Mapping and Performance Check of the Supply of Accessible Tourism Services

(220/PP/ENT/PPA/12/6491)

Final Report

Annex 8

Detailed Information on the Review of Tourism AIS

Table of Contents

Table of Figures

Table of Tables

1 REVIEW OF TOURISM ACCESSIBILITY INFORMATION SCHEMES (AIS)

A survey of Accessibility Information Schemes was conducted in order to identify the scale and variety of accessible supply in the European tourism sector. The survey of AIS sites was based on web searches across all European Union countries, aiming for as full a list as possible. Websites were identified by the ENAT experts and other contacts who have assisted the research.

The criteria for selection of Accessibility Information Schemes were as follows:

- Online presence in the form of a Website or "app"

- Provision of accessibility information for <u>at least one target group</u> of persons with specific access needs (as defined for the purposes of this study)

- Provision of information specific to <u>at least one tourism service</u> (as defined for the purposes of this study)

- Accessibility information <u>gathered in a systematic way</u> and <u>presented as advisory information for the stated target group(s)</u>

- Accessibility information <u>provided free of charge</u> to site visitors (or as a free app)

- Accessibility information should be <u>no more than 5 years old</u>

- Provision of information in <u>at least one main European language</u>: (English, French, German, Italian, Spanish, Scandinavian languages).

Websites which provided general information, offers and packages for tourists were included ONLY if they had information specifically addressing access requirements, according to the criteria listed above. Thus, travel websites targeting families, seniors, couples, etc. were generally not included. Only if they included structured accessibility information would they be included in the sample.

The study team examined over 100 websites, arriving at final sample of:

- **83 national and regional schemes within EU countries**;

- **7 schemes that cover more than one EU country ("Europe"); and**

- **12 International schemes.**

It should be noted that some accessibility information websites have not been included, either because their information is out of date (more than 5 years old) or because they are not fully functioning. During the course of the study, some AIS websites also closed and their information was therefore discarded.

The methodologies used by the different AIS were not used as a selection criterion. However, the approaches taken were analysed in order to provide a general assessment of the reliability and validity of the methods in use and their particular strengths and weaknesses.

1.2 Sampling and Quantification of Supply

- Services registered on AIS websites are recruited by different means and under different conditions. All of the suppliers are effectively a "self-selected" sample,

meaning that suppliers have placed their names and access details in a register or list on the presumption that they are accessible for one or other of the main target groups of visitors who need good access. Some schemes require services to be "access audited" by trained auditors while others use "self-assessment" or User Generated Content (UGC) or a combination of these;

▪ Conversely, there are no AIS where all accessible tourism services in a region are *obliged* to register. This means that there may be a greater number of accessible services than are listed in national, regional or sectoral AIS but these cannot be counted;

▪ In general, it is assumed accessible suppliers are subscribed to the AIS which covers their particular geographical region or country. However, there are exceptions, for example some suppliers' details may appear in several websites that use the same database. For example the *Tourisme et Handicaps* system in France. Other databases cover several European countries, for example Scandic Hotels which has hotels in 8 countries;

Considering the above three caveats, the total study sample presents a *"best possible universe"*, of data. Moreover the use of AIS data as the most reliable source of information on accessible supply, since there is some degree of quality control of listed services, even though the quality control may be exercised differently in each case.

It should be noted that he numbers of services in the many AIS are not static and, as such, the true figure of assessed accessible tourism services in Europe cannot be derived precisely from the schemes. For example, during the course of this study, the major booking website www.hotels.com introduced a simple set of seven "accessibility features" which are now displayed as checkboxes on the page of some of its listed hotels. The features are "self-assessed" by hotel managers and relate to the access needs of guests with mobility, visual and hearing impairments. Being such a large player in the market, this change by Hotels.com has suddenly boosted the number of listed accessible services in Europe by over 100%, with more than 250,000 of their hotels now displaying one or more accessibility feature.

The data set of AIS schemes reveals information on the number of service providers in Europe who are aware of the benefit of promoting their offers to the accessible tourism market. We might expect, that AIS websites have an over-representation of "specialist" providers (corresponding to Type A businesses in the Industry Survey), who potentially serve persons with higher-level access needs. Businesses that are more "mainstream", with some accessible services (Type B) and those businesses that do not consider themselves accessible (but may be accessible for some target groups, Type C) are more likely not to join an AIS, simply because they do not see themselves as operating in the accessible tourism field.

In the last one or two years some AIS have appeared which build on very large databases of hotels or venues where accessibility was not the principle reason for establishing the database (e.g. hotels.com and yelp.com). In these cases, venues may be registered in the AIS without any regard for the accessibility of the services, the intention being that travellers (with access needs) will review and rate these places over time. This contradicts the "service rationale" which this study has adopted but some of these websites are identified and their data is discussed as part of the analysis.

It should also be pointed out that the review of AIS in Europe and Internationally has revealed important insights into the difficulties that exist in delivering accurate and

reliable access information to customers. This subject will be explored in the subsequent section and in the conclusions of this report.

During 2013 – 2014 a total of 102 schemes were identified, providing accessibility information in 27 European countries: (23 EU Member States and 4 others, Iceland, San Marino, Switzerland and Serbia). The AIS are listed in the following table (**Table 1**). Most of the schemes are national or regional in scope. The last 7 schemes in this list contain data from more than one EU country and can be considered "European" in scope.

From this research it was found that out of 83 information schemes, there are:

- **52 national schemes;**

- **57 regional, local destination or city-based schemes;**

- **7 schemes at European level (covering more than one EU country); and**

- **12 schemes at international level.**

(Total numbers exceed 83, as some schemes cover more than one geographical level).

Table 1: List of AIS in Europe

Code	Country	Name of Scheme or Information Provider	No. of Listed Services	URL
AT001	Austria	IBFT	100	www.ibft.at
AT002	Austria	Salzburgerland	25	http://www.salzburgerland.com/en/nohandicap/index.html
BE001	Belgium	Toegankelijk Vlaanderen / Accessible Flanders	270	http://toevla.vlaanderen.be/publiek/nl/register/start
BE002	Belgium	Brussels for All	400	http://bruxellespourtous.be/-Categories-NEW-.html?lang=en
BE003	Belgium	Acces City	5,000	www.accescity.be
BE004	Belgium	l'Indice Passe-Partout (IPP)®	882	www.ipp-online.org/recherche/recherche.php
BE005	Belgium	Access-i	42	http://access-i.be
CR001	Croatia	Croatian Paraplegic & Tetraplegic Association	57	www.hupt.hr/index.php/en/tourism
HR002	Croatia	Association for Promotion of Equal Opportunities (APEO - UPIM)	17	http://www.upim.hr/category/15/subcategory/15/136
HR004	Croatia	Kvarner County Tourist Board	42	http://www.kvarner.hr/en/tourism/What_to_do/Vacation/Offer_for_Persons_with_Special_Needs
HR005	Croatia	Travabled	1,217	http://travabled.com/
CY001	Cyprus	VisitCyprus	47	www.visitcyprus.com/wps/portal/getting_to_cyprus/disabled_visitors
CZ001	Czech Republic	Jedemetaky (We are going too)	150	www.jedemetaky.cz/
CZ002	Czech Republic	Morasvski - Sleszk	59	www.ms-holiday.cz/
DK001	Denmark	Godadgang	3,650	www.godadgang.dk
ET001	Estonia	Freedom of Movement	2,105	http://www.liikumisvabadus.invainfo.ee/?go=index&lang=eng
FI001	Finland	Finland for All	110	http://www.finlandforall.fi/
FI002	Finland	Turku for All	312	www.turkukaikille.info
FR001	France	Tourisme et Handicap	5,000	http://www.tourisme-handicaps.org/
FR002	France	J'accede	500	http://www.jaccede.com/fr/

Mapping and Performance Check of the Supply of Accessible Tourism Services
(220/PP/ENT/PPA/12/6491)

Code	Country	Name of Scheme or Information Provider	No. of Listed Services	URL
FR003	France	ParisInfo	83	http://en.parisinfo.com/where-to-sleep-in-paris/info/guides/accommodation-and-disability
FR004	France	Handi-Hotels.com	516	http://www.handi-hotels.com/
FR005	France	Handistrict.com	4,000	www.handistrict.com
FR006	France	Handibooking.com	5,600	www.handibooking.com
FR007	France	Handiplage	105	http://handiplage.fr/spip.php?rubrique219
FR008	France	Petit Fute Handitourism	5,400	http://www.petitfute.com
DE001	Germany	Destination Germany - holdays for all (Barrierefreie)	6	www.germany.travel/en/germany-for/barrier-free-travel/people-with-restricted-mobility.html
DE002	Germany	Frankfurt Tourist+Congress Board	13	http://www.frankfurt-tourismus.de/cms/tourismussuite/en/culture_leisure_recreation/barrier-free_handicapped.html
DE003	Germany	Düsseldorf Marketing & Tourismus GmbH	58	http://www.duesseldorf-barrierefrei.de/en.html
DE004	Germany	German Railways Barrier-free travel for mobility-impaired	4	http://www.bahn.com/i/view/GBR/en/services/overview/handicap.shtml
DE005	Germany	Berlin for All	36	http://www.berlin4all.com/
DE006	Germany	Berlinfuerblinde	10	http://www.berlinfuerblinde.de
EL002	Greece	Rollout.gr	941	www.rollout.gr
EL003	Greece	Greece4All	326	http://greece4all.eu/
IS001	Iceland	Access Iceland	80	http://www.gottadgengi.is/
IR001	Ireland (ROI)	Ireland.com	31	http://www.ireland.com/about-ireland/once-you-are-here/accessibility
IR002	Ireland (ROI)	National Q Mark	3	http://www.eiqa.com/
IR003	Ireland (ROI)	Dept. Transport, Tourism and Sport	103	http://www.dttas.ie/accessible-travel/Home.html
IT001	Italy	Like Home	30	www.likehome.it/ita/home_ita.html
IT002	Italy	Village for All	40	www.villageforall.net/en/cerca-struttura/
IT003	Italy	Turismabile	800	http://www.turismabile.it/it/database/
IT004	Italy	Sicilia Accessibile. Fondazione Giovanni Amato Onlus	59	http://www.fondazioneamato.it/
IT005	Italy	ANGOLOGIRO	10	http://pantou.org/angologiro-adw-access-design-workshop
LT001	Latvia	Accessible Latvia	10	www.accessiblelatvia.lv/pivot/entry.php?id=32
LU001	Luxembourg	Welcome Luxembourg	183	http://www.welcome.lu/index.php/en/
MT001	Malta	Accessible Malta	69	www.accessibletourismmalta.eu
NL001	Netherlands	Ongehinderd	2,000	http://www.ongehinderd.nl/
NL002	Netherlands	Onbeperkt Oost	280	http://www.onbeperktoost.com/
PL001	Poland	Tourism for All project	4,872	http://www.turystykadlawszystkich.pl/index_e.php

Mapping and Performance Check of the Supply of Accessible Tourism Services
(220/PP/ENT/PPA/12/6491)

Code	Country	Name of Scheme or Information Provider	No. of Listed Services	URL
PT001	Portugal	Accessible Portugal	6	www.accessibleportugal.com/en/
PT002	Portugal	Portugal acessivel	3,588	http://www.portugalacessivel.com/default/home/id/1
PT003	Portugal	Herewego	20	http://www.herewegoapp.com/
RO02	Romania	Motivation Accessibility Map	1,000	www.accesibil.org
SM001	San Marino	San Marino Per Tutti	36	http://www.sanmarinopertutti.com/default.asp?id=422
SR001	Serbia	Serbian Railways	6	www.serbianrailways.com/active/en/home/glavna_navigacija/putnicki_saobracaj/unutrasnji_saobracaj/node_1226415515.html
SL001	Slovenia	"Disabled-friendly Municipality" charter	21	www.slovenia.info/?turizem_za_ljudi_s_posebnimi_potrebami=5934
ES001	Spain	Barcelona, for accessible tourism	454	www.barcelona-access.com/?idioma=3
ES002	Spain	TUR4all (PREDIF)	1,000	http://geoportal.predif.org/
ES003	Spain	Puedo Viajar	956	http://www.puedoviajar.es/informacion/acceso-para-profesionales.aspx
ES004	Spain	Grancanariaccesible	1,000	www.grancanariaccesible.com
ES005	Spain	Tenerife Accesible SINPROMI	96	http://www.tenerife-accesible.org/en
ES006	Spain	Euskadi Turismo official website	259	http://tourism.euskadi.net/x65-15633x/en/s12PortalWar/buscadoresJSP/buscadorA1.jsp?r01kLang=en&accesibility=1&general=1
ES007	Spain	Catalan Tourist Board	6,500	http://www.turismeperatothom.com/en/
SV001	Sweden	Svenska EQUALITY	40	http://www.equality.se/equality-tillg%C3%A4nglighetsdata-3690798
SV002	Sweden	Swedish Accessibility database	2,308	http://www.t-d.se/en/TD-2/
CH002	Switzerland	MIS Switzerland	21	www.mis-ch.ch/typo/index.php?id=22&L=2
UK001	United Kingdom	National Accessible Scheme	618	www.visitengland.com/ee/Practical-Information/Accessible-England/National-Accessible-Scheme.htm
UK002	United Kingdom	Acccess Statements as part of Quality Scheme	1,403	www.visitengland.org/busdev/bussupport/access/info/Statements.aspx
UK003	United Kingdom	OpenBritain	8,000	www.openbritain.net
UK004	United Kingdom	DisabledGo	120,000	www.disabledgo.com
UK005	United Kingdom	Direct Enquiries	24,500	www.directenquiries.com
UK005	United Kingdom	Historic Scotland	345	www.historic-scotland.gov.uk/index/places/access.htm
UK006	United Kingdom	English Heritage	411	www.english-heritage.org.uk/professional/advice/advice-by-topic/equality-and-diversity/disability/access-guides/
UK007	United Kingdom	National Trust	350	www.nationaltrust.org.uk/article-1356394063324/
UK008	United Kingdom	National Trust for Scotland	83	www.nts.org.uk/Holidays/Downloads/DisabilityAccess.pdf

Code	Country	Name of Scheme or Information Provider	No. of Listed Services	URL
UK009	United Kingdom	Visit Wales	615	http://www.visitwales.com/accommodation-search
UK010	United Kingdom	Euan's Guide	1,296	www.euansguide.com
UK011	United Kingdom	Disability Onboard (National Rail)	2,516	http://www.disability-onboard.co.uk/
UK012	United Kingdom	Rough Guides - Accessibility	177	http://www.accessibleguide.co.uk/
UK013	United Kingdom	Changing Places	669	http://www.changing-places.org/find_a_toilet/location_map_and_national_register.aspx
UK014	United Kingdom	Isle of Man Accessible Accommodation	11	http://www.visitisleofman.com/accommodation/disabled.xml
UK015	United Kingdom	Official London Theatre Access Guide	70	http://www.officiallondontheatre.co.uk/access/
UK016	United Kingdom	Accessible-Property.org.uk	151	http://accessible-property.org.uk/holidays/accessible-accommodation.htm
		TOTAL	224,179	

The 83 national and regional schemes listed above are represented on the following map of Europe **(Figure 1)** with a graduated colour scheme, indicating the aggregated numbers of registered venues per country.

No. of services	
Zero	
< 100	
101 to 450	
900 to 2500	
2501 to 6600	
10000 to 21204	
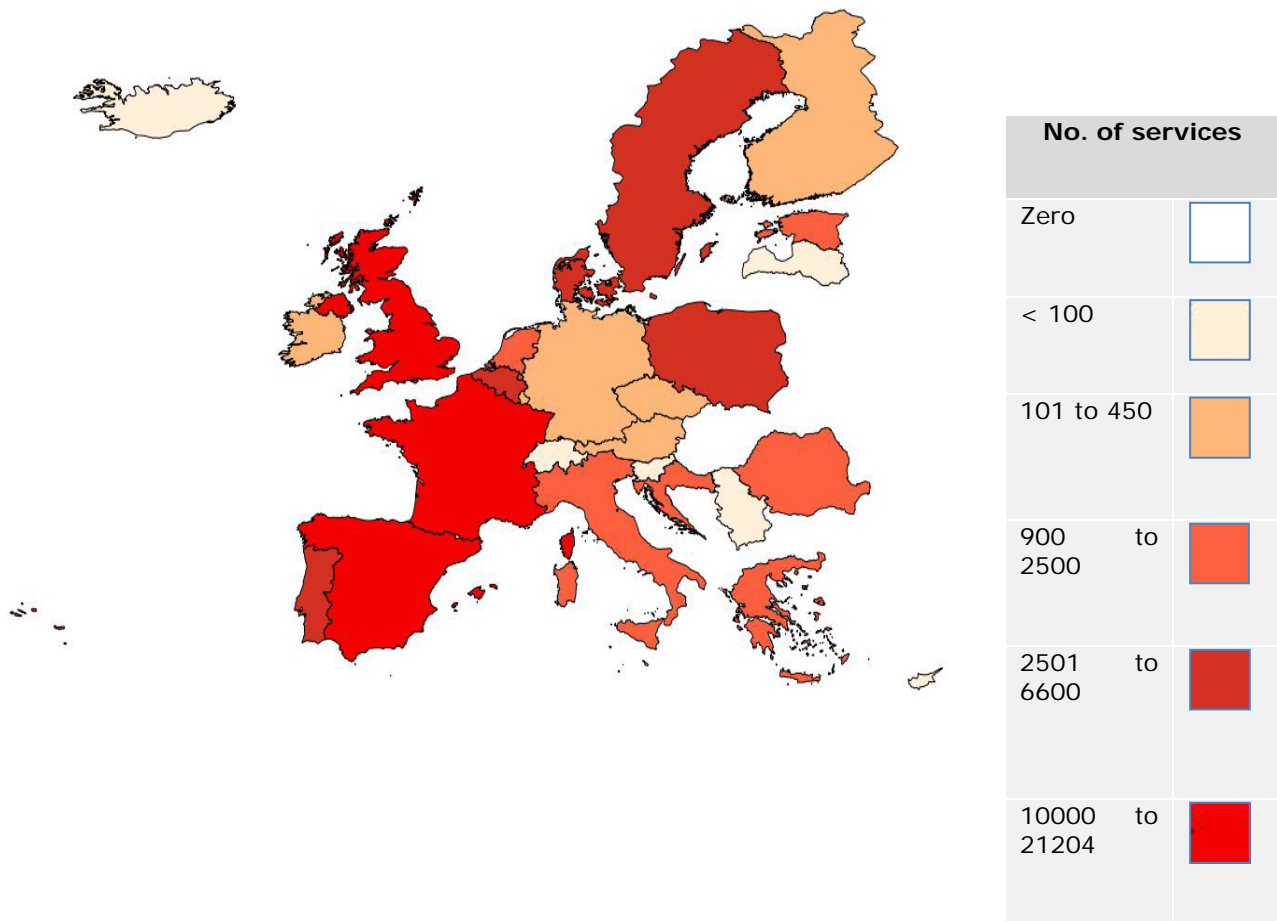
Figure 1: Map: Number of Services Listed in 83 National and Regional AIS

The map was generated on the basis of the data shown in the table below **(Table 2)**.

It should be noted that neither the 7 Europe-wide AIS schemes nor the 12 International schemes are aggregated with these national and regional data to avoid possible "double-counting" in various countries. The table shows the number of registered accessible services or venues recorded per country, summing the totals of all the country-specific AIS.

Table 2: Table of Accessible Services by Country Based on 83 AIS

Country	No. of Services
Albania	0
Bulgaria	0
Lithuania	0
Hungary	0
Norway	0
Slovakia	0
Serbia	< 100
Latvia	< 100
Slovenia	< 100
Switzerland	< 100
San Marino	< 100
Cyprus	< 100
Malta	< 100
Iceland	< 100
Germany	101 to 450
Austria	101 to 450
Ireland	101 to 450
Luxembourg	101 to 450
Czech Republic	101 to 450
Finland	101 to 450
Italy	900 to 2500
Romania	900 to 2500
Croatia	900 to 2500
Greece	900 to 2500
Estonia	900 to 2500
Netherlands	900 to 2500
Sweden	2501 to 6600
Portugal	2501 to 6600
Denmark	2501 to 6600
Poland	2501 to 6600
Belgium	2501 to 6600
Spain	10000 to 21204
France	10000 to 21204
United Kingdom	10000 to 21204

From the basic data shown in the above tables and map, several observations can be made about the number of schemes and registered services/venues.

- **In total there are 224,179 registered accessible services listed in Accessible Information Schemes in the whole of Europe.**

- **Only 4 EU Member States appear not to have any such scheme: Bulgaria, Lithuania, Hungary and Slovakia.** The exact reasons for this are not fully known but may be generally attributed to either lack of awareness of the business case for accessible tourism or lack of opportunity or resources for starting such a scheme.

- The ENAT expert in Bulgaria (NGO "Bulgaria for All") has attempted to set up a national scheme after a successful "Cluster" development project for small businesses, funded by the European Union. The plans for the AIS were hindered by lack of funding.

- In Lithuania and Slovakia there is no active policy of accessible tourism development nor are there any NGOs active in this area.
  In Hungary there are some NGO activities concerning social tourism and holidays for children with disabilities and some small business development but no actors have come forward to create an accessibility information system.

- Countries with the lowest number of services registered in their AIS are: Serbia, Latvia, Slovenia, Switzerland, San Marino, Cyprus, Malta and Iceland all having less than 100 accessible venues/services.

- The countries which make up the middle range have between 101 and 2,500 registered venues. These are, in ascending order: Germany, Austria, Ireland, Luxembourg, Czech Republic, Finland, Italy, Romania, Croatia, Greece, Estonia, Netherlands.

- The higher end of the scale is taken up by countries that have between 2,501 to 16,000 venues: Sweden, Portugal, Denmark, Poland, Belgium, Spain and France. Here only Spain, France and the United Kingdom pass the 10,000 mark.

- At the top of the scale comes the United Kingdom with over 161,000 registered venues/services.

The above data requires some additional clarifications regarding the observed numbers, especially for some countries that seem to do relatively poorly and others that do relatively well.

Germany, which is a major tourism destination, ranking among the top ten in the world, is making new efforts in 2014 to promote accessible tourism. The National Tourist Board website and other accessible destination websites act as "signposting" sites to other data sources rather than holding databases of access information for venues that are directly searchable by the visitor. Site visitors must normally download a PDF guide or a document which contains further information about accessibility. This has hampered the investigation of accessible venues in Germany and has probably led to an "under-counting" of available information.

Italy, also a major world tourist destination, is ranked as a mid-range country in terms of AIS listed accessible services, since the number of available registered venues for online search is just under 1,000. This number is likely to be an underestimate, although the large database of over 4,000 venues, which was created under the *STARe* project

(1999 -2001)[1] has been taken off-line. Meanwhile, there are tourism accessibility information services offered by NGO Superabile and ROMA-Tutti, for example, the latter having processed over 61,000 enquiries (20% in English) since 1996, covering a wide range of accessibility questions.[2]

Denmark is at the higher end of the main scale, with about 3,650 registered accessible venues in one national scheme. This number includes public infrastructure such as educational institutions and separate listings for some individual accessible guests rooms within the same hotel or conference centre. This wide range of venue types and specific information for disabled facilities raises the number of "venues" somewhat above the general level for tourism infrastructure. In most AIS accessible rooms are included within the data profile for an entire hotel.

Sweden (2,348) and Estonia (2,105) also have accessibility databases which go beyond tourism services, which may give a higher figure than is justified, compared with other countries.

The United Kingdom has much the largest number of registered accessible venues, with 161,215 based on the sum of 16 different accessibility information schemes. It should be noted that there is a degree of coordination and possible overlap between some schemes but the high level of registrations is undoubtedly influenced by three factors:

▪ the need for businesses to comply with the UK Equality Act, which requires "reasonable accommodations" for accessibility to be included in the delivery of products and services, (giving rise, in turn to active and vocal demands for better accessibility from disability groups, seniors and families with small children);

▪ the relatively high level of participation in a broad range of "quality schemes" and business development activities, (of which accessibility marketing is one), which are prevalent in UK business culture

▪ the inclusion of AIS which record accessibility features of some "non-tourism" facilities such as schools, public offices and hospitals.

▪ Common to all AIS is that they are free of charge to use and most often they are also free of charge for suppliers to register their services. In the accessible tourism supply chain, accessibility information does not serve as a source of income in itself. Websites and AIS schemes depend on other sources of revenue for their existence, such as sponsorship, public sector support, selling bookings, travel packages, promotion of venues and offers and so on.

1.3 Service Types in AIS

This and the following section describes the types of service information covered by the AIS at national and regional levels as well as in Europe-wide AIS and International AIS.

The range of services covered in an AIS directly influences the types of opportunities for travel and the activities which can be enjoyed, for without having relevant service information, visitors' choices are obviously limited.

Here are presented summary tables, maps and diagrams describing:

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[1] Quoted in "Make it Accessible", (2013). First White Paper on Tourism for All in Italy. Prime Minister's Office. Mission Office for Enhancing Italy's Image.
[2] Presentation by A-G Laura, IV International Tourism for All Congress, Ávila, Spain, June 2013.

1. The types and sums of sample accessible information services present per country (based on combining services data from multiple AIS in some countries);

2. The target groups for whom access information is provided (listed by disability and other access needs);

3. The languages offered on AIS websites for searching accessibility data.

The following table shows the sums and service types per AIS by European country.

Table 3: **Sum and Range of Sample Service Types per Country (Covered by Multiple AIS in Some Countries)**

Country	Total of service types covered	Range of Sample Service Types covered by AIS, 1 = Yes and blank = No									
		Physical access Public Areas	Accommodation	Food and drink	Transport services	Booking/ Reservations	Attractions	Beaches	Leisure Facilities	Equipment hire	Personal assistance
Austria	2	1	1								
Belgium	9	1	1	1	1		1	1	1	1	
Croatia	7	1	1	1			1	1	1		
Cyprus	1		1								
Czech Republic	2		1	1							
Denmark	6	1	1	1			1	1	1		
Finland	10	1	1	1	1	1	1	1	1	1	
France	10	1	1	1			1	1	1	1	1
Germany	9	1	1	1	1		1		1	1	1
Greece	6	1	1	1			1	1	1		
Iceland	5	1	1	1			1		1		
Italy	10	1	1	1		1	1	1	1	1	1
Latvia	2				1		1				
Luxembourg	6	1	1	1	1		1		1		
Malta	10	1	1	1	1	1	1	1	1	1	1
Netherlands	6	1	1	1			1	1	1		
Portugal	10	1	1	1	1	1	1	1	1	1	1

Country	Total of service types covered	Range of Sample Service Types covered by AIS, 1 = Yes and blank = No									
		Physical access Public Areas	Accommodation	Food and drink	Transport services	Booking/ Reservations	Attractions	Beaches	Leisure Facilities	Equipment hire	Personal assistance
Romania	6	1	1	1	1		1		1		
San Marino	6	1	1	1	1		1		1		
Serbia	1	1									
Slovenia	7	1	1	1	1		1	1	1		
Spain	10	1	1	1	1	1	1	1	1	1	1
Sweden	5	1	1	1			1		1		
Sweden	6	1	1	1		1	1		1		
Switzerland	4		1	1			1		1		
United Kingdom	10	1	1	1	1	1	1	1	1	1	1
TOTALS		63	62	55	32	21	61	26	52	15	12

The 83 AIS that were clearly assignable to a single country were assessed to determine whether accessibility information was present for 10 key accessible tourism services. These "sample" services were:

- Physical access in public areas
- Accommodation
- Food and drink
- Transport services
- Booking/ Reservations
- Attractions
- Beaches
- Leisure Facilities
- Equipment hire
- Personal assistance

The total number of service types covered by all the 83 AIS was 399, giving an average of 4.80 service types per scheme. The range was from 1 service (e.g. "Changing Places" which is a UK listing of large accessible toilets) to all 10 services listed by various AIS covering tourist destinations. The following figure shows the frequency of occurrence of accessibility information in all the AIS combined for the key services.
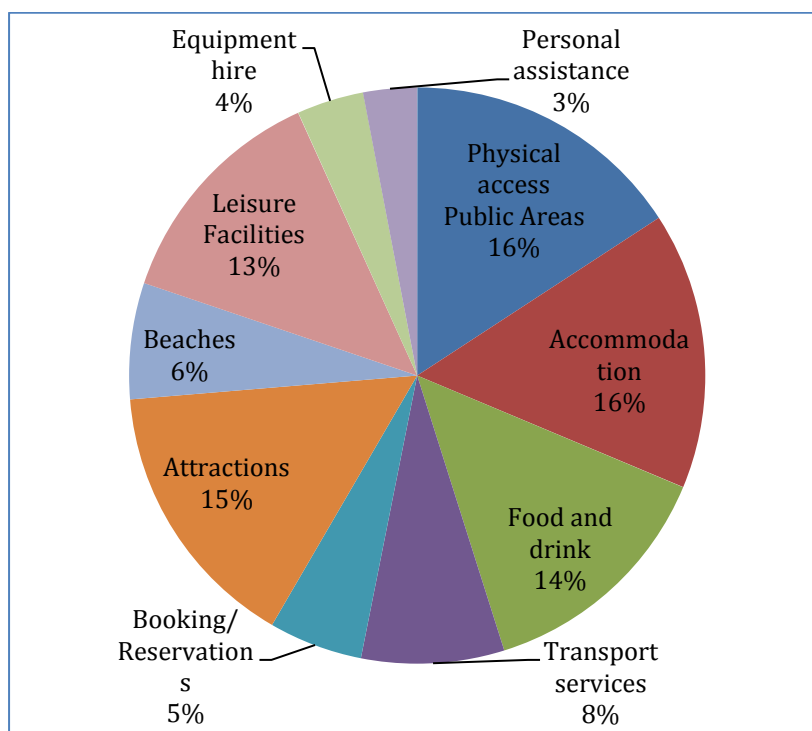

Figure 2: Frequency of Accessible Services Information in 83 National and Regional AIS (%).

Table 4: **Breakdown of Sample Service Types Covered Across Regional and National Schemes**

Physical access Public Areas	Accom-modation	Food and drink	Trans-port services	Booking/ Reserv-ations	Attrac-tions	Beach-es	Leisure Facil-ities	Equip-ment hire	Personal assist-ance
63	62	55	32	21	61	26	52	15	12

In terms of absolute numbers, Accessibility information for Public Areas was the most frequent (63), followed by Attractions (61), Accommodation (60), Food and drink establishments (55), Leisure facilities (52), Transport services information (32), Beaches (26), Booking (21), Equipment hire (15), and Personal Assistance (12).

The range of sample services was from a low of just 1 service in Cyprus (Accommodation) and Serbia (Outdoor environment) to all 10 services in the combined AIS found in: Finland, France, Italy, Malta, Portugal, Spain and UK.

Countries which covered information for 7 to 9 key services were: Belgium, Croatia, Germany, and Slovenia.

Countries with accessibility information for 4 to 6 key services were: Denmark, Estonia, Greece, Iceland, Ireland , Luxembourg, Netherlands, Poland, San Marino, Sweden and Switzerland.

Austria, the Czech Republic and Latvia each covered two of the sample services in their AIS.

It is important to note that the above figures for service information per country are *combined totals from several AIS* for some countries, which naturally leads to the possibility of higher total coverage scores.

In the entire sample of 83 AIS, just a few individual schemes covered accessibility information on all 10 key services, namely:

- Accessible Tourism Malta
- Accessible Portugal
- Barcelona-Access.com
- VisitEngland (Access Statements)

These AIS covered 9 services:

- Finland for All
- Threshold Association, Finland
- VillageforAll (Italy)
- PortugalAccesivel

And the following AIS covered 8 services:

- Accessible Flanders
- Duesseldorf-barrierefrei (Germany)
- Berlin4All.com (Germany)
- LikeHome.it (Italy)
- Herewegoapp.com (Portugal)
- Puedoviajar.es (Spain)

- Catalan Regional Tourist Board (Spain)

It is noticeable that those AIS that cover the wider range of accessible services tend to be NTOs, regions and small businesses that have a diverse number of competences and manage a broad range of tourism activities in their particular region. The more services covered, the more likely it is that an AIS plays a leading role in coordinating accessible tourism services, as evidenced by the major players in accessible tourism in the above lists, such as VisitEngland, Visit Flanders, Accessible Portugal, Barcelona-Access, Catalan Tourist Board, Puedoviajar and Village for All.

Some relatively new, small businesses that cover a wide range of accessible service information include Berlin4All, LikeHome and Herewegoapp.

With a wide range of information at hand, it is more likely that each of these players will be in strong position to develop effective supply chains for accessible tourism in their respective regions. Conversely, countries and regions where managers of AIS are lacking accessibility information on a diverse range of services, this can be indicative of a weak level of accessible tourism development. Without accessibility information, however small, getting out to customers, growth of a destination and its businesses may be held back as a consequence.

1.4 Accessible Services in Europe-wide and International AIS

An examination of the pan-European AIS shows that the relative distribution of service information across 7 schemes, (**Figure 3** below).

Of the pan-European AIS, Pantou, Handycairn and Sage Traveling cover all 10 sample services, while DisabledHolidays4U covers 9 services and AbleRoad covers 8. The remaining schemes cover from 1 to 6 of the sample services.
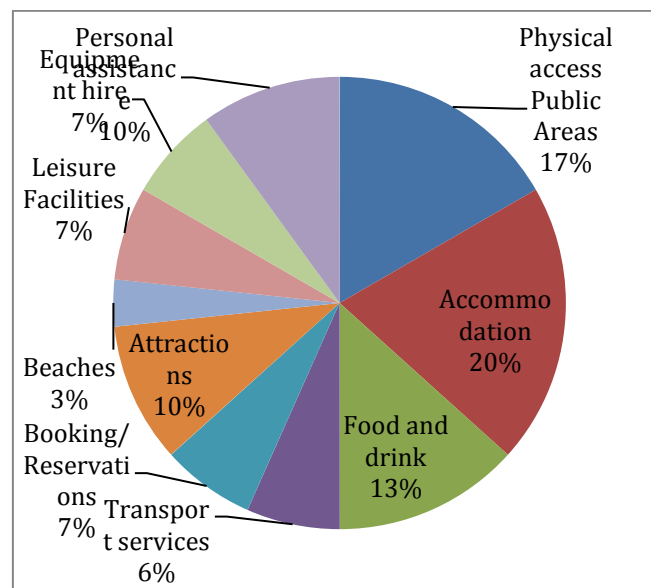
Figure 3: **Frequency of accessible services information in 7 Europe-wide AIS (%).**

Table 5: **Breakdown of Number of Service Types Covered in 7 Europe-Wide AIS**

Physical access Public Areas	Accom-modation	Food and drink	Transport services	Booking/ Reserv-ations	Attrac-tions	Beach-es	Leisure Facili-ties	Equip-ment hire	Person-al assist-ance
05	06	04	02	02	03	01	02	02	03

Table 6: Sample Services and Customer Groups in 7 European and 12 International AIS

		Sample Services included in pan-European and International AIS											Customer Groups covered								
		Physical access Public Areas	Accommodation	Food and drink	Transport services	Booking/ Reservations	Attractions	Beaches	Leisure Facilities	Equipment hire	Personal assistance	Sub total	Mobility	Hearing	Visual	Learning difficulties	Asthma-allergy	Long-term illness e.g. Diabetes	Different stature	Service animal	Sub total
Europe	EuropeforAll	1	1	1	0	0	1		1	0	0	5	1	1	1	1	1	1	1	1	8
Europe	Accessibility Pass	1	1	0	1	0	0	0	0	0	0	3	1	1	1	0	0	0	1	1	5
Europe	Clear Project	1	0	0	0	0	1	0	0	0	0	2	1	1	1						3
Europe	Scandic Hotels		1	1		1				1	1	5	1	1	1	1	1	1	1	1	8
Europe	Pantou	1	1	1	1	1	1	1	1	1	1	10	1	1	1	1	1	1	1	1	8
Europe	MapAbility Map	1	1	1							1	4	1	1	1	0	0	0	0	0	3
Europe	ECARF Travel		1	0	0	0	0	0	0	0	0	1	0	0	0	0	1	0	0	0	1
International	DisabledHolidays4U	0	1	1	1	1	1	1	1	1	1	9	1	1	1	1	0	1	1	1	7
International	Australia for All (+ International section)	0	1	1	1	1	1	0	1	0	0	6	1	1	1	1	0	0	0	0	4
International	Planat.com	0	1	1	0	0	1	0	1	0	0	4	1	0	0	0	0	0	0	0	1
International	Travabled	0	1	0	0	1	0	0	0	0	0	2	1	0	0	0	0	0	0	0	1
International	Access All Rooms	1	1	1	0	0	1	0	0	0	0	4	1	1	1	0	0	0	0	0	3
International	HandyCairn	1	1	1	1	1	1	1	1	1	1	10	1	1	1	0	0	0	0	0	3
International	NATIVE Hotels	0	1	0	0	1	0	0	0	0	0	2	1	1	1	1	0	0	0	0	4
International	Wheelmap.com	1	1	1	0	0	1	0	1	0	0	5	1	0	0	0	0	0	0	0	1
International	Sage Traveling	1	1	1	1	1	1	1	1	1	1	10	1	0	1	0	0	0	1	1	4
International	Able Road	1	1	1	1	1	1	1	1	0	0	8	1	1	1	1	0	0	1	1	6
International	Euan's Guide	1	1	1	1	0	1	0	1	0	0	6	1	0	0	0	0	0	0	0	1

The following **Table 7** shows 12 AIS websites listing accessible venues in several countries, including European destinations. These were selected on the basis of offering different insights into the range of information about accessible tourism supply *in Europe.* This is a very *short* list compared with the number of websites that have been set up by individuals, NGOs and small businesses across the world, numbering probably in the hundreds or even thousands. Overseas AIS tend to offer accessible travel advice and information only for the specific destination. The International AIS shown below are among the best known in terms of their global and European reach.

Table 7: List of International AIS

	Country of site provider	Name of scheme or information provider	No. of listed services	URL
IN001	International	DisabledHolidays4U	500	http://www.disabledholidays4u.com
IN002	International	Australia for All (+ International section)	150	http://www.australiaforall.com
IN003	International	Planat.com	31,634	www.planat.com
IN004	International	Travabled	41,727	http://travabled.com
IN005	International	Access All Rooms	13	www.accessallrooms.com
IN006	International	HandyCairn	46	http://www.handycairn.com/index.php
IN007	International	NATIVE Hotels	53	www.nativehotels.eu
IN008	International	Wheelmap.com	450,000	www.wheelmap.org
IN009	International	Sage Traveling	437	www,sagetraveling.com
IN010	International	Able Road	*	http://ableroad.com
IN011	International	Euan's Guide	1,300	www.euansguide.com
IN012	International	Hotels.com	250,000	www.hotels.com
		TOTALS	**775860**	

The websites listed above in **Tables 6 and 7** vary greatly in size, types of venues or services covered and in the types of customer information provided.

In keeping with the European national and regional AIS, the highest number of schemes focus on accommodation services. The next most common service information concerns Food and drink establishments, followed by access to public areas, attractions, leisure facilities, booking and ticketing, and transport services.
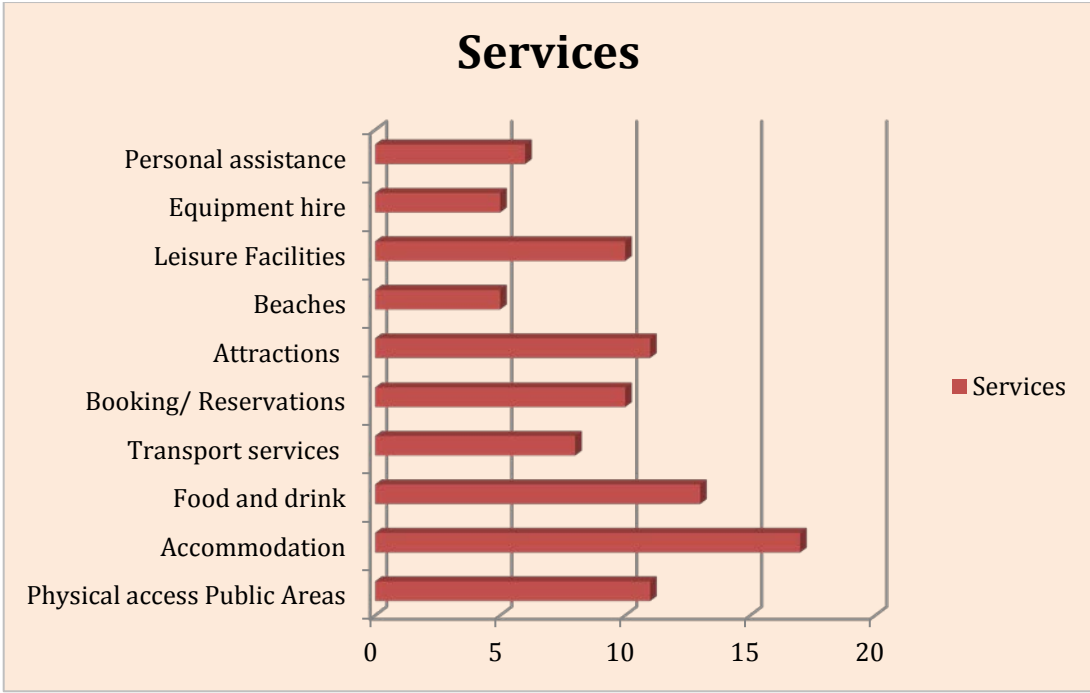
Figure 4: **Number of Services Covered in the 18 European and International Schemes**
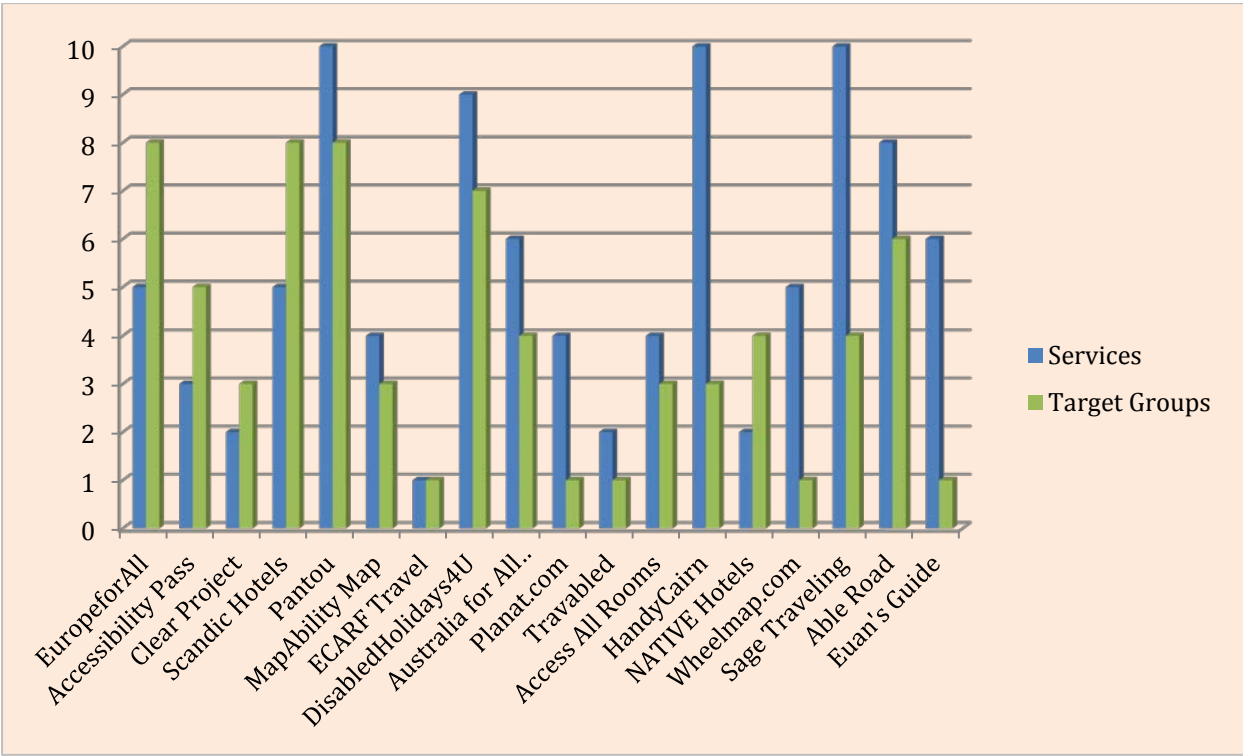
Figure 5: **Number of Services and Target Groups Covered in the 18 European and International schemes - Total Services 10 - Total Target Groups 8**

Some notable characteristics of the pan-European and International AIS websites are described as follows:

International AIS sites tend to be either relatively small (with less than 500 services listed) or very large (with 10s of thousands). This is dependent mainly on the way they are set up originally.

Smaller websites are often based on a personal "mission" undertaken by a person – often someone with a disability - or an organisation working in the combined fields of accessibility and tourism. Most of the smaller International AIS are run from outside Europe. A similar situation exists in many European countries, too. This is not unique to any particular country, as individuals anywhere can start a website with very few resources, if they have the know-how and ambition.

Smaller AIS generally have a high degree of direct involvement by the owner or manager in data collection, validation processes and dissemination. Small AIS websites do not necessarily seek to become large and may focus on high quality and "bespoke' services for users (or consumers, against payment for additional services). Some of these websites (but not the ones listed above) are not updated after an initial period of activity. This can be due to lack of funding and/or resources to continue the maintenance and growth of the information base. Where a business model is created to serve a niche market of customers, for example for high-end or luxury accessible hotels, the website may succeed, as in the case of www.accessallrooms.com.

Sage Traveling is a website which was begun by John Sage, an American wheelchair user with a passion for travel in Europe. He began his website as a personal mission to share accessible travel tips and information, gradually building up the range of information and adding his own accessibility rating scheme for city streets, hotels, cruise ship holidays, attractions and so on. The website is now at the core of John Sage's travel agency which specialises in arranging accessible tours to Europe for people with mobility impairments and their companions. John Sage, together with his team of regional experts in Europe creates packages and tours, bringing together the different parts of the supply chain: transport, transfers, accommodation, attractions, tourist guides, etc. to create a seamless accessible experience for the visitor. This exemplary accessible tourism business is referred to in the Case Study, "Barcelona Accessible Cruise Destination".

DisabledHolidays4U is a B2C website with "curated" accessibility information concerning accommodation, local transport services, personal assistance and other services for people with disabilities travelling on holiday. Its main scope is Europe but it covers other destinations overseas. It acts as a "shop window" for businesses that post their offers and information on the site. The owner and manager of the site has worked for many years in accessible tourism in Portugal.

The websites with very large databases of accessible venues have appeared in recent years since it has become possible for web managers to collaborate with large database-driven booking and travel review websites through their published "API" protocols. Large websites make their entire database available to other businesses in order to increase the numbers of visitors using their channels (and booking or buying tourism products). With a suitable business proposition to major websites, small companies like Travabled and AbleRoad have created AIS websites with many venues. The intention is then to gather reviews focusing on access from people who, themselves, experience access difficulties when travelling.

Travabled is a based on the database of www.hotels.com The site lists accessible hotels based on data from hotels.com, supplemented with user feedback. The key purpose of Travabled is that users should add ratings and reviews to these hotels making the information more detailed and possibly more reliable. Travabled began in 2013 and has

collected accessibility reviews from Croatia in particular, where the owner lives and where the website is hosted. The owner is disabled and is a wheelchair user.

Able Road is a new (2014) US-based scheme developed to show accessible venues that are listed on the popular "Yelp" directory websites. The number of registered venues with accessibility information is not known, as all Yelp venues are listed (even though they have no accessibility rating or user review). Potentially this site can run into the hundreds of thousands but the access information delivered will depend on the collaboration of the user community (as with "Travabled", above).

Wheelmap.org is a website and mobile app providing information about the level of wheelchair accessibility of venues, using just three categories: Good (Green), Acceptable (Orange) and Not accessible (Red). People who use the website or app can mark places after visiting the venues. The service uses the global *OpenStreetMap* as its geographical source, which is already loaded with data identifying the venue types.
At present Wheelmap.org has about 450,000 registered places of which 420,000 are in Europe. These figures include all categories: accessible, partly accessible and not accessible. The study team has been informed that about 55% of all marked points are of the category "accessible".

Wheelmap has produced the image of registered places (**Figure 6** below) especially for this study. (The normal online Wheelmap shows only a close-up view of a local area). This map shows the aggregated data for all shops and WCs in Europe, where users have uploaded their rating: "Yes" (accessible), either on the map at the Wheelmap.org website or via their mobile device.

The data points on this map indicate that Germany has by far the largest number of assessed points (venues). This shows the selectivity of crowd-sourcing websites, in that the data collected depends largely on the ability of the site manager to reach and engage with the target audience or user community. It is not suggested that Germany is the only country in Europe with many accessible retail premises and WCs. Since the website is only in German at present, it mostly attracts a German-speaking community of "reporters" and users and the marked venues are those where these people go. Language is clearly a limiting factor for the development and range of crowdsourcing websites but the need for multi-linguality also applies to any AIS websites.
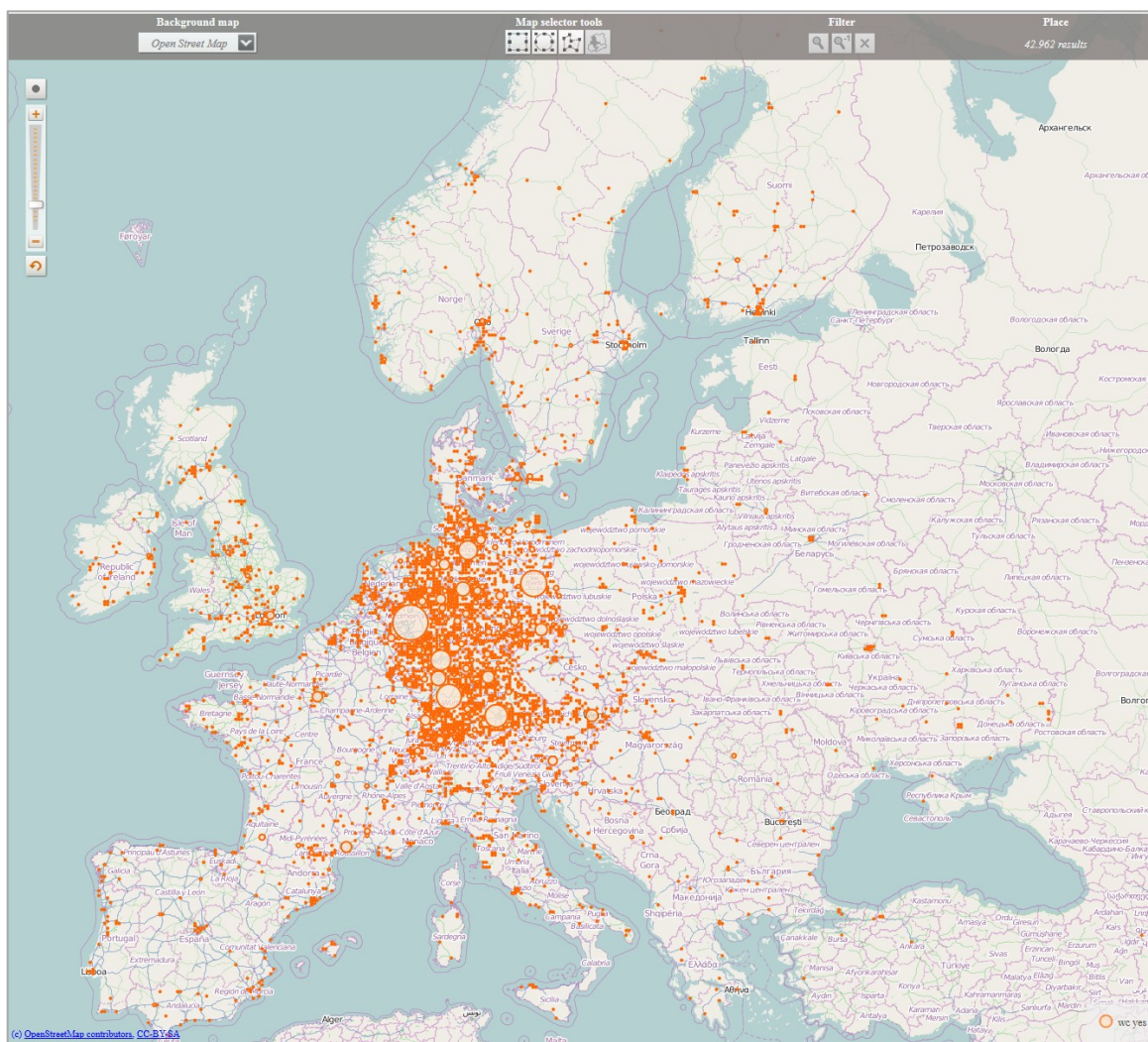
Figure 6: Wheelmap View of Accessible Shops and WCs in Europe

1.5 Types of Disabilities and Access Needs covered by AIS

The study has identifying the prevalence of information about accessible services in 76 European AIS for 8 main target groups, namely:

- People with mobility impairments, including wheelchair users and people with walking difficulties
- People with hearing impairments, deaf (and people using sign language)
- People with visual impairments, low vision and blind
- People with learning difficulties, including autism and other developmental disorders
- People with asthma, allergies and food intolerance,
- People with long-term illness e.g. diabetes,
- People of very large or very small statute and small children
- People accompanied by a service animal.

The overall coverage of customers with specific access needs in the 83 AIS is shown in the table and chart below:

Table 8: Frequencies of Types of Customer Access Needs Addressed in 83 European National and Regional AIS.

Access needs	Customers' Disabilities and Access Requirements							
	Mobility	Hearing	Visual	Learning difficulties	Asthma-allergy	Long-term illness e.g. Diabetes	Different stature	Service animal
Total needs covered in all AIS	82	62	68	45	13	12	34	28

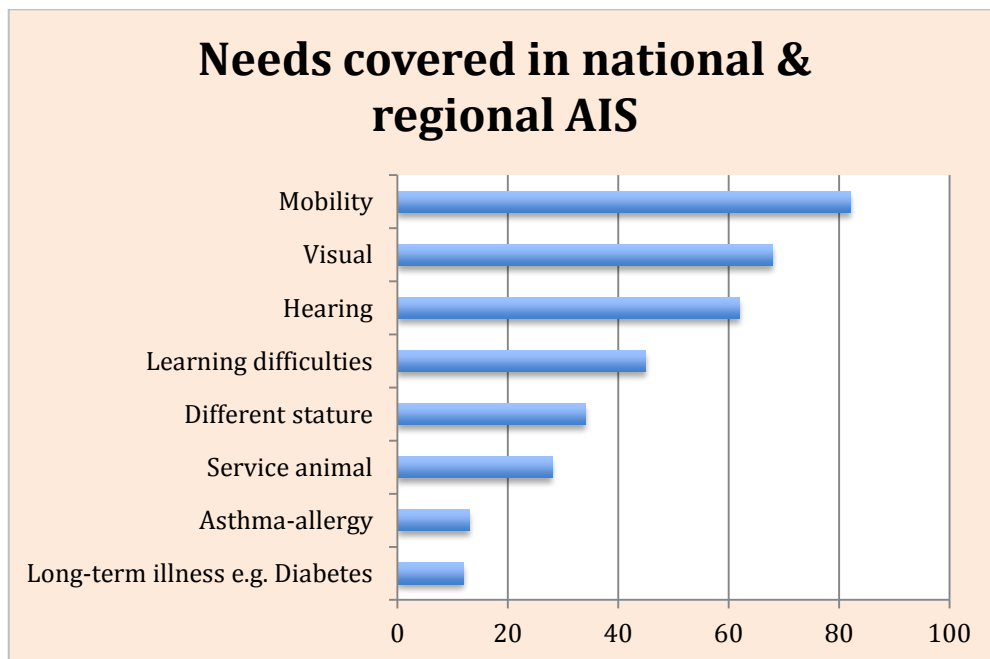## Needs covered in national & regional AIS

Figure 7: Frequencies of Types of Access Needs Covered by AIS

The total number of customer access needs covered by all AIS was 344, giving an average of 4.1 types per AIS.

5 AIS provide information to all the 8 target groups, demonstrating a strong commitment to cross-disability provisions: IBFT (Austria), Godadgang (Denmark), Turku for All, (Finland), Berlin4All (Germany) and Accessible Portugal.

The frequencies of information across all AIS were: Mobility (83), Visual impairment (68), Hearing impairments (62), learning difficulties (45), Different stature (34), With a service animal (28), Asthma & allergies (13) and Long-term illness (12).

Where information only addressed one target group this was invariably for people with mobility impairments. 10 AIS addressed only the needs of customers with mobility impairments (wheelchair users).

As indicated in the survey data received from national disability organisations (q.v.), despite the great value of having AIS to help plan a trip, The extent of the information available to people with different access requirements is a crucial limiting factor on their choice of where to go, how to stay and what they can do at the destination.

The following maps, based on figure (**Figure 7**) illustrate which European countries present accessibility information for each of the 8 main customer groups addressed by this study:

People with: mobility impairments, hearing impairments, visual impairments, learning difficulties, asthma and allergies, long-term illness e.g. Diabetes, different stature (very large or very small) and people accompanied by a service animal.
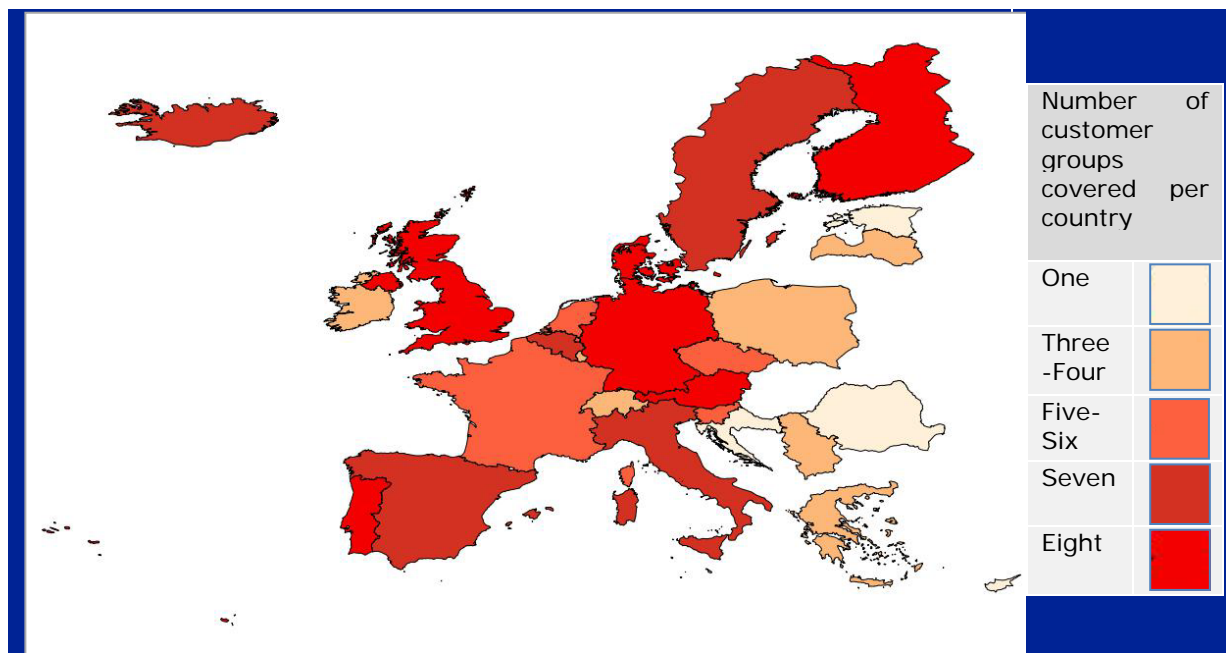
Figure 8: **Map of Customer Groups Covered per Country**
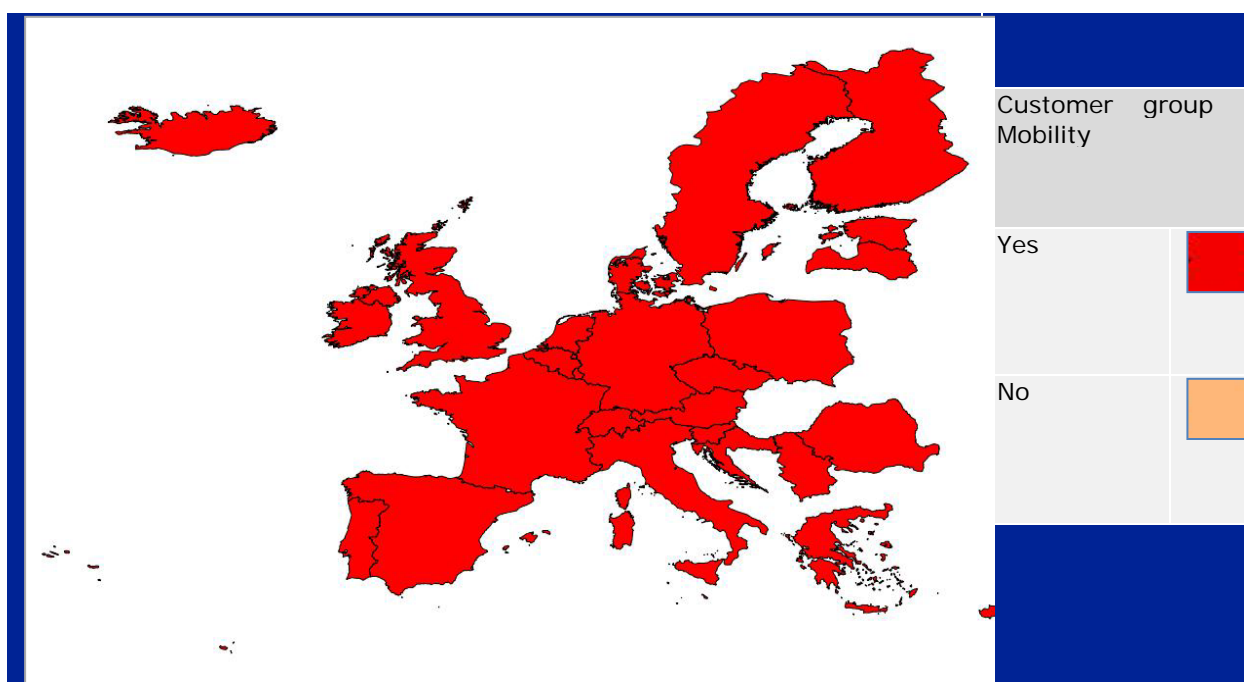
Figure 9: **Customer Groups Covered – Mobility Impairment**
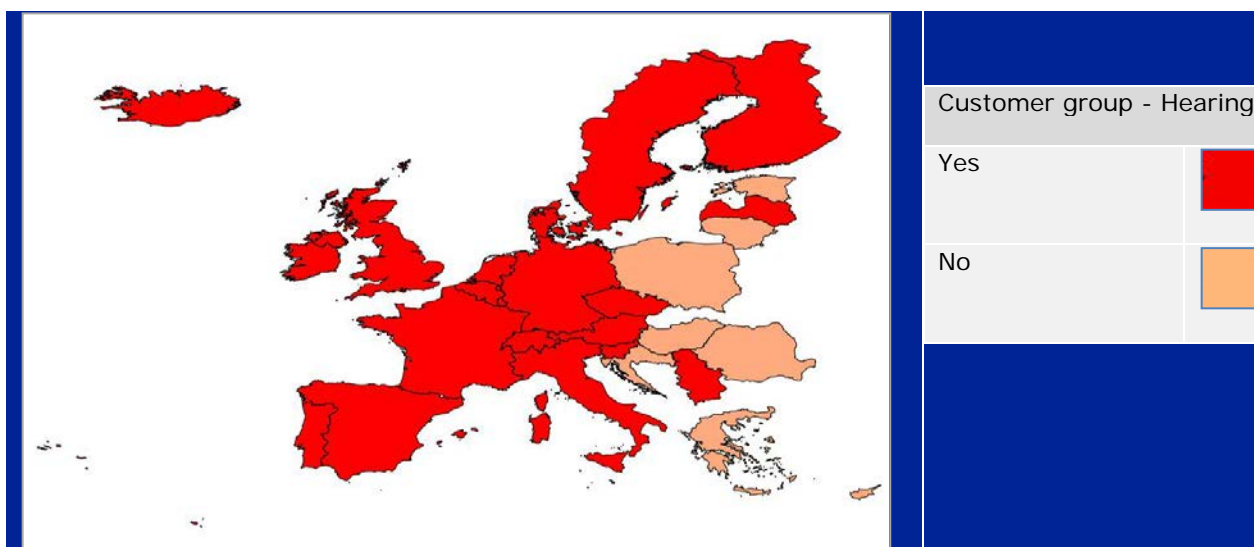
Figure 10: **Customer Groups Covered – Hearing Impairment**
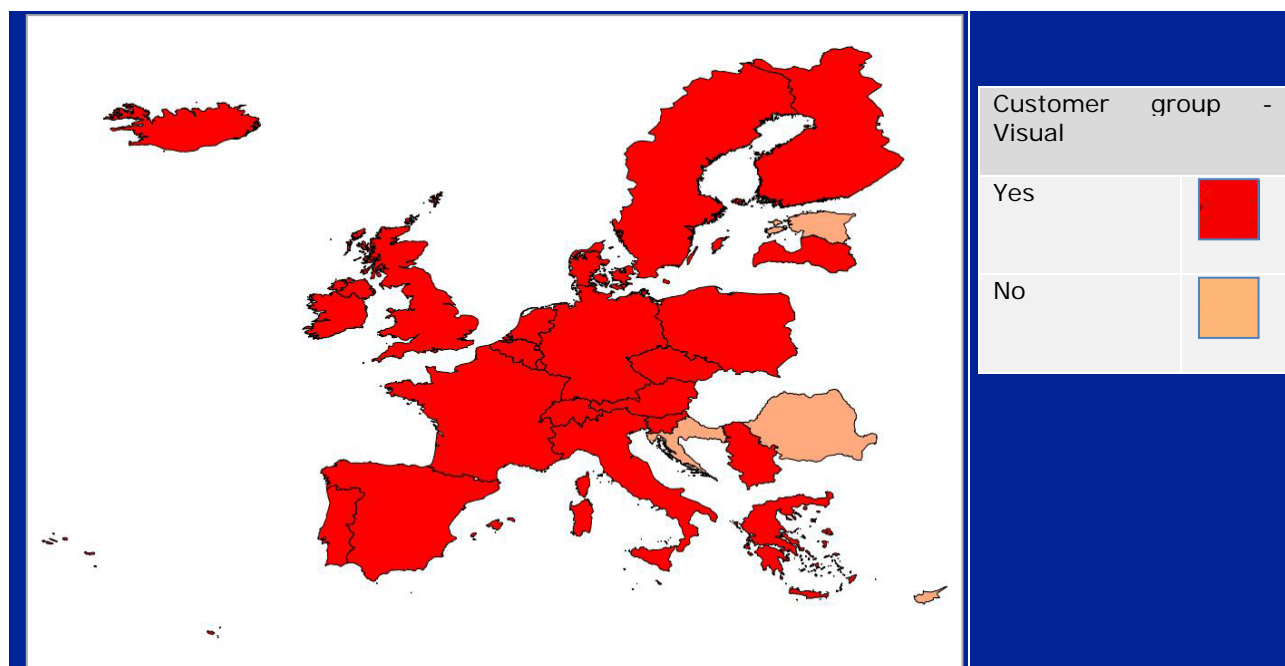
Figure 11: **Customer Groups Covered - Visual Impairment**
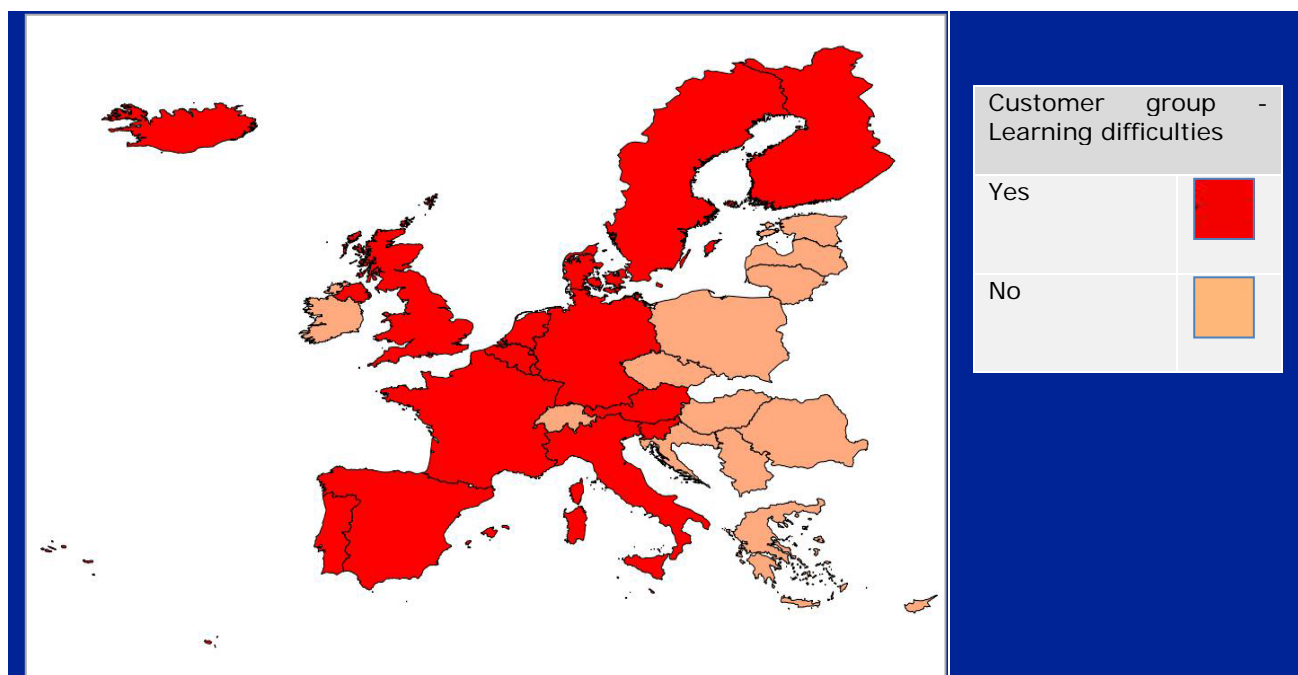
Figure 12: **Customer Groups Covered - Learning Difficulties**
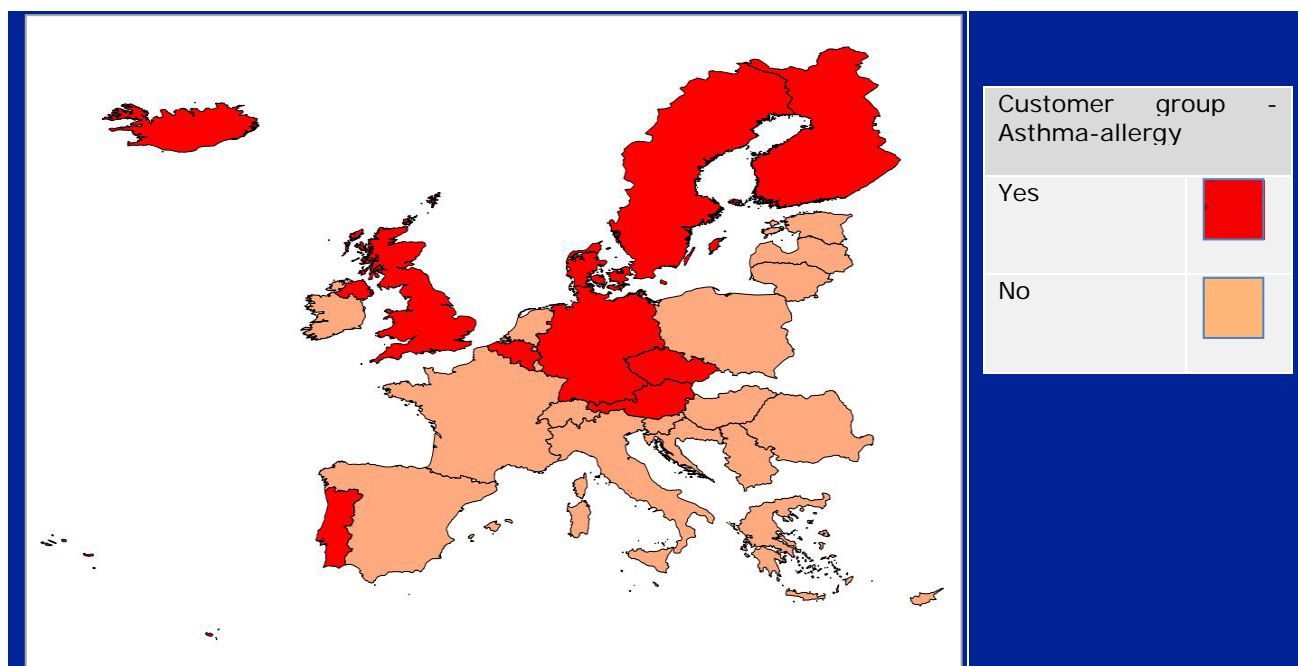
Figure 13: **Customer Groups Covered - Asthma-Allergy**
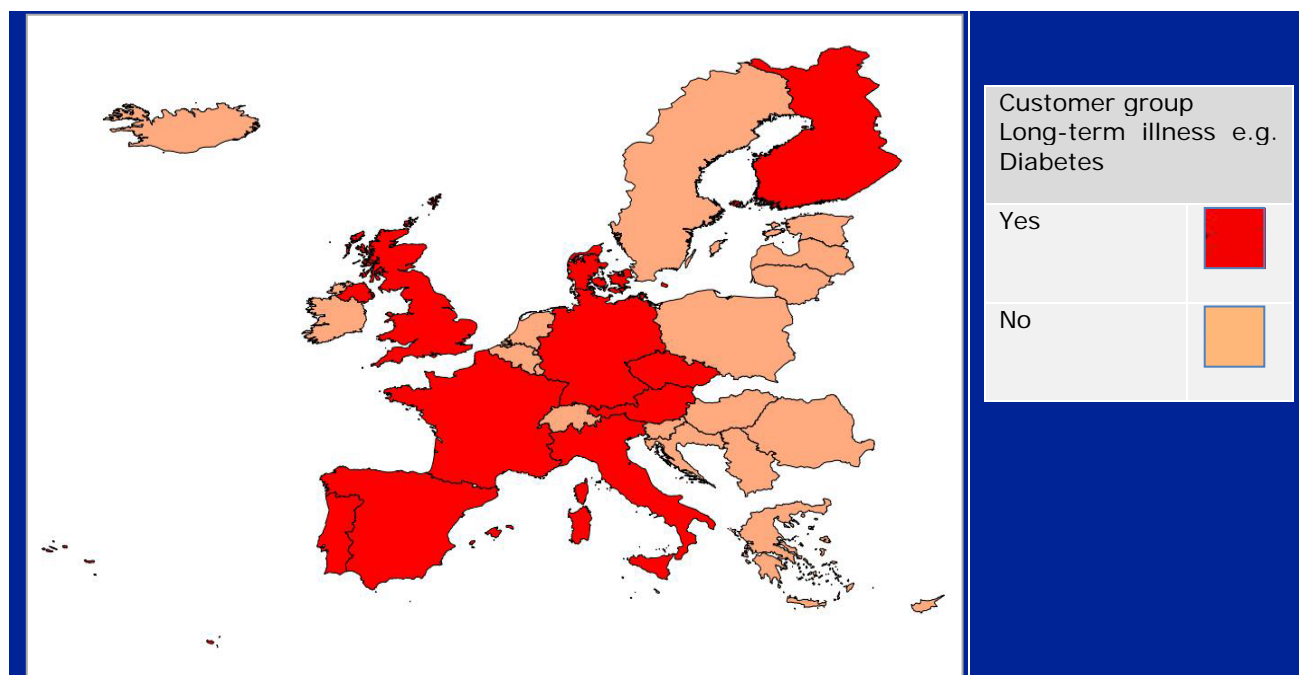
Figure 14: **Customer Groups Covered - Long-Term Illness e.g. Diabetes**
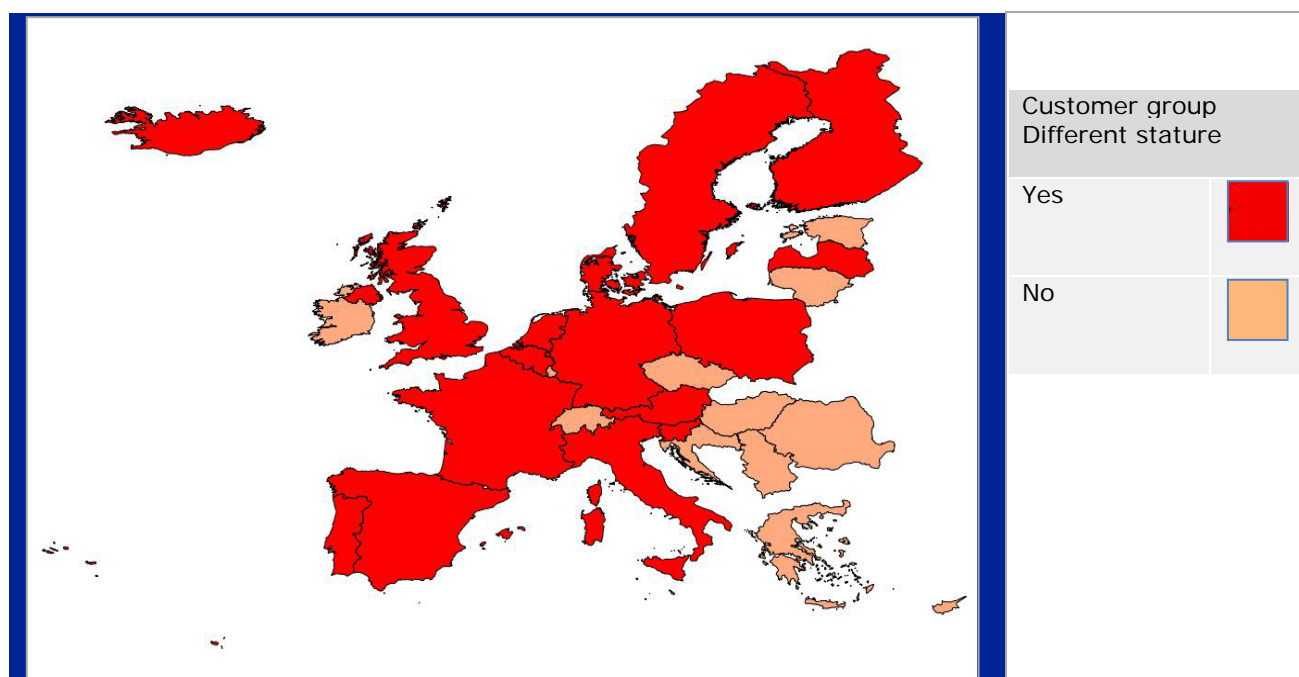
Figure 15: **Customer Groups Covered - Different Stature**
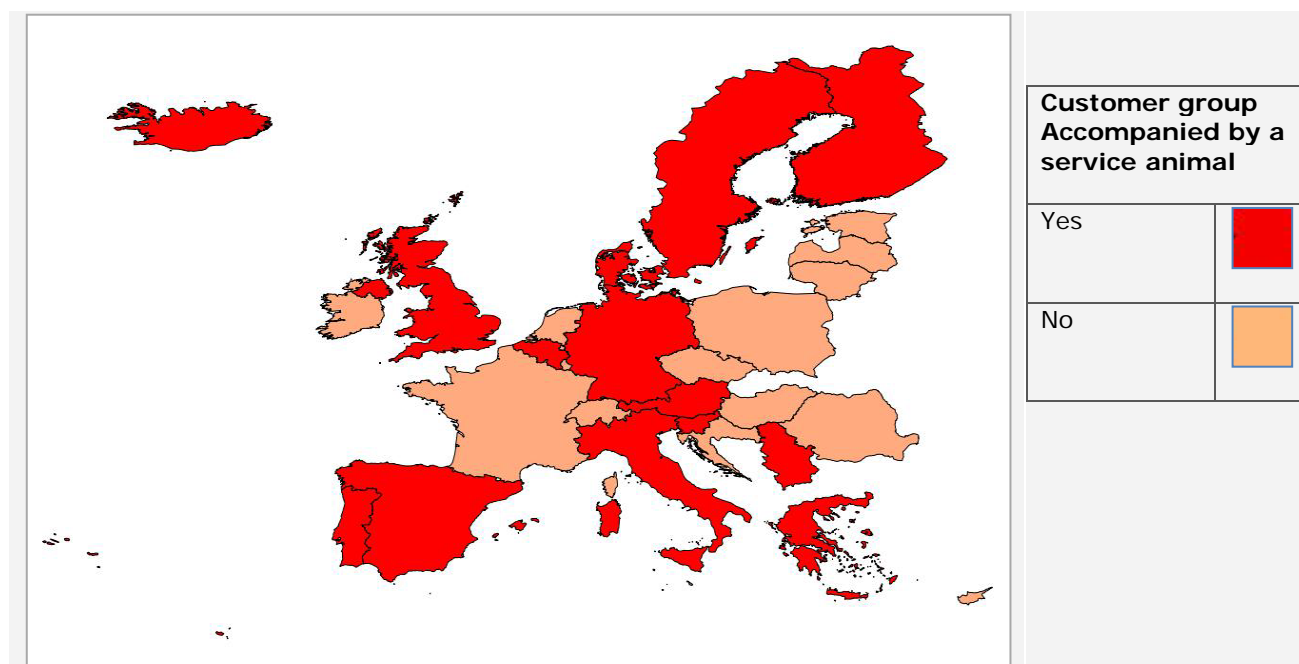
Figure 16: **Customer Groups Covered – Accompanied by Service Animal**

1.6 Disabilities and Access Needs Covered by Europe-Wide and International Schemes

A similar pattern emerges from the AIS data in pan-European and International schemes.
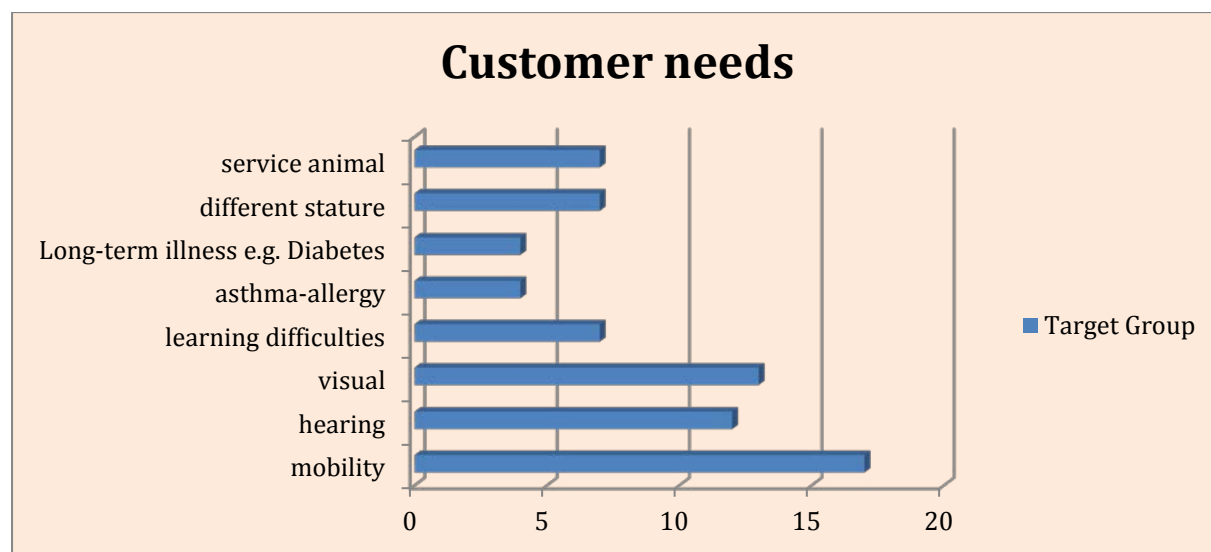
Figure 17: **Number of Customer Access Needs Covered out of the 18 European and International Schemes**

This review of AIS clearly indicates that, besides accessibility information for tourists being relatively seldom on the whole, and even missing altogether in some EU countries, there is **a systemic lack of information, especially for those persons who may have learning difficulties, different stature, be accompanied by a service animal, have asthma or allergies or long-term illness.**

These findings point to the need for policies and actions to improve the quality and prevalence of accessibility information in general in the tourism and travel sector and to

take specific and positive action to enhance and extend information for those customers who currently have little informational support. It seems likely that improving information will give the greatest benefits, both for the personal efficacy of disabled travellers and for those tourism businesses that make their access features known to the travelling public.

Table 9: **Types of Disabilities (Customer Groups) Covered in 83 European National and Regional AIS**

Country	Name of scheme or information provider	Target Groups covered. 1 = Yes, blank = No								SUM
		Mobility	Hearing	Visual	Learning Difficulties	Asthma-Allergy	Long-term illness e.g. Diabetes	Different Stature	Service Animal	
Austria	IBFT	1	1	1	1	1	1	1	1	8
Austria	Salzburgerland	1	1	1	1					4
Belgium	Toegankelijk Vlaanderen / Accessible Flanders	1	1	1	1	1		1	1	7
Belgium	Brussels for All	1	1	1	1			1	1	6
Belgium	Acces City	1	1	1	1	1		1		6
Belgium	l'Indice Passe-Partout (IPP)®	1	1	1	1			1		5
Belgium	Access-i	1	1	1	1			1		5
Croatia	Croatian Paraplegic & Tetraplegic Association	1								1
Croatia	Association for Promotion of Equal Opportunities (APEO - UPIM)	1								1
Croatia	Kvarner County Tourist Board	1								1
Croatia	Travabled	1								1
Cyprus	VisitCyprus	1								1
Czech Republic	Jedemetaky (We are going too)	1	1	1						3
Czech Republic	Morasvski - Sleszk	1		1		1	1			4
Denmark	Godadgang	1	1	1	1	1	1	1	1	8

Country	Name of scheme or information provider	Target Groups covered. 1 = Yes, blank = No								
		Mobility	Hearing	Visual	Learning Difficulties	Asthma-Allergy	Long-term illness e.g. Diabetes	Different Stature	Service Animal	SUM
Estonia	Freedom of Movement	1								1
Finland	Finland for All	1	1	1	1					4
Finland	Turku for All	1	1	1	1	1	1	1	1	8
France	Tourisme et Handicap	1	1	1	1			1		5
France	J'accede	1								1
France	ParisInfo	1	1	1	1					4
France	Handi-Hotels.com	1	1	1	1					4
France	Handistrict.com	1	1	1	1					4
France	Handibooking.com	1	1	1	1					4
France	Handiplage	1	1	1	1		1	1		6
France	Petit Fute Handitourism	1	1	1	1					4
Germany	Destination Germany - holdays for all (Barrierefreie)	1	1	1	1				1	5
Germany	Frankfurt Tourist+Congress Board	1	1	1	1				1	5
Germany	Düsseldorf Marketing & Tourismus GmbH	1	1	1	1			1	1	6
Germany	German Railways Barrier-free travel for mobility-impaired	1								1
Germany	Berlin for All	1	1	1	1	1	1	1	1	8

Country	Name of scheme or information provider	Target Groups covered. 1 = Yes, blank = No								SUM
		Mobility	Hearing	Visual	Learning Difficulties	Asthma-Allergy	Long-term illness e.g. Diabetes	Different Stature	Service Animal	
Germany	Berlinfuerblinde			1					1	2
Greece	Rollout.gr	1								1
Greece	Greece4All	1		1					1	3
Iceland	Access Iceland	1	1	1	1	1		1	1	7
Ireland (ROI)	Ireland.com	1								1
Ireland (ROI)	National Q Mark	1	1	1						3
Ireland (ROI)	Dept. Transport, Tourism and Sport	1								1
Italy	Like Home	1	1	1	1		1	1	1	7
Italy	Village for All	1	1	1	1					4
Italy	Turismabile	1	1	1				1		4
Italy	Sicilia Accessibile. Fondazione Giovanni Amato Onlus	1	1	1						3
Italy	ANGOLOGIRO	1	1	1				1		4
Latvia	Accessible Latvia	1	1	1				1		4
Luxembourg	Welcome Luxembourg	1	1	1	1					4
Malta	Accessible Malta	1	1	1	1					4

Country	Name of scheme or information provider	Target Groups covered. 1 = Yes, blank = No								SUM
		Mobility	Hearing	Visual	Learning Difficulties	Asthma-Allergy	Long-term illness e.g. Diabetes	Different Stature	Service Animal	
Netherlands	Ongehinderd	1	1	1						3
Netherlands	Onbeperkt Oost	1	1	1	1			1		5
Poland	Tourism for All project	1		1				1		3
Portugal	Accessible Portugal	1	1	1	1	1	1	1	1	8
Portugal	Portugal acessivel	1						1		2
Portugal	Herewego	1	1	1	1					4
Romania	Motivation Accessibility Map	1								1
San Marino	San Marino Per Tutti	1	1	1	1			1		5
Serbia	Serbian Railways	1	1	1					1	4
Slovenia	"Disabled-friendly Municipality" charter	1	1	1	1			1	1	6
Spain	Barcelona, for accessible tourism	1	1	1	1			1	1	6
Spain	TUR4all (PREDIF)	1	1	1	1					4
Spain	Puedo Viajar	1	1	1	1			1		5
Spain	Grancanariaccesible	1		1						2
Spain	Tenerife Accesible SINPROMI	1	1	1	1			1		5
Spain	Euskadi Turismo official website	1	1	1	1		1		1	6
Spain	Catalan Tourist Board	1	1	1	1			1	1	6

Country	Name of scheme or information provider	Target Groups covered. 1 = Yes, blank = No								SUM
		Mobility	Hearing	Visual	Learning Difficulties	Asthma-Allergy	Long-term illness e.g. Diabetes	Different Stature	Service Animal	
Sweden	Svenska EQUALITY	1	1	1	1	1		1		6
Sweden	Swedish Accessibility database	1	1	1	1	1		1	1	7
Switzerland	MIS Switzerland	1	1	1						3
United Kingdom	National Accessible Scheme	1	1	1						3
United Kingdom	Acccess Statements as part of Quality Scheme	1	1	1	1	1	1	1	1	8
United Kingdom	OpenBritain	1	1	1	1	1	1	1	1	8
United Kingdom	DisabledGo	1	1	1	1			1	1	6
United Kingdom	Direct Enquiries	1	1	1						3
United Kingdom	Historic Scotland	1	1	1					1	4
United Kingdom	English Heritage	1	1	1					1	4
United Kingdom	National Trust	1	1	1						3
United Kingdom	National Trust for Scotland	1	1	1					1	4
United Kingdom	Visit Wales	1	1	1						3
United Kingdom	Euan's Guide	1								1
United Kingdom	Disability Onboard (National Rail)	1	1	1	1				1	5

Country	Name of scheme or information provider	Target Groups covered. 1 = Yes, blank = No								SUM
		Mobility	Hearing	Visual	Learning Difficulties	Asthma-Allergy	Long-term illness e.g. Diabetes	Different Stature	Service Animal	
United Kingdom	Rough Guides - Accessibility	1	1	1						3
United Kingdom	Changing Places	1		1	1		1	1		5
United Kingdom	Isle of Man Accessible Accommodation	1						1		2
United Kingdom	Official London Theatre Access Guide	1	1	1	1				1	5
United Kingdom	Accessible-Property.org.uk	1	1	1						3
	TOTALS	82	62	68	45	13	12	34	28	
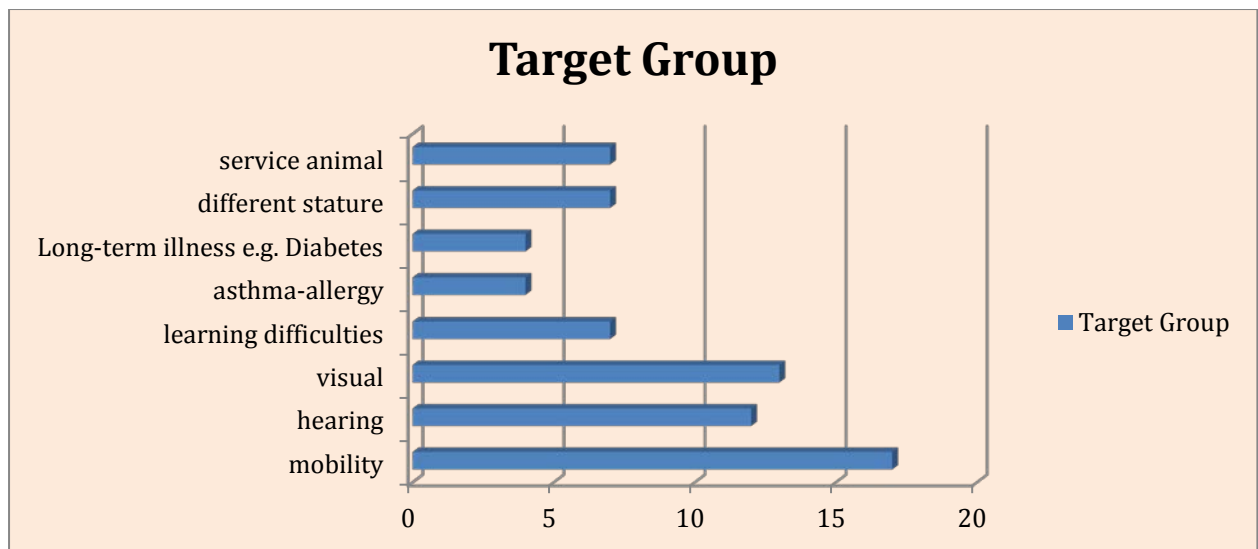
Figure 18: **Number of Target Groups Covered out of the 18 European and International Schemes**

1.7   Different Languages

The number of languages available on European national and regional AIS websites was also checked as part of the review process.

The frequencies of languages used in AIS websites is shown in the table and figure below.

Table 10: **Frequencies of Languages Available on 83 European AIS Websites**

EN	FR	DE	ES	IT	NL	RUS	CHN	OTHERS
64	17	18	9	10	5	2	01	29

Figure 19: **Languages Available on AIS Websites (%)**

Of the European national and regional AIS, most AIS have one main language, which is usually English (41%) or the national language. The national language is more often used as the primary language (in which there is most written content) on regional sites.

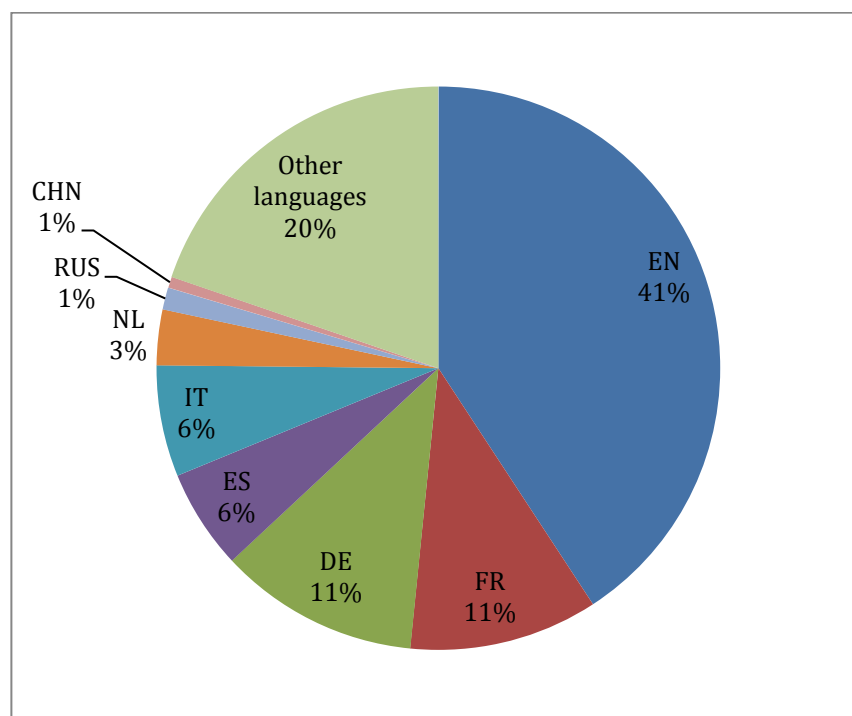Other languages used were the major European languages, French (11%), German (11%), Spanish (6%), Italian (6%) and Dutch (3%). Additional languages such as Japanese, Arabic, Korean were only found on 1% of the websites or less.

Websites that carried information in a larger number of languages were mainly those that were managed by national and regional tourist boards, such as Tourism Flanders and Catalan Tourist Board. One of the key services which national and regional tourist boards can offer to tourist business in their area is to develop multi-lingual websites to reach a wider audience. However, it was noted that accessibility information was not often offered in more than 3 alternative languages on most AIS websites and this presents a barrier to some foreign visitors wishing to find accessibility information.

The Danish Godadgang website (which is in 4 languages) also has information for "People who do not understand the local language". Venues which can provide special assistance in foreign languages and sign language are labelled accordingly.

1.8   Reliable Accessibility Information

As stated in previous sections of this report, reliable accessibility information is vital to many customers when making their travel decisions.

The review of AIS has pinpointed 6 key factors where the reliability of information can be discerned from the accessibility information in published schemes. These are:

- Visibility of the latest update of access information (- is there a date and how old is the information);

- Whether the access data incorporates legislated access criteria;

- Whether the access data incorporates specified target users' functional requirements;

- Whether the access data includes objective measurements that are made visible to the user;

- Whether the access data has been gathered by an on-site "audit";

- Whether the access data is self-assessed by the owner or manager and if it is contained in an Access Statement.

All the above factors can give a greater or lesser sense of trust and transparency to a reader of accessibility information on a website.

The data displayed in the table below, show that all AIS (83 out of 83) focus on presenting *data that incorporates user requirements*, that is relevant to visitors with specific access needs. (This was a criterion for selection in the sample).

Considering their overall reliability, it was found that 68 out of 83 schemes present *audited access data on their websites.* This data is gathered by a trained technician or expert in accessibility. In some cases suppliers may begin by making a "self-assessed" report that is verified at a later date or verified by auditors on a random basis. Knowing that premises or services have been audited by competent person(s) is highly important to customers in this market.

Less than one third of schemes (25 out of 83) use *legislated access criteria* as a basis for defining their access information.

About one third (24 out of 76) use self-assessed data and Access Statements. It is possible that cultural differences as well as practical or financial reasons have some impact on the use of self-assessment. In general, it must be said that organisations of people with disabilities tend to be against *self-assessed* information, pointing to the frequent failure of owners/managers to give accurate information to visitors with disabilities. The failure may be unintentional, of course, but it takes a well-designed assessment process to help owners produce a good access statement or self-assessment report.

Objective measurements of access conditions, for example measurements of the height of steps, internal dimensions of lifts and door-openings are provided in 62 out of 83 AIS websites. This information can give reassurance to many visitors with higher level access needs when making their travel decision, thanks to detailed and unequivocal information.

Table 11: Reliability Measures for Accessibility Data Collection in European AIS

Country	Name of Scheme or Information Provider	Latest Access Information Updates	Incorporates Legislated Access Criteria	Incorporates Users' Functional Requirements	Objective Measurement	Audited	Self-Assessed /Access Statement
Austria	IBFT	2013		1	1		1
Austria	Salzburgerland	2014	1	1	1	1	
Belgium	Toegankelijk Vlaanderen / Accessible Flanders	2013	1	1	1	1	
Belgium	Brussels for All	2014		1	1	1	
Belgium	Acces City	2010		1	1	1	
Belgium	l'Indice Passe-Partout (IPP)®	2014		1	1	1	
Belgium	Access-i	2014		1	1	1	
Croatia	Croatian Paraplegic & Tetraplegic Association	2014		1		1	
Croatia	Association for Promotion of Equal Opportunities (APEO - UPIM)	2014		1			1
Croatia	Kvarner County Tourist Board	2013		1			1
Croatia	Travabled	2014		1			1
Cyprus	VisitCyprus	2012		1		1	1
Czech Republic	Jedemetaky (We are going too)	2014		1			
Czech Republic	Morasvski - Sleszk	2014		1			
Denmark	Godadgang	2014	1	1	1	1	

Country	Name of Scheme or Information Provider	Latest Access Information Updates	Incorporates Legislated Access Criteria	Incorporates Users' Functional Requirements	Objective Measurement	Audited	Self-Assessed /Access Statement
Estonia	Freedom of Movement	2014		1	1	1	
Finland	Finland for All	2014		1	1	1	
Finland	Turku for All	2014		1	1	1	
France	Tourisme et Handicap	2014	1	1	1	1	1
France	J'accede	2014		1	1	1	1
France	ParisInfo	2014	1	1	1		1
France	Handi-Hotels.com	2014	1	1	1	1	1
France	Handistrict.com	2014	1	1	1	1	1
France	Handibooking.com	2014	1	1	1	1	1
France	Handiplage	2014	1	1	1	1	
France	Petit Fute Handitourism	2014		1			
Germany	Destination Germany - holdays for all (Barrierefreie)	2014		1		1	1
Germany	Frankfurt Tourist+Congress Board	2013	1	1	1	1	
Germany	Düsseldorf Marketing & Tourismus GmbH	2013	1	1	1	1	
Germany	German Railways Barrier-free travel for mobility-impaired	2014		1			1
Germany	Berlin for All	2014		1	1	1	

Country	Name of Scheme or Information Provider	Latest Access Information Updates	Incorporates Legislated Access Criteria	Incorporates Users' Functional Requirements	Objective Measurement	Audited	Self-Assessed /Access Statement
Germany	Berlinfuerblinde	2014		1	1	1	
Greece	Rollout.gr	2013		1			1
Greece	Greece4All	2014		1		1	
Iceland	Access Iceland	2014	1	1	1	1	
Ireland (ROI)	Ireland.com	2014		1			1
Ireland (ROI)	National Q Mark	2013		1	1	1	
Ireland (ROI)	Dept. Transport, Tourism and Sport	2014		1	1	1	
Italy	Like Home	2014		1	1	1	
Italy	Village for All	2014		1	1	1	
Italy	Turismabile	2014		1		1	
Italy	Sicilia Accessibile. Fondazione Giovanni Amato Onlus	2014		1		1	
Italy	ANGOLOGIRO	2013		1	1	1	
Latvia	Accessible Latvia	2014		1	1	1	
Luxembourg	Welcome Luxembourg	2014		1	1	1	
Malta	Accessible Malta	2014	1	1	1	1	
Netherlands	Ongehinderd	2014		1	1	1	

Country	Name of Scheme or Information Provider	Latest Access Information Updates	Incorporates Legislated Access Criteria	Incorporates Users' Functional Requirements	Objective Measurement	Audited	Self-Assessed /Access Statement
Netherlands	Onbeperkt Oost	2014		1	1	1	
Poland	Tourism for All project	2008		1	1	1	
Portugal	Accessible Portugal	2014		1	1	1	
Portugal	Portugal acessivel	2014		1		1	
Portugal	Herewego	2014		1			
Romania	Motivation Accessibility Map	2014	1	1	1	1	
San Marino	San Marino Per Tutti	2014		1	1	1	
Serbia	Serbian Railways	2014		1	1	1	
Slovenia	"Disabled-friendly Municipality" charter	2014		1	1	1	
Spain	Barcelona, for accessible tourism	2014	1	1	1	1	
Spain	TUR4all (PREDIF)	2014	1	1	1	1	
Spain	Puedo Viajar	2014	1	1	1		1
Spain	Grancanariaccesible	2014		1	1	1	1
Spain	Tenerife Accesible SINPROMI	2014	1	1	1	1	
Spain	Euskadi Turismo official website	2009		1	1	1	
Spain	Catalan Tourist Board	2014	1	1	1	1	
Sweden	Svenska EQUALITY	2014		1	1	1	

Mapping and Performance Check of the Supply of Accessible Tourism Services   (220/PP/ENT/PPA/12/6491)

Country	Name of Scheme or Information Provider	Latest Access Information Updates	Incorporates Legislated Access Criteria	Incorporates Users' Functional Requirements	Objective Measurement	Audited	Self-Assessed /Access Statement
Sweden	Swedish Accessibility database	2014		1	1	1	
Switzerland	MIS Switzerland	2014		1	1	1	
United Kingdom	National Accessible Scheme	2014	1	1	1	1	
United Kingdom	Acccess Statements as part of Quality Scheme	2014		1			1
United Kingdom	OpenBritain	2014		1	1	1	1
United Kingdom	DisabledGo	2014		1	1	1	
United Kingdom	Direct Enquiries	2014		1	1	1	
United Kingdom	Historic Scotland	2014		1	1	1	
United Kingdom	English Heritage	2011	1	1	1	1	
United Kingdom	National Trust	2013		1	1	1	
United Kingdom	National Trust for Scotland	2014	1	1	1	1	
United Kingdom	Visit Wales	2014		1			1
United Kingdom	Euan's Guide	2014		1		1	1
United Kingdom	Disability Onboard (National Rail)	2014	1	1	1	1	
United Kingdom	Rough Guides - Accessibility	2014		1		1	1

Country	Name of Scheme or Information Provider	Latest Access Information Updates	Incorporates Legislated Access Criteria	Incorporates Users' Functional Requirements	Objective Measurement	Audited	Self-Assessed /Access Statement
United Kingdom	Changing Places	2014	1	1	1	1	
United Kingdom	Isle of Man Accessible Accommodation	2014		1	1	1	
United Kingdom	Official London Theatre Access Guide	2014		1	1	1	
United Kingdom	Accessible-Property.org.uk	2014	1	1	1	1	1
			25	83	62	68	24

As mentioned previously, crowd-sourcing and user ratings are not common in the AIS field as there is a commonly held belief that individuals with access needs must have more certainty to make their travel plans than these methods of assessment allow.

Since there is no obligation under EU or national laws in Member States for tourism providers to issue accessibility information, as such, all AIS schemes present their information voluntarily.

Some scheme managers publish a "disclaimer", to warn visitors to check all information and that they cannot be held responsible for loss or damage incurred due to use or misuse of the data on the website. The use of such disclaimers was not recorded for this study. Although they may be quite common, they are probably not always seen by users as they may be placed in a "Terms and Conditions" section of the website, which most site users typically do not read.

1.9 Accessible Information Schemes and Supply-Side Information

From analysing the "information trail" around the marketing, promotion and sale of accessible tourism products though AIS schemes, it is evident that a great deal of work is being done by often inspired teams of people, to identify and create accessible places, resources and services and bring these to the attention of those who need them and who, in many cases, cannot travel without them.

Accessibility information schemes are needed so that the visitor can narrow down he search for an accessible venue or service – not because the choice is so wide but more likely because the choice of services is so restricted and without an AIS it takes much time and effort to find the appropriate offer.

The number of AIS websites in Europe continues to grow, expanding the visibility of accessible venues and services for people with disabilities and specific access requirements. However, the phenomenon of increasing numbers of AIS websites and information tools is not necessarily bringing positive results fast enough for visitors and the search for reliable information seems to lead further away from the goal rather than closer to it.

AIS websites are not showing signs of convergence around a common approach or methodology, although it is clear that certain practices are likely to be more successful when used as part of a general business and destination marketing strategy.

It is clear that the provision of accessibility information is driven by both a profit motive and by a public service ethic, depending on who is the information and service provider. This study has not examined the motives of the owners or managers of AIS in the different countries and regions but it seems that, whatever the motives, there is a strong tendency to focus on the key elements of a visitor journey when selecting the information to be provided, primarily: the accommodation, food and drink and access to public spaces and attractions. Where there is access to private facilities, it is in the interest of businesses to inform visitors with access requirements about the quality and characteristics of their premises and services. For encouraging visitors to visit a destination, the management organisation or municipality can inform the travellers about the accessibility of festivals and events, attractions, public buildings and other facilities that may be available either free of charge or for an entrance fee.

The principle, however is the same for public, private and third sector organisations: reliable and detailed accessibility information is needed for a wide variety of visitors and for every kind of service.

1.10 Quality Criteria for Accessibility Information Schemes (AIS)

In pursuit of the objective of mainstreaming accessibility and developing "Tourism for All", the following quality criteria for AIS are proposed, , based on the findings of this survey:

- Deliver the AIS through an accessible website (WAI/W3c Level 2.0 compliant)

- Mobile apps should also be compliant with WAI/W3C guidelines

- Sites and access information should be searchable in multiple languages

- A wide range of services should be included in AIS to enable visitors to plan the different parts of their journey and accessible activities

- Present accessibility information for as many target groups as possible, (refer to the list used in the survey).

- Ensure that accessibility information or the AIS tool is updated regularly

- Use qualified and trained auditors to gather the information.

- Use legislated standards in access information where these are applicable to the tourism environment. Point out what the law requires and how the offer fulfils or goes beyond the legal requirement.

- Make sure that objective measurements are included for those who need more details.

- Share the AIS database with the upstream and downstream supply chain partners at national, regional and local level, ensuring that visitors will have an experience of the accessible destination from start to finish.

- Publicise the AIS through social media websites, (as some DMOs and NTOs are doing, e.g. VisitEngland, Catalan Tourist Board, VisitFlanders), to help spread the word about your accessible offers.

- Use different communication media and alternative formats to reach different audiences.

- If you use crowd-sourcing and user-generated content (photos, videos, ratings or reviews), make sure that this information is clearly marked as such, so that visitors can use it – or not – at their will.

- Monitor the effectiveness and use of the AIS using web tools and visitor surveys. Having feedback from visitors brings more opportunities for improvement and better customer care.