ Sentinella, J. (2006) Access to Air Travel for Disabled People: 2005. Monitoring study. Department for Transport, Mobility and Inclusion Unit. Available at: http://www.accessibletourism.org/resources/2_access_air_travel_trl_monitoring_en.pdf

exclusion and discrimination¹. Further, issues related to on-board toilets (including lack of user-friendly on-board toilets, lack of space in on-board toilets and the distance between the cabin seats and the toilets on board) seem to represent the most significant barriers. In addition, it is anticipated that these barriers augment when choosing low-cost carriers. The most crucial barriers here refer to²:

- Fares and baggage allowances
e.g. people with a disability are charged a higher fare due to strict baggage allowances
- Airport (ground) facilities and services
e.g. lack of trained staff / staff not understanding the needs of people with different access needs
- In-flight services and facilities
e.g. seating density
- Aircraft used
e.g. lack of accessible toilets and on-board aisle chairs

Apart from the on-board toilets, inappropriate customer service triggers the emergence of other barriers, which are:

- At the boarding and disembarking stage:

Staff not trained in understanding different access needs are unaware of the importance of providing information about services that are available to wheelchair users (barrier of 'airline wheelchair services'). Further, not understanding different access needs often leads to ignoring the desire of people with access needs to remain in their wheelchair as long as possible (barrier of 'lack of comfortable transfer wheelchairs')

- At the equipment handling stage:

Staff not trained in understanding different access needs will not know how to securely stow wheelchairs (barrier of 'insecure stowing of wheelchairs')

¹ Hitsch, W. (2005) Probleme, Risiken und Chancen des barrierefreien Tourismus. Institut für Unternehmensführung, Tourismus und Dienstleistungswirtschaft, Fakultät für Betriebswirtschaft der Leopold-Franzens-Universität Innsbruck. Available at: <http://www.ibft.at/ibft/doc/Diplomarbeit%20-%20Barrierefreies%20Reisen.pdf>

² Darcy, S., & Ravinder, R. (2012) Air Travel for People with a Disability. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism, (pp. 207-221). Bristol, Channel View Publications.

- Additional services:

Staff not trained in understanding different access needs have very limited knowledge about how a specialist cushion can contribute to personal comfort on the plane (barrier of 'lack of provision of specialist cushions')

It is surmised that all of these barriers contribute to feelings of helplessness and the fact of needing help results in feelings of embarrassment and discomfort.

When more specific information on the barriers faced by people with different types of access needs is included, an additional important element can be added to the debate. For both types of difficulty (mobility and visual) there appears to be a question with regard to the **importance of attitudinal barriers versus physical access barriers in the transit stage**. For example, a study conducted in Israel strongly highlights that social obstacles, e.g. negative attitudes, weigh stronger than physical access barriers. This is because social barriers affect the feelings of individuals to a greater extent than physical access issues¹. Similar results were revealed by a study in the UK, where respondents reported the greater importance of attitudinal barriers (e.g. staff not understanding the needs of people with access needs) at 75% compared to physical access barriers (e.g. problems boarding the aircraft) at 66%².

However, in contrast, studies from China and the United States stress that people with mobility impairments perceive physical access barriers as being more important than attitudinal barriers^{3 4}. A study by the Open Doors Organization (ODO) reports that the biggest barrier refers to physical obstacles (67%) with cramped seating areas (52%) heading the list, followed by service/ personnel issues with 60%⁵. In Germany, and by focusing on visually restricted individuals, it was found that

¹Poria, Y., Reichel, A., & Brandt, Y. (2010). The flight experiences of people with disabilities: An exploratory study, *Journal of Travel Research*, 49(2):216-227.

²Wright, A. (2012) *Tour Operating for the less mobile traveller*. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) *Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism*, (pp. 195-206). Bristol, Channel View Publications.

³Bi, Y., Card, J.A., & Cole, S.T. (2007). Accessibility and Attitudinal barriers encountered by Chinese Travellers with Physical Disabilities, *International Journal of Tourism Research*, 9:205-216.

⁴Card, J. A., Cole, S. T., & Humphrey, A. H. (2006) A Comparison of the Accessibility and Attitudinal Barriers Model: Travel Providers and Travelers with Physical Disabilities. *Asia Pacific Journal of Tourism Research*, 11, 161-175.

⁵Van Horn, L. (2012). The United States: Travellers with Disabilities. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) *Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism*, (pp. 65-78). Bristol, Channel View Publications.

fewer attitudinal barriers (e.g. assistance from personnel) exist compared to physical access barriers¹.

As the importance attached to physical access barriers versus attitudinal access barriers remains an unresolved question in the debate on barriers encountered in the transit stage, the hypothesis to be tested for the European context is:

H27: In the transit stage, attitudinal barriers, such as how tourists with access needs are treated by service staff, are equally as important as physical access barriers, particularly in terms of assistance with getting on board, leaving or changing.

The hypothesis test results revealed that H27 is partially supported for the European context.

Attitudinal barriers are more important than physical access barriers in the transit stage, which does not only support the research conducted in Israel², highlighting the importance of negative attitudes in the transit stage weighing stronger than physical access barriers, but also backs-up the monitoring study of access to air travel in the UK, indicating that further improvements are needed to enhance the communication between staff and passengers. In addition, greater attention needs to be paid to the general disability awareness of staff working in this sector³. Yet, attitudinal barriers are equally as important as some physical access barriers, such as transport to and from the destination for people with communication and hidden limitations (Figure 170).

¹ Becker, M. (2007). Barrierefreier Tourismus für Alle – untersucht am Beispiel von Reisen blinder und sehbehinderter Menschen. Universität Paderborn, Fakultät für Kulturwissenschaften – Geografie, Deutschland. Available at: http://www.accessibletourism.org/resources/magister_monika_becker_de-2.pdf

² Poria, Y., Reichel, A., & Brandt, Y. (2010). The flight experiences of people with disabilities: An exploratory study, *Journal of Travel Research*, 49(2):216-227.

³ Sentinella, J. (2006). Access to Air Travel for Disabled People: 2005. Monitoring study. Department for Transport, Mobility and Inclusion Unit. Available at: http://www.accessibletourism.org/resources/2_access_air_travel_trl_monitoring_en.pdf

Figure 170 – H27 Barriers: Transit stage: Attitudinal versus physical access barriers by type of access need

Type of access need	Hypothesis supported	More important barriers	Barriers experienced
Mobility	No	Attitudinal barriers	14.8%
Senses	No	Attitudinal barriers	14.5%
Communication	Partially*	Attitudinal barriers	15.7%
Behaviour	No	Attitudinal barriers	15.5%
Hidden limitations	Partially*	Attitudinal barriers	13.4%

Note: * Statistically, attitudinal barriers are equally as important as transport to and from destination, and more important than accessible transport types

Given that people with communication difficulties give equal importance to attitudes, e.g. how they are treated, and physical aspects, e.g. transport to and from the destination, it can be argued that the National Society for the Deaf in Italy has taken appropriate actions in tailoring its efforts to both of these aspects. Together with the State Railways for transport by rail and the 'Autostrade' for private car transport, a programme to remove physical access barriers was put in place in addition to improving levels of awareness among the general public, including service personnel¹.

5.2.2.3 Barriers encountered with transport at the destination and access paths

Overall, barriers related to transport at the destination often only highlight that these services, including taxis and trains, remain largely inaccessible²³. Further barriers include missing kerb cuts,

¹ Collu, I. (2010). The access to tourism for deaf people: requirements and good practice. IN IsITT – Istituto Italiano per il Turismo per Tutti (ed.) Viaggiare senza limiti: il turismo per tutti in Europa. Available at: http://www.turismabile.it/file/lib/files/viaggiare_senza_limiti_web.pdf

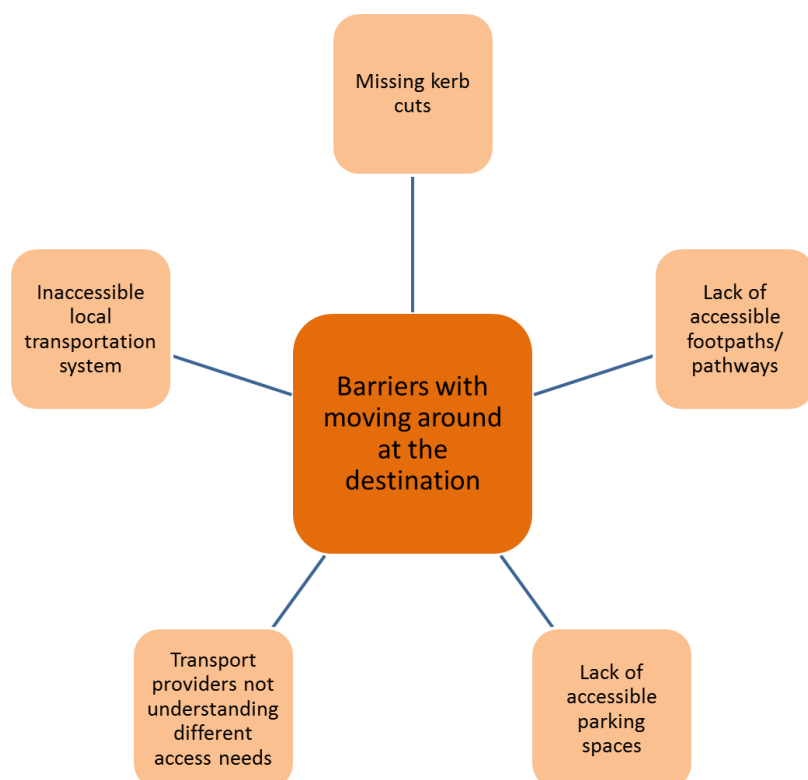
² Stumbo, N.J., & Pegg, S. (2005). Travelers and Tourists with Disabilities: A Matter of Priorities and Loyalties. *Tourism Review International*, 8, 195-209.

³ Murray, M., & Sproats, J. (1990). The Disabled Traveller: Tourism and Disability in Australia. *Journal of Tourism Studies* 1, 9-14.

lack of suitable transportation from and to the airport and taxi drivers not understanding the different needs of people with access needs¹.

Studies from Germany² and Israel³, examining the barriers faced by mobility-restricted individuals, contribute to reaching a better understanding of the barriers experienced when moving around at the destination (Figure 171).

Figure 171 – Barriers experienced when moving around at the destination



In order to determine which of these barriers weighs higher than other barriers, a study conducted in Australia reported that the lack of accessible public transport is one of the main weaknesses for

¹ Horgan-Jones, M., & Ringaert, L. (2001). Accessible Tourism in Manitoba. TTRA - Travel and Tourism Research Association. Niagara Falls, Canada, 14.-16. October 2001.

²BMW (2004). Economic Impulses of Accessible Tourism for All, Berlin, Federal Ministry of Economics and Technology.

³Poria, Y., Reichel, A., & Brandt, Y. (2009). People with disabilities visit art museums: an exploratory study of obstacles and difficulties, *Journal of Heritage Tourism*, 4(2):117-129.

Australia as a holiday destination¹. Another research study, also from outside Europe, ranked the relative importance of certain accessibility features. It was found that when the number of visitations increases, the **relative importance of paths and accessible parking increases**, while the significance of restrooms, sidewalks, elevators and access ramps decreases². In order to test this assumption for the European context, the following hypothesis was set-up:

H28: Access pathways, e.g. continuous, accessible routes between facilities and services, and accessible parking spaces, are the most important aspects for people with access needs when moving around at the destination.

The statistical analysis has shown that H28 is partially supported. Access pathways and accessible parking spaces are perceived as the most important aspects for people with access needs when moving around at the destination for people with mobility difficulties (

¹ Economic and Social Commission for Asia and the Pacific (2003). Barrier-free Tourism for People with Disabilities in the Asian and Pacific Regions, United Nations, New York. Available at: http://www.unescap.org/ttdw/Publications/TPTS_pubs/pub_2316/pub_2316_tor.pdf

²Israeli, A.A. (2002). A Preliminary Investigation of the Importance of Site Accessibility Factors for Disabled Tourists. Journal of Travel Research, 41, 101-104.

Figure 172). This not only supports research from non-European countries such as Israel¹ and Australia² but also existing studies from a European context, such as Italy³, Finland⁴ and Spain⁵.

¹ Israeli, A.A. (2002) A Preliminary Investigation of the Importance of Site Accessibility Factors for Disabled Tourists. *Journal of Travel Research*, 41, 101-104.

² Darcy, S., Cameron, B., & Schweinsberg, S. (2012). Accessible Tourism in Australia. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) *Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism*, (pp. 79-113). Bristol, Channel View Publications.

³ Vitali, G., & Vitali, R. (2010). The results of a complex project to the sea: statistics, economic impact, best practices and customer satisfaction. IN *IsITT – Istituto Italiano per il Turismo per Tutti* (ed.) *Viaggiare senza limiti: il turismo per tutti in Europa*. Available at:

http://www.turismabile.it/file/lib/files/viaggiare_senza_limiti_web.pdf

⁴ Ministry of Transport and Communications (2003) *Towards Accessible Transport – Accessibility Strategy of the Ministry of Transport and Communication. Programmes and Strategies of the Ministry of Transport and Communications, Finland*. Available at:

http://www.accessibletourism.org/resources/18_toward_accessible_transport_en.pdf

⁵ Ministerio de Industria, Turismo y Comercio (no date) *Decálogo de Buenas Prácticas en Accesibilidad Turística*. Available at:

http://www.planaccesibilidadturistica.es/UserFiles/publicaciones/ficheros/Decalogo_Buenas_Practicas_Accesibilidad_Turistica.pdf

Figure 172 – H28 Barriers: At the destination: Importance of access pathways and accessible parking by type of access need

Type of access need	Hypothesis supported	Importance score - Access pathways and accessible parking spaces	Importance score - Transport at the destination (outdoors)	More important aspect
Mobility	Yes	4.02	3.91	Access pathways and accessible parking spaces
Senses	No	3.93	3.90	Equally important
Communication	No	4.00	3.94	Equally important
Behaviour	No	3.94	3.91	Equally important
Hidden limitations	No	3.95	3.91	Equally important

Yet, for people with different access needs various aspects of transport at the destination are equally important. This includes an accessible transportation system for all user groups incorporating tactile guiding systems to ensure a better orientation in public transport stations. Such an improved transport system has been put in place by Vienna Lines in Austria, ensuring a fully accessible network of buses, tramways and underground lines for all user groups¹.

By analysing destination-specific differences and comparing the top destination countries visited by the respondents of the survey (Figure 173), travellers to Belgium, Croatia, Germany, Greece, Ireland, Italy, Poland, Slovenia, Sweden, the Netherlands and the United Kingdom perceive various aspects of the transport at the destination as equally important.

¹ Krpata, R. (2012). Accessible Public Transport: Vienna City Tourism. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism, (pp. 222-240). Bristol, Channel View Publications.

Evidence can be found that some of these countries already pay attention to reducing the barriers encountered with transport at the destination and access paths. For example in Italy, the city of Genoa has improved access paths by designing new barrier-free pedestrian crossings and public elevators to reach specific tourism facilities¹. Yet, improving access paths can be challenging for cities such as Venice. While improvements have been made in terms of making individual attractions, such as museums accessible, the most predominant difficulty rests with improving the pathways from and to specific attractions which requires the involvement of all stakeholders².

¹ Coop. Sociale La Cruna (2008). Genova per tutti noi – a guide for tourism without barriers. Ambient Intelligence System of Agents for Knowledge-based and Integrated Services for Mobility impaired users (ASK-IT), Genova, Italy. Available at: <http://www.lacruna.com/amministra/media/9.pdf>

² Mengardo, G. (2012). Turismo Accessibile a Venezia. Un' "isola dell'accessibilità" attorno ai Musei Civici per una cultura senza barrier. Università Ca'Foscari Venezia, Venice, Italy. Available at: <http://dspace.unive.it/handle/10579/2057>

Figure 173 – H28 Barriers: At the destination: Importance of access pathways and accessible parking by destination

Destination	Hypothesis supported	Importance score - Access pathways and accessible parking spaces	Importance score - Transport at the destination (outdoors)	More important aspect
Belgium	No	3.91	3.81	Equally important
Bulgaria	Yes	3.91	3.57	Access pathways and accessible parking spaces
Croatia	No	3.83	3.68	Equally important
France	Yes	3.92	3.75	Access pathways and accessible parking spaces
Germany	No	4.14	4.00	Equally important
Greece	No	3.70	4.04	Equally important
Ireland	No	3.99	4.08	Equally important
Italy	No	4.08	4.00	Equally important
Lithuania	Yes	4.24	3.66	Access pathways and accessible parking spaces
Poland	No	4.12	4.00	Equally important
Slovenia	No	3.77	3.64	Equally important
Spain	No	3.73	3.89	Transportation at destination (outdoors)
Sweden	No	3.90	3.65	Equally important
The Netherlands	No	3.71	3.79	Equally important
United Kingdom	No	3.93	3.84	Equally important

In contrast to the destinations mentioned above, where various aspects of the transport at the destination are perceived as equally important by travellers, tourists visiting Bulgaria, France and Lithuania found that access paths and accessible parking spaces represent the most important aspects. This highlights the need for these countries to invest their efforts in ensuring that visitors can fully enjoy the destination by creating uninterrupted paths to or within a building providing access to all required facilities, also incorporating accessible parking¹. Evidence can be found that France seems to tackle these problems as among the suggestions provided by the National Tourist Board it is highlighted that the concept of ease of use should become a predominant value for all touristic services provided².

Spain was identified as the only country where transport at the destination represents the most important aspect by visitors. This is line with other research conducted in Spain highlighting that 55.4% of the research participants encountered major problems particularly with the transfers at the destination³ while improvements have been made with regard to improving accessible parking in cities such as Avila⁴.

5.2.2.4 Barriers encountered in the accommodation sector

In the accommodation sector, an often-stated barrier refers to hotels not complying with access standards and legislation, such as in the United States despite the existence of the Americans with Disabilities Act (ADA)⁵. In addition to this, a number of other barriers are reported with regard to hotel establishments^{6 7 8 9 1 2} (Figure 174).

¹ Darcy, S., Cameron, B., Pegg, S., & Packer, T. (2008) Developing Business Case Studies for Accessible Tourism. STCRC (Sustainable Tourism Cooperative Research Centre), Queensland, Australia. Available at: http://www.crctourism.com.au/wms/upload/images/disc%20of%20images%20and%20pdfs/for%20bookshop/documents/90042_Darcy_DevBusCaseWEB.pdf

² Conseil National du Tourisme (no date). Tourisme & Handicap: La chaîne de l'offre touristique pour le droit aux vacances. Available at: <http://www.ladocumentationfrancaise.fr/var/storage/rapports-publics/054000368/0000.pdf>

³ Huesca González, A.Mª., & Ortega Alonso, E. (2005). Hábitos y actitudes hacia el Turismo de las Personas con Discapacidad Física. Available at: http://www.snr.gob.ar/uploads/TA-Otros-27-HabActhaciaelTURISMO-2da_edic-PREDIF.pdf

⁴ Melgosa Arcos, F.J. (2009). Turismo accesible, Turismo para Todos en una Ciudad Patrimonio de la Humanidad: el caso de Ávila. Revista Turismo & Desenvolvimento N.º 11.

⁵ Stumbo, N.J., & Pegg, S. (2005). Travelers and Tourists with Disabilities: A Matter of Priorities and Loyalties. *Tourism Review International*, 8, 195-209.

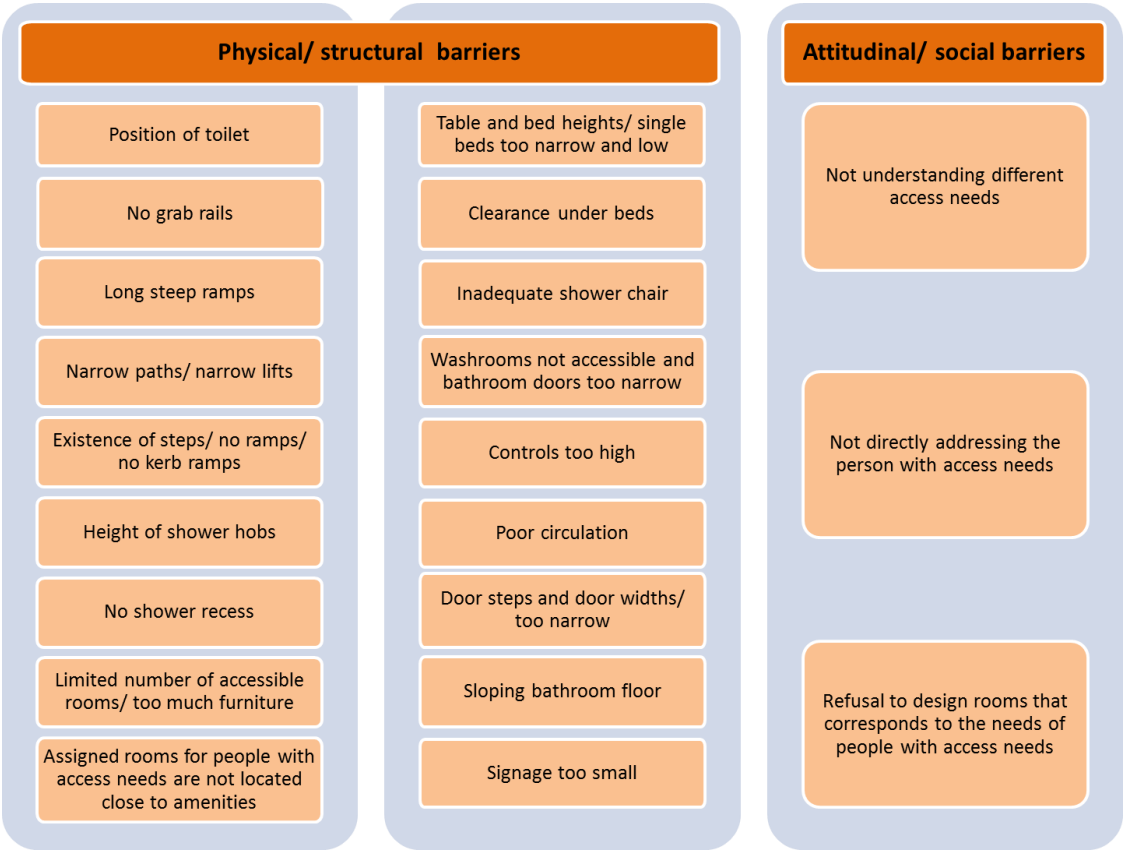
⁶ Murray, M., & Sproats, J. (1990). The Disabled Traveller: Tourism and Disability in Australia. *Journal of Tourism Studies* 1, 9-14.

⁷ Murray, M., & Sproats, J. (1990). The Disabled Traveller: Tourism and Disability in Australia. *Journal of Tourism Studies* 1, 9-14.

⁸ Horgan-Jones, M., & Ringaert, L. (2001). Accessible Tourism in Manitoba. TTRA - Travel and Tourism Research Association. Niagara Falls, Canada, 14.-16. October 2001.

⁹ Darcy, S. (2002). Marginalised Participation: Physical Disability, High Support Needs and Tourism. *Journal of Hospitality and Tourism Management*, 9, 61-72.

Figure 174 – Barriers experienced with hotel establishments



Comparing the relative importance of physical access barriers versus attitudinal barriers within the accommodation sector reveals that obstacles in the physical environment are encountered more often than attitudinal barriers (Figure 175).

Figure 175 – Physical access and attitudinal barriers encountered in the accommodation sector (United States)³

¹Poria, Y., Reichel, A., & Brandt, Y. (2011). Dimensions of hotel experiences of people with disabilities: An exploratory study, *International Journal of Contemporary Hospitality Management*, 23(5):571-591.
²Wright, A. (2012). Tour Operating for the less mobile traveller. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) *Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism*, (pp. 195-206). Bristol, Channel View Publications.
³Card, J. A., Cole, S. T., & Humphrey, A. H. (2006). A Comparison of the Accessibility and Attitudinal Barriers Model: Travel Providers and Travelers with Physical Disabilities. *Asia Pacific Journal of Tourism Research*, 11, 161-175.

Physical access barriers		Attitudinal barriers	
Accommodation	81%	Accommodation	65%

The tendency for physical access barriers to be perceived as greater than attitudinal barriers in the accommodation sector is supported by another study from the United States where the biggest barrier relates to physical obstacles (48%) followed by service/ personnel (45%). Among the most prevailing physical access barriers are doors being too hard to open (36%), limited mobility in the rooms (20%) and inaccessible bath facilities (19%)¹.

Similar results highlighting that physical access barriers are greater when compared to attitudinal barriers were also obtained from a Chinese study (Figure 176).

Figure 176 – Physical access and attitudinal barriers encountered in the accommodation sector (China)²

Physical access barriers		Attitudinal barriers	
Accommodation	2.80	Accommodation	2.21

Note: The numbers in the table refer to the means of physical and attitudinal barrier levels, based on a 1 to 5 measurement scale, where 1 means few and 5 means many.

The studies discussed above have provided crucial information and assist in establishing the first hypothesis for the accommodation sector. Key information deriving from these qualitative and quantitative findings from various studies outside Europe highlights that **physical access barriers are ranked higher compared to attitudinal barriers in the accommodation sector**. Therefore, the hypothesis to be tested for the European context is:

H29: In the accommodation sector, physical access barriers, particularly related to toilets and mobility within rooms, are more important than attitudinal barriers, such as how tourists with access needs are treated by service staff.

¹ Van Horn, L. (2012). The United States: Travellers with Disabilities. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism, (pp. 65-78). Bristol, Channel View Publications.

²Bi, Y., Card, J.A., & Cole, S.T. (2007). Accessibility and Attitudinal barriers encountered by Chinese Travellers with Physical Disabilities, International Journal of Tourism Research, 9:205-216.

Following on from this hypothesis and particularly focusing on individual physical access barriers within the accommodation sector (Figure 174), a study from Italy highlights a variety of features, such as architectural barriers, unsuitable lifts, inaccessible bathrooms and rooms being too small as barriers¹, yet without indicating the relative importance of these aspects. In contrast, focusing on the relative importance of different physical access barriers, studies from the United States, Israel and Australia found that the **inaccessibility of toilets and bathrooms resides among the greatest barriers**^{2 3 4 5}.

Specialised tour operators confirm toilets and bathrooms as representing a major obstacle⁶. As these studies derive from a non-European context, it is essential to examine this assumption by investigating whether toilets represent the barrier which causes the greatest dissatisfaction among individuals with access needs for the European context. As such, the second hypothesis for the accommodation sector is as follows:

H30: Among the physical access barriers encountered in the accommodation sector, people with access needs are least satisfied with toilets.

The hypothesis testing procedure for H29 (in the accommodation sector, physical access barriers, particularly related to toilets and the mobility within rooms, are more important than attitudinal barriers, such as how tourists with access needs are treated by service staff) revealed that H29 is partially supported for the European context. Physical access barriers are perceived as being equally as important as attitudinal barriers in the accommodation sector for all groups of individuals with access needs (Figure 177), with the exception of one destination country (discussed further below).

¹ Presidenza del Consiglio dei Ministri (2013). Accessibile è meglio: Primo Libro Bianco sul Turismo per Tutti in Italia 2013. Comitato per la Promozione e il Sostegno del Turismo Accessibile. Available at: http://www.unifg.it/dwn/ateneo/sportello_west/accessibile_libro_bianco.pdf

² Turco, D.M., Stumbo, N.J., & Garncarz, J. (1998). Tourism Constraints for People with Disabilities. Parks and Recreations, 33, 78-84.

³ Poria, Y., Reichel, A., & Brandt, Y. (2011). Dimensions of hotel experiences of people with disabilities: An exploratory study, International Journal of Contemporary Hospitality Management, 23(5):571-591.

⁴ Darcy, S. (2002). Marginalised Participation: Physical Disability, High Support Needs and Tourism. Journal of Hospitality and Tourism Management, 9, 61-72.

⁵ Van Horn, L. (2012). The United States: Travellers with Disabilities. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism, (pp. 65-78). Bristol, Channel View Publications.

⁶ Wright, A. (2012). Tour Operating for the less mobile traveller. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism, (pp. 195-206). Bristol, Channel View Publications.

The result that respondents of the survey stated that physical access barriers are equally as important as attitudinal barriers in the accommodation sector contradicts research findings from the United States¹ and China². It also stands in contrast to other studies. For example, particularly for visually restricted people, it has been reported that physical access barriers, such as navigating through areas with steps, are less important when compared to attitudinal or emotional aspects of the service³. Yet, the equal importance afforded to attitudinal barriers highlights the crucial role of well-trained personnel, since positive attitudes and professionalism in the accommodation sector contribute greatly to the satisfaction of visitors with access needs⁴. A French report goes even further by arguing that accommodation establishments should be in the position of offering 'companionship services' as people with access needs often feel isolated when holidaying⁵.

¹ Van Horn, L. (2012). The United States: Travellers with Disabilities. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) *Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism*, (pp. 65-78). Bristol, Channel View Publications.

² Bi, Y., Card, J.A., & Cole, S.T. (2007) Accessibility and Attitudinal barriers encountered by Chinese Travellers with Physical Disabilities, *International Journal of Tourism Research*, 9:205-216.

³ Rolli, R. (2010). Tourism for all and people with visual impairment. IN *IsITT – Istituto Italiano per il Turismo per Tutti* (ed.) *Viaggiare senza limiti: il turismo per tutti in Europa*. Available at: http://www.turismabile.it/file/lib/files/viaggiare_senza_limiti_web.pdf

⁴ Weiß, C., Adler, P., Grundner, M.R., Hirschmugl-Fuchs, M., Kirchsteiger, D., Marano, D., Petrovics, G., Pisecky, J., Strzalka, A., Waneczek, H., & Zimmer, C. (2011). *Tourismus für alle - Barrierefreies Reisen - ein Leitfaden zum Umgang mit dem Gast*. BMWFJ, Sektion Tourismus und Historische Objekte WKO, Bundessparte Tourismus und Freizeitwirtschaft. Available at: http://www.bmwfj.gv.at/Tourismus/TourismusstudienUndPublikationen/Documents/Leitfaden_umgang%20mit%20dem%20Gast%20MINIMIERT.pdf

⁵ Rigalleau, R. (2001). *Incitation au départ en vacances des non-partants*. Conseil National du Tourisme, Commission Droit aux vacances. Available at: <http://www.vacances-ouvertes.asso.fr/publications/cnt/cnt2001.pdf>

Figure 177 – H29 Barriers: Accommodation sector: Physical access barriers versus attitudinal barriers by type of access need

Type of access need	Hypothesis supported	Importance score - Physical access barriers	Importance score - Attitudinal barriers	More important barrier
Mobility	No	4.16	4.17	Equally important
Senses	No	4.11	4.16	Equally important
Communication	No	4.16	4.17	Equally important
Behaviour	No	4.13	4.13	Equally important
Hidden limitations	No	4.14	4.17	Equally important

Only one destination country (Sweden) was identified where physical access barriers are considered more important than attitudinal barriers (Figure 178). Possible explanations for this are provided by Müller (2012). First, there is a widespread willingness in Sweden ‘to do what is possible in order to welcome customers with special needs’ (p.159), highlighting the emphasis placed on attitudinal aspects. Second, many Swedish regions run training and awareness courses to be able to constantly improve customer services and change attitudes. These training courses employ a role play technique of learning and understanding¹. Further, it is argued that in Sweden many service operators are not driven by market principles but rather respond to national policies and laws before making changes to their establishments – and even then these changes include only what is absolutely necessary².

These arguments provide a justification why Sweden can be seen as an example where many efforts are in place to eliminate attitudinal barriers. Yet, physical barriers are still apparent as

¹ Müller, L. (2012). Accessible Tourism in Sweden: Experiences, Stakeholders, Marketing. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism, (pp. 157-167). Bristol, Channel View Publications.

² Turism för Alla, European Union & Växtkraft 3 (no date) Att resa utan hinder - Slutrapport från ett utvecklingsprojekt: 2003 - 2006. Available at: <http://www.skane.se/upload/Webbplatser/Naringsliv/Dokument/AttResaNutanHinder.pdf>

perceived by the respondents of the survey, potentially also due to the fact that Sweden is a key destination for nature-based activities and attractions which entail greater barriers compared to other activities and attractions (see section 5.2.2.6 – *barriers in the attraction sector*).

Figure 178 – H29 Barriers: Accommodation sector: Physical access barriers versus attitudinal barriers by destination

Destination	Hypothesis supported	Importance score - Physical access barriers	Importance score - Attitudinal barriers	More important barrier
Belgium	No	3.97	3.98	Equally important
Bulgaria	No	4.05	4.08	Equally important
Croatia	No	4.10	4.02	Equally important
France	No	4.01	4.09	Equally important
Germany	No	4.02	3.91	Equally important
Greece	No	4.02	4.43	Equally important
Ireland	No	4.13	4.36	Equally important
Italy	No	4.18	4.18	Equally important
Lithuania	No	4.39	4.33	Equally important
Poland	No	4.30	4.13	Equally important
Slovenia	No	3.96	4.05	Equally important
Spain	No	4.07	4.19	Attitudinal barriers
Sweden	Yes	4.30	3.89	Physical access barriers
The Netherlands	No	3.95	4.15	Equally important
United Kingdom	No	4.11	4.04	Equally important

For all other destination countries, travellers place an equal importance on both physical access and positive attitudes. It is anticipated that for some countries, overcoming both types of barriers might represent a problem. For example, in Poland and Slovenia and specific to the removal of attitudinal

barriers, staff competences are rather weak and participation levels in training courses for the industry are still relatively low. This is mainly due to two reasons. First, there is limited supply of training courses and second, the demand for accessibility training is still very low¹.

While respondents rate physical access and attitudes as equally important, it is still essential to identify the specific physical access barriers that cause the greatest dissatisfaction, leading to the presentation of the results of the hypothesis testing for **H30 (among the physical access barriers encountered in the accommodation sector, people with access needs are least satisfied with toilets)**. The hypothesis **H30** is partially supported. People with access needs are least satisfied with toilets among all physical access barriers encountered in the accommodation sector. This supports a study from Austria, pointing out that the lack of accessible bathrooms and toilets represent the greatest barriers for people with mobility difficulties, including the elderly population in the accommodation sector².

Yet, in order to reach a more nuanced understanding, the current study shows that individuals with behavioural restrictions rank toilets as equal when compared to other physical access elements (Figure 179). In this context, it can be argued that this is mainly due to the nature of behavioural limitations as learning disabilities and/ or emotional and mental problems do not interfere with the ability to use bathrooms. Thus, people with behavioural restrictions face different sets of barriers. This has been identified by UNAPEI, a specialised organisation in France, which has subsequently outlined how the existing barriers for people with behavioural problems can be addressed by developing a special access guide for this group³.

¹ MIT! – Make It Accessible (no date). WP3 Report on Research & Exploitation – Learning about MIT! Target Groups. Available at: <http://www.mit-makeitaccessible.eu/MIT%20WP3%20Report%20on%20Research%20&%20Exploitation.pdf>

² Hitsch, W. (2005) Probleme, Risiken und Chancen des barrierefreien Tourismus. Institut für Unternehmensführung, Tourismus und Dienstleistungswirtschaft, Fakultät für Betriebswirtschaft der Leopold-Franzens-Universität Innsbruck. Available at: <http://www.ibft.at/ibft/doc/Diplomarbeit%20-%20Barrierefreies%20Reisen.pdf>

³ UNAPEI (Union National des Associations de Parents, de Personnes Handicapées Mentales et de leurs Amis) (2009). Guide pratique de l'accessibilité - Pour vous accompagner dans vos démarches en matière d'accessibilité en faveur des personnes en situation de handicap mental. UNAPEI. Available at: <http://www.unapei.org/IMG/pdf/GuidePratiqueAccessibilite.pdf>

Figure 179 – H30 Barriers: Accommodation sector: Satisfaction with toilets by type of access need

Type of access need	Hypothesis supported	Satisfaction score - Toilets	Satisfaction score - Accommodation availability and accessibility	People are least satisfied with
Mobility	Yes	4.28	4.37	Toilets
Senses	Yes	4.27	4.35	Toilets
Communication	Yes	4.25	4.32	Toilets
Behaviour	No	4.28	4.31	Equally satisfied
Hidden limitations	Yes	4.32	4.37	Toilets

While previous studies based on qualitative research identified that inaccessible toilets represent the greatest barrier in the United States, Israel and Australia^{1 2 3}, the data collected for this study also provides a more comprehensive understanding for different European destinations. It was found that respondents visiting France were least satisfied with toilets in their accommodation establishments (Figure 180). This provides valuable guidance for France, as a major and important tourist destination in Europe, to prioritise its efforts in making its offering, particularly related to toilets and bathrooms in the accommodation sector, more accessible.

Figure 180 – H30 Barriers: Accommodation sector: Satisfaction with toilets by destination

¹Turco, D.M., Stumbo, N.J., & Garncarz, J. (1998). Tourism Constraints for People with Disabilities. Parks and Recreations, 33, 78-84.

²Poria, Y., Reichel, A., & Brandt, Y. (2011). Dimensions of hotel experiences of people with disabilities: An exploratory study, International Journal of Contemporary Hospitality Management, 23(5):571-591.

³Darcy, S. (2002). Marginalised Participation: Physical Disability, High Support Needs and Tourism. Journal of Hospitality and Tourism Management, 9, 61-72.

Destination	Hypothesis supported	Satisfaction score - Toilets	Satisfaction score - Accommodation availability and accessibility	People are least satisfied with
Belgium	No	4.17	4.07	Equally satisfied
Bulgaria	No	3.85	3.97	Equally satisfied
Croatia	No	4.30	4.36	Equally satisfied
France	Yes	4.12	4.38	Toilets
Germany	No	4.44	4.38	Equally satisfied
Greece	No	4.39	4.48	Equally satisfied
Ireland	No	4.47	4.51	Equally satisfied
Italy	No	4.32	4.32	Equally satisfied
Lithuania	No	4.63	4.67	Equally satisfied
Poland	No	4.31	4.36	Equally satisfied
Slovenia	No	4.11	4.20	Equally satisfied
Spain	No	4.24	4.33	Equally satisfied
Sweden	No	4.37	4.42	Equally satisfied
The Netherlands	No	4.29	4.25	Equally satisfied
United Kingdom	No	4.64	4.61	Equally satisfied