

5.2.2.5 Barriers encountered in the catering/ gastronomy/ food & beverage sector

Overall, very limited research has been conducted that investigates the barriers encountered by people with access needs in the food and beverage sector. The few existing studies report that the accessibility of gastronomic organisations is regarded as highly problematic¹. For example, it was reported that many catering establishments in Greece are promoted as accessible while in reality they are not². In addition, discrimination by restaurants providers plays a crucial role in the debate on barriers in this sector³, apart from the existence of physical access barriers.

Particularly, in the United States, physical access barriers represent a major concern. These include the lack of room between tables (stated by 40% of respondents), doors being too heavy to open (stated by 33% of respondents) and steps at the entrance or in the restaurant (stated by 28% of respondents)⁴. By investigating individuals with different access needs, the following specific barriers can be summarised (Figure 181):

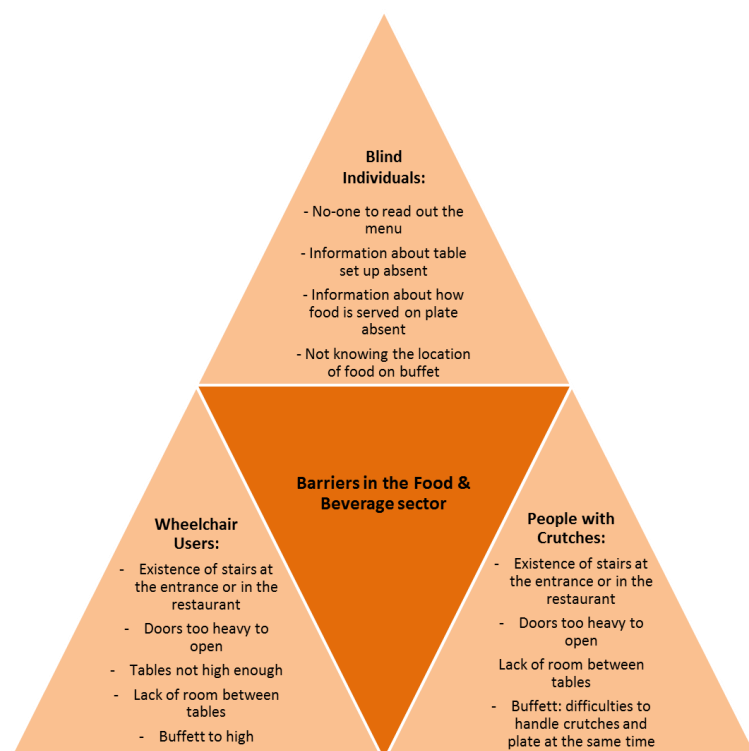
¹ Hitsch, W. (2005). Probleme, Risiken und Chancen des barrierefreien Tourismus. Institut für Unternehmensführung, Tourismus und Dienstleistungswirtschaft, Fakultät für Betriebswirtschaft der Leopold-Franzens-Universität Innsbruck. Available at: <http://www.ibft.at/ibft/doc/Diplomarbeit%20-%20Barrierefreies%20Reisen.pdf>

² 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>

³ 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.

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.

Figure 181 – Barriers experienced in the Food and Beverage Sector^{1 2}



By assessing the overall scope of barriers based on quantitative findings from the United States^{3 4}, it is assumed that the **food and beverage sector causes the greatest amount of barriers to people with access needs**. In order to test this assumption for the European context, the hypothesis is:

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

The analysis showed that **H31** is not supported. Respondents did not encounter barriers most often in the food and beverage sector. Hence, findings from a European context differ from studies

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.

² 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.

³Takeda, K., & Card, J.A. (2002). U.S. Tour Operators and Travel Agencies: Barriers Encountered When Providing Package Tours to People Who Have Difficulty Walking. *Journal of Travel and Tourism Marketing* 12, 47-61.

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.

conducted in United States^{1 2} as for the US it has been reported that most barriers are encountered in the food and beverage sector whereas this is not the case for Europe. Instead barriers are faced by people with access needs in the transport (at destination) sector most often compared to other sectors, particularly for individuals with mobility, sensory, behavioural and hidden difficulties (Figure 182).

Figure 182 – H31 Barriers: Food & Beverage sector compared to other sectors by type of access need

Type of access need	Hypothesis supported	Sector with most barriers	Barriers experienced
Mobility	No	Transport at destination	12.6%
Senses	Partially*	Transport at destination	12.1%
Communication	Partially*	Transit	13.4%
Behaviour	No	Transport at destination	13.3%
Hidden limitations	Partially*	Transport at destination	12.0%

Note: * Barriers in the food & beverage sector are encountered significantly more often than in the accommodation sector. See Annex O for details.

For people with communication difficulties barriers are encountered most often in the transit sector. Hence, for no single group of people with access needs is the food and beverage sector the most problematic. Yet, for individuals with sensory, communication and hidden limitations, barriers in the food & beverage sector are encountered significantly more often than in the accommodation sector.

After investigating different geographical regions, the study found that the food and beverage sector is not the sector where survey participants encountered barriers most often (Figure 183). These

¹Takeda, K., & Card, J.A. (2002) U.S. Tour Operators and Travel Agencies: Barriers Encountered When Providing Package Tours to People Who Have Difficulty Walking. *Journal of Travel and Tourism Marketing* 12, 47-61.

²Card, 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.

findings are in line with a report from Spain, highlighting that only 22% of people with access needs had indicated that restaurants have little or no accessibility¹.

Figure 183 – H31 Barriers: Food & Beverage sector compared to other sectors by destination

Destination	Hypothesis supported	Sector with most barriers	Barriers experienced
Belgium	Partially*	Food and beverage	12.5%
Bulgaria	Partially*	Information	18.9%
Croatia	No	Attractions/Activities	8.4%
France	No	Transport at destination	15.4%
Germany	No	Transport at destination; Accommodation	10.9%
Greece	No	Attractions/Activities	14.9%
Ireland	No	Accommodation	16.0%
Italy	No	Attractions/Activities	11.5%
Lithuania	No	Transit; Transport at destination	10.9%
Poland	No	Attractions/Activities	13.2%
Slovenia	No	Transport at destination	8.1%
Spain	No	Transport at destination	12.4%

¹ 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

Sweden	Partially*	Food and beverage	10.3%
The Netherlands	No	Accommodation	9.2%
United Kingdom	No	Accommodation	9.4%

Note: * Barriers in the food & beverage sector are not always encountered significantly more often than in other sectors.

See Annex O for details.

For Belgium and Sweden, most barriers are encountered in the food and beverage sector, yet the results show that they are not experienced *significantly* more often than in other sectors, except in the accommodation sector in Belgium and in attractions in Sweden. The same can be argued for Bulgaria as most barriers are faced in the pre-travel stage. Respondents who visited Bulgaria experienced more barriers in the food and beverage sector than in the attractions sector, but again the percentage is not different enough from other sectors to support the hypothesis (Annex O).

5.2.2.6 Barriers encountered with attractions/ activities

It is often reported that the attractions/ activities sector remains inaccessible due to a number of environmental and architectural barriers¹. For example, studies call for the elimination of architectural barriers in places of cultural interest^{2 3}. Museums and galleries count as sites of cultural interest and the emphasis of the Council for Museums, Archives and Libraries in the UK is placed on removing barriers, which are physical and sensory, intellectual, cultural, attitudinal and financial⁴. Further, museum operators need to find a balance between providing access for people with different requirements while at the same time ensuring the conservation of historical and artistic

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

² Cirelli, C. (2011). Turismo Urbano e Disabilità. Available at: <http://www.siciliaccessibile.it/wp-content/uploads/paper-turismo-urbano-disabilit%C3%A0-caterina-cirelli.pdf>

³ National Disability Authority (NDA) (2012). Access - Improving the Accessibility of Historic Buildings and Places. Government of Ireland. Available at: [http://www.nda.ie/website/nda/cntmgmtnew.nsf/0/911AA8C52EA2A0D98025798700303E93/\\$File/Access_Improving_accessibility_Historic_Buildings_and_Places.pdf](http://www.nda.ie/website/nda/cntmgmtnew.nsf/0/911AA8C52EA2A0D98025798700303E93/$File/Access_Improving_accessibility_Historic_Buildings_and_Places.pdf)

⁴ The Council for Museums, Archives and Libraries (2001). Disability Directory for Museums and Galleries. London, UK. Available at: http://www.accessibletourism.org/resources/uk_museumsand-galleries_disability_directory_pdf_6877.pdf

heritage¹. The same challenge has been reported by the National Disability Authority in Ireland when examining ways of improving access to historic buildings and places².

Particularly related to the context of historic environments/ attractions in the United Kingdom, main barriers are summarised in Figure 184.

Figure 184 – Main barriers encountered when visiting historic attractions³

Main general barriers	
Informational barriers	Lack of accurate and comprehensive information
Design barriers	Exclusionary design of signage, notices, display boards, announcements and alarm systems which triggers communication difficulties for people with sensory or learning difficulties
Lack of awareness of service providers	Lack of awareness of the different needs of people with a disability
Attitudinal barriers	Negative attitudes of managers and staff
Intrinsic/ personal barriers	Low aspirations/ expectations which triggers the loss of dignity and independence

Investigating the specific barriers of people with different access needs, a more nuanced understanding can be achieved (Figure 185).

Figure 185 – Main barriers encountered when visiting historic attractions and outdoor attractions (Australia)⁴

¹ 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>

² National Disability Authority (NDA) (2012). Access - Improving the Accessibility of Historic Buildings and Places. Government of Ireland. Available at:

[http://www.nda.ie/website/nda/cntmgmtnew.nsf/0/911AA8C52EA2A0D98025798700303E93/\\$File/Access_Improving_accessibility_Historic_Buildings_and_Places.pdf](http://www.nda.ie/website/nda/cntmgmtnew.nsf/0/911AA8C52EA2A0D98025798700303E93/$File/Access_Improving_accessibility_Historic_Buildings_and_Places.pdf)

³ Goodall, B., Pottinger, G., Dixon, T., & Russell, H. (2005). Access to Historic Environments for Tourists with Disabilities: A Compromise? Tourism Review International, 8, 177-194.

⁴Muloin, S. (1992). Wilderness Access for Persons with a Disability. IN Harper, G. & Weiler, B. (Eds.) Ecotourism, (pp. 20-25). Canberra, Australian Bureau of Research.

Main general barriers	Barriers faced by mobility-impaired people	Barriers faced by sight-impaired people
<u>Informational barriers</u> : Lack of accurate and comprehensive information		<u>Informational barriers</u> : Lack of printed material in large print
<u>Design barriers</u> : Exclusionary design of signage, notices, display boards, announcements and alarm systems which triggers communication difficulties for people with sensory or learning difficulties	<u>Design barriers</u> : inaccessible public washrooms and BBQ facilities Picnic tables not useable	<u>Design barriers</u> : limited possibilities to feel exhibits
<u>Lack of awareness</u> of the different needs of people with a disability		
<u>Attitudinal barriers</u> : Negative attitudes of managers and staff		<u>Attitudinal barriers</u> : Interaction with and attitudes of other visitors and condescending attitudes by service personnel
<u>Intrinsic/ personal barriers</u> : Low aspirations/ expectations which triggers the loss of dignity and independence		

Specific to the European context, studies from Denmark report that advancements were made in removing physical access obstacles by installing ramps with illuminated directional guidance, positioning textual information about exhibits at an accessible height, integrating touch-screen

displays and providing text in large print. Yet, it has equally shown that **outdoor settings are still inadequately designed with regard to access and use**^{1 2}.

Numerous studies report that many outdoor settings, such as parks in general or national parks in particular are still not accessible, causing numerous barriers to people with different access needs when wanting to access these natural attractions or activities^{3 4 5}. For example, it is argued that the accessibility of national parks is quite poor in Spain and much remains to be done to ensure equal access to facilities, activities and programs offering positive experiences in protected natural areas to people with access needs⁶. Similar results were reported in Italy, as mountain areas are often difficult to access for people with mobility restrictions^{7 8}. In fact, mountainous areas are said to represent the least accessible attractions as only 1.9% of respondents of a study in Spain found these to be accessible (33.2%)⁹.

Barriers to the enjoyment of nature-based activities and attractions such as parks, national parks and other protected natural areas need to be reduced as studies illustrate that, for example, Germany's elderly travellers show high preferences and motivation to experience nature-based activities and attractions¹⁰.

¹ Jensen, P.H. (2008). Merging Architecture and Accessibility, IN: Ethical – Barrier-Free Tourism. Available at: www.tourism-review.com/fm485.org/ethical-barrier-free-tourism.pdf

² Jensen, P.H. (2007). Merging architecture and accessibility. Ordrupgaards and the Danish Jewish Museum. Access by Design, Issue 112. Available at:

http://www.accessibletourism.org/resources/jensen_2007_merging_architecture_and_accessibility-1.pdf

³ Kreiter, J.N. (2010). A holiday for all from the perspective of a tourist with disabilities. 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 Ministerio de Industria, Turismo y Comercio (no date). Decálogo de Buenas Prácticas en Accesibilidad Turística - Destinos y Recursos Culturales y Naturales. Available at:

http://www.planaccesibilidadturistica.es/UserFiles/publicaciones/ficheros/Decalogo_de_Buenas_Practica_2.pdf

⁵ Marcos Pérez, D. & González Velasco, D.J. (2003). Turismo Accesible - Hacia un Turismo Para Todos. Comité Español de Representantes de Personas con Discapacidad – CERMI. Available at:

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

⁶ Ministerio de Industria, Turismo y Comercio (2008). El mercado potencial del turismo accesible para el sector turístico español. Available at:

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

⁷ Cosentino, M. (2010). Accessible tourism in mountain areas: tourism for all in a hostile environment. 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

⁸ Martin, G. (2010). The ideal winter resort: professionalism and organisational skills in the service of tourism. 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

⁹ 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

¹⁰ Lohmann, M. & Grimm, B. (2011). Urlaubsreisen und –motive der Altergruppe 50plus: Daten und Trends IN RKW Kompetenzzentrum (Ed.) Tourismus 50plus: Anforderungen erkennen – Wünsche erfüllen, (pp. 11-13).

As part of the nature-based offering, beach holidays play a crucial role and are in high demand by seniors as reported by an Italian study¹ or other European travellers with access needs such as Spaniards². Yet, it is the beach offer that causes the greatest concern and complaints³. For example, investigating nature-based activities at the French Riviera, it was found that providers are making progress with regard to offering accessible products and services. Yet, this is a result of general willingness and pressure in terms of complying with the regulations. With the latter in mind, people with access needs are still not considered as 'real' customers which often leads to separating them from other tourists with the aim of upholding the image of a 'perfect destination'⁴.

The discussion above has highlighted that **nature-based activities** (e.g. recreation in mountainous areas or beach holidays) represent a very important element for people with access needs in the attraction sector. Yet, it was equally highlighted that **these activities are accompanied by the most barriers**. Thus, it is important to better understand this barrier for Europe as a whole, moving away from individual national studies. In addition, greater levels of detail are required with regard to frequency calculations of barriers with nature-based activities and attractions. Thus, the hypothesis can hence be summarised as:

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

After the hypothesis testing, H32 is partially supported. People with access needs experienced most frequently barriers with nature based activities or attractions. Yet, for people with sensory and behavioural impairments, both nature and shopping opportunities are the equally important barriers in the attractions/activities sector (Figure 186). This coincides with a study investigating if Italy is an

Available at: [http://www.dehoga-](http://www.dehoga-bundesverband.de/fileadmin/Inhaltsbilder/Publikationen/Wifa_Tourismus_www.pdf)

[bundesverband.de/fileadmin/Inhaltsbilder/Publikationen/Wifa_Tourismus_www.pdf](http://www.dehoga-bundesverband.de/fileadmin/Inhaltsbilder/Publikationen/Wifa_Tourismus_www.pdf)

¹ Monti, M. (2010). Tourism for Senior citizens: needs 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 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 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>

⁴ Christofle, S., & Massiera, B. (2009). Tourist Facilities for Disabled People on the French Riviera: A Strategic Model of the Controversial Plans to Develop the Seafront Areas, Journal of Coastal Conservation, 13(2/3):97-107.

accessible destination. While not specifying the type of restriction, it was found that shopping malls and mountainous areas often pose the greatest difficulties to people with access needs¹.

Figure 186 – H32 Barriers: Attraction sector: Nature-based activities by type of access need

Type of access need	Hypothesis supported	Most important barrier	Barrier experienced
Mobility	Yes	Nature	15.6%
Senses	Partially*	Nature	14.5%
Communication	Yes	Nature	17.1%
Behaviour	Partially*	Nature	15.5%
Hidden limitations	Yes	Nature	14.5%

Note: * Nature is not always statistically more important than other barriers. See Annex O for details.

Although not always statistically significant, nature based activities or attractions are the most important barriers at 10 out of 15 destinations. Greece, Poland and Ireland are the top three destinations where people experienced most frequently barriers with nature based activities or attractions (Figure 187).

Figure 187 – H32 Barriers: Attraction sector: Nature-based activities by destination

Destination	Hypothesis supported	Most important barrier	Barrier experienced
Belgium	No*	Shopping opportunities	16.7%
Bulgaria	Partially**	Shopping opportunities	16.8%
Croatia	Partially**	Accessible sport or leisure equipment or service	15.2%

¹ Tournour-Viron, P. (2010). Is Italy an accessible destination? The opinion of foreign tour operators, suggestions to increase the flows according to the data from TTG Italy Observatory. 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

Destination	Hypothesis supported	Most important barrier	Barrier experienced
France	Partially**	Nature	13.6%
Germany	Partially**	Nature	18.8%
Greece	Partially**	Nature	26.1%
Ireland	Partially**	Nature	22.6%
Italy	Partially**	Nature	15.5%
Lithuania	Partially**	Nature; Accessible locations; Accessible shops or shopping services	13.0%
Poland	Yes	Nature	23.1%
Slovenia	No*	Accessible locations; Accessible shops or shopping services	8.1%
Spain	No*	Excursion activities available at destination	10.4%
Sweden	Partially**	Nature	11.0%
The Netherlands	Partially**	Nature	12.3%
United Kingdom	Partially**	Nature	12.5%

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

** Nature is statistically more important than certain other barriers. See Annex O for details.

This is supported by reports from Greece, highlighting that while some nature-based activities (e.g. beaches) offer accessible features, the situation does not apply to the majority of areas where nature-based beach activities can be enjoyed¹. Yet, improving access to nature-based activities is not impossible as shown by the city of Arona (Spain), acting as a best practice case for nature-

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.

based beach activities as numerous obstacles have been removed to allow for the enjoyment of beaches by all users¹. Similar examples can be found in Germany, where not only barriers were removed but solutions found to enable greater independence, for example by providing a well-designed vehicle (Mobile Strand- und Badeinsel) to move around and to enter the water².

Nature based activities or attractions also include the enjoyment of national parks and a pre-requisite for overcoming barriers is a thorough understanding of all different requirements as well as the incorporation of people with access needs in all aspects of planning, implementation and operation³. Portugal has shown that successfully reducing the barriers in parks and nature reserves is possible when implementing principles of universal access to allow for the enjoyment of this part of the attraction sector⁴. Further, Greenways are said to provide the most inclusive access to natural areas. Greenways are characterised by being among the few nature routes which are accessible to all people with access needs. Due to the importance of Greenways, they have been incorporated into the grant programme of the European General Directorate of Tourism (2011) in recognition of their great potential and value for the development of sustainable tourism development in Europe. Among the most important benefits of Greenways is the higher level of safety due to their separation from roads. Yet, while Greenways are said to be fully accessible and safe, all destinations need to ensure that all elements of the tourism system contribute to or enhance the accessibility of Greenways. Particularly important in this context is transport to and from dedicated Greenways⁵.

5.2.2.7 Barriers: cross-sector comparisons

After discussing the results of the specific hypotheses for each individual tourism sector, this section introduces three main cross-sector hypotheses and their results. This is important as it permits a holistic overview of the relative importance of barriers encountered in each sector. These cross-

¹ Hernández Galán, J. (2012). Accessible Tourism in Spain: Arona and Madrid. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism, (pp. 310-321). Bristol, Channel View Publications.

² Knigge, M. (2011). Mehr Gäste durch komfortables und attraktives Design, IN: RKW Kompetenzzentrum (Ed.) Gesund und sicher unterwegs - Konzepte und Marktchancen für kleine und mittlere Unternehmen im Tourismus. Available at: http://www.rkw-kompetenzzentrum.de/fileadmin/media/Dokumente/Publikationen/2011_LF_dfa-gesund-unterwegs.pdf

³ Frank, G. (2011). Natur erlebbar machen – Rangertouren im Nationalpark Eifel, IN: RKW Kompetenzzentrum (Ed.) Gesund und sicher unterwegs - Konzepte und Marktchancen für kleine und mittlere Unternehmen im Tourismus. Available at: http://www.rkw-kompetenzzentrum.de/fileadmin/media/Dokumente/Publikationen/2011_LF_dfa-gesund-unterwegs.pdf

⁴ Espírito Santo, R. (2009). Iniciativa Natureza para Todos: o acesso universal às áreas protegidas portuguesas, Revista Turismo & Desenvolvimento N.º 11.

⁵ Hernández Colorado, A., & Aycart Luengo, C. with the collaboration of Martínez Pastor, I. (2013). Guide to Best Practices and Recommendations for Accessible Greenways. Environmental Activities and Greenways Department (FFE). Available at: http://www.aevv-egwa.org/SiteResources/data/MediaArchive/pdf/Greenways4tour/G4T_Guide%20to%20best%20practices%20for%20accessible%20Greeways.pdf

sector hypotheses derive from the qualitative and quantitative assessments of barriers faced by people with access needs reported within the individual sectors (sections 5.2.2.1 to 5.2.2.6). Reports and studies from both European and non-European countries have assisted in establishing these hypotheses.

5.2.2.7.1 1st cross-sector hypothesis: Physical access versus attitudinal barriers across all sectors

Almost throughout all sectors, the desk research highlighted the importance of investigating physical access barriers compared to attitudinal barriers. In analysing studies from non-European and European countries, contrasting evidence was found with regard to the extent of physical and attitudinal barriers across different tourism sectors.

For example, when talking about the most positive holiday experience, Austrian travellers referred to positive attitudes and willingness to help¹. Also Australian tourists with access needs highlighted knowledge and positive attitudes of others as key in reducing exclusion in the tourist experience².

Similar results were reported by a number of Italian studies. Overall, it was found that attitudinal barriers weigh higher compared to physical access barriers particularly with regard to how tour operators treat customers with access needs³. The main barriers often relate to information and reception (attitudinal perspective – 57%) compared to infrastructural barriers (physical access barriers – 43%) from a service provider perspective as well^{4 5}. As a consequence, it is argued that not only physical access barriers need to be dismantled but also efforts need to be in place to improve staff qualification⁶. Yet, by comparing the perceptions of the population without immediately apparent access needs with people who do have explicit access needs, it was highlighted that the

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 STCRC (Sustainable Tourism Cooperative Research Centre) (2008). Accessible Tourism – Challenges and Opportunities. Understanding an evolving aspect of Australian tourism. Sustainable Tourism Cooperative Research Centre (STCRC), Queensland. Available at: http://www.accessibletourism.org/resources/crc_accessible_tourism_final_en.pdf

³ 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>

⁴ 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

⁵ 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

⁶ 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

physical environment represents a major barrier. 73.4% of people with a disability stated that physical access barriers represent the greatest obstacle compared to only 18% of the population without explicit access needs)¹.

In addition, by investigating the development of removing physical access barriers through the implementation of Universal Design criteria, it was revealed that progress is still limited in Greece with the biggest barrier referring to society's attitude², emphasising the importance of attitudinal barriers.

Yet, in the United States, physical access barriers were encountered more often compared to attitudinal barriers and thus represent the bigger barriers³. This was supported by another US study. Based on quantitative findings (Figure 188), it was suggested that American people with access needs encounter more physical than attitudinal barriers in all four tourism sectors that were investigated (food & beverage, accommodation, attraction and transportation sector)⁴.

Figure 188 – Physical access and attitudinal barriers encountered in different sectors (United States)

Physical access barriers		Attitudinal barriers	
Eat/ Drink	83%	Eat/ Drink	66%
Accommodation	81%	Accommodation	65%
Attractions	78%	Attractions	56%
Transportation	67%	Transportation	55%

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 Vozikis, K.T. (2009). Are there accessible environments in Athens, Greece today? WSEAS Transactions on Environment and Development, Vol. 5 (7):488-497. Available at: <http://www.wseas.us/e-library/transactions/environment/2009/29-523.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.

⁴ Card, 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.

Similar results were obtained from a study in China (Figure 189) stating that people with access needs experience more physical access barriers than attitudinal barriers across four sectors¹.

Figure 189 – Physical access and attitudinal barriers encountered in different sectors (China)

Physical access barriers		Attitudinal barriers	
Transportation	3.07	Transportation	2.44
Accommodation	2.80	Accommodation	2.21
Eat/ Drink	2.89	Eat/ Drink	2.27
Attractions	3.41	Attractions	2.65

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.

Given these contrasting opinions with regard to **physical access barriers versus attitudinal barriers**, there is a need to examine the situation for the European context, investigating which overall category of barriers (physical access barriers or attitudinal barriers) are experienced most often across the six main sectors (pre-travel/ information gathering stage, transit/ transportation, transport at the destination and access paths, accommodation sector, food and beverage as well as the attraction sector). Thus, the hypothesis is:

H33: Across all sectors, physical access barriers are encountered more often than attitudinal barriers.

The statistical analysis for this hypothesis revealed that **H33** is not supported with the exception of one destination country (which is discussed below in further detail). Attitudinal barriers are encountered more often than physical access barriers by comparing the perceptions of individuals with different types of access needs (Figure 190).

Figure 190 – H33 Barriers: Cross-sector comparison: Physical access vs. attitudinal barriers by type of access need

¹ 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.

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

By investigating destination-specific differences, only Spain was identified as the country supporting the hypothesis. This means that visitors to Spain encounter more physical access barriers compared to attitudinal barriers. Yet, in most other cases, attitudinal barriers are encountered more often than physical access barriers (Figure 191).

Figure 191 – H33 Barriers: Cross-sector comparison: Physical access vs. attitudinal barriers by destination

Destination	Hypothesis supported	More important barriers	Barriers experienced
Belgium	No	Attitudinal barriers	16.7%
Bulgaria	No	Attitudinal barriers	20.0%
Croatia	No	Attitudinal barriers	23.9%
France	No	Attitudinal barriers	16.0%
Germany	No*	Physical access barriers	10.3%
Greece	No	Attitudinal barriers	17.4%
Ireland	No	Attitudinal barriers	20.8%
Italy	No	Attitudinal barriers	15.5%
Lithuania	No*	Attitudinal barriers	8.7%
Poland	No	Attitudinal barriers	18.2%
Slovenia	No	Attitudinal barriers	13.5%
Spain	Yes	Physical access barriers	8.9%
Sweden	No*	Attitudinal barriers	8.2%
The Netherlands	No	Attitudinal barriers	13.8%
United Kingdom	No	Attitudinal barriers	9.4%

Note: * The encounter frequencies of attitudinal barriers and physical barriers are not significantly different.

While reports from Spain underline that people with access needs were not treated adequately and with limited respect^{1 2}, the findings from this current study draw attention to the need to focus on the removal of physical access barriers alongside changing attitudes of service providers.

In addition to investigating the relative importance of physical access barriers versus attitudinal barriers, it is also important to gain a more in-depth understanding of the frequency of barriers across all sectors, which is discussed next.

5.2.2.7.2 2nd cross-sector hypothesis: Frequency of barriers across all sectors

In order to be able to develop initiatives and set-up policies to reduce barriers in the tourism industry, it is essential to identify the sector where most barriers are experienced by people with access needs.

In this context, the desk research assisted in providing a preliminary overview of the frequency of barriers encountered in different countries and regions in and outside Europe.

Outside Europe, investigating the relative importance of barriers, it was found that in the United States, mobility-restricted individuals ranked the barriers encountered at the hotel bar, in eating/ and drinking establishments and at bus/ coach stations as the top three sectors where most barriers are experienced³ (Figure 192).

¹ Ministerio de Industria, Turismo y Comercio (no date). Decálogo de Buenas Prácticas en Accesibilidad Turística - Destinos y Recursos Culturales y Naturales. Available at:

http://www.planaccesibilidadturistica.es/UserFiles/publicaciones/ficheros/Decalogo_de_Buenas_Practica_2.pdf

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 Takeda, K., & Card, J.A. (2002). U.S. Tour Operators and Travel Agencies: Barriers Encountered When Providing Package Tours to People Who Have Difficulty Walking. *Journal of Travel and Tourism Marketing* 12, 47-61.

Figure 192 – Frequency of barriers encountered in different sectors (United States I)

Tourism Sectors	
Hotel Bar	80.8%
Eating/ Drinking Establishments	80.6%
Bus/ Coach station	80%
Accommodation (Hotels & Motels)	75.8%
Ship/ Port	69.2%
Train/ Train Station	69.2%

Concurring with another study from the US, the food and beverage sector is highlighted as the sector which entails the most barriers for people with access needs (Figure 193)¹. Here, food and beverage establishments do not only represent the most problematic sector overall but also when comparing physical access barriers and attitudinal barriers.

Figure 193 – Frequency of barriers encountered in different sectors (United States II)

Physical access barriers		Attitudinal barriers	
Eat/ Drink	83%	Eat/ Drink	66%
Accommodation	81%	Accommodation	65%
Attractions	78%	Attractions	56%
Transportation	67%	Transportation	55%

¹ Card, 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.

Yet, in contrast to the American studies discussed above, research conducted in China revealed that people with access needs encounter most barriers in the attraction sector. This result is also consistent when comparing physical access barriers and attitudinal barriers (Figure 194)¹.

Figure 194 – Frequency of barriers encountered in different sectors (China)

Physical access barriers		Attitudinal barriers	
Transportation	3.07	Transportation	2.44
Accommodation	2.80	Accommodation	2.21
Eat/ Drink	2.89	Eat/ Drink	2.27
Attractions	3.41	Attractions	2.65

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.

Summarising the discussion above, it can be stated that sectors where most barriers are encountered vary according to different geographical contexts. In order to provide a comprehensive analysis for the European situation, the following hypothesis is established to offer insights into **different levels of frequency of barriers experienced in different tourism sectors**:

H34: People with access needs encounter different levels of frequency of barriers across key tourism sectors (accommodation, food and beverage, attractions and transportation).

After finalising the statistical testing, **H34** is supported. People with access needs encounter different levels of frequency of barriers across key tourism sectors. Barriers experienced in the transport (at the destination) stage are encountered more often compared to other sectors, particularly for individuals with mobility, sensory, behavioural and hidden limitations (Figure 195). This is supported by an Italian study reporting that the main barriers can be found in transport-related sectors². Particularly the distances between service offerings including access to transportation heavily reduce the possibilities for all citizens and the autonomy of people with special

¹ 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.

² Tournour-Viron, P. (2010). Is Italy an accessible destination? The opinion of foreign tour operators, suggestions to increase the flows according to the data from TTG Italy Observatory. 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

access needs¹. This means that a failure to ensure accessible transport and access paths at the destination leads to the exclusion of people with access needs. It is thus not only necessary that hotels and attractions are accessible as attention also needs to be paid to the links between these service offerings regardless of the distance between different establishments. As transport is a major facilitator of social participation², barriers inherent in this sector have to be addressed in the short-term.

Yet in contrast, for people with communication impairments, transit is the stage where they face the most barriers. This might be attributable to the lack of alternative means of communication tools and devices (e.g. in airports, rail or coach stations) and/ or the information provided by organisations in the transit stage being perceived as too complex.

Figure 195 – H34 Barriers: Cross-sector comparison: Frequency of barriers by type of access need

Type of access need	Hypothesis supported	Sector with most barriers	Barriers experienced
Mobility	Yes	Transport at destination	12.6%
Senses	Yes	Transport at destination	12.1%
Communication	Yes	Transit	13.4%
Behaviour	Yes	Transport at destination	13.3%
Hidden limitations	Yes	Transport at destination	12.0%

While transport (at the destination) is the sector where most barriers are experienced by people with access needs, accommodation establishments are found to represent the sector with the least barriers. This opposes findings from other studies. For example, looking at the European context, in

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 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

all sectors, accommodation appears as the main concern due to different European interpretations of what counts as an 'accessible' hotel¹.

In addition to the different perceptions held by people with different access needs, opinions with regard to the sector that entails most barriers also vary with regard to the destination context (Figure 196).

¹ Kreiter, J.N. (2010). A holiday for all from the perspective of a tourist with disabilities. 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

Figure 196 – H34 Barriers: Cross-sector comparison: Frequency of barriers by destination

Destination	Hypothesis supported	Sector with most barriers	Barriers experienced
Belgium	Yes	Food and beverage	12.5%
Bulgaria	Yes	Information	18.9%
Croatia	Yes	Attractions/Activities	8.4%
France	Yes	Transport at destination	15.4%
Germany	Yes	Transport at destination; Accommodation	10.9%
Greece	Yes	Attractions/Activities	14.9%
Ireland	No*	Accommodation	16.0%
Italy	Yes	Attractions/Activities	11.5%
Lithuania	Yes	Transit; Transport at destination	10.9%
Poland	Yes	Attractions/Activities	13.2%
Slovenia	No*	Transport at destination	8.1%
Spain	Yes	Transport at destination	12.4%
Sweden	No*	Food and beverage	10.3%
The Netherlands	Yes	Accommodation	9.2%
United Kingdom	No*	Accommodation	9.4%

Note: * The frequencies of barriers encountered across sectors are not significantly different.

Summarising the table above, transport at the destination is the sector where most barriers are encountered for destinations such as France, Germany, Lithuania, Slovenia and Spain. This is partially supported by a study conducted in Spain where it was highlighted that transport represents the second most important sector where respondents felt that they were treated badly or very badly¹.

In contrast, destination countries such as Germany, Ireland, the Netherlands and the United Kingdom need to work further in reducing obstacles in the accommodation sector. This coincides with research from the UK, indicating that the lack of accessible accommodation (mean score of 3.99) ranks highest followed by no accessible transportation at the destination (mean score of 3.94), no accessible transport to get to the destination (mean score of 3.93) and inaccurate information on accessibility (mean score of 3.91)². Thus, it is the accommodation sector that is perceived as containing the most obstacles in a holiday environment.

Visitors to Belgium and Sweden experience most barriers in the food and beverage sector, whereas tourists holidaying in Poland, Italy, Croatia and Greece encounter most obstacles and difficulties with the attractions sector. The latter can be explained by the fact that these destination countries rely heavily on nature-based attractions and activities such as beach tourism, where people with access needs most frequently encountered barriers (see section 5.2.2.6 – barriers encountered with attractions/ activities).

Having identified and discussed the frequency of barriers encountered in different tourism sectors, the final cross-sector analysis deals with one specific access element that was reported as a barrier throughout almost all sectors.

5.2.2.7.3 3rd cross-sector hypothesis: Inaccessible toilets as most important barrier across all sectors

The desk research covering studies from European and non-European countries has identified the lack of accessible toilets as a key barrier throughout all sectors.

For the transit stage, numerous studies have highlighted that the lack of accessible toilets represents a major barrier at airports as well as for low-cost and standard airlines which causes

¹ 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

² Buj, C. (2010). Paving the way to accessible tourism. International Centre for Responsible Tourism, Leeds Metropolitan University, Leeds, UK. Available at: <http://turismo-sostenible.net/Paving%20the%20way%20to%20accessible%20tourism-Carlos%20Buj.pdf>

many difficulties and obstacles for people with access needs^{1 2 3}. Similar results were obtained from an assessment of the effectiveness of the 'Access to Air Travel for Disabled People – Code of Practice' in the UK, which has highlighted that in-flight services such as toilets and assistance in reaching toilets were not always provided by airlines⁴. Equally, motorway service stations create concern with regard to accessible bathrooms⁵.

In the accommodation sector, inaccessible toilets and bathrooms were emphasised by articles and reports conducting research in the United States^{6 7}, Australia⁸ and Israel⁹. Within Europe, a qualitative research study from Austria also confirms the importance of an accessible bathroom and toilet as the most significant aspect in the accommodation sector¹⁰.

In Germany, research has shown that many people refrain from visiting restaurants due to the lack of accessible toilets in the food & beverage sector¹¹.

The attractions sector portrays a similar situation with regard to the failure to provide accessible toilet facilities. For example, outside Europe, a study investigating the accessibility of various museums in Rio de Janeiro, noted poorly adapted bathrooms (if adapted at all) among the principal

¹ 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.

² 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.

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 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

⁵ Masala, D. (2010). Tourism for all and people with intellectual disabilities from a families point of view. 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

⁶ Turco, D.M., Stumbo, N.J., & Garncarz, J. (1998). Tourism Constraints for People with Disabilities. *Parks and Recreations*, 33, 78-84.

⁷ 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.

⁸ Darcy, S. (2002). Marginalised Participation: Physical Disability, High Support Needs and Tourism. *Journal of Hospitality and Tourism Management*, 9, 61-72.

⁹ 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.

¹⁰ 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>

¹¹ BMWi (Ed.) (2010). Wirtschaftsfaktor Alter. Faktenblatt 4. Available at: <http://www.bmwi.de/BMWi/Redaktion/PDF/Publikationen/wirtschaftsfaktor-alter-faktenblatt-4-barrierefreiheit,property=pdf,bereich=bmwi,sprache=de,rwb=true.pdf>

barriers encountered in this part of the attraction sector¹. In contrast, examples can be found for Europe where progress has been made in terms of the accessibility of museums. For example in Genoa/ Italy, many museums offer accessible toilets². Understandably, the National Disability Authority of Ireland argues that accommodating accessible toilets in historic buildings is more challenging compared to 'standard' buildings³.

Also with regard to nature-based activities in Spain⁴ and sport facilities⁵ in general, the lack of accessible toilets represents a major obstacle preventing people with access needs engaging and enjoy this part of the tourism offer at destinations. Particularly with regard to beach holidays, reports call for more accessible toilets at beaches to be made available⁶. This is important as bathrooms with accessible toilets are mentioned as the first element that needs to be in place in order to remove existing architectural barriers in Italy⁷.

The examination of the importance of accessible toilets and bathrooms across different sectors has emphasised that 'accessible toilets are a "must"' (p.314)⁸. In order to test this assumption empirically, the hypothesis is:

H35: The lack of accessible toilets is the most important barrier encountered by people with access

¹ Cohen, R., Rose de Siqueira Duarte, C., de Barros Horizonte Brasileiro, A., & Rogrigues de Melo, N. (2012). Tourism in Brazilian Cities: Accessibility Condition for Museums declared as Historic Patrimony in Rio de Janeiro, Brazil. Available at:

http://www.transed2012.in/Common/Uploads/Theme_C_Session_1_Regency_III/346-paper_transedAbstract00155.pdf

² 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>

³ National Disability Authority (NDA) (2012). Access - Improving the Accessibility of Historic Buildings and Places. Government of Ireland. Available at: [http://www.nda.ie/website/nda/cntmgmtnew.nsf/0/911AA8C52EA2A0D98025798700303E93/\\$File/Access_Improving_accessibility_Historic_Buildings_and_Places.pdf](http://www.nda.ie/website/nda/cntmgmtnew.nsf/0/911AA8C52EA2A0D98025798700303E93/$File/Access_Improving_accessibility_Historic_Buildings_and_Places.pdf)

⁴ Hernández Galán, J. (2012). Accessible Tourism in Spain: Arona and Madrid. IN D. Buhalis, S. Darcy & I. Ambrose (Eds.) Best Practice in Accessible Tourism: Inclusion, Disability, Ageing Population and Tourism, (pp. 310-321). Bristol, Channel View Publications.

⁵ Kreiter, J.N. (2010). A holiday for all from the perspective of a tourist with disabilities. 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

⁶ Ministerio de Industria, Turismo y Comercio (no date). Decálogo de Buenas Prácticas en Accesibilidad Turística - Destinos y Recursos Culturales y Naturales. Available at: http://www.planaccesibilidadturistica.es/UserFiles/publicaciones/ficheros/Decalogo_de_Buenas_Practica_2.pdf

⁷ Faccin, M. (2012). Analisi dell'evoluzione del concetto di accessibilità nel turismo. Università Ca'Foscari Venezia, Venice, Italy. Available at: <http://dspace.unive.it/bitstream/handle/10579/2036/834819-1163227.pdf?sequence=2>

⁸ Kreiter, J.N. (2010). A holiday for all from the perspective of a tourist with disabilities. 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

needs across all sectors.

The hypothesis testing procedure has revealed that H35 is partially supported. Accessible toilets and bathroom facilities are perceived as more important compared to 28 out of 36 aspects of a destination (Figure 197).

Figure 197 – H35 Barriers: Cross-sector comparison: Importance of barriers by type of access need

Type of access need	Hypothesis supported	Most important aspect	Importance score
Mobility	Partially (28/36)	General value for money of the destination	4.39
Senses	Partially (27/36)	General value for money of the destination	4.36
Communication	Partially (28/36)	General value for money of the destination	4.40
Behaviour	Partially (28/36)	General value for money of the destination	4.36
Hidden limitations	Partially (28/36)	General value for money of the destination	4.40

In particular, accessible toilets and bathroom facilities are perceived as the most important aspect in Sweden (Figure 198), while they are relatively less important in Ireland, Germany and the Netherlands. With an average importance score ranging from 4.0 for the Netherlands to 4.6 for Poland (Annex O), it is suggested that all sectors must strengthen their efforts to improve the availability of toilets and bathrooms as an indispensable element for people with access needs when being on holiday.

Figure 198 – H35 Barriers: Cross-sector comparison: Importance of barriers by destination

Destination	Hypothesis supported	Most important aspect	Importance score
Belgium	Partially (11/36)	Nature	4.40
Bulgaria	Partially (20/36)	Nature	4.35
Croatia	Partially (15/36)	General value for money of the destination	4.46
France	Partially (15/36)	General value for money of the destination	4.40
Germany	Partially (8/36)	General value for money of the destination	4.47
Greece	Partially (16/36)	Nature	4.70
Ireland	Partially (7/36)	General value for money of the destination	4.57
Italy	Partially (20/36)	General value for money of the destination	4.58
Lithuania	Partially (10/36)	Nature	4.52
Poland	Partially (34/36)	General value for money of the destination	4.60
Slovenia	Partially (19/36)	Food and drink available at destination	4.27
Spain	Partially (21/36)	General value for money of the destination	4.46
Sweden	Yes (36/36)	Accessible toilet and bathroom facilities	4.48
The Netherlands	Partially (9/36)	How tourists are treated	4.15
United Kingdom	Partially (20/36)	General value for money of the destination	4.36

As can be seen from the table above, respondents also stressed the general value for money. It can be argued that this is not different compared to the population without explicit access needs as during times of economic downturn and recessions, individuals pay closer attention to what they get for their money spent. Recent news stories highlight that tourism to Ireland has significantly improved by giving value for money, which also leads to tourists being more willing to recommend the destination to friends and family members¹.

¹ TheJournal.ie (2013) Ireland getting better in offering value for money, say tourists. Available at: <http://www.thejournal.ie/ireland-value-for-money-tourism-878516-Apr2013/>

6 Task 4 - Estimate of the current and future economic contribution of accessible tourism

6.1 Task - 4a Stakeholder consultation

6.1.1 Methodology

The consultation of stakeholders is a qualitative approach and an additional tool to complement the survey's quantitative approaches. The main aims are:

- Gathering information regarding the current impact of the demand for accessible tourism
- Surveying means and tools of relevant service providers in product development and marketing
- Contributing to the definition of success factors and recommendations
- Refining the definition of the three possible future scenarios to be used in the surveys.
- Last but not least, the stakeholder consultation plays an important role in reaching and informing key influencers in tourism about the project itself and Accessible Tourism in general.

6.1.1.1 Focus groups

Two focus groups have been conducted. The first one in Luxembourg was a preliminary one in order to test the questions and the procedure. This first focus group was organised within the European Grundtvig workshop: "EMPOWER - MUNICIPALITIES ENABLING THE CITIZENS" on May 12th 2013. The members of the focus group represent 10 countries (Figure 199). Their common interest was accessibility and Design for All although from different perspectives: some as public servants in local administrations, some as disability NGOs members, some as tourism professionals, some as design professionals (industrial design, ergonomists, architects, engineers) and tourism agencies employees.

Figure 199 - Pre-focus group participants

	Name	First Name	Country	Sector
Mr	Boussemaere	Wim	Belgium	Disk Jockey (blind)
Mr	Masson	James	Belgium	Travel Agency Employee
Mrs	Mihaleva	Radostina	Bulgaria	Personal interest in accessibility
Ms	Vinšová	Jana	Czech Republic	Designer
Ms	Abidini	Loreta	Greece	Local administration
Mrs	Gkolfinopoulou	Maria	Greece	Local administration
Mrs	Grigoropoulou	Despoina	Greece	Local administration
Mrs	Kanellopoulou	Despina	Greece	Marketing expert
Mrs	Paliotheodorou	Georgia	Greece	Local administration
Mr	Lucchini	Lorenzo	Italy	Architect
Mrs	Orlandi	Daniela	Italy	Architect
Ms	Steffan	Isabella Tiziana	Italy	Architect
Mr	Sagramola	Silvio	Luxembourg	NGO
Mr	Breuer	Yannick	Luxembourg	NGO
Mr	Zandstra	Christiaan	Netherlands	Cultural Heritage student (wheelchair user)
Mr	Dankovic	Vidan	Serbia	Accessibility expert
Mr	Počuč	Miodrag	Serbia	Traffic Engineer (hearing impaired)
Ms	Rudić Počuč	Bojana	Serbia	NGO
Mrs	Marković	Ivana	Serbia	Sign language interpreter
Ms	Bonet Pedrol	Imma	Spain	NGO
Mr	Yontar	Ahmet Alper	Turkey	Engineer

The IVth International Congress of Tourism for All in Avila (27 June 2013) provided an excellent opportunity to conduct a focus group with experts from many fields in Tourism for All. Many experts from different countries and different branches gathered in one place.

The focus group duration was approximately two hours, and yielded an in-depth discussion amongst the participants on a wide range of aspects of accessible tourism.

Figure 200 presents the list of participants. The discussion guide is available in Annex P.

To investigate certain aspects at a deeper level the participants agreed to comment further on the three future scenarios by e-mail (see below).

Figure 200 - Focus group participants

Name	Institution	Type
Tatiana Aleman	Predif, Spain	Tour Operator
Veroniek Maat	Accessible Travel Netherlands	Tour Operator
Ana Garcia	Accessible Portugal	Tour Operator
Blanka Cros	Catalunya Turisme Cultural i de Lleure, Spain	Destination Manager Tour Operator
Diego Gonzales	Catalunya Turisme Cultural i de Lleure, Spain	Consultant
Carolina Vicens	Mallorca for All, Spain	Tour Operator
Imma Bonet	Design for All Foundation	Stakeholder Organisation
Rüdiger Leidner	Nationale Koordinationsstelle Tourismus für Alle e.V. (NatKo), Germany	Stakeholder Organisation
Magnus Berglund	Scandic Hotels, Sweden	Hotel Manager
Ivor Ambrose	European Network for Accessible Tourism	Stakeholder Organisation
Danny Silva	eCALYPSO.eu	Tour Operator
Annagrazia Laura	Consorzio Sociale COIN Società Cooperativa Sociale, Italy (President of ENAT)	Stakeholder Organisation
Silvio Sagramola	European Disability Forum	Stakeholder Organisation
Pete Kercher	EIDD - Design for All Europe	Stakeholder Organisation
Clara Mineiro (face to face communication only)	Cultural Heritage Portugal	Service supplier

6.1.1.2 In-depth-interviews (IDIs)

The stakeholder consultation included not just the focus groups, but in-depth interviews (IDIs) additionally. Indeed, these two approaches are complementary. IDIs were preferred for stakeholders for whom confidentiality is important (e.g. economic operators) or for experts who could not join the focus group.

11 IDIs were conducted with stakeholders in 10 countries:

- Austria
- Belgium
- Bulgaria
- Czech Republic
- Denmark
- Germany
- Italy
- Romania
- Spain
- Sweden

The stakeholders come from the following branches:

- Advocacy group (6 x)
- Information organisation (2 x)
- Marketing organisation (1 x)
- Public body (1 x)
- Service provider (1 x)

The interviews were carried out by telephone with a semi-structured questionnaire. Each interview lasted around 20 minutes. The interviews were conducted by highly trained and experienced interviewers.

Semi-structured interviews were conducted with a fairly open framework which allow for focused, conversational, two-way communication. Unlike the traditional questionnaire framework, where detailed questions are formulated ahead, semi structured interviewing starts with more general questions or topics. Relevant topics are initially identified and the possible relationship between these topics becomes the basis for more specific questions which do not need to be prepared in advance. The majority of questions were created during the interview, allowing both the interviewer and the person being interviewed the flexibility to probe for details or discuss issues.

6.1.2 Results

The following findings result from both the focus groups and the in-depth-interviews. They are grouped by the most important branches of interest.

6.1.2.1 Associations with accessible tourism

Most stakeholders have a formal definition that they use for “accessible tourism”. This definition tends to put accessible tourism in a positive context. Definitions of accessible tourism put forward by focus group participants and interview partners include the following aspects:

- Making tourism possible for everybody
- Equal opportunities – including financial opportunities – for everybody
- Respect for diversity – including gender questions
- Reliable Information
- Adapting services offered to each guest

However, some stakeholders express a concern that the term “accessibility” is (too) strongly connected with “disabilities”.

Some stakeholders (in particular the tourism providers) do not know the meaning of “accessible tourism” and need additional explanations. Likewise, the term “Tourism for All” had a lower level of comprehension among some stakeholders, especially tourism operators. One of the focus group participants with limited understanding of the two terms suggested that alternatively terminology would be more appropriate and understandable: “If you want to convince someone, better use other words”.

Despite these slight concerns regarding comprehension, the term “accessible tourism” is widely accepted among professionals, as they recognise its potential in terms of driving a specific tourism market: “‘Accessible tourism’ can be a brand, though it has not yet found its meaning”.

6.1.2.2 Product development and marketing

In general, the stakeholders clearly favour a mainstream approach of accessible tourism instead of a special interest approach for disabled guests.

“Interesting attractions should be first of all interesting and then accessible”.

A summary of opinion is that all services should be available for all guests, so that no special offers for disabled people are needed. However, the view is also expressed that the lack of information at present about accessible services at the destination requires that some specialised agents provide this information in order to build relations between clients and providers (especially when disabled people travel in group).

The stakeholders do not perceive that elderly people have any special requirement as a target group, but acknowledge that elderly people are more likely than younger tourists to request improved access.

Business-to-business relationships must be established and fostered in order to provide guests with consistency along the service chain. In addition, co-operation helps providers to learn from each other and strive for continuous improvement in the delivery of client satisfaction, while keeping up with the offers of rival companies.

“We should have also in mind that there will not always be people available to deliver assistance services. Therefore, environments where elderly people can be as autonomous as possible is a must”.

Due to the importance of considering the whole service chain, accessible tourism needs both political and public support. Some elements of the service chain, such as public transport and public infrastructure, will not be improved by private enterprises, but rather by public authorities. With this in mind, legislation and its enforcement are required.

6.1.2.3 Motivations

Enjoying holidays is the main need for consumers of tourism services, and the stakeholders agree on the social necessity to care for all members of the society.

However, profitability is an important driver and motivational factor for tourism service providers (destination manager, tour operators, hotel manager). Even the stakeholders with a social background (advocacy groups) tend to bring the financial argument forward.

6.1.2.4 Success factors and recommendations

The stakeholders identified the following success factors to support accessible tourism:

- Political and public support
 - Enhancing public-private-cooperation
 - Direct financial support
 - Harmonisation of standards and legislation
- Encouraging service providers to invest in accessible tourism
- Identifying and disseminating success cases
- Training of staff and decision makers. “Hotels or services providers who show a willingness to learn or treat a guest as well as possible are more likely to have a returning guest, regardless of the ability of the guest.” Employment of disabled people in tourism. “Employ people with disabilities and you create customers”.
- Communication with the guests:
 - Detailed and reliable information is important

- Demands are very individual. “Once, we had 140 guests in wheelchairs, but just 10 rooms for disabled guests. Many travellers with disabilities don’t need rooms for disabled guests”.
- Learning from guests and from team members: trained staff are aware of the guests’ demands and often are able to find good solutions themselves
- Product development:
 - Develop accessible tourism step by step, beginning with an inventory of the current offer in order to better understand any shortfalls in the offer. “We collected all accessible offers and grouped them”.
 - Think about the diversity and flexibility of your guests. “Through experience, people with access needs are more open to diversity and challenge than the organisations that passionately defend them.”

6.1.2.5 Economic meaning and potential impact

The stakeholders agreed that accessible tourism is profitable, whether taking the definition of ‘special interest tourism’ for disabled guests (example of a winter sport resort) or understood as ‘mainstream tourism’ (example of Scandic Hotels). Even under the present conditions, accessible tourism may bring a return on investment within the first year. At present, tourism service providers in general do not fully realise that many disabled or elderly guests have a lot of money.

However, some stakeholders stress the social facet of accessible tourism and insist on including social tourism for travellers with little money in order to fully embrace the concept of “Tourism for All”.

Looking to the future, the stakeholders expect that this market will grow and there is a growing acceptance of accessible tourism due to the demographic change that will push the market.

As a further note, one stakeholder underlined that accessibility may primarily assist the decision to travel but without a diverse and qualified offer, no tourism business can thrive.

6.1.2.6 Scenario Analysis

The comments on the single scenarios (including the additional feedback received by e-mail) can be summarised as follows:

Scenario 1: “At the destination some buildings are made accessible, but not all of them. Some of the hotels, restaurants and museums have been adapted for access needs, but no other services – such as wheelchairs – are available.”

- The general view was that this scenario is more or less identical to the reality of many tourist destinations today.
- People with access needs will travel less or seek out trusted locations rather than new destinations.

- Since information is not always available and/or not reliable, it becomes harder to decide whether or not to travel.
- Such a scenario would not change the spending habits of a traveller. Rather it will influence their choices. Such a location will most likely be dismissed as an option.
- Most services providers have a lack of training and hence no good offers.
- In conclusion, the customers' needs are not sufficiently fulfilled.

Scenario 2: "At the destination, most buildings are made accessible. Most of the hotels, restaurants and museums are adapted for access needs, and some services – like wheelchairs, visual and hearing aids – are available."

- This scenario comes closer to the concept of Tourism for All.
- This scenario will enlarge the potential market to a certain extent, and would enlarge it further with additional investments in infrastructure.
- Factors that will have a particularly positive impact on increasing demand include:
 - Accessibility of visiting cultural sites
 - Accessibility of hotels of 3 stars or less
 - Provision of additional information about accessibility
- However, since a number of buildings and transport service are not accessible, this might constrain their tourism experience or travel pattern. The tourist with access needs would still be required to spend more money to assure quality.
- Depending on the level (hotels stars) of adapted facilities, this destination will attract different segments. For example, a destination where the most accessible buildings are relatively expensive hotels rather than cheaper hotels may be more attractive to older people with more disposable income, but it may still be an unattractive offer to tourists with more severe access needs and limited income resources.
- Since not all the service chain elements are better adapted or made more user-friendly, this might require additional costs which may not be planned in the organizational phase of the travel, but will be faced by the tourist while at the destination, thus compromising the overall satisfaction for the whole trip.
- A better training of tourism sector staff will improve the relationship with the customer, and lead to a more satisfactory experience for the customer.
- The fidelity of tourists will increase, and the positive image of the destination will be enhanced too. This means that the destination will become more attractive and the tourism offer there will become more competitive.

Scenario 3: “At the destination, almost all buildings are made accessible. Almost all of the hotels, restaurants and museums are adapted for access needs, and many services – like wheelchairs, visual or hearing aids, medical services, dedicated personal assistants etc. – are available.”

- Obviously such a destination offers comfort and trust to the tourist. The likely impact is to have a high average of return guests/visitors, thus ensuring sustainability, provided that the destination has an attractive and constantly renewed offer.
- Tourists with access needs will not be treated differently from any other tourist. We are not talking about tourist with special needs, or disabled tourist, or accessible tourism, because the accessibility is already everywhere. Therefore, the offer of Scenario 3 closes matches the concept of Tourism for All.
- Persons with disabilities will certainly travel more frequently and thus would spend more money.
- If all accommodation, transport systems within and to/from the destinations and the tourist sites would really be accessible, tourists with access needs would have to spend less to guarantee a good experience.
- Accessibility should be available on all service levels when it comes to travel costs (hostels, 3 star hotels, 4 star hotels etc.)
- The likely impact is to have a high average of return guests
- There are 80 million people who are disabled or with reduced mobility in the EC. All of them would be a potential tourist to this destination, and so this tourist destination will increase its competitiveness and income.
- Accessibility then, will be always part of the design, management and in any of the tourist resources /services /offer. They will use the same commercialisation channels (they will be for both customers with special needs or not), so the demand will increase significantly.

The comments made by the stakeholders were very useful for the team to refine the scenarios and to formulate and support the hypotheses formulated for this study.

6.1.2.7 Conclusion

Focus groups and in-depth-interviews with experienced stakeholders show that:

- Accessible tourism is considered a business opportunity but there is a lack of coordination, particularly between the public and private sector.
- Accessibility is mainly understood as a feature for disabled guests and almost never understood as a plus in comfort and service and, therefore, not used in marketing and advertising.
- Product development and marketing is mainly targeted only to disabled people.
- For the tourism business, political and financial support, awareness raising and activation of service providers are important drivers
- For the guest, reliable information on accessible offers and services is a key factor for success

6.2 Current economic contribution

6.2.1 Methodology

6.2.1.1 Direct economic contribution estimation

The rationale of estimating the economic contribution of accessible tourism can be described as below:

Direct economic contribution =

daily spending × length of stay × people with access needs × travel propensity × travel frequency

From the formula above, it is apparent that the key indicator to be considered is the spending by travellers. Briefly speaking, the economic contribution is the tourism demand in monetary terms.

The first two parameters, daily spending and length of stay, dictate a traveller's spending per trip. Although secondary data on tourist expenditure may be available regarding generic tourism, figures for the accessible tourism are not available. For the current project, the daily spending and length of stay figures were gathered from an online survey conducted in the 12 representative countries. Specifically, this information can be extracted from:

Q18. We will now ask you about your travel budget.

Thinking of your most recent trip, how much money did you spend per person on the following items?

Please write down your destination and the number of nights you spent at your destination.

Please give an amount for each category in [CURRENCY]. If you are unsure about the answer, please give your best estimate.

In the estimation of economic contribution, the other three parameters, i.e., people with access needs, travel propensity and travel frequency, are the backbone of demand estimation. The sources and methods for demand estimation have been explained in Section 3.2.

6.2.1.2 Total economic contribution estimation – indirect and induced effects

Apart from the direct economic contribution generated by directly serving the accessible tourism market, there are secondary effects incurred.

As with any economic contribution estimation, two types of secondary effects are identified, namely the indirect effect and the induced effect. Indirect effect means the changes in income and employment within the destination in backward-linked industries supplying goods and services to tourism businesses. For example, the increased revenue of local farms resulting from supplying fruits and vegetables to hotels are an indirect effect of tourist spending. Induced effect means the increased sales within a destination from household spending of the income earned from tourism

and its supporting sectors. Such income is spent by tourism employees on other consumer goods and services or housing. This generates additional income and employment throughout the destination's economy.

Therefore, via the indirect and induced effects that help to circulate the revenue of tourism businesses, one euro received by the accessible tourism operators can benefit the whole economy by more than one euro.

The rationale of total economic contribution estimation is as follows:

Total of direct and indirect contribution = direct economic contribution × indirect multiplier

Total of direct, indirect and induced contribution = direct economic contribution × induced multiplier

The multipliers are derived from the input-output tables, which are collected from Eurostat¹. The idea of an input-output table is to track the inputs used in the producing different categories of products. For example, a restaurant uses such inputs as food & beverage, utilities (water, electricity, gas etc.), transport (or logistics), and so on. Hence, via the supply chain linkage the revenue earned by the restaurant is channelled to other industries providing supplies to the restaurant, and is magnified across all industries in the economy.

The derivation of multipliers follows standard procedures, which involve matrix operation. A more detailed explanation of the methodology is provided by the Eurostat Manual of Supply, Use and Input-Output Figures² (pp.497-506) and the Input-Output Methodology Guide by the Scottish Government³ (pp.22-26). A brief technical description is provided in Annex Q.

Specifically, in this task three major contributions were investigated, namely the contribution in terms of output, gross value added and employment. Basically, output consists of those goods or services that are produced within an establishment that become available for use outside that establishment, plus any goods and services produced for own final use⁴. Gross value added (GVA) is the value of output less the value of intermediate consumption; it is a measure of the contribution to GDP made by an individual producer, industry or sector⁵. As a component of GDP, gross value added of the total economy usually accounts for more than 90% of GDP. The difference between GVA and GDP

¹ http://epp.eurostat.ec.europa.eu/portal/page/portal/esa95_supply_use_input_tables/data/workbooks

² http://epp.eurostat.ec.europa.eu/cache/ITY_OFFPUB/KS-RA-07-013/EN/KS-RA-07-013-EN.PDF

³ <http://www.scotland.gov.uk/Resource/Doc/919/0116738.pdf>

⁴ http://epp.eurostat.ec.europa.eu/cache/ITY_OFFPUB/KS-RA-07-013/EN/KS-RA-07-013-EN.PDF, p.569.

⁵ http://epp.eurostat.ec.europa.eu/cache/ITY_OFFPUB/KS-RA-07-013/EN/KS-RA-07-013-EN.PDF, p.558.

is the taxes and subsidies on products¹. Conceptually, both GVA and GDP measure the same value added (or net output) in an economy over a certain period. In the following sections, the contribution in terms of GVA will be presented alongside the output contribution and employment contribution, whilst the contribution in terms of GDP were presented in the text as a supplement to the GVA figures. Output, gross value added (GVA) and GDP are all measured in monetary terms, while employment is measured in terms of persons.

For the three terms of contribution, both the indirect and the induced effects were estimated. Hence the total set of contribution figures includes six indicators.

6.2.1.3 Effect of travel companions

As discussed in Section 3.2.2.2, there is an urge to quantify the ‘multiplication’ effects generated by travel companions.

The data is available from the survey questionnaire, specifically

Q18. We will now ask you about your travel budget.

Thinking of your most recent trip, how much money did you spend per person on the following items?

Please write down your destination and the number of nights you spent at your destination.

Please give an amount for each category in [CURRENCY]. If you are unsure about the answer, please give your best estimate.

The respondents were asked to fill in ‘the number of people who travelled with you (excluding yourself)’. This directly indicates the number of companions.

To calculate the average number of companions at country level, the answers to the question right above were taken simple average for a specific group (with disabilities, or elderly) of a specific country.

To calculate the number of companions at the EU level, the numbers at the country level were taken weighted average, with the weights being the corresponding current tourism demand. Equivalently, this means the calculation is the ratio between the total number of people (including the people with

¹ The sum of GVA at basic prices over all industries plus taxes on products minus subsidies on products gives gross domestic product (GDP).
http://epp.eurostat.ec.europa.eu/statistics_explained/index.php/Glossary:Value_added

access needs and their companions) within the EU27 countries who go out to travel, and the total number of trips (i.e., tourism demand) they conduct.

6.2.2 Results

The following sections report the results of economic contribution estimation at the EU regional level, together with some key comparisons among individual member states. With regard to the full results about each EU country, a detailed summary is provided in Annex T.

6.2.2.1 Direct economic contribution

The daily spending figures and the average length of stay figures, as derived from Q18 of the survey questionnaire, are presented in Figure 201 to Figure 203.

At the EU level, the average day trips spending amounts to about €80.

For overnight trips, as spending on accommodation has to be considered, the daily spending tends to be above €100. Another dimension that needs attention is the length of stay. From Figure 201, it is apparent that the overnight trips to intra-EU destinations (about 10 days) take longer than those within the home country (about 7 days). Hence the spending per overnight trip within the home country stands at about €700, whereas the figure for intra-EU overnight trip is about €1,100.

Comparing both groups of people with access needs, it is not surprising to see that the elderly population has more spending power than the people with disabilities.

At the country level, among the people with disabilities (Figure 202), those from Cyprus, Germany, Ireland and Italy are among the biggest spenders. Their average day trip spending can be as high as €90, whereas the spending per overnight trip is about €800 (domestic) or €1,200 (intra-EU). These almost double the figures of the lowest spending, seen in Bulgaria, Hungary and Romania.

Among the elderly population (Figure 203), the highest spending groups are those from France and the United Kingdom, especially when it comes to overnight trips. The average length of stay of the elderly population from these two countries is about 2 weeks. With the spending more than €100 per day, a whole overnight trip can cost as much as €800 at home or €1,500 at intra-EU destinations. In comparison, the elderly population from Estonia, Latvia and Lithuania spent less than a quarter of the spending by their French and UK counterparts on overnight trips.

Figure 201 - Travel behaviour of people with access needs: EU-wide averages of per person spending, 2012

Group	People with Disabilities		The Elderly Population	
	Day Trips	Overnight Trips	Day Trips	Overnight Trips
Daily Spending - Domestic (€)	74.8	101.4	82.3	109.5
Average Days - Domestic	-	6.8	-	6.8
Daily Spending - Intra-EU (€)	74.2	102.3	76.8	113.8
Average Days - Intra-EU	-	10.1	-	10.4

Note: 1) Of the 2,111 responses received, 53 responses have been discarded for the estimation, due to irrational travel patterns answered.

Figure 202- Travel behaviour of people with disabilities in the EU27 countries: country-specific averages of per person spending, 2012

Source Market	Austria	Belgium	Bulgaria	Cyprus	Czech Republic	Denmark	Estonia	Finland	France	Germany	Greece	Hungary	Ireland	Italy
Travel Type	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips
Daily Spending (€)	72.5	72.5	40.3	91.9	40.8	84.7	57.7	84.7	74.0	84.0	83.9	40.3	91.9	84.0

Source Market	Latvia	Lithuania	Luxembourg	Malta	Netherlands	Poland	Portugal	Romania	Slovakia	Slovenia	Spain	Sweden	United Kingdom
Travel Type	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips
Daily Spending (€)	57.7	57.7	72.5	56.9	73.1	40.8	83.9	40.3	40.8	56.9	83.9	84.7	75.8

Source Market	Austria	Belgium	Bulgaria	Cyprus	Czech Republic	Denmark	Estonia	Finland	France	Germany	Greece	Hungary	Ireland	Italy
Travel Type	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips
Daily Spending (€)	114.8	114.8	49.3	117.6	54.1	109.0	77.2	109.0	99.5	123.6	116.1	49.3	117.6	123.6
Average Days - Domestic	6.1	6.1	6.6	7.1	6.8	5.6	4.2	5.6	8.7	6.7	6.7	6.6	7.1	6.7
Average Days - Intra-EU	9.5	9.5	12.9	10.1	14.0	10.3	9.3	10.3	9.2	9.6	9.8	12.9	10.1	9.6

Source Market	Latvia	Lithuania	Luxembourg	Malta	Netherlands	Poland	Portugal	Romania	Slovakia	Slovenia	Spain	Sweden	United Kingdom
Travel Type	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips
Daily Spending (€)	77.2	77.2	114.8	73.5	95.5	54.1	116.1	49.3	54.1	73.5	116.1	109.0	103.3
Average Days - Domestic	4.2	4.2	6.1	5.0	6.5	6.8	6.7	6.6	6.8	5.0	6.7	5.6	5.7
Average Days - Intra-EU	9.3	9.3	9.5	8.9	10.8	14.0	9.8	12.9	14.0	8.9	9.8	10.3	10.2

Note: 1) Of the 2,111 responses received, 53 responses have been discarded for the estimation, due to irrational travel patterns answered.

Figure 203 - Travel behaviour of the elderly population in the EU27 countries: country-specific averages of per person spending, 2012

Source Market	Austria	Belgium	Bulgaria	Cyprus	Czech Republic	Denmark	Estonia	Finland	France	Germany	Greece	Hungary	Ireland	Italy
Travel Type	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips
Daily Spending (€)	60.6	60.6	47.1	67.3	47.2	56.5	42.1	56.5	90.9	74.3	65.5	47.1	67.3	74.3

Source Market	Latvia	Lithuania	Luxembourg	Malta	Netherlands	Poland	Portugal	Romania	Slovakia	Slovenia	Spain	Sweden	United Kingdom
Travel Type	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips	Day trips
Daily Spending (€)	42.1	42.1	60.6	62.9	52.1	47.2	65.5	47.1	47.2	62.9	65.5	56.5	137.6

Source Market	Austria	Belgium	Bulgaria	Cyprus	Czech Republic	Denmark	Estonia	Finland	France	Germany	Greece	Hungary	Ireland	Italy
Travel Type	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips
Daily Spending (€)	97.1	97.1	57.1	96.3	62.6	93.6	51.4	93.6	110.2	112.7	111.1	57.1	96.3	112.7
Average Days - Domestic	7.0	7.0	7.2	5.8	6.3	4.4	3.6	4.4	7.4	8.8	6.2	7.2	5.8	8.8
Average Days - Intra-EU	10.1	10.1	16.0	9.3	8.3	7.4	6.8	7.4	13.7	10.8	5.8	16.0	9.3	10.8

Source Market	Latvia	Lithuania	Luxembourg	Malta	Netherlands	Poland	Portugal	Romania	Slovakia	Slovenia	Spain	Sweden	United Kingdom
Travel Type	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips
Daily Spending (€)	51.4	51.4	97.1	84.3	70.4	62.6	111.1	57.1	62.6	84.3	111.1	93.6	174.8
Average Days - Domestic	3.6	3.6	7.0	7.6	5.6	6.3	6.2	7.2	6.3	7.6	6.2	4.4	4.3
Average Days - Intra-EU	6.8	6.8	10.1	9.8	10.6	8.3	5.8	16.0	8.3	9.8	5.8	7.4	13.9

Note: 1) Of the 2,111 responses received, 53 responses have been discarded for the estimation, due to irrational travel patterns answered.

With the spending figures, it is feasible to establish the current direct economic contribution of accessible tourism.

Figure 204 illustrates the estimation process of direct economic contribution of accessible tourism at the EU level.

The direct economic contribution is usually measured by gross turnover and net turnover. The gross turnover directly captures the final demand for goods and services by travellers and is equivalent to the direct economic contribution in terms of output. The net turnover is basically the gross turnover deducted by valued added tax (VAT)¹. An EU-wide average VAT rate of 12.1% was applied for calculation purpose. The VAT was calculated according to the rates announced at Eurostat² and the tourism revenue at each member state³. Only the VAT rates related to accessible tourism were considered, namely those for transport, hotel accommodation, restaurant, sightseeing and medical care.

¹ In business, both the VAT and the trade discounts (if applicable) need to be deducted from the gross turnover to yield the net turnover.

² http://ec.europa.eu/taxation_customs/resources/documents/taxation/vat/how_vat_works/rates/vat_rates_en.pdf
³ http://epp.eurostat.ec.europa.eu/cache/ITY_OFFPUB/KS-RA-10-031/EN/KS-RA-10-031-EN.PDF;
http://epp.eurostat.ec.europa.eu/cache/ITY_OFFPUB/KS-TC-13-006/EN/KS-TC-13-006-EN.PDF

Figure 204 - Direct economic contribution of EU's accessible tourism by people from the EU27 countries in 2012

Group	People with disabilities	The elderly population
Day trips		
Demand for EU's tourism ('000 trips)	169,902	225,623
Spending per trip (€)	74.7	81.6
Gross turnover (€ million)	12,698	18,420
Net turnover (€ million)	11,162	16,191
Overnight trips		
Demand for EU's tourism ('000 trips)	169,656	217,586
Spending per trip (€)	798	852
Gross turnover (€ million)	135,362	185,457
Net turnover (€ million)	118,983	163,016

Notes:

- 1) The demand for EU's tourism figures are from Figure 33, which have already taken into consideration the population of people with access needs, travel propensity and travel frequency.
- 2) The spending per trip figures are averages for both domestic trips and intra-EU trips, derived from Figure 201.
- 3) The gross turnover is equivalent to the output, which measures the final tourism demand in monetary terms.
- 4) The EU-wide weighted averaged VAT rate is 12.1%, by own calculation.

From Figure 204 the direct economic contribution, in terms of gross turnover (output), of EU's accessible tourism by people with access needs within EU is €351,936 million in 2012.

From the input-output tables available from Eurostat, an EU-wide gross value added (GVA) rate¹ for accessible tourism related products is calculated as 42.6%. Hence the direct economic contribution, in terms of gross value added (GVA), is €149,947 million in 2012. After considering taxes and subsidies on products on top of GVA, the equivalent contribution in terms of GDP is €164,066 million.

Also from the input-output tables, an EU-wide employment input ratio² for accessible tourism related industries is calculated as 0.012 (thousand persons per million €). Hence the direct economic contribution, in terms of employment, is 4,249 thousand persons.

Figure 205 summarises the direct economic contribution in terms of gross turnover (output), GVA and employment.

Figure 205 - Direct economic contribution of EU's accessible tourism in 2012

Contribution	People with access needs	People with disabilities	The elderly population
Gross turnover (€ million)	351,936	148,060	203,876
Gross value added (€ million)	149,947	62,329	87,618
Employment ('000 persons)	4,249	1,579	2,670

A further breakdown of the economic contribution is shown in Figure 206 to Figure 208.

¹ It is calculated as the ratio between 'value added at basic prices' and 'output at basic prices'.

² It is calculated as the ratio between 'Labour inputs (1.000 persons)' and 'output at basic prices'.

Figure 206 - Breakdown of Gross Turnover Contributed by People with Access Needs in EU27 Countries

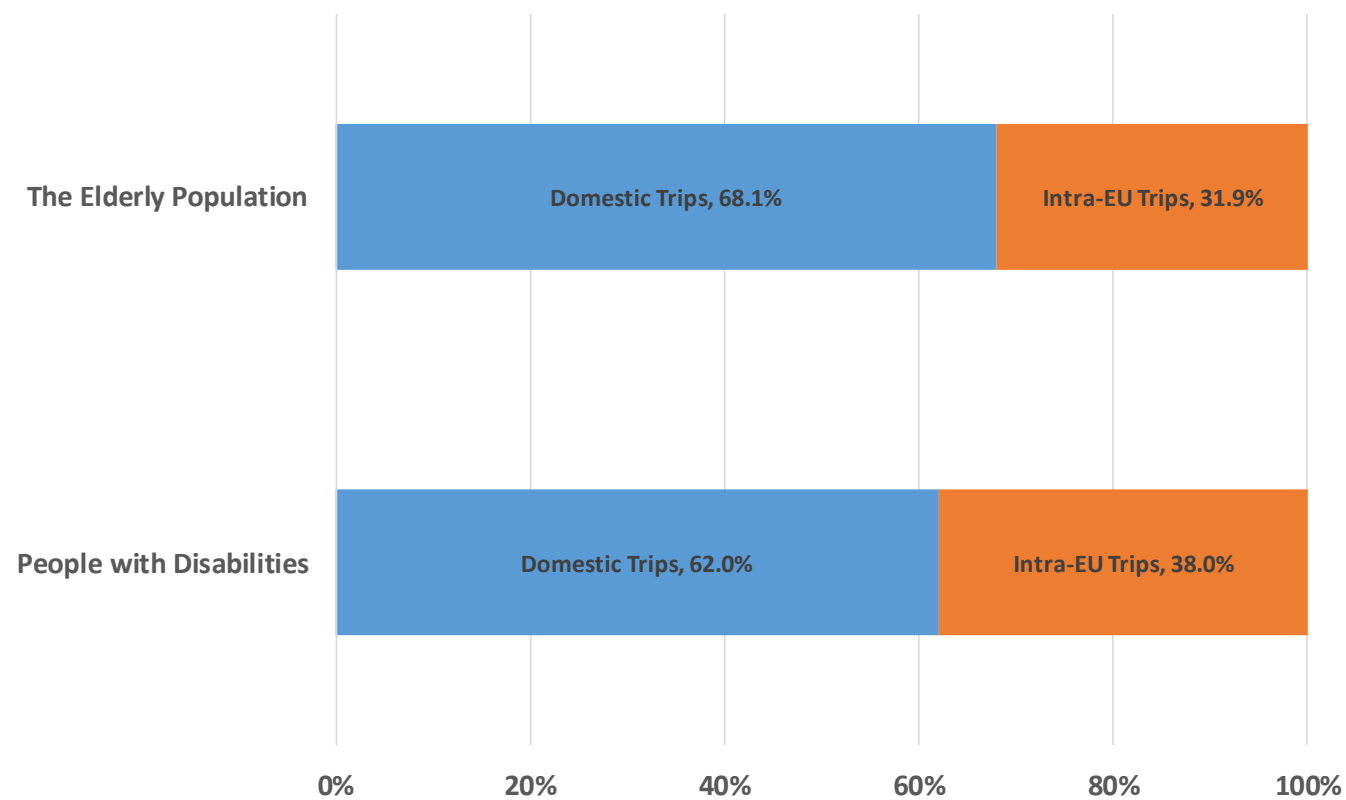


Figure 207 - Breakdown of Direct Gross Value Added Contributed by People with Access Needs in EU27 Countries

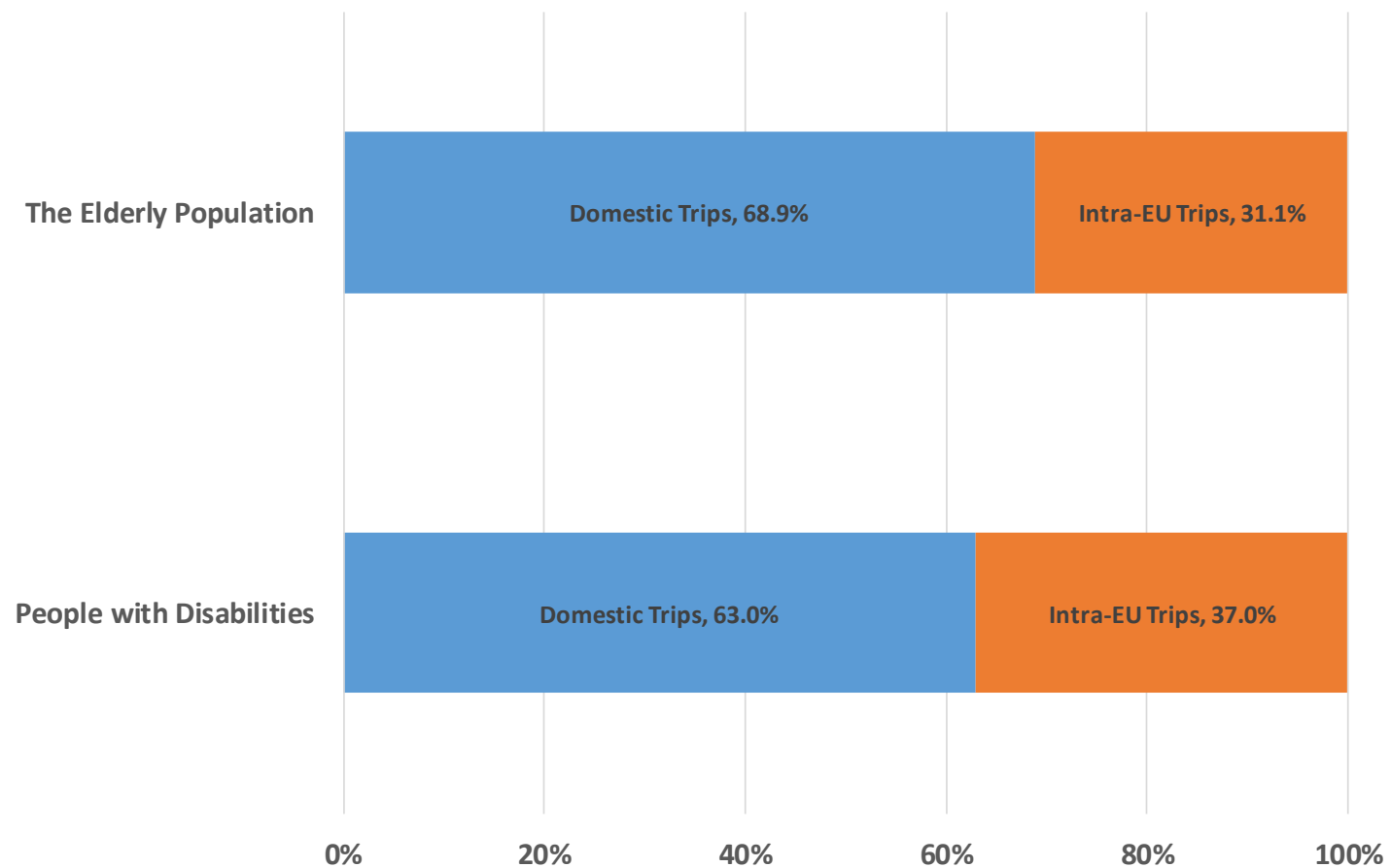
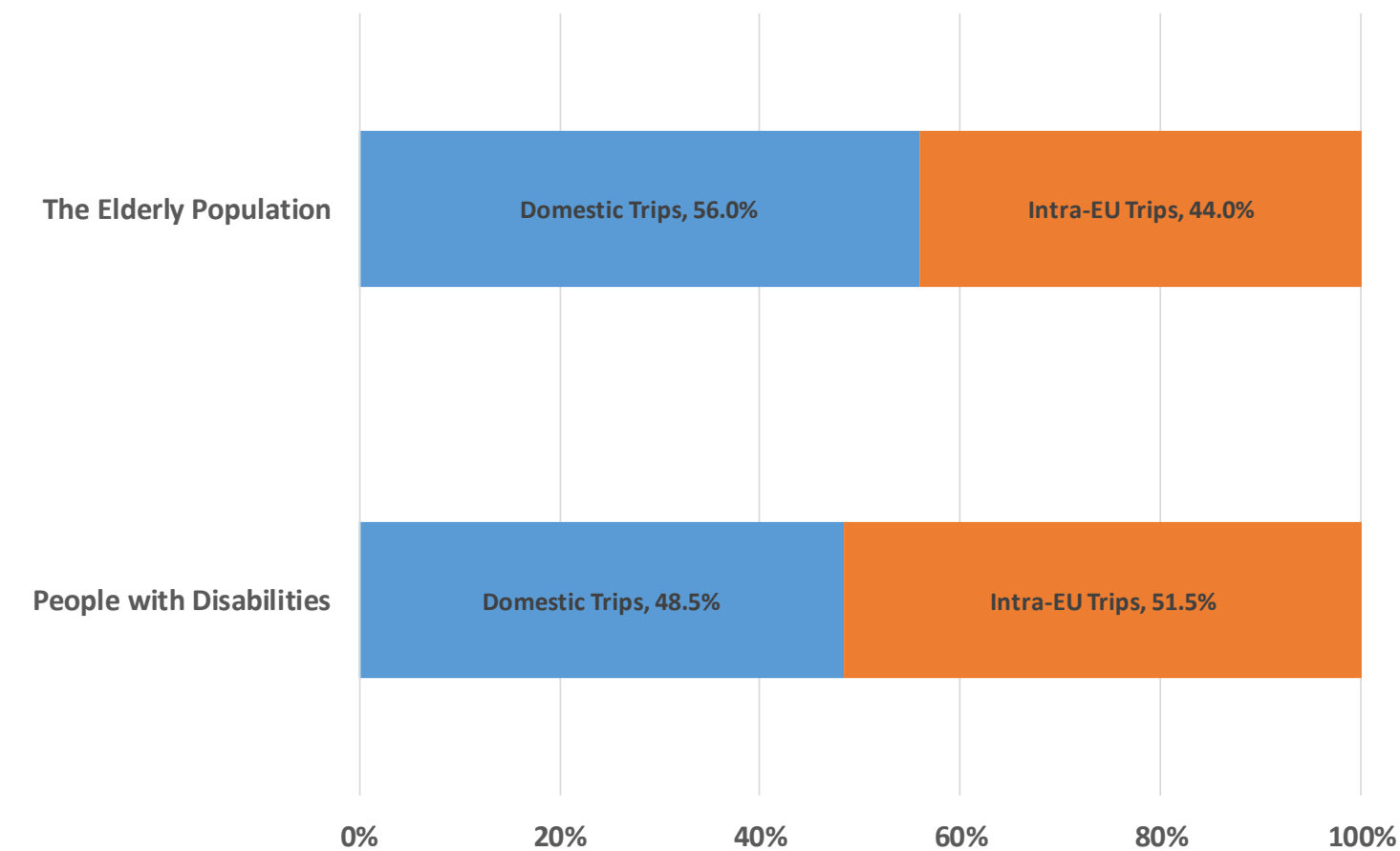


Figure 208 - Breakdown of Direct Employment Contributed by People with Access Needs in EU27 Countries



6.2.2.2 Total economic contribution

On top of the direct economic contribution, total economic contribution that contains both the indirect and induced effects of accessible tourism was estimated.

The key parameters needed for this estimation are the multipliers, which were calculated from the input-output tables. For each tourism expenditure category, a specific multiplier is derived. The results are attached in Annex R.

Overall, at the EU level, the indirect multipliers stand at 1.79 (gross turnover/output), 1.84 (gross value added) and 1.65 (employment). The induced multipliers are 2.23 (gross turnover/output), 2.38 (gross value added) and 2.05 (employment).

Figure 209 shows how each multiplier effect builds up to form the total economic contribution. Based on the GVA figures, the equivalent total economic contribution in terms of GDP is €394,259 million, of which €164,066 million is direction contribution, €140,540 million is indirect effect, and €89,653 million is induced effect.

Figure 209 - Breakdown of total economic contribution of EU's accessible tourism by people with access needs in the EU27 countries

Contribution	Direct contribution [1]	Indirect effect [2]	Induced effect [3]	Total economic contribution [4]=[1]+[2]+[3]
Output (€ million)	351,936	277,900	156,457	786,294
Gross value added (€ million)	149,947	126,622	79,632	356,201
Employment ('000 persons)	4,249	2,778	1,683	8,711

To visualise these results, Figure 210 to Figure 212 are presented, with further breakdown by the two groups of people with access needs.

Figure 213 to Figure 215 provide breakdowns according to source markets. It can be discerned from the charts that, France, Germany, Italy, Spain and the United Kingdom are consistently among the top 5 source markets that hold most shares of economic contribution, whichever terms of economic contribution.

Figure 210 - Total output contribution of EU’s accessible tourism by people from the EU27 countries in 2012 (unit: ‘000 000 €)

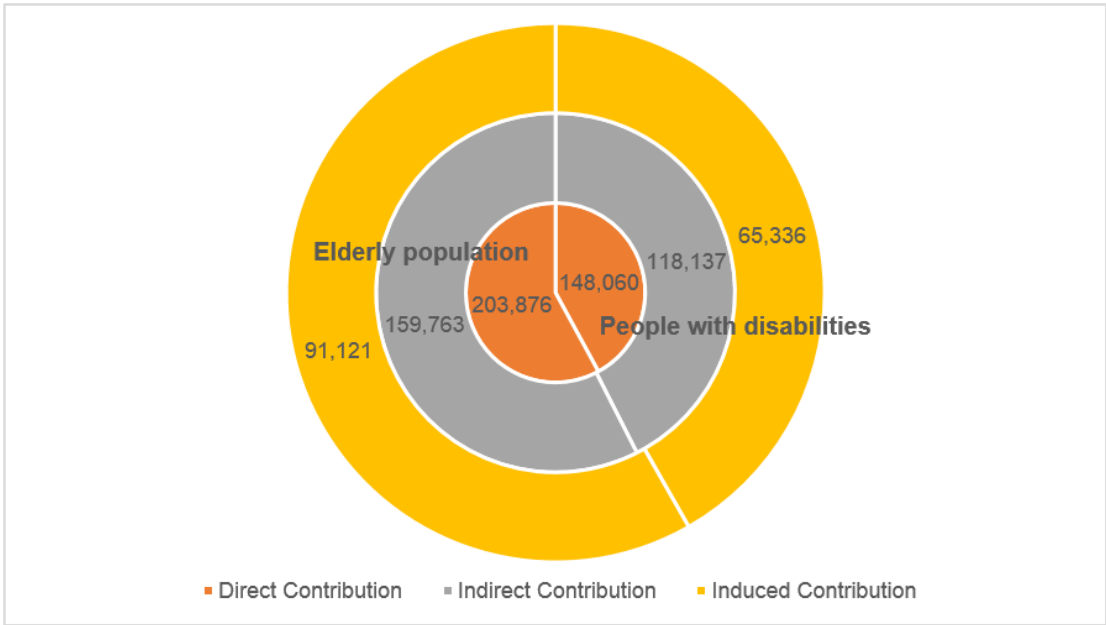


Figure 211 - Total gross value added contribution of EU’s accessible tourism by people from the EU27 countries in 2012 (unit: ‘000 000 €)

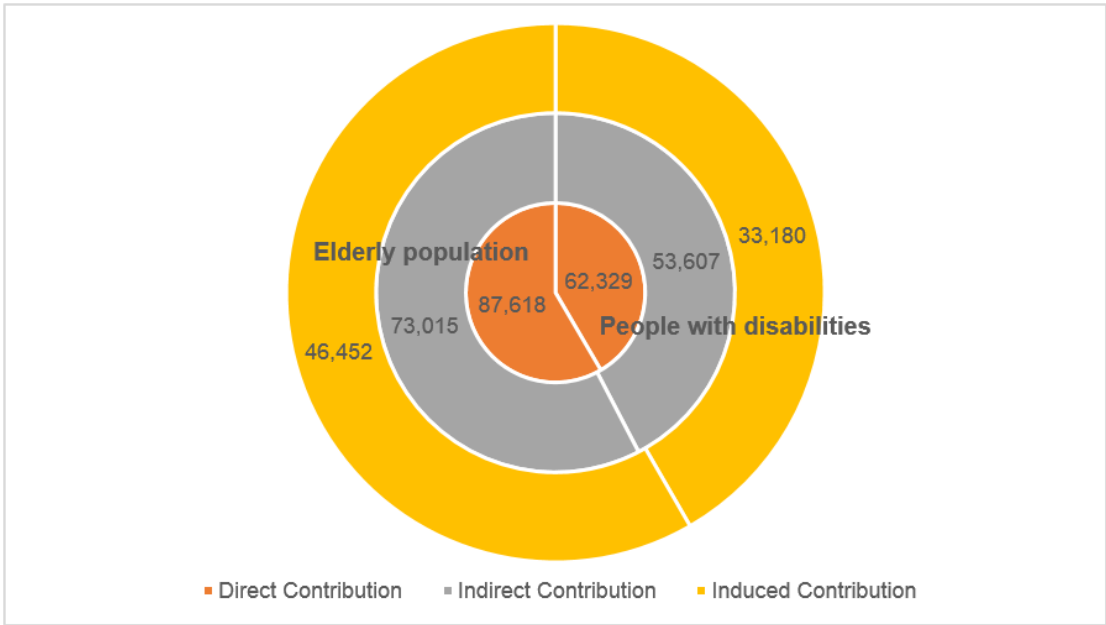


Figure 212 - Total employment contribution of EU’s accessible tourism by people from the EU27 countries in 2012 (unit: ‘000 persons)

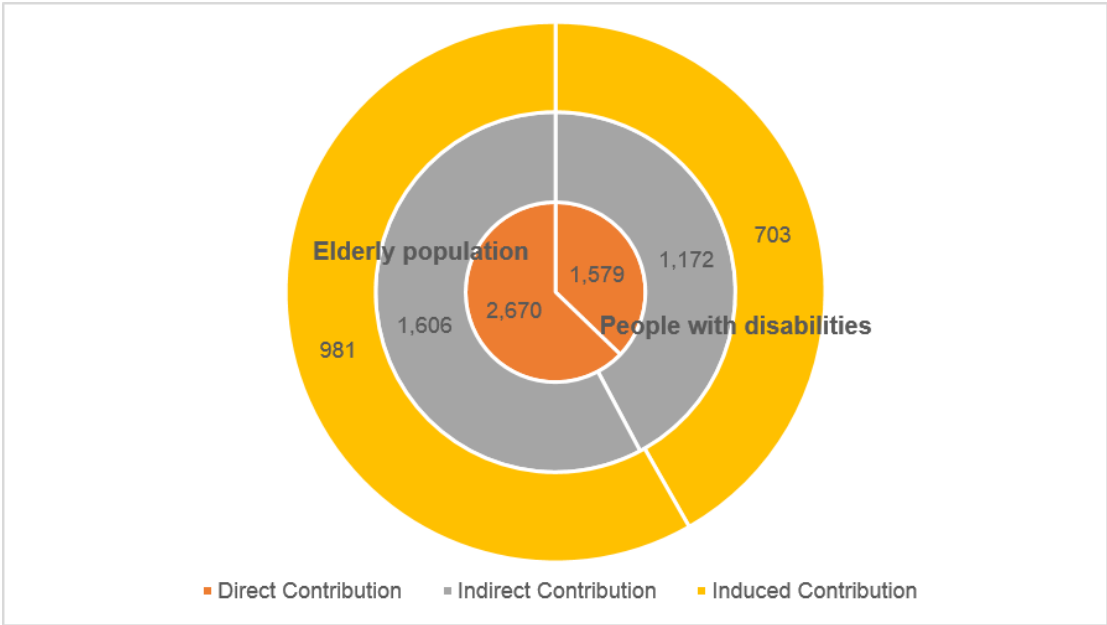


Figure 213 - Breakdown of Total Output Contribution of EU's Accessible Tourism by Source Market

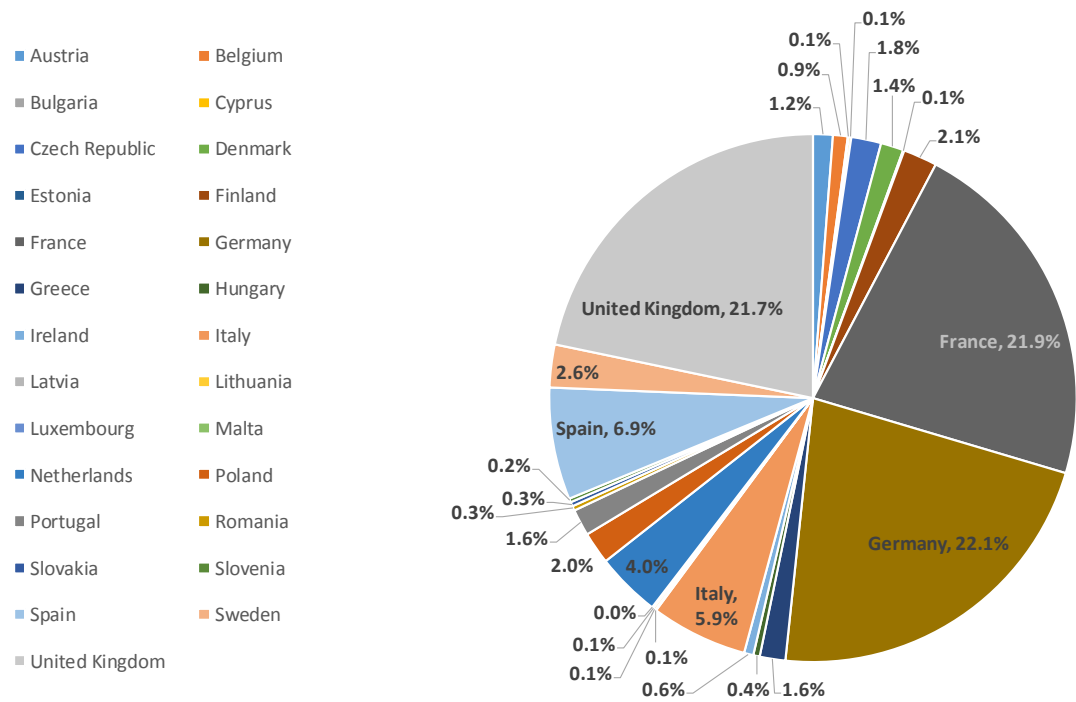


Figure 214 - Breakdown of Total Gross Value Added Contribution of EU's Accessible Tourism by Source Market

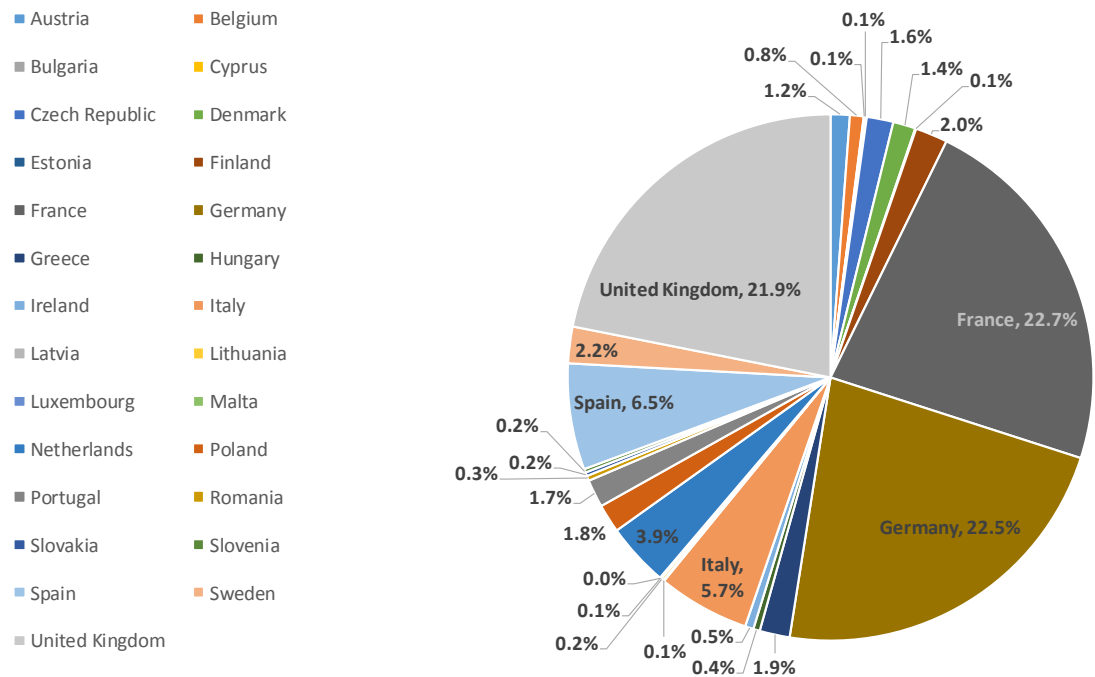
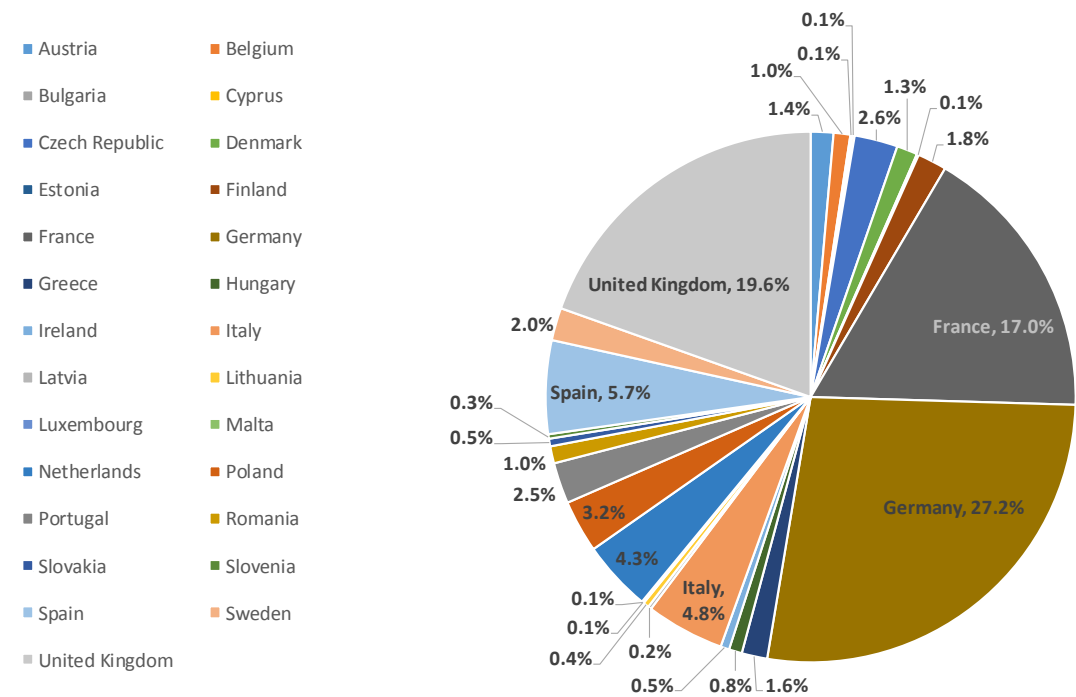


Figure 215 - Breakdown of Total Employment Contribution of EU's Accessible Tourism by Source Market



6.2.2.3 Effect of travel companions

Figure 218 and Figure 219 provide an overview of the number of companions with each country's people with access needs. Generally speaking, across the EU27 countries the people with disabilities travel with more companions (on average 2.2 persons) than the elderly population do (on average 1.6 persons). Overall at the EU level, the weighted average number of companions the people with access needs (both those with disabilities and the elderly) travel with is 1.9. This result is consistent with the previous studies. For example, Neumann and Reuber (2004)¹ showed that the respondents with dependence needs were on average accompanied by 1.56 persons. Buhalis, Eichhorn and Miller (2005)² suggested a 'multiplier' of 2 with regard to travel companions.

When travel companions are taken into consideration, there will be additional demand generated by this group of people.

Figure 216 provides a contrast between two sets of estimation at the EU level for people with access needs (both those with disabilities and the elderly population). It should be noted that the numbers for 'with companions' consider the contribution by both the people with access needs themselves and the travel companions. When taxes and subsidies on products are considered on top of GVA, the direct economic contribution in terms of GDP generated by both the people with access needs and the companions is €459,946 million, and the total contribution in terms of GDP is €1,109,740 million.

¹ Neumann, P., & Reuber, P. (2004). Economic Impulses of Accessible Tourism for All. *Study commissioned by the Federal Ministry of Economics and Labour (BMWA), Berlin, Germany.*

² Buhalis, D., Eichhorn, V., Michopoulou, E., & Miller, G. (2005). Accessibility market and stakeholder analysis. *OSSATE project Guildford: University of Surrey.*

Figure 216 - Economic contribution of EU's accessible tourism: without/with travel companions

	Direct economic contribution			Total economic contribution		
	Gross turnover (output) (€ million)	Gross value added (€ million)	Employment ('000 persons)	Gross turnover (output) (€ million)	Gross value added (€ million)	Employment ('000 persons)
Without companions	351,936	149,947	4,249	786,294	356,201	8,711
With companions	991,263	421,660	11,615	2,218,773	1,004,187	24,158

Note: 1) The 'with companions' figures consider the contribution by both the people with access needs themselves and the travel companions. 2) Caution should be exercised when referring to the economic contribution with travel companions being taken into account. Since some travel companions themselves were also the individuals with special access needs, the total economic contribution therefore tended to be over-estimated to some extent, due to double-counting this group of companions' share of contribution.

As a robust check of the estimation of direct economic contribution (with the effect of travel companions accounted for), the OSSATE research by Buhalis et al. (2005)¹ is used for comparison, of which the results are displayed in Figure 217.

As explained in Section 3.2.2.2, the general demand figure (127.5 million) by the OSSATE research is highly comparable to that of the current study (138.6 million, see Figure 18).

The travel propensity figure used by the OSSATE research was 70%, whereas the current study finds the figure at below 60% (see Figure 33). As explained in Section 3.2.3.1, cross validation has been carried out to ensure the figures used in the current study are in line with the existing statistics

¹ Buhalis, D., Eichhorn, V., Michopoulou, E., & Miller, G. (2005). Accessibility market and stakeholder analysis. *OSSATE project Guildford: University of Surrey*.
http://www.ossate.org/doc_resources/OSSATE_Market&Stakeholder%20Analysis_Public_Version_Fina..pdf

reported on Eurostat, particularly the figures regarding the elderly population segment¹. This treatment reflects the conservative and prudent approach taken throughout the economic estimation of the current report.

Regarding the multiplier effect of travel companions, both the OSSATE research and the current study use very similar estimates (roughly 2).

One indicator that has considerable difference is the average expenditure per person per holiday. The OSSATE research has a lower figure (€620 in 2003) whereas the current study finds out that the figure stands at €800 in 2012 (see Figure 204). This can be largely explained by the inflation of consumer prices² and the increase of real income³.

Overall, the OSSATE research estimated that the potential tourism revenues when the companion number is 2 are 166 billion euros. The current study estimated it to be 991 billion euros (see Figure 216, gross turnover with companions). The striking difference comes from the fact that the OSSATE research assumed that every people with access needs only travel **once** (over an unspecified period), whereas the survey of the current study has shown that people tend to travel **several times** (roughly 6.7 day trips and 6.2 overnight trips to both EU and international destinations) over a 12-month period. Other studies such as Dwyer and Darcy (2011)⁴, Neumann and Reuber (2004)¹, Van

¹ See Section 3.2.3.1, the travel propensity figures of the elderly population in the EU have been adjusted according to The 'Participation in tourism for personal purposes by age group in 2012 (tour_dem_toage)' series from: <http://epp.eurostat.ec.europa.eu/portal/page/portal/tourism/introduction>

² According to the harmonised indices of consumer prices (HICPs) reported on Eurostat (series name: HICP (2005 = 100) - annual data (average index and rate of change (prc_hicp_aind)), the general consumer prices increase by roughly 24% from 2003 to 2012. HICPs provide the official measure of consumer price inflation in the euro area for the purposes of monetary policy and the assessment of inflation convergence as required under the Maastricht criteria for accession to the euro.

³ According to the real GDP per capita reported on Eurostat (series name: GDP per capita - annual Data (nama_aux_gph)), the real GDP per capita of EU27 countries was €21,700 in 2003, and €23,200 in 2012, an increase of 6.9%. According to the economic theory and consumer demand, higher income of consumers leads to increased demand for consumption, such as demand for accessible tourism. It should be noted that, if there were no economic recession in 2012-2013, the average holiday expenditure estimated by the present study could have been even higher.

⁴ Dwyer, L., & Darcy, S. (2011). Economic contribution of tourists with disabilities: An Australian approach and methodology. *Accessible tourism: Concepts and issues*, 213-239.

Horn (2012)² also confirmed that multiple trips were taken by people with access needs. Therefore the estimation of the present study is believed to be more realistic and accurate.

Figure 217 - Potential travel market and tourism revenues of Accessible Tourism

General demand for accessibility	70% that have the economical and physical ability to travel	Multiplier effect for friends & family members	Accompanying friends and family	TOTAL potential travel market	Average expenditure per person per holiday	Potential tourism revenues
127.5 million	89.3 million	0.5	44.7 million	134 million	€ 620	83 billion euro
		2	178.6 million	267.9 million		166 billion euro

Source: Buhalis, D., Eichhorn, V., Michopoulou, E., & Miller, G. (2005). *Accessibility market and stakeholder analysis*. OSSATE project Guildford: University of Surrey.

Note: The average holiday expenditure in the EU was 620 euro in 2003 (see OSSATE report)

¹ Neumann, P., & Reuber, P. (2004). *Economic Impulses of Accessible Tourism for All*. Study commissioned by the Federal Ministry of Economics and Labour (BMWA), Berlin, Germany.

² Van Horn, L. (2012). The United States: Travellers with disabilities. *Best practice in accessible tourism: Inclusion, disability, ageing population and tourism*, 65-78.

Figure 218 - Average number of companions travelled with people with disabilities from the EU27 countries

Source Market	Austria	Belgium	Bulgaria	Cyprus	Czech Republic	Denmark	Estonia	Finland	France	Germany	Greece	Hungary	Ireland	Italy
Number of Companions	2.5	2.5	2.5	2.0	1.8	2.3	2.2	2.3	2.1	2.3	2.1	2.5	2.0	2.3

Source Market	Latvia	Lithuania	Luxembourg	Malta	Netherlands	Poland	Portugal	Romania	Slovakia	Slovenia	Spain	Sweden	United Kingdom
Number of Companions	2.2	2.2	2.5	2.3	2.1	1.8	2.1	2.5	1.8	2.3	2.1	2.3	2.4

Figure 219 - Average number of companions travelled with the elderly population from the EU27 countries

Source Market	Austria	Belgium	Bulgaria	Cyprus	Czech Republic	Denmark	Estonia	Finland	France	Germany	Greece	Hungary	Ireland	Italy
Number of Companions	1.7	1.7	1.1	1.9	1.7	1.5	1.7	1.5	1.7	1.1	1.9	1.1	1.9	1.1

Source Market	Latvia	Lithuania	Luxembourg	Malta	Netherlands	Poland	Portugal	Romania	Slovakia	Slovenia	Spain	Sweden	United Kingdom
Number of Companions	1.7	1.7	1.7	1.7	1.7	1.7	1.9	1.1	1.7	1.7	1.9	1.5	2.0

6.2.3 Results – International inbound markets

6.2.3.1 Direct economic contribution

The starting point of estimating the economic contribution, as explained in Section 6.2.1.1, is tourists' daily spending behaviour. This information is supposed to be derived from Q18 of the survey questionnaire. However, a close examination of the answers to Q18, which reports the destination and spending structure of the respondents' most recent trip, suggests that only 34 respondents across the four countries surveyed have visited the EU during their last trip¹. This means that, to derive the average level of international tourists' daily spending in the EU, only 34 responses can be used. This renders the sample base rather small. A preliminary estimation showed that the average spending figures were biased due to some reported extreme values.

To pursue a robust solution, the spending structure statistics yielded from the main survey conducted in 12 EU representative countries were used as proxies for the international markets. The calculation involves only deriving the average daily spending in the EU by the respondents in the 12 representative countries, excluding their average transport spending between the destination and the origin. The implicit assumption is that the level of spending within the EU by the international tourists is much comparable to that of their EU counterparts. This is plausible, as the international tourists and the EU tourists are both subject to the same prices of goods and services when travelling across the EU. Their levels of average daily spending should thus be similar. The only part of spending that sees considerable difference between the international tourists and the EU tourists is the transport to/from destinations, which has been removed from the calculation (in line with tourism statistics of most countries and international organisations such as UNWTO), as this spending is not expected to benefit the EU tourism.

As to the length of stay, which also determines the total spending per trip, the statistics are derived from the Q18 of the survey.

The estimation results of the tourists' daily spending, length of stay and the average spending per trip are presented in Figure 220 and Figure 221.

¹ After 9 responses being discarded due to irrational answers, of the 414 respondents, 96 reported that they had visited the EU **over the last 12 months**. However, to derive the spending behaviour of the tourists, the answers to their **last trip**'s spending are needed, which are reported in Q18. Here, only 34 respondents reported their spending in the EU, the rest reported spending in either domestic destinations or other international destinations.

Figure 220 - Travel behaviour of people with disabilities in the 11 key international inbound markets: averages of per person spending, 2012

Source Market	Australia	Brazil	Canada	China	India	Japan
Travel Type	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips
Daily Spending (€) [1]	84.9	84.9	84.9	84.9	84.9	84.9
Average Days [2]	11.6	17.8	11.6	11.8	11.6	11.6
Spending per trip (€) [3]=[1]*[2]	984.9	1510.9	984.9	999.7	984.9	984.9

Source Market	Norway	Russia	South Africa	Switzerland	USA
Travel Type	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips	Overnight Trips
Daily Spending (€) [1]	84.9	84.9	84.9	84.9	84.9
Average Days [2]	10.2	8.8	11.6	10.2	11.7
Spending per trip (€) [3]=[1]*[2]	868.4	749.8	984.9	868.4	990.3

Figure 221 - Travel behaviour of the elderly population in the 11 key international inbound markets: averages of per person spending, 2012

Source market	Australia	Brazil	Canada	China	India	Japan
Travel type	Overnight trips	Overnight trips	Overnight trips	Overnight trips	Overnight trips	Overnight trips
Daily spending (€) [1]	83.0	83.0	83.0	83.0	83.0	83.0
Average days [2]	11.6	17.8	11.6	11.8	11.6	11.6
Spending per trip (€) [3]=[1]*[2]	963.1	1477.4	963.1	977.6	963.1	963.1

Source market	Norway	Russia	South Africa	Switzerland	USA
Travel type	Overnight trips	Overnight trips	Overnight trips	Overnight trips	Overnight trips
Daily spending (€) [1]	83.0	83.0	83.0	83.0	83.0
Average days [2]	10.2	8.8	11.6	10.2	11.7
Spending per trip (€) [3]=[1]*[2]	849.2	733.2	963.1	849.2	968.4

From the figures above, it emerged that of the 11 key international markets, travellers with access needs from Brazil contributed the most to the EU economy in terms of average spending per trip. This is generally associated with the longer stay (up to around 18 days per trip). On the contrary, the relatively short stay by the people with access needs from Russia leads to a lower spending per trip. By and large, across all the key international inbound markets, it can be expected that tourists spend approximately €1,000 per trip within the EU, which is considerably higher than the figures (about €700-800) found when analysing the tourists from EU countries (see Figure 201 in Section 6.2.2.1).

With the spending figures, the direct economic contribution to the EU was estimated. Figure 222 shows the direct economic contribution by people with access needs from all the 11 international markets. The results for each individual international market are presented in Annex T.

Figure 222 - Direct economic contribution of EU's accessible tourism by people from the key international inbound markets in 2012

Group	People with disabilities	The elderly population
Overnight trips		
Demand for EU's tourism ('000 trips)	7,186	10,390
Spending per trip (€)	968	918
Gross turnover (€ million)	6,957	9,539
Net turnover (€ million)	6,115	8,385

In 2012, the gross turnover generated from accessible tourism that serves the 11 key international inbound markets was estimated to be €16,496 million, with roughly 58% associated with the elderly tourists and the rest 42% representing travellers with disabilities. The distribution structure here (58% and 42%) coincides with that of the gross turnover generated by the people with access needs within the EU countries (see Figure 204 and Figure 205).

In addition to the gross turnover and the net turnover, the economic contributions in terms of gross value added (GVA) and the associated employment are also calculated. Figure 223 summarises the three types of direct economic contributions. With the taxes and subsidies on products added to the GVA, the equivalent direct contribution in terms of GDP amounts to €7,781 million.

Figure 223 - Direct economic contribution of EU's accessible tourism associated with people with access needs from the key international inbound markets in 2012

Contribution	People with access needs	People with disabilities	The elderly population
Gross turnover (€ million)	16,496	6,957	9,539
Gross value added (€ million)	6,897	2,889	4,008
Employment ('000 persons)	268	106	162

6.2.3.2 Total economic contribution

Considering the multiplier effects, accessible tourism is expected to benefit not only the businesses that directly serve the tourists, but also those who work in the supply chain or associated sectors. Accessible tourism can impact on every sector of the economy. Figure 224 illustrates the build-up of secondary effects (i.e., indirect and induced effects) which form the total economic contributions.

Figure 224 - Breakdown of total economic contribution of EU's accessible tourism by people with access needs from all the 11 key international inbound markets

Contribution	Direct contribution [1]	Indirect effect [2]	Induced effect [3]	Total economic contribution [4]=[1]+[2]+[3]
Gross turnover (€ million)	16,496	11,887	5,999	34,382
Gross value added (€ million)	6,897	5,267	2,968	15,133
Employment ('000 persons)	268	171	98	538

Taking the taxes and subsidies on products into account, the equivalent total contribution in terms of GDP is €16,901 million, of which €7,781 million is direct contribution, €5,762 million is indirect effect and €3,358 million is induced effect.

It should be noted that, at the aggregate level of all the 11 international markets, the magnitude of the multiplier effect (as shown in Figure 224) is slightly lower than that at the aggregate level of all the EU27 countries (as shown in Figure 209). This is basically due to the fact that the multiplier effect associated with the transport to/from destination is omitted in the international market estimation.

The results are visualised in Figure 225 – Figure 227, with a breakdown between people with disabilities and the elderly population.

Figure 225 - Total output contribution of EU’s accessible tourism by people from the 11 key international inbound markets in 2012 (unit: '000 000 €)

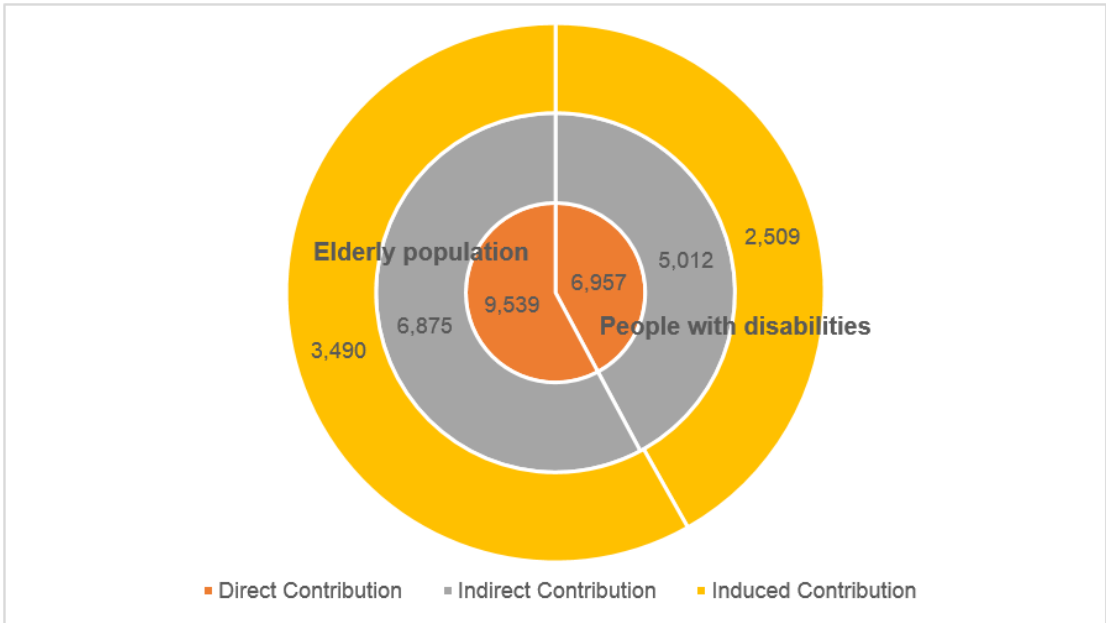


Figure 226 - Total gross value added contribution of EU’s accessible tourism by people from the 11 key international inbound markets in 2012 (unit: '000 000 €)

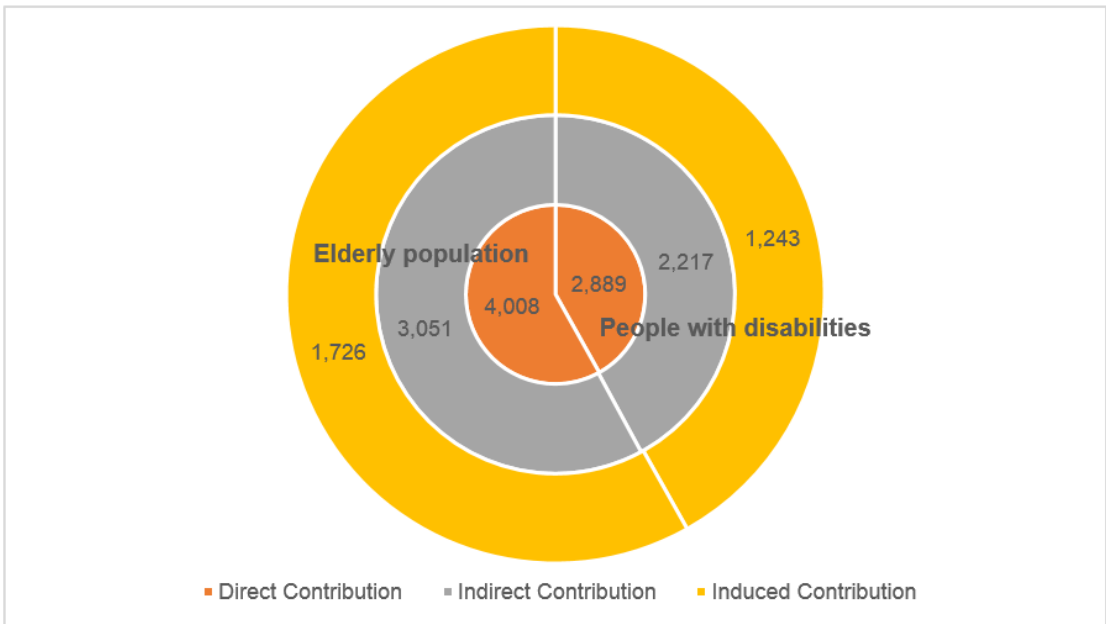
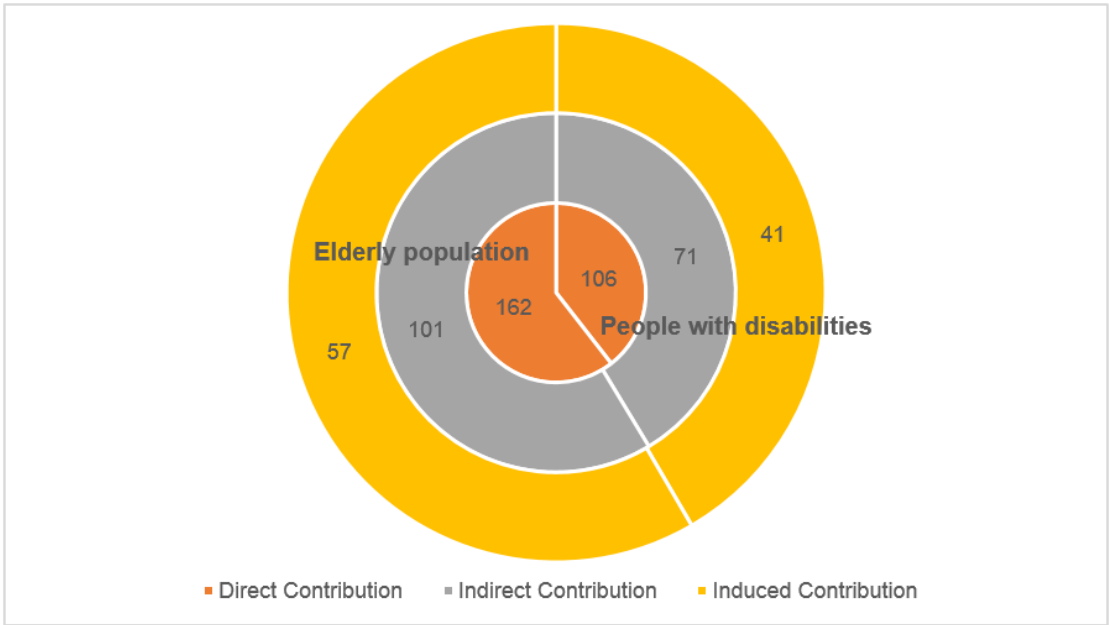


Figure 227 - Total employment contribution of EU’s accessible tourism by people from the 11 key international inbound markets in 2012 (unit: '000 persons)



In addition, the distributions of total economic contributions according to the source markets are provided in Figure 228 – Figure 230.

Figure 228 - Breakdown of Total Output Contribution of EU's Accessible Tourism by Source Market

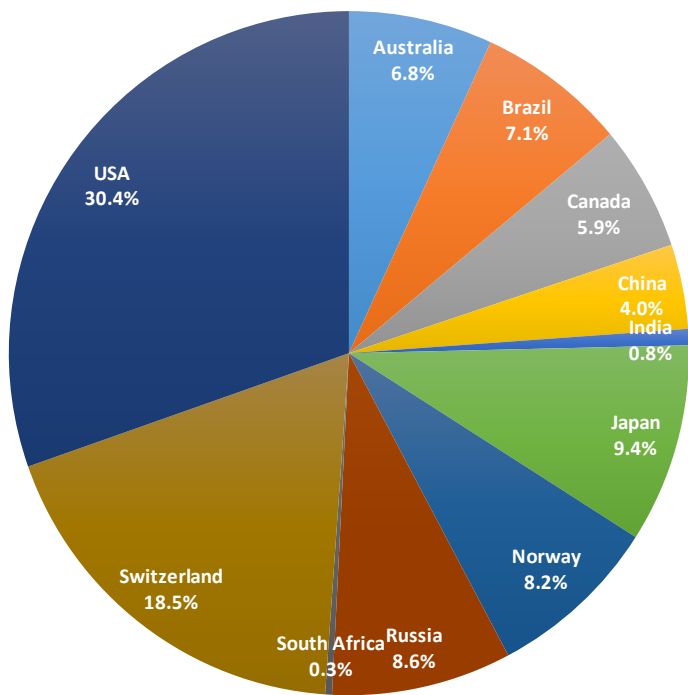


Figure 229 - Breakdown of Total Gross Value Added Contribution of EU's Accessible Tourism by Source Market

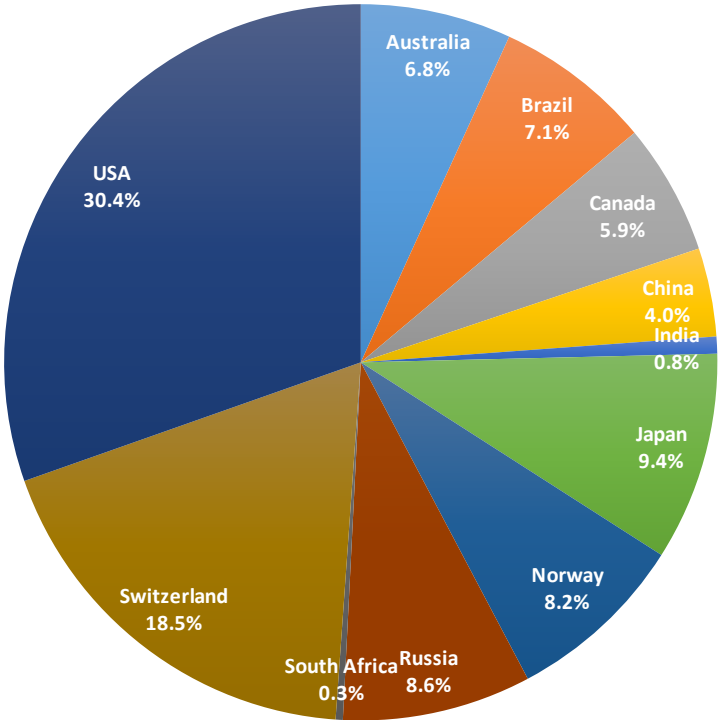
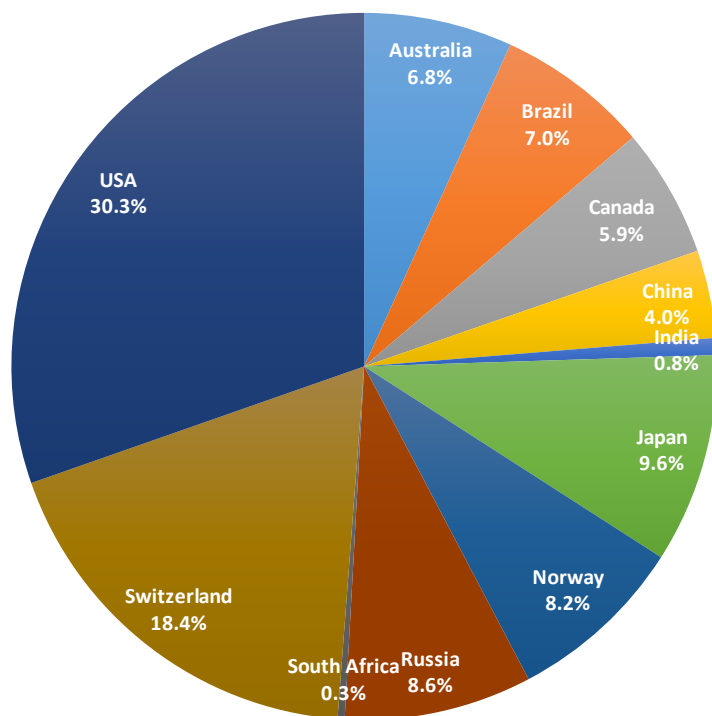


Figure 230 - Breakdown of Total Employment Contribution of EU's Accessible Tourism by Source Market



As with the pattern found in tourism demand figures (see Figure 52), the top source markets that generate most economic contributions are the more developed countries, such as the USA, Switzerland, Japan and Norway.

6.2.3.3 Effects of travel companions

Travelling with companions is common among people with access needs, as shown by the results in Section 6.2.2.3. This is also the case when it comes to those coming from the international inbound markets, given that travelling to the EU usually means embarking on a long haul trip.

According to the respondents' answers to Q18 of the survey questionnaire, the average numbers of companions travelling with people with access needs are presented in Figure 231 and Figure 232.

Figure 231 - Average number of companions travelled with people with disabilities from the 11 key international inbound markets

Source Market	Australia	Brazil	Canada	China	India	Japan
Number of Companions	2.6	2.7	2.6	3.0	2.6	2.6

Source Market	Norway	Russia	South Africa	Switzerland	USA
Number of Companions	2.2	1.0	2.6	2.2	3.0

Figure 232 - Average number of companions travelled with the elderly population from the 11 key international inbound markets

Source Market	Australia	Brazil	Canada	China	India	Japan
Number of Companions	1.6	2.4	1.6	3.0	1.6	1.6

Source Market	Norway	Russia	South Africa	Switzerland	USA
Number of Companions	1.6	2.3	1.6	1.6	1.0

Overall, the average number of companions who travelled with people with access needs for the 11 international markets stands at 1.9, which is the same as the average number of their EU counterparts (see Section 6.2.2.3). Hence, in terms of the companion effect, there is no notable difference between the EU source markets and the international markets.

Among the group of people with disabilities, the average number across all the 11 international markets is 2.5 and among the group of the elderly population it is 1.6. This is in line with the findings from the main survey in the EU countries, e.g. that the people with disabilities tend to travel with more companions than the elderly population.

After considering the additional demand brought by travel companions, the economic contributions are further magnified as shown in Figure 232. Moreover, the equivalent direct contribution in terms of GDP generated by both the people with access needs and their companions is €23,052 million, and the total contribution amounts to €50,139 million.

Figure 233 - Economic contribution of EU's accessible tourism: without/with travel companions

	Direct economic contribution			Total economic contribution		
	Gross turnover (output) (€ million)	Gross value added (€ million)	Employment ('000 persons)	Gross turnover (output) (€ million)	Gross value added (€ million)	Employment ('000 persons)
Without companions	16,496	6,897	268	34,382	15,133	538
With companions	49,029	20,480	789	102,170	44,945	1,589

Note: 1) The 'with companions' figures consider the contribution by both the people with access needs themselves and the travel companions. 2) Caution should be exercised when referring to the economic contribution with travel companions being taken into account. Since some travel companions themselves were also the individuals with special access needs, the total economic contribution therefore tended to be over-estimated to some extent, due to double-counting this group of companions' share of contribution.

6.3 Task 4b - Scenarios and impact assessment

6.3.1 Methodology

The estimation of direct economic contribution under different scenarios is largely based on the baseline contribution estimation.

With improvements of accessibility, it is expected that the people with access needs who have travelled before are willing to travel more often and, furthermore they are willing to increase their budget to explore new destinations. In addition, those who have not travelled are believed to be more willing to travel, because a wide range of destinations will be more accessible if the improvements under each scenario would be made.

Hence, the estimation makes use of the additional budget that the existing travellers (those who have travelled this last year) will make, and the contribution generated by the new travellers (those who have not travelled but are willing to travel under different scenarios).

Direct economic contribution (scenario) =

Direct economic contribution (baseline) + additional budget by existing travellers + contribution by new travellers

The baseline direct economic contribution can be found in Figure 205. The additional budget by existing travellers can be extracted from the questionnaire:

Q26. Thinking about the last 12 months, there are some destinations in the European Union (EU) that you may have wanted to visit, but you couldn't because of accessibility problems. For example, you did not go because no services have been made accessible and basic things like wheelchairs are not available.

If Scenarios A, B or C were true for any EU destinations you were interested in visiting, would you consider including some of these EU destinations in your travel plans for the next 12 months?

Q27. You said that you would visit some of these EU destinations and increase your travel budget for the next 12 months if options A, B or C were true. How much extra budget would you be ready to spend for your trip(s) to such destinations? Please give your best estimate as a percentage of your current travel budget per year.

The contribution generated by the new travellers can be estimated following the exact rationale described in Section 6.2.1.1, which relies on the spending behaviour of travellers and the tourism demand. Specifically this will make use of the travel spending figures found in Figure 201 to Figure 203 and the scenario tourism demand Figure 48 and Figure 49, and the country level scenario tourism demand found in Annex T.

The estimation of total economic contribution of accessible tourism under different scenarios follows the exact rationale described in Section 6.2.1.2, which is

Total of direct and indirect economic contribution (scenario) = direct economic contribution (scenario) × indirect multiplier

Total of direct, indirect and induced economic contribution (scenario) = direct economic contribution (scenario) × induced multiplier

Apparently, as long as the direct economic contribution (scenario) is available, the scenario contribution can be derived accordingly.

It should be noted that the direct and total economic contributions estimated based on the rationale above only reflect the potential benefits that the EU's economy can receive from Accessible Tourism, whereas the costs (i.e., investments) to be made to improve accessibility have not been considered. Since details about the scale of investments under each scenario are not available yet, the cost aspect of Accessible Tourism is omitted in the current report. Hence, the economic contribution figures are gross values, rather than net values. Nevertheless, the figures would still give a clear sense of the size of Accessible Tourism under each scenario of improvements.

6.3.2 Results

The following sections report the results of economic impact assessment under different scenarios at the EU regional level. With regard to the results about each EU member state, a detailed summary is provided in Annex T.

6.3.2.1 Direct economic contribution under different scenarios

Under different scenarios of improvement, people who have travelled are likely to spare additional budget to explore new destinations.

According to answers to Q27 of the questionnaire, among all the people with access needs who have travelled during last 12 months, the percentage of budget they are willing to expend are presented in Figure 234. It should be noted that the numbers are weighted averages among all existing travellers according to their travel spending over the last 12 months.

Figure 235 further shows how the direct economic contribution under different scenarios is established following the rationale described in Section 6.3.1. The numbers are at the EU level.

Figure 234 - Percentage of extra budget under different scenarios by all existing travellers with access needs from the EU27 countries

Scenario	People with disabilities	The elderly population
Scenario A	2.21%	0.14%
Scenario B	3.53%	0.37%
Scenario C	9.51%	3.76%

Figure 235 - Estimation of direct economic contribution of EU's accessible tourism under different scenarios

Scenario	Scenario A		Scenario B		Scenario C	
Group	People with disabilities	The elderly population	People with disabilities	The elderly population	People with disabilities	The elderly population
Baseline direct economic contribution (gross turnover, € million) [1]	148,060	203,876	148,060	203,876	148,060	203,876
Additional budget by existing travellers (€ million) [2]	3,270	275	5,231	762	14,082	7,660
Contribution by new travellers (€ million) [3]	25,338	35,126	38,586	42,554	47,319	58,969
Direct economic contribution (scenario, (€ million) [4]=[1]+[2]+[3]	176,668	239,277	191,878	247,192	209,461	270,505

Figure 236 - Breakdown of direct economic contribution under different scenarios between existing travellers and new travellers

Scenario	Scenario A		Scenario B		Scenario C	
Group	People with disabilities	The elderly population	People with disabilities	The elderly population	People with disabilities	The elderly population
Direct economic contribution (scenario, € million)	176,668	239,277	191,878	247,192	209,461	270,505
of which, generated by						
Existing travellers	85.7%	85.3%	79.9%	82.8%	77.4%	78.2%
New travellers	14.3%	14.7%	20.1%	17.2%	22.6%	21.8%

Note: 1) This table is inferred from Figure 235.

Figure 235 can be used to further infer the structure of contribution between existing travellers and new travellers. As shown in Figure 236, the existing travellers would still be the major driving forces of accessible tourism under different scenarios of improvements.

In addition to the direct economic contribution in terms of gross turnover (output) (as in Figure 235), the other types of direct economic contribution, namely in terms of gross value added and employment, are also calculated. The results are presented in Figure 237, and the comparison against baseline has also been provided. Considering the taxes and subsidies on products on top of GVA, the equivalent direct contributions in terms of GDP under baseline and Scenario A, B and C are €164,066 million, €193,565 million, €204,141 million, and €223,183 million, respectively. All the numbers include contribution by both the people with disabilities and the elderly population.

Figure 237 - Direct economic contribution of EU's accessible tourism under different scenarios by people with access needs in the EU27 countries

Scenario	Gross turnover (output) (€ million)		Gross value added (€ million)		Employment ('000 persons)	
Baseline	351,936	increase against baseline	149,947	increase against baseline	4,249	increase against baseline
Scenario A	415,946	18.2%	176,943	18.0%	5,068	19.3%
Scenario B	439,070	24.8%	186,696	24.5%	5,352	26.0%
Scenario C	479,966	36.4%	204,073	36.1%	5,888	38.6%

6.3.2.2 Total economic contribution under different scenarios

Since the estimation of total economic contribution under different scenarios relies on the same set of multipliers in Section 6.2.2.2 and Annex R, Figure 238 only presents the total economic contribution numbers at the EU level. Considering the taxes and subsidies on products on top of GVA, the equivalent total economic contributions in terms of GDP are €394,259 million, €465,340 million, €490,922 million and €536,540 million for baseline, Scenario A, B and C. The numbers include the contribution by both the people with disabilities and the elderly population. Figure 239 to Figure 241 visualise the indirect and induced effects under different scenarios.

Figure 238 - Total economic contribution of EU's accessible tourism under different scenarios by people with access needs in the EU27 countries

Scenario	Total output Contribution (€ million)		Total gross value added contribution (€ million)		Total employment contribution ('000 persons)	
Baseline	786,294	increase against baseline	356,201	increase against baseline	8,711	increase against baseline
Scenario A	929,801	18.3%	420,240	18.0%	10,426	19.7%
Scenario B	981,603	24.8%	443,380	24.5%	11,032	26.6%
Scenario C	1,073,179	36.5%	484,476	36.0%	12,145	39.4%

Figure 239 - Total output contribution under different scenarios by people with access needs (unit: '000 000 €)

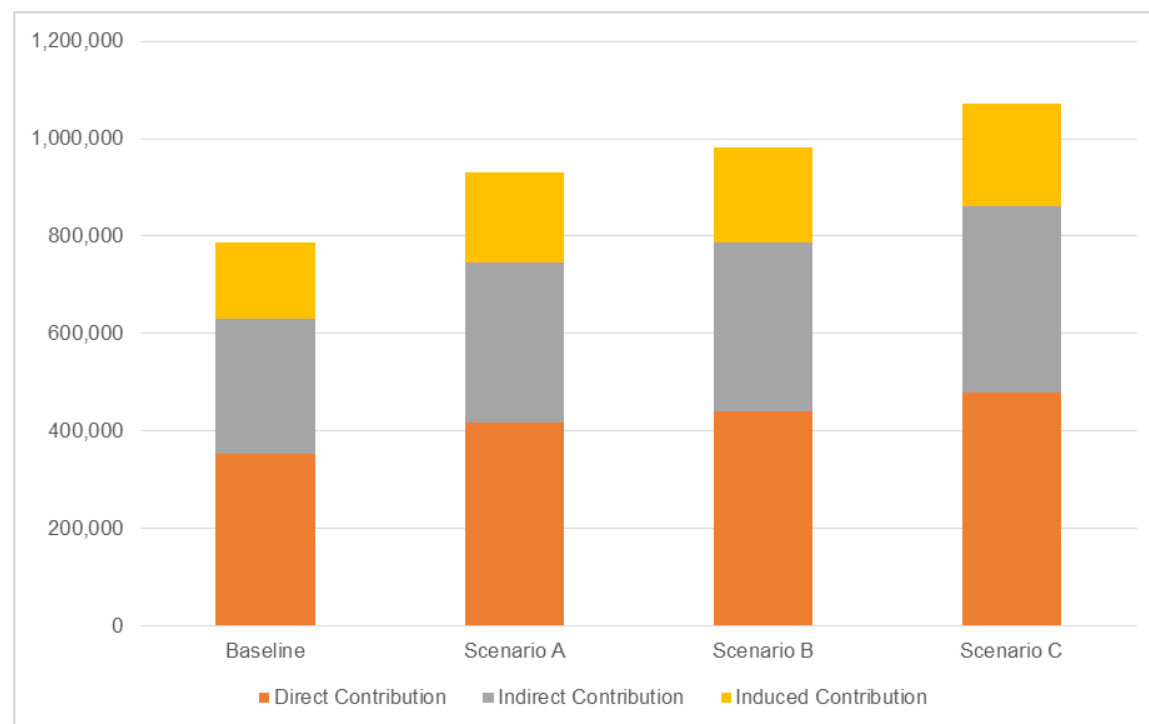


Figure 240 - Total gross value added contribution under different scenarios by people with access needs (unit: '000 000 €)

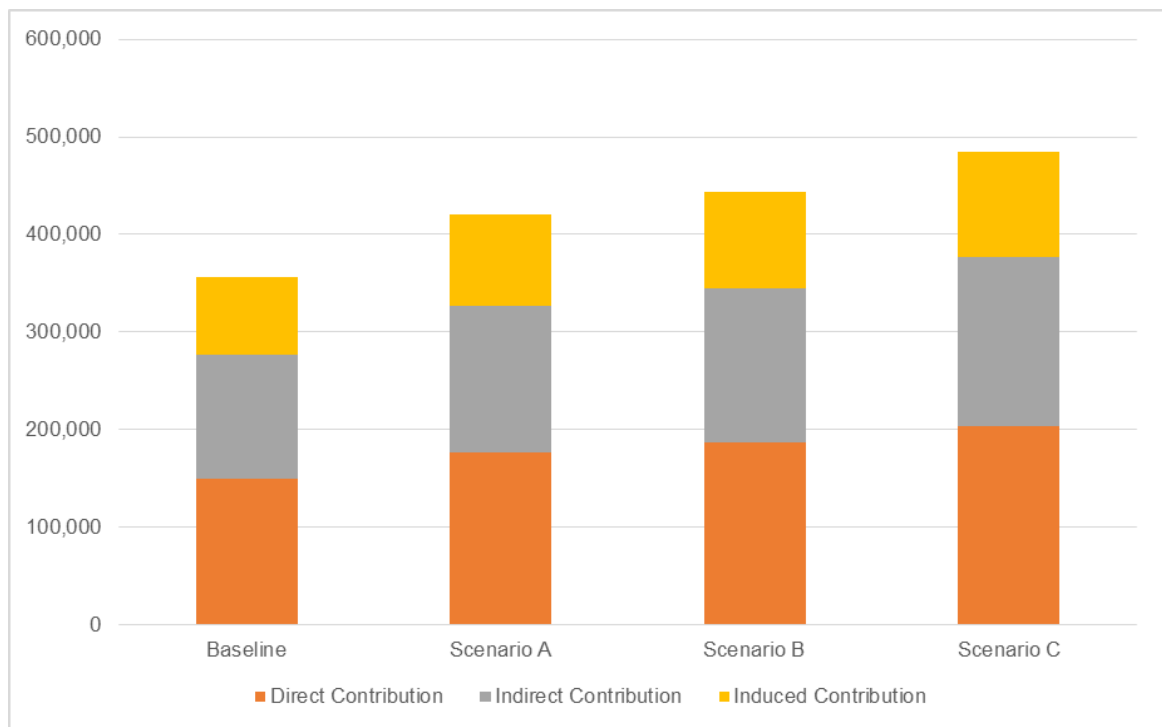
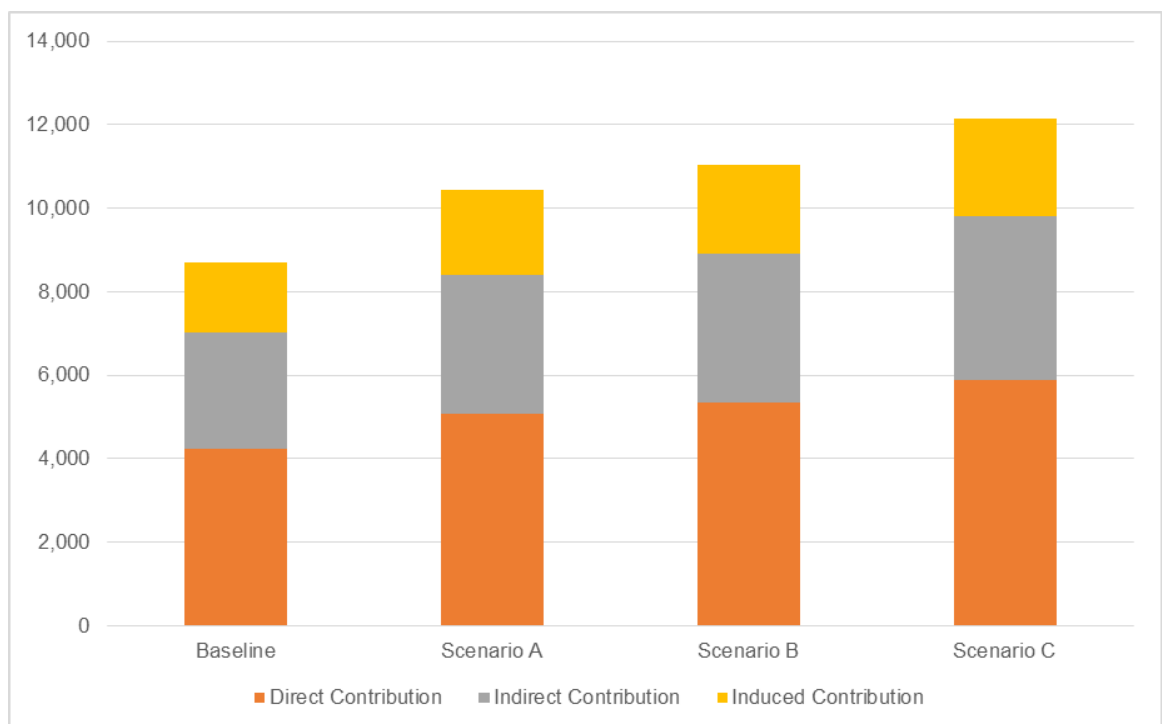


Figure 241 - Total employment contribution under different scenarios by people with access needs (unit: '000 persons)



6.3.2.3 Effect of travel companions

The multiplication effect of travel companions under different scenarios are summarised in Figure 242. As opposed to the GVA figures, the equivalent direct economic contributions in terms of GDP generated by both the people with access needs and their companions are €542,847 million, €574,220 million, and €627,671 million under Scenario A, B and C, respectively. The equivalent total contributions in terms of GDP generated by the people with access needs and their companions are €1,310,204 million, €1,386,289 million, €1,514,711 million under Scenario A, B and C.

Figure 242 - Economic contribution of EU's accessible tourism under different scenarios: without/with travel companions

Scenario A

	Direct economic contribution			Total economic contribution		
	Gross turnover (output) (€ million)	Gross value added (€ million)	Employment ('000 persons)	Gross turnover (output) (€ million)	Gross value added (€ million)	Employment ('000 persons)
Without companions	415,946	176,943	5,068	929,801	420,240	10,426
With companions	1,171,720	497,738	13,864	2,623,906	1,185,096	28,923

Scenario B

	Direct economic contribution			Total economic contribution		
	Gross turnover (output) (€ million)	Gross value added (€ million)	Employment ('000 persons)	Gross turnover (output) (€ million)	Gross value added (€ million)	Employment ('000 persons)
Without companions	439,070	186,696	5,352	981,603	443,380	11,032
With companions	1,240,483	526,734	14,692	2,778,083	1,254,009	30,704

Scenario C

	Direct economic contribution			Total economic contribution		
	Gross turnover (output) (€ million)	Gross value added (€ million)	Employment ('000 persons)	Gross turnover (output) (€ million)	Gross value added (€ million)	Employment ('000 persons)
Without companions	479,966	204,073	5,888	1,073,179	484,476	12,145
With companions	1,355,671	575,656	16,156	3,036,245	1,369,889	33,784

6.3.3 Results – International inbound markets

6.3.3.1 Direct economic contribution under different scenarios

As with the tourism demand under different scenarios, the economic contribution is expected to increase when more tourists are attracted to the EU destinations due to improved accessibility. Under different scenarios, the increase of economic contribution against the baseline situation comes from the additional budget that the travellers would be willing to spare (i.e., Option 1 in Q26 of the questionnaire, which states that the respondent is willing to visit some EU destinations and willing to increase travel budget) and the shift of tourism spending from other destinations to the EU destinations (i.e., Option 2 in Q26, which states that the respondent is willing to visit some EU destinations but not willing to increase travel budget).

Figure 243 shows the percentages of additional budget that the travellers would be willing to commit under each scenario. The numbers are applied to the baseline economic contribution figures.

Figure 243 - Percentage of extra budget under different scenarios by all travellers with access needs from the 11 key international inbound markets

Scenario	People with disabilities	The elderly population
Scenario A	5.24%	3.77%
Scenario B	13.93%	7.19%
Scenario C	32.20%	47.73%

Note: 1) The travellers here are those who have travelled to **any destination** in the last 12 months, irrespective of whether they have been to the EU or not. 2) The numbers are the average across all the 11 key international markets.

The estimation process of the economic contribution under each scenario is presented in Figure 244, which takes into consideration the additional budget and the shift of budget between destinations.

Based on Figure 244, Figure 245 further explores the distribution of economic contribution between existing travellers and new travellers. A general observation is that under each scenario, the majority of the economic contribution is associated with existing travellers, i.e., those who have visited the EU destinations over the last 12 months, although the dominant role of existing travellers is not as strong for the elderly population as it is for people with disabilities.

It can also be discerned that with the improvements in accessibility going further (from scenario A to scenario C), the role of new travellers becomes more and more important. The share of economic contribution generated by new travellers increases progressively, from 14.2% to 19.5% for people with disabilities, and from 17.1% to 34.6% for the elderly population.

Figure 244 - Estimation of direct economic contribution (gross turnover) of EU's accessible tourism under different scenarios

Scenario	Scenario A		Scenario B		Scenario C	
Group	People with disabilities	The elderly population	People with disabilities	The elderly population	People with disabilities	The elderly population
Baseline direct economic contribution (gross turnover, € million) [1]	6,957	9,539	6,957	9,539	6,957	9,539
Additional contribution by existing travellers (€ million) [2]	645	735	1,856	1,021	2,372	1,719
Contribution by new travellers (€ million) [3]	1,263	2,115	1,811	4,105	2,254	5,968
Direct economic contribution (scenario, € million) [4]=[1]+[2]+[3]	8,865	12,390	10,624	14,665	11,583	17,226

Notes: 1) Existing travellers are those who have visited the EU in the last 12 months;

2) Under different scenarios, the additional contribution by existing travellers comes from either the additional budget they would be willing to commit or the shift of spending from other destinations to EU destinations;

3) New travellers are those who have not been to the EU in the last 12 months but would be willing to travel to the EU under different scenarios; they may have been to domestic destinations or other international destinations, or simply have not travelled at all in the last 12 months;

4) Under different scenarios, the contribution by new travellers comes from either the additional budget they would be willing to commit or the shift of spending from other destinations to EU destinations.

Figure 245 - Breakdown of direct economic contribution under different scenarios between existing travellers and new travellers

Scenario	Scenario A		Scenario B		Scenario C	
Group	People with disabilities	The elderly population	People with disabilities	The elderly population	People with disabilities	The elderly population
Direct economic contribution (scenario)	8,865	12,390	10,624	14,665	11,583	17,226
of which, generated by						
Existing travellers	85.8%	82.9%	83.0%	72.0%	80.5%	65.4%
New travellers	14.2%	17.1%	17.0%	28.0%	19.5%	34.6%

Following the same estimation process presented in Figure 244, the economic contribution in terms of gross value added (GVA) and employment is also made available. The results, which are the sum of contributions by both people with disabilities and the elderly population, are shown in Figure 246. Based on the GVA figures, the equivalent direct economic contributions in terms of GDP under baseline, scenario A, B and C are €7,781 million, €10,028 million, €11,929 million, and €13,600 million.

Figure 246 - Direct economic contribution of EU's accessible tourism under different scenarios by people with access needs from the 11 key international inbound markets

Scenario	Gross turnover (output) (€ million)		Gross value added (€ million)		Employment ('000 persons)	
Baseline	16,496	increase against baseline	6,897	increase against baseline	268	increase against baseline
Scenario A	21,255	28.9%	8,888	28.9%	345	28.9%
Scenario B	25,289	53.3%	10,574	53.3%	411	53.3%
Scenario C	28,809	74.6%	12,048	74.7%	469	75.0%

Compared with Figure 237, which shows the increase of economic contribution against the baseline situation for the EU source markets, Figure 246 indicates a very optimistic picture. However, it should be noted that all the figures regarding the respondents' behaviour under different scenarios are only an expression of willingness, rather than the reality. Given that the scenarios are hypothetical at the time of the survey, caution has to be taken to interpret the survey results. Besides, unlike the EU countries which are more homogenous because they are a unified market and are subject to a more unanimous economic climate, the international markets are way much more diverse. There are developed economies, such as Australia, Japan and the USA, and emerging economies, such as Brazil, China and India. Each international source market may thus face unique factors that influence its outbound tourism demand.

Even though it can be expected that with improved accessibility the tourism demand by the key international inbound markets would see substantial growth, such growth (as shown in Figure 246) would inevitably be subject to various uncertainties.



6.3.3.2 Total economic contribution under different scenarios

Under different scenarios, the economic contribution of accessible tourism will also be amplified, according to the same multiplier effects summarised in Annex R. The total economic contribution, in terms of output, gross value added and employment, is presented in Figure 247. The total economic contributions of GDP, which include taxes and subsidies on products on top of GVA, are €16,901 million, €21,779 million, €25,910 million, and €29,530 million under baseline, scenario A, B and C. The magnitude of the increase between scenarios follows that of the direct economic contribution (see Figure 246). For the results of each individual source market, the country profiles in Annex T provide a summary.

Figure 247 - Total economic contribution of EU's accessible tourism under different scenarios by people with access needs from all the 11 key international inbound markets

Scenario	Total output Contribution (€ million)		Total gross value added contribution (€ million)		Total employment contribution ('000 persons)	
Baseline	34,382	increase against baseline	15,133	increase against baseline	538	increase against baseline
Scenario A	44,302	28.9%	19,500	28.9%	693	28.9%
Scenario B	52,709	53.3%	23,199	53.3%	824	53.3%
Scenario C	60,049	74.7%	26,433	74.7%	940	74.9%

Figure 248– Figure 250 visualise the build-up of indirect and induced effects, on top of the direct contribution.

Figure 248 - Total output contribution under different scenarios by people with access needs (unit: '000 000 €)

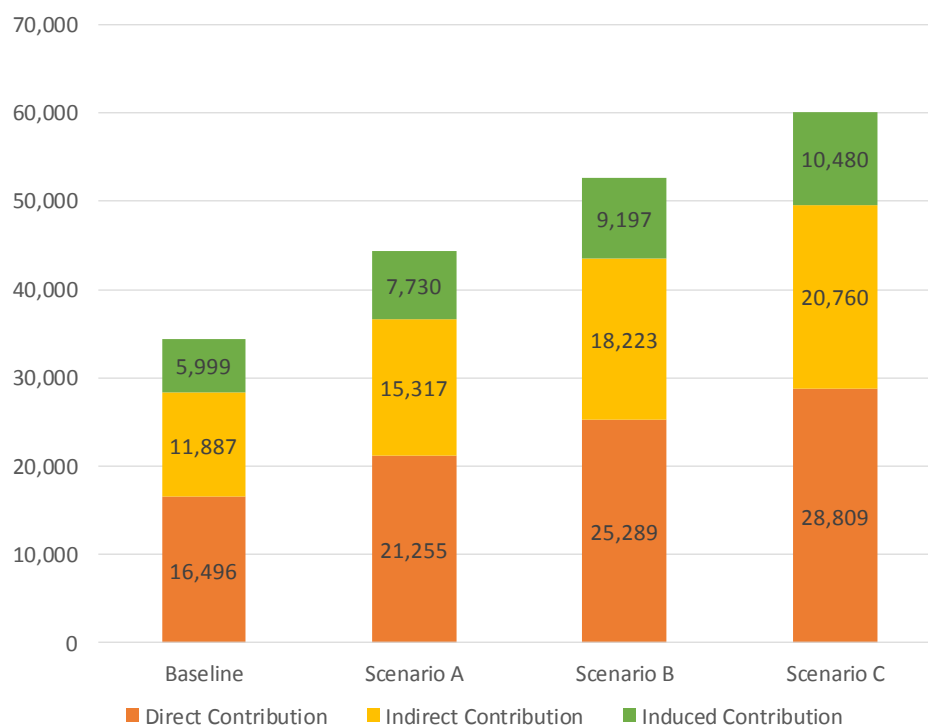


Figure 249 - Total gross value added contribution under different scenarios by people with access needs (unit: '000 000 €)

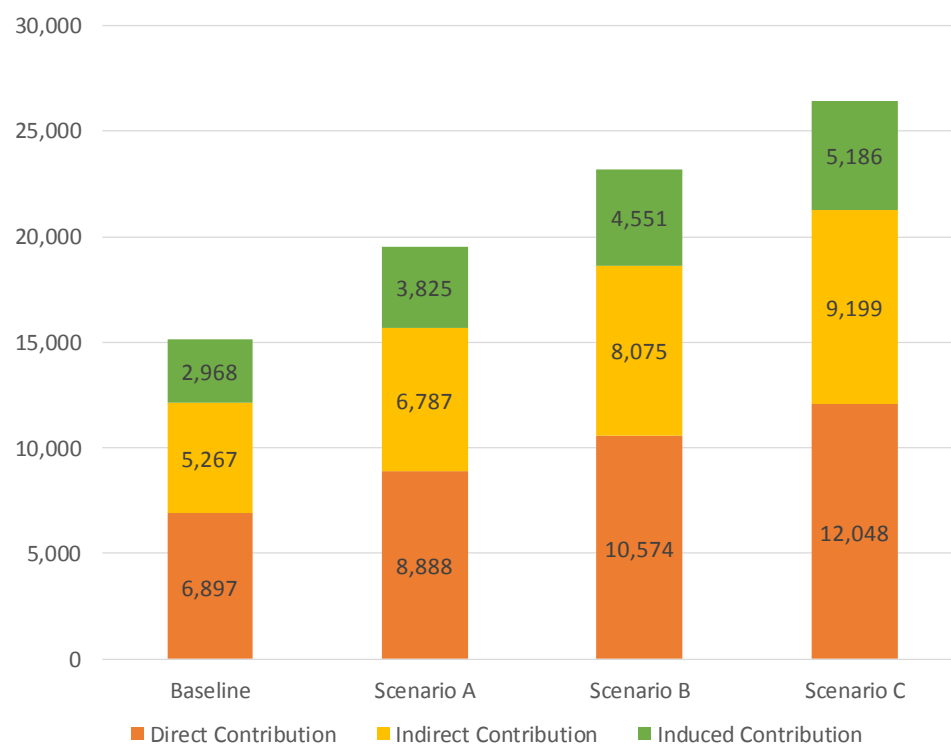
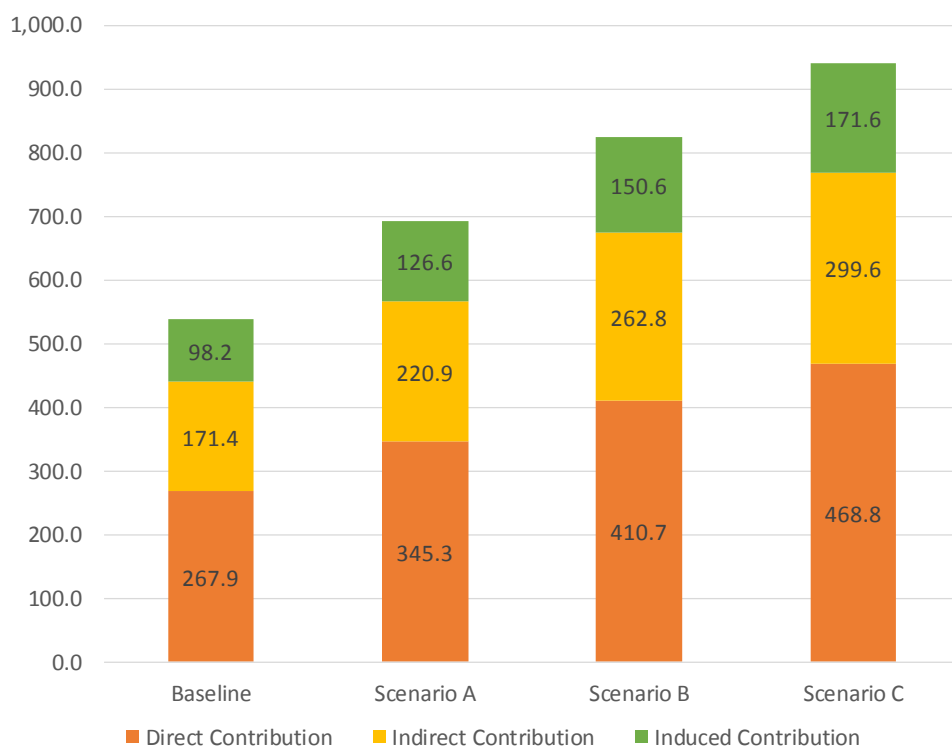


Figure 250 - Total employment contribution under different scenarios by people with access needs (unit: '000 persons)



6.3.3.3 Effect of travel companions

Based on Figure 231 and Figure 232, the multiplication effects of travel companions are calculated. Results presented in Figure 251 are the sum of contributions by all 11 international inbound markets. As opposed to the GVA figures, the equivalent direct economic contributions in terms of GDP generated by both the people with access needs and their companions are €29,664 million, €35,323 million, and €40,037 million under scenario A, B and C, respectively. The equivalent total contributions in terms of GDP generated by the people with access needs and their companions are €64,516 million, €76,827 million, €87,050 million under scenario A, B and C.

Figure 251 - Economic contribution of EU's accessible tourism under different scenarios: without/with travel companions

Scenario A

	Direct economic contribution			Total economic contribution		
	Gross turnover (output) (€ million)	Gross value added (€ million)	Employment ('000 persons)	Gross turnover (output) (€ million)	Gross value added (€ million)	Employment ('000 persons)
Without companions	21,255	8,888	345	44,302	19,500	693
With companions	63,080	26,351	1,016	131,452	57,828	2,045

Scenario B

	Direct economic contribution			Total economic contribution		
	Gross turnover (output) (€ million)	Gross value added (€ million)	Employment ('000 persons)	Gross turnover (output) (€ million)	Gross value added (€ million)	Employment ('000 persons)
Without companions	25,289	10,574	411	52,709	23,199	824
With companions	75,123	31,381	1,210	156,548	68,867	2,435

Scenario C

	Direct economic contribution			Total economic contribution		
	Gross turnover (output) (€ million)	Gross value added (€ million)	Employment ('000 persons)	Gross turnover (output) (€ million)	Gross value added (€ million)	Employment ('000 persons)
Without companions	28,809	12,048	469	60,049	26,433	940
With companions	85,082	35,549	1,373	177,310	78,010	2,761

6.4 Summary of hypothesis results

A number of hypotheses were formulated in relation to the demand for accessible tourism. Based on the findings discussed above, this section provides a review of the hypotheses.

- H1: France, Germany, Italy and the UK are the major European source markets for the EU's Accessible Tourism.

According to the estimated accessible tourism demand by each of the EU states in 2012 (see Figure 252, the top 10 source markets are listed below, with France, Germany, Italy and the UK ranked at the top, third, seventh and second, respectively. Therefore, H1 is mostly supported.

Figure 252 - Top 10 source markets for accessible tourism demand in EU

Rank	Source market	No. of trips ('000)
1	France	161128
2	United Kingdom	156027
3	Germany	121428
4	Spain	54828
5	Netherlands	39540
6	Sweden	32262
7	Italy	30787
8	Poland	30210
9	Czech Republic	29246
10	Finland	22405

Note: The number of trips includes both day trips and overnight trips.

- H2: The BRICS countries and the USA are the most important international inbound markets for the EU's Accessible Tourism.

Based on Figure 52, Figure 228, Figure 229 and Figure 230, the USA is the country that contributes the most tourism demand (up to 29.2%) and the most economic contribution (up to 30.4%). Hence, it is confirmed that the USA is the most important international inbound market for the EU's accessible tourism.

The next most important market is Switzerland, holding 20.2% of the demand and 18.5% of the economic impact.

The BRICS countries as a whole and Switzerland come very close. In terms of demand, the BRICS countries take up 20.1% of the share in total, with Russia being the best performer (10.9%). In terms of economic contribution, the BRICS countries have a share of 20.8% in total, with Russia contributing the most again (8.6%).

Therefore, H2 is generally supported.

- H3: Mobility facilities are the primary area of access needs, and sufficient attention should be paid to these facilities.¹

According to the distribution of impairment types among all individuals with disabilities in EU27 (see Figure 24) and the estimated accessible tourism demand by different types of impairments (see Figure 38), mobility impairments account for the highest proportion (about 36% within EU27 overall) apart from hidden impairments. Therefore mobility facilities are the primary area of access needs, and it is necessary to pay particular attention to these facilities. Hence H3 is supported.

- H4: The seniors have higher spending power than the people with disabilities, because they have higher wealth level and are more willing to spend on leisure activities.

According to Figure 201, the EU-wide average daily spending of the elderly travellers is slightly higher than of people with disabilities as far as both day trips and overnight trips are concerned. Nevertheless, this pattern does not always hold at the individual country level (see Figure 202 and Figure 203). Overall, within EU27 the elderly population spent more on travel than individuals with disabilities and thus contributed more to the EU economy (see Figure 204). Beyond the EU area, the elderly population from the key international inbound markets spend roughly the same as the people with disabilities, when they travel to the EU (see Figure 219 and Figure 220). This general observation basically holds at the individual country level. Both groups spend approximately €1,000 per trip within the EU.

Therefore, H4 is generally supported for the EU population with access needs, but not for the international inbound markets.

- H5: The seniors are more frequent travellers than the people with disabilities.

As shown in Figure 28, the elderly population in EU27 travelled slightly more frequently than the people with disabilities for day trips (6.9 versus 6.7 trips per year), but the opposite trend is found with regard to overnight trips. Across EU27, on average the elderly population travelled 1.2 times less than people with disabilities. Therefore, H5 is partially supported.

- H7: Female senior customers will dominate the senior travel market, given the higher proportion of population.

¹Please note hidden impairments are a major type of disability but the related access needs are more varied and therefore less widely used and needed by smaller proportions of people.

As Figure 8, Figure 26 and Figure 27 show, the female senior population always outnumbers the male counterpart, and therefore account for a higher share of the senior travel market (58% with EU27 overall, 55% within 11 key inbound markets). Therefore H7 is supported.

- H8: Key parameters such as travel propensity, travel frequency, and expenditure level should be notably different across clusters.

According to Figure 29 to Figure 32, Figure 202 and Figure 203, across EU 27 countries the propensity, travel frequency, and average expenditure figures vary significantly for both groups of the people with access needs and as far as both day trips and overnight trips are concerned. Using overnight trips of the people with disabilities as an example, the travel propensity varied from 7.8% in Bulgaria to 85.7% in the Netherlands. The travel frequency varied from 3.9 trips in Malta and Slovenia to 8.1 trips in Ireland and Cyprus. With regard to average spending per night, it varied between 49.3 Euros (in Bulgaria/Hungary/Romania) and 123.6 Euros (in Germany/Italy). So H8 is supported.

- H9: The senior travel market will become even more important by 2020, given that the steep growth of the elderly population will continue.
- Within the EU27 area, based on the predicted growth both market segments of accessible tourism demand (see Figure 34), the senior travellers segment will grow much faster (about 2% annually) than the segment of the people with disabilities (only 0.12% per year)¹. By 2020 the demand of the senior travel market is predicted to reach 518,647 thousand trips, accounting for 60% of total accessible tourism demand in EU27, 66% higher than the demand of the segment of individuals with disabilities (343,222 thousand trips). As to the key inbound markets, Figure 53 shows that the senior travellers segment will significantly outperform the segment of the people with disabilities, in the sense that the annual growth rate of demand by the senior travellers is predicted to be 2.9%, versus 0.55% by the people with disabilities. Thus H9 is supported.

- H10: China and India will be much more important than other inbound markets for Accessible Tourism.

From Figure 52, Figure 228, Figure 229 and Figure 230, it emerged that the USA is the most important inbound market due to its high share of tourism demand (29.2%) and economic

¹ These are baseline forecasts assuming the travel propensity and frequency of the people with access needs remain unchanged.

contribution (30.4%) among all the inbound markets. In contrast, the shares of China and India are much lower. In terms of demand, China only accounted for 3.8% and India 0.7% in 2012. In terms of economic contribution, China accounted for 4.0% and India 0.8%. The reason for China and India falling behind is related to the extremely low departures per 100 people. Compared to a figure of 6.87 for the USA, it is only 0.38 for China and 0.16 for India. Therefore, H10 is rejected.

- H41: The improvement of accessibility will help attract people with access needs to explore new destinations.

Figure 41, Figure 42, Figure 54 and Figure 55 show clear evidence that by improving accessibility of those destinations which are currently less accessible in Europe, people with access needs were keen to expand their travel to these new destinations. In particular, current non-travellers showed higher interest in travelling in future if accessibility could be improved. A higher level of accessibility improvements corresponds to a higher level of willingness to travel to the new destinations. Therefore, H41 is supported.

- H42: Extensive improvements of accessibility can generate significant economic contributions with respect to output and employment. As Figure 237 to Figure 241 and Figure 246 to Figure 250 clearly show, extensive improvements of accessibility (i.e., Scenario C) can improve the overall economic contributions by up to 36.5% and 39.4% (EU27 travellers), and up to 74.7% and 74.9% (international travellers) with regard to economic output and employment, respectively, as far as direct, indirect and induced effects are concerned all together. Therefore H42 is supported.

6.5 Limitations of demand forecasting and economic impact assessment

This project aimed to provide a broad picture of the scale of accessible tourism and its economic contribution in the European Union. Although rigorous methodologies and scientific procedures have been followed to achieve the objectives, the precision of the estimated results were inevitably affected by some limitations of the research design, which could not be avoided.

On the one hand, this project has three limitations that to some extent may lead to over-estimated results. First, using cluster representative countries' profiling parameters to infer the behaviour of other countries could only provide the best possible approximation rather than actual figures. Second, although the overall sample size of the main survey in the EU representative countries is large, the country specific sample sizes are relatively small for estimating the demand and economic contribution at the country level. The small sample also represented a challenge for the international

market survey as outliers (i.e. extreme values) were identified. Hence approximation is unavoidable in order to achieve meaningful results, even though this means the estimation would be less accurate. Third, an online survey is an effective way for primary data collection. Nevertheless, its limitation is also unavoidable, particularly in relation to the representativeness of the sample. Online survey tends to capture a higher proportion of active internet users. Particularly among the people with disabilities and the elderly population, these respondents may represent relatively well-educated population whose income level is likely to be above average. Their travel and spending behaviour also tends to be above average.

On the other hand, some underlying issues may render the results relatively conservative. First, the online survey was conducted in mid-2013 to capture the tourists' most recent behaviour in mid-2012 to mid-2013, during which the debt crisis in the Eurozone still haunted the EU area. Due to reduced personal income, the tourists might have acted conservatively when travelling. Once the economy recovers and people's income bounces back to pre-crisis level, the behavioural profiling parameters, such as travel propensity, travel frequency and expenditure per trip, could be improved against the current figures captured by the survey. Second, in forecasting the future tourism demand (in terms of trips), it is assumed that the behavioural profiling parameters will remain unchanged over the next decade. The reason for this assumption is that there are no relevant historical data available to infer the parameters' evolution, given that the current online survey is a one-off. Such restriction may overlook the intrinsic trend of people travel behaviour over time.

All in all, caution has to be taken when interpreting the estimation results, as exaggeration factors and conservative factors co-exist.

7 Task 5 - Recommendations and success factors

The study results show that the accessible tourism demand by people with special access needs from the EU generated a total economic contribution of 786 billion Euros in terms of total output and 356 billion Euros in terms of gross value added or 394 billion Euros in terms of GDP within the EU. This scale is equivalent to about 3% of total GDP of EU27 in 2012¹. In addition, the people with special access needs from the 11 key international inbound markets generated a total economic contribution of 34 billion Euros in terms of total output and 15 billion Euros in terms of gross value added or 17 billion Euros in terms of GDP to the EU.

Demand for accessible tourism will also continue to grow in future, with the forecast of future growth suggesting that by 2020 the demand by people within the EU will grow to about 862 million trips per year whilst the demand by the key international inbound markets will reach 21 million trips per year, and possibly more if accessibility improves in the tourism sector. The forecast based on the most optimistic scenario tested in this study, based on extensive improvements in accessibility (Scenario C), shows that up to 39.4% of additional economic contribution associated with the demand by people within the EU could be achieved, which suggests that up to 1,073 billion Euros of total output could be generated, along with up to 12.1 million employed persons within the whole EU economy - taking all direct, indirect and induced effects into account. Moreover, under Scenario C, up to 74.9% of additional economic contribution associated with the demand by people from the key international inbound markets would be reached, which the whole EU economy will in total benefit from 60 billion Euros of economic output and 940 thousand employed persons. Besides, it was estimated that each individual with special access needs in the EU and beyond travelled with 1.9 companions on average. With the additional contribution from travel companions taken into consideration, the overall economic contribution related to accessible tourism demand could be further amplified by a similar scale. Another interesting trend is the growth of the population with access needs in inbound markets, which can have a positive impact on the EU tourism sector (see Tasks 1b and 4b).

However, the study shows that **travellers with access needs encounter problems and obstacles while preparing a trip or travelling** and that, in general, **destinations and service providers in tourism have insufficient awareness of the importance of accessible tourism** (see Tasks 3b, 2b and 4a). Many are not yet prepared for the demands of guests with access needs in terms of

¹ According to the latest statistics from Eurostat:
<http://epp.eurostat.ec.europa.eu/tgm/refreshTableAction.do?tab=table&plugin=1&init=1&pcode=tec00001&language=en>

infrastructure, services and attitudes. Nevertheless the results show that the majority of tourists with access needs managed to find destinations that, in general, were satisfactory for them in that respect. This illustrates two important aspects:

- Even when facing difficulties in finding information, tourists with access needs are often able to choose destinations adapted to their needs.
- A number of destinations already benefit from accessibility as a competitive tool, either following the implementation of a specific strategy or through word-of-mouth.

In order to improve the accessible tourism offer and encourage demand, isolated and individual responses to support or develop accessible tourism do not address the issue adequately. Success depends on a professional and coherent approach tackling a range of factors and leading to a cost-effective implementation of initiatives. The present study therefore makes the following recommendations:

1. Commitment of the decision-makers

Under three scenarios of increasing accessibility levels, it was estimated that demand would increase respectively by 24.2%, 33.2% and 43.6% (see Task 1). For the tourism industry to realise these benefits and taking into account the diversity of social, economic or political systems, the implementation of accessible tourism generally stands a greater chance of success when it is also of benefit to the general tourist and **integrated in mainstream offers**. It is also an important task for decision makers to encourage service providers to invest in accessible tourism and to demonstrate its economic and social benefits to the whole community.

Service providers in tourism may also feel unsure about the strategy to follow because they are unaware of how to implement accessibility. Similarly guests encounter a variety of standards and labels across Europe and even within the same country (see Task 3b). The study suggests that the question of **harmonising standards and legislation** could be an important factor in improving accessibility, through better guidance for providers and clearer information for users. Existing legislation such as, for example, the Lifts Directive 95/16/EC have already shown the benefits of this type of approach. This harmonisation towards improved accessibility could also be an effective way to attract tourists with access needs from the growing inbound markets.

Strong and on-going support from politicians, administrators and decision makers in business is another key factor. This includes **support in education and training** as well as **direct financial**

support (see Tasks 3a, 3b and 4a). Many service providers who are aware of the issues are looking for stronger financial support and funding especially for accessible offers. In many countries, tourism in general is crucially dependent on public money. Accessibility and Design for All¹ should be considered for inclusion in the criteria for public funding and may also be considered a requirement in public procurements.

2. Coordinating and continuity

The study findings show that accessible tourism is considered a valuable business opportunity. Yet, in order to ensure future growth, it is anticipated that the industry needs to improve its **coordination efforts, particularly through public-private partnerships** and on local and regional level (see Task 4a). Accessible tourism requires long term commitment. Enhancement of services and infrastructure is an on-going task, which requires technical and financial resources as well as human resources and knowledge. To ensure the sustainability of the development process and a professional approach, it is useful to assign a **dedicated work unit or coordinator** within the management structure of tourism organisation with appropriate resources, particularly in terms of budget and time allocated to this role (see Task 3a). The coordinator's role would mainly consists of setting up and maintaining network communication, following up strategies and actions defined within the process plan and storing and circulating knowledge accumulated during the process. The higher the position of the coordinator within the management structure, the greater the impact of internal and external communication is.

3. Networking and participation

Accessible tourism is a complex subject and there are many potential pitfalls for service providers and destinations. Analysis of good practice and success stories shows that knowledge transfer flows more easily when organisations are part of wider **professional networks** of experienced service providers and experts on accessibility (see Task 3a). European countries have access to the ENAT network, and national or regional networks exist in many countries. Among the benefits are the exchange of knowledge, enhanced advertising opportunities and improved communication with client groups. In addition, these networks play an important role in putting accessible tourism issues on the political and administrative agenda.

¹Design for All is about ensuring that environments, products, services and interfaces work for people of all ages and abilities in different situations and under various circumstances.

Local networks among providers at a destination are a key factor for success as they enable closer collaboration to ensure accessibility along the entire tourism chain. In addition to including the entire chain, it is equally important to **guarantee the accessible offer across all categories of services and prices** offered at the destination. Indeed, the study shows that sizeable proportions of travellers feel they have to pay more or switch to more expensive services to benefit from an accessible offer (see Task 2b).

4. Strategic planning

Service providers, destinations and other decision-makers in tourism may often respond to demands of guests in an *ad hoc* fashion. This may be useful as a first step in responding to guests' needs. However, strategic planning is crucial for sustainable success, particularly when the forecasted increase in demand is taken into account. So, the development of accessible tourism should proceed strategically, and step by step:

1. On a strategic and long-term level, it is important to **be aware of the diversity of access needs and patterns of travel behaviour across different groups and countries, but also across individuals within groups**, and to target them in the most appropriate way. For instance, the results of the study show that it is not enough to focus just on wheelchair users or older guests. Those travelling with children complain about a lack of services for children, while diet-related aspects, such as special menus for allergies and religious restrictions, would enhance many travellers' experience (see Task 2b).
2. An **inventory of the current offer in terms of infrastructure, services and possibilities for improvement** might be a first step. It is important to involve guests and other stakeholders already at this stage of the process in order to incorporate the very best practice.
3. Having identified the strengths and weaknesses of the offer and the demands of potential guests, it can be advisable to **improve the offer gradually**. Often, just minor changes are enough to substantially enhance services and comfort for the guests (see Task 2b). Furthermore, **accessibility should be an important feature of long-term planning and investments** in modernisation of infrastructure. It is also crucial to develop **tools to listen to the specific requirements of guests** to establish accessibility priorities (see Task 3a).
4. The study shows that a well planned investment in infrastructures and service provision can make a good return on investment in the relatively short term as high proportions of tourists with access needs tend to return (see Tasks 3a and 2b). This can also be enhanced through **improved marketing and advertising strategies** taking into account accessibility features.

5. Knowledge management and qualification

Though accessibility is often considered merely a matter of infrastructure, services are at least as important. As shown in the study (see Tasks 2b and 3a), good services can overcome many obstacles in infrastructure, while poor service may prevent guests from enjoying accessible offers. For instance, an accessible toilet (the main barrier identified in Task 3b) is useless if staff do not inform guests that it is available. It is therefore important that all members of the staff acquire a solid knowledge base on accessibility through good **knowledge management**. This can be supplemented by information about good practice examples and with the experience of external experts in order to learn from the experience of other successful providers (see Task 3a).

Regular training of staff and management is also important to keep all service providers up-to-date and to help them to understand the demands and wishes of all guests. Many service providers still feel uncertain about how to treat a disabled guest or the specific needs of families with children. This is why many guests experience attitudinal barriers and find the way they are treated an important aspect of their trip (see Tasks 3b and 2b). Special training involving guests of different groups is very helpful and can ensure an on-going exchange between guests and providers ultimately leading to better quality services.

6. Optimisation of resources

Optimisation of resources has two dimensions: using as many resources as possible to meet the demands of a strategic development of accessible tourism while prioritising tasks along the service chain. A better understanding of travel behaviour and patterns can help improve specific aspects of the service chain within different tourism sectors (see Tasks 2b and 3b).

Most importantly, the study shows that overall, attitudinal barriers are encountered more often than physical access barriers across all sectors by individuals with different types of access needs. The **awareness and level of training of service providers** is thus an important factor across all sectors, as highlighted above.

In the pre-travel/ information gathering stage, the lack or limited **availability of information about accessible services** represents the biggest barrier for people with access needs. Therefore, the communication of accessible features of infrastructure and services remains to be improved (see recommendation 7.Communication and marketing).

Barriers encountered in the transport stage largely refer to airlines not ensuring an accessible environment. The **infrastructure of airports and aircrafts** (although significantly improved in recent years for people with mobility impairments) should therefore be better adapted to the needs of

travellers with access needs. In addition to transport from home to destination, moving around at the destination was seen as the sector where most barriers are encountered. This result shows the importance to improve, for example, the **accessibility of public transport, pathways and parking** for travellers with access needs.

In the entertainment sector, people experience the most barriers with **nature-based activities**, indicating that destinations should develop their offer on experiencing nature in an accessible way.

Usually all guests benefit from improvements in infrastructure and services. However, the results of the survey show that different sub-groups report different barriers (see Tasks 2b and 3b). While guests with limitations and seniors experience problems with the accessibility of toilets and private space, families face more problems in public services and leisure activities. **In planning improvements, the different needs and expectations of guests have to be taken into account.** Therefore, although improvement of toilets and ergonomics in general along with additional space are important factors, it is not possible to give general recommendations on how a service provider or a destination should invest: improvements targeting specific sub-groups are more likely to have an impact on the quality of the offer.

Aside from tourism chain stages and target group needs, **seasonality and price offers** are also aspects to take into account (see Task 2b). For many service providers, it may be profitable to shift the focus from the high season to the high percentage of people in all groups that travel off season. Besides, the study shows that many potential guests do not travel due to financial reasons. This underlines the need for accessible offers in the lower budget sector. In addition, it supplies a strong argument for social tourism – not just for guests with access needs.

7. Communication and marketing

People with access needs demand specific information when preparing their trip (see Task 2b). However, information on accessibility on websites and especially in brochures and other printed materials is often insufficient, technical and not user-friendly. Once individuals have tried and tested websites, these sources are then subsequently considered sufficient and reliable (see task 3b). 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 sufficient progress has been made in this area. Most importantly, information on accessibility is not integrated in general marketing and communication materials (see Task 2a). This is an issue as the results of the study show that people with access needs show similar patterns in preparing their holiday trips to tourists in general and only a small proportion use special-interest resources (see Task 2b). This is a strong indicator to **include sufficient accessibility information in mainstream tourism information.**

However, detailed features may be difficult to fully integrate in all general materials and special-interest media remain a useful resource to share more in-depth information. Regarding market segmentation, the study results advise against segmenting target groups based on different types of access needs. On the contrary, it suggests that as different access needs are present in any target group, accessibility should always be part of the offer.

Besides, many guests rely on **personal information and recommendations** which **should be an element of marketing strategies**. Social media play an important role in word-of-mouth-communication, especially among younger groups of guests, for instance the important group of families with children (see Task 2b).

Further to the efforts to improve accessibility through the involvement of decision-makers, better coordination, networking, strategic planning, knowledge management and the optimisation of resources, the key final step is to promote these accessible tourism services and products among travellers. Communication and marketing are therefore of particular relevance to embracing the business opportunities created by the demand for Accessible Tourism.

Roadmap to success

The above-mentioned recommendations and success factors should be integrated part of a process to implement Tourism for All approaches. This process can only be completed step by step and according to the specific situation at hand. Service providers, destination managers and administrations have to decide when and how to start, which path to follow and what targets to be achieved.

The development process usually takes place in four phases of transition¹:

1. Awareness Phase
2. Starting Phase
3. Developing Phase
4. Consolidating Phase

All four phases display certain characteristics and actions that are common to all developments and the recommendations are of different importance in the different phases. Nevertheless, the recommendations can be prioritised and grouped according to the seven success factors and four phases of transitions as per Figure 253.

¹ Neumann/Reuber 2004, Aragall/Neumann/Sagramola 2008, Neumann/ Pagenkopf/Schiefer/Lorenz 2008

In order to respond in an appropriate and balanced way to all recommendations and success factors mentioned before, the participation of all stakeholders and available resources has to be considered in all phases according to the local or regional culture and conditions.

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Figure 253 - Roadmap to success

	Awareness Phase	Starting Phase	Developing Phase	Consolidating Phase
1. Commitment of the decision-makers	Encourage service providers to invest in accessible tourism and demonstrate its economic and social benefits	Strong and on-going support from politicians, administrators and decision makers in business – including education and training as well as direct financial support	Harmonise standards and legislation to provide better guidance for providers and clearer information for users Integration in mainstream offers	
2. Coordinating and continuity		Assign dedicated work unit or coordinator within the management structure of tourism organisations with appropriate resources	Improve the industry's coordination efforts, particularly through public-private partnerships and on local and regional levels	
3. Networking and participation		Encourage knowledge transfer, particularly through professional networks		Guarantee the accessible offer across all categories of services and prices offered at the destination
4. Strategic planning	Raise awareness for the diversity of access needs and patterns of travel behaviour across different groups and countries, but also across individuals within groups, to target them in the most appropriate way	Install an inventory of the current offer in terms of infrastructure, services and possibilities for improvement	Improve the offer gradually, include accessibility in long-term planning and investments and develop feedback tools for customers to establish accessibility priorities	Improve marketing and advertising strategies by taking into account accessibility features
5. Knowledge management and qualification		Staff with a solid knowledge base on accessibility through good knowledge management	Regular training of staff and management	
6. Optimisation of resources		Using as many resources as possible for a strategic development of accessible tourism Prioritising tasks along the service chain		

<p>7. Communication and marketing</p>			<p>Include sufficient accessibility information in mainstream tourism information Take personal information and recommendations into account in marketing strategies (e.g. through social media)</p>	
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