



ECONOMIC IMPACT AND TRAVEL PATTERNS OF ACCESSIBLE TOURISM IN EUROPE – FINAL REPORT SUMMARY

Service Contract SI2.ACPROCE052481700 –
European Commission, DG Enterprise and
Industry

Table of contents

1 Executive summary..... 3

1.1 *Task 1 – Demographic profiling of tourists with special access needs..... 3*

1.1.1 Task 1a – Cluster analysis..... 3

1.1.2 Task 1b – Forecasting 4

1.2 *Task 2 – Behavioural profiling of tourist with special access needs..... 5*

1.2.1 Task 2a - Website analysis 5

1.2.2 Task 2b – Online survey and focus groups 5

1.3 *Task 3– Evaluation of the tourist experience across different tourism sectors..... 6*

1.3.1 Task 3a - Case-studies 6

1.3.2 Task 3b - Desk research on existing barriers faced or perceived by people with access needs 6

1.4 *Task 4 - Estimate of the current and future economic contribution of accessible tourism 8*

1.4.1 Task - 4a Stakeholder consultation 8

1.4.2 Task 4b - Scenarios and impact assessment..... 8

2 Recommendations and success factors 11

1. *Commitment of the decision-makers 12*

2. *Coordinating and continuity 13*

3. *Networking and participation 13*

4. *Strategic planning 14*

5. *Knowledge management and qualification 15*

6. *Optimisation of resources 15*

7. *Communication and marketing 16*

Roadmap to success 17

1 Executive summary

This is one of three studies commissioned by the European Commission, DG Enterprise and Industry (DG ENTR) in 2012-2013 in order to build a comprehensive picture of Accessible Tourism in the European Union (EU). This survey was conducted by GfK Belgium, the University of Surrey, NeumannConsult and ProAsolutions. The main aim of the present study is to better understand demand for Accessible Tourism in order to guide policy-making in this field. For this purpose, five main research objectives were identified:

- To examine the current and future demand for Accessible Tourism in Europe and beyond
- To investigate the travel patterns and behaviours of, and information provision for people with access needs
- To evaluate the tourist experience across different tourism sectors from demand and supply-side perspectives
- To estimate the current and future economic contribution of Accessible Tourism and its impact on employment
- To propose recommendations and success factors to improve the supply of Accessible Tourism offers

These objectives were translated into five key tasks whose key findings are presented below.

1.1 Task 1 – Demographic profiling of tourists with special access needs

1.1.1 Task 1a – Cluster analysis

To take the most effective use of available resources, this project conducted a cluster analysis, aiming to group 27 EU member states into different clusters and then selecting one or two countries to represent each cluster to carry out the primary data collection. It was presumed that the people in the same cluster should exhibit similar travelling behaviour. Hence, the primary data collected from the representative countries could be used to infer the behaviour of people in other countries.

Ultimately, the estimation of demand and economic contribution for different countries will use the same profiling parameters calculated from the representative countries' primary data. In the cluster analysis of this project, thirteen variables related to each country's location, demographics, income and education were used as clustering criteria. In total 8 clusters and 12 representative countries derived from the analysis. The decision on the representative countries was based on both quantitative evidence, such as correlation coefficients, and qualitative judgement. The 12 representative countries include Belgium, Bulgaria, France, Ireland, Italy, Lithuania, the Netherlands, Poland, Slovenia, Spain, Sweden, and the United Kingdom.

1.1.2 Task 1b – Forecasting

In order to forecast the demand for Accessible Tourism, the analysis first addressed the current situation. More than half of the individuals with disabilities in the EU travelled during the 12 months between mid-2012 and mid-2013. On average, each individual took 6.7 daily trips, plus a further 6.7 overnight trips during the period, mostly within Europe. In total, this group of travellers made about 170 million day trips and a similar number of overnight trips within the EU. In comparison, a slightly smaller proportion of elderly people aged 65 or above travelled during the same period. On average this group took 6.9 day trips and 5.5 overnight trips per person. They travelled slightly more widely than individuals with disabilities. In total, they made over 225 million day trips and 217 million overnight trips over the 12 months. Overall, people with special access needs in the EU took nearly 783 million trips within EU, including both domestic travel and intra-EU travel. Among all EU member states, France, the UK and Germany are the top source markets for accessible tourism, taking both domestic and intra-EU travel into account.

As for the key international inbound markets, according to the ratio between departures into the EU and the population with special access needs, people from the developed countries are more likely to travel to the EU than people from the BRICS countries. In total, the demand for EU's accessible tourism by people with special access needs was 17.6 million trips in 2012, of which 7.2 million was taken by people with disabilities and 10.4 million by the elderly population. Among the 11 key inbound markets, the USA, Switzerland and Russia are the biggest source countries.

To forecast the future growth of accessible tourism demand, a two-step forecasting approach was followed. As the first step, three statistical forecasting methods were employed to generate forecasts separately; secondly, combination forecasts were derived based on the average of the results of these three individual forecasting techniques. Based on the forecasted growth of the elderly population and the growth of individuals with disabilities, and assuming stable travel propensity and frequency of these people, a baseline forecast is obtained. It is suggested that by 2020 the demand for EU's accessible tourism by people within the EU will continue to grow to about 862 million trips per year, and the demand by the key international inbound markets will reach 21 million trips per year.

In addition, scenario forecasting was performed based on people's responses towards three scenarios of accessibility improvements, i.e., minimum, medium and extensive levels of improvements. Three potential scenarios for future improvements in the accessibility of tourism destinations were proposed to people with special access needs: Scenario A offered a destination with partial accessibility of buildings, hotels, restaurants and museums, with no additional accessible services; Scenario B offered extended accessibility of buildings, hotels, restaurants and museums,

with some accessible services; Scenario C offered almost complete accessibility of buildings, hotels, restaurants and museums with various accessible services available.

It was predicted that the demand by people within the EU would increase by 24.2%, 33.2% and 43.6% against the baseline under Scenarios A, B and C, respectively. By 2020 the total accessible tourism demand by people within the EU would reach 1,067, 1,143, and 1,231 million trips per year under Scenarios A, B and C, respectively. The demand by people from the key international inbound markets would increase 27.8%, 49.3% and 74.6% against the baseline under Scenarios A, B and C, respectively. As a result, the total potential demand for EU's accessible tourism from the 11 key inbound markets could be up to 26 million, 31 million and 36 million by 2020 under Scenarios A, B and C, respectively. However, it should be noted that due to a small base size of 66 respondents, these results should be interpreted with caution.

1.2 Task 2 – Behavioural profiling of tourist with special access needs

1.2.1 Task 2a - Website analysis

For this task, 66 tourism-related websites and brochures from 12 tourism offices were analysed to evaluate the information available to travellers with accessibility needs from a user's point of view.

Almost 70% of all 66 surveyed websites provide information on accessible offers, but accessible features are almost never used in marketing and advertising. Information remains technical and does not seek to promote a destination.

Special interest brochures with information for guests with access needs are not present on the level of the tourism boards of the 12 surveyed countries.

1.2.2 Task 2b – Online survey and focus groups

An online survey was conducted among people with access needs in 12 EU Member States and 4 inbound markets and 2 focus groups were conducted with people aged 65 and above.

Overall, people with access needs share many behavioural patterns with other travellers, with minorities selecting answers specific to this group. More differentiated behavioural patterns appear in the preparation process: people with access needs tend to take their specific needs into account when preparing and booking their trip, with many checking accessibility conditions in advance or selecting trips where issues are unlikely to arise.

In terms of barriers, the price of accessibility seems to be an issue for some, while medical help and the availability of information about accessibility are mentioned as barriers as much as the accessibility of locations itself. An important finding is that many people say they do not experience barriers with the items mentioned, a finding supported by the focus group results indicating that some people adapt to issues as they arise and do not perceive them as barriers as such.

People with access needs are not a uniform group: although some overall trends are consistent, results vary across groups (people who travel with children, people aged 65 and above and people with limitations), countries, as well as across limitations within the third group.

The survey asked a number of questions related to expectations and changes to the accessible tourism offer with results pointing towards possible behaviour changes if accessibility conditions were improved, such as an increase in travel budget or travel frequency. Besides, respondents mentioned a range of improvements which would improve the experience of various groups with access needs.

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

1.3.1 Task 3a - Case-studies

10 case-studies were analysed in order to better understand the tourist experience and identify good practices. It has emerged that in most cases accessibility is integrated as part of the quality policy.

It is clear that the closer the cooperation with other local service providers the greater the success. Although results are also good where cooperation is not that close but the provision of accessible services is assured along the tourism chain. Although social responsibility is a motivation, it does not imply that the company deviates from its own business focus. The engagement and training of all the staff is a key issue in improving results.

Knowledge transfer flows more easily when the organisation is part of a number of professional networks such as Design for All Foundation. Planning and anticipating the results before starting is also a key element of success.

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

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

The main aim for task 3b was to reach a thorough understanding of the barriers faced by people with access needs. The analysis, employing desk research in conjunction with hypotheses testing procedures, revealed key barriers for each stage of the tourism value chain as well as across different tourism sectors. Key findings include:

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, particularly for individuals with mobility, sensory and behavioural difficulties. While accessibility information schemes, set up by specialised organisations, have been designed to overcome existing informational barriers, it is highlighted that information about the level of accessibility of products and services should be incorporated in mainstream channels.

Barriers encountered in the transit/ transport stage largely refer to airlines not ensuring an accessible environment. In addition, these barriers augment when using low-cost carriers. Yet, while a number of physical access barriers impede a comfortable arrival/ departure, attitudinal barriers are more important, particularly for people with mobility, sensory and behavioural access needs.

Once at the destination, the desk research together with the empirical testing revealed the importance of access paths and accessible parking for moving around at the destination, particularly for people with mobility limitations.

In general, past research indicates that physical access barriers are perceived as greater obstacles when compared to attitudinal barriers in the accommodation sector. Yet, for European travellers physical access barriers are ranked as being equally important compared to attitudinal barriers.

While previous research highlighted that the food and beverage sector causes the greatest amount of barriers to individuals with access needs, European travellers with mobility, sensory, behavioural and hidden restrictions felt that the transport at the destination is the sector where most barriers are encountered. Yet, for people with sensory, communication and hidden limitations, barriers encountered in the food and beverage sector are encountered significantly more often than in the accommodation sector.

As part of the attraction sector, nature-based activities are in high demand by people with access needs. Yet, these activities are accompanied by the most barriers. Only for individuals with sensory and behavioural difficulties, both nature and shopping opportunities are equally important barriers in the attraction sector.

The cross-sector comparisons revealed that overall, attitudinal barriers are encountered more often than physical access barriers across all sectors by individuals with different types of access needs. Barriers experienced in the transport (at the destination) stage are faced more often compared to other sectors, particularly for individuals with mobility, sensory, behavioural and hidden limitations.

Destination specific differences were also identified when investigating the importance of accessible toilets across all key tourism sectors. Thus, 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.

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

1.4.1 Task - 4a Stakeholder consultation

A pre-focus group, a focus group and in-depth interviews were conducted with a range of stakeholders. The findings 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 mainly targets 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.

1.4.2 Task 4b - Scenarios and impact assessment

With regard to the economic contribution of accessible tourism in the EU generated by the people with special access needs of EU27 countries, the elderly population spent more nights and more money on their trips and therefore generated more economic contribution than individuals with disabilities. On average, both people with disabilities and the elderly population spent about €80 per day trip within the EU; for overnight trips, both groups spent approximately €700 per trip in their home country and €1,100 in other EU-countries. Overall, the direct contribution of EU27's accessible tourism demand to the EU's economy was estimated to be approximately 352 billion Euros, in terms of the economic output or gross turnover of tourism-related service providers. After the deduction of intermediate consumption, the net output, or gross value added, amounted about 150 billion Euros. Equivalently the economic contribution in terms of gross domestic product (GDP) was 164 billion Euros, which is equal to gross value added (GVA) plus taxes and subsidies on products. This scale of economic output corresponds to over 4.2 million persons employed directly in tourism-related businesses in the EU. In addition to the direct contribution to the revenues of tourism-related service providers directly through trip expenditures, accessible tourism contributes to the wider-scale of economy through the "multiplier" effect. The additional contribution includes the economic benefits received by the backward-linked industries supplying goods and services to tourism businesses (i.e., an indirect effect), and the benefits received at a destination from household spending of the income earned from tourism and its supporting sectors (i.e., an induced effect). The indirect and induced multipliers were derived from national and regional input-output tables collected from Eurostat. Taking all the direct, indirect and induced effects into consideration, accessible tourism demand within the EU generated a total economic contribution of 786 billion Euros in terms of economic

output, 356 billion Euros in terms of gross value added, and 394 billion Euros in terms of GDP. To provide this amount of economic output, in total 8.7 million people were employed within region.

For the 11 key international inbound markets, on average people with special access needs spent approximately €1,000 per trip when in the EU. Overall, the direct economic contribution to the EU economy was estimated to be 16 billion Euros, in terms of the economic output or gross turnover; 7 billion Euros of net output or gross value added (GVA), or 8 billion Euros of GDP. To meet the needs by the people from the 11 inbound markets, roughly 268 thousand persons in the EU would be employed directly in tourism-related businesses. In addition to the direct economic contribution, further benefits to the EU economy will be generated via the multiplier effect. The total economic contribution was estimated to be 34 billion Euros, in terms of economic output, 15 billion Euros of gross value added, and 17 billion Euros of GDP. The associated employment within the economy would be 538 thousand persons.

Under the three scenarios of accessibility improvements, there is also potentially increased economic demand from people in the EU who did not participate in travel in the past. The scenarios measured the willingness to travel to some new destinations - currently relatively weak in offering accessible facilities - if their offer improved in terms of accessibility. In particular, the survey results showed that, if accessibility could be improved under Scenarios A, B and C, up to 24%, 37% and 44%, respectively, of respondents in the EU who did not participate in travel in the past would be willing to travel to some of these new destinations.

Under Scenario A (minimum improvements of accessibility), the economic contribution of EU's accessible tourism demand would increase by 18.3-19.7% against the baseline across the three indicators (economic output, gross value added and employment). Under Scenario B (medium improvements of accessibility), the economic contribution would increase further, by 24.8-26.6% against the baseline. With extensive improvements of accessibility (i.e., Scenario C), up to 39.4% of additional economic contribution to the baseline level could be achieved, which suggests that 1,073 billion Euros of economic output, 484 billion Euros of gross value added and 537 billion Euros of GDP could be generated associated with the demand by people with special access needs within the EU, along with 12.1 million employed persons within the whole EU economy, taking all direct, indirect and induced effects into account.

Under the scenarios of improvements, the potential tourism demand and economic contribution generated by people with special access needs from the 11 key international inbound markets would also significantly increase. Under Scenarios A, B and C, up to 33%, 40% and 46% of respondents from the international markets who did not travelled to the EU would participate in travel to some of the EU's destinations. The total economic contribution would thus increase by 28.9%, 53.3% and 74.9% under Scenarios A, B and C against the baseline across the three indicators. Hence, under

the best scenario, up to 60 billion Euros of economic output, 26 billion Euros of gross value added, 30 billion Euros of GDP could be generated by the people from the key international markets, and 940 thousand persons would be employed within the whole EU economy, considering all direct, indirect and induced effects.

People with special access needs often travelled with companions. According to the survey question about the number of companions during the respondents' most recent trip, it was calculated that, on average, each individual with special access needs (in the EU and beyond) travelled with 1.9 companions. Individuals with disabilities tend to travel with slightly more companions than the elderly population. 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.

2 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 1.

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.

Figure 1 - 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		
7. Communication and marketing			Include sufficient accessibility information in mainstream tourism information Take personal information and recommendations into account in marketing strategies (e.g. through social media)	