



MIND

THE ACCESSIBILITY GAP!

C O N F E R E N C E

Re-thinking Accessible Tourism in Europe

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

“The Supply Study”



Introduction

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

Study Team

Funded by
DG Enterprise





EU Tourism 2020 Strategy >>>

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

1. Demand

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

Policy recommendations

Future Actions

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

2. Skills needs

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

Policy recommendations

2. EU-wide actions to support training in AT

3. Supply & Performance Check

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

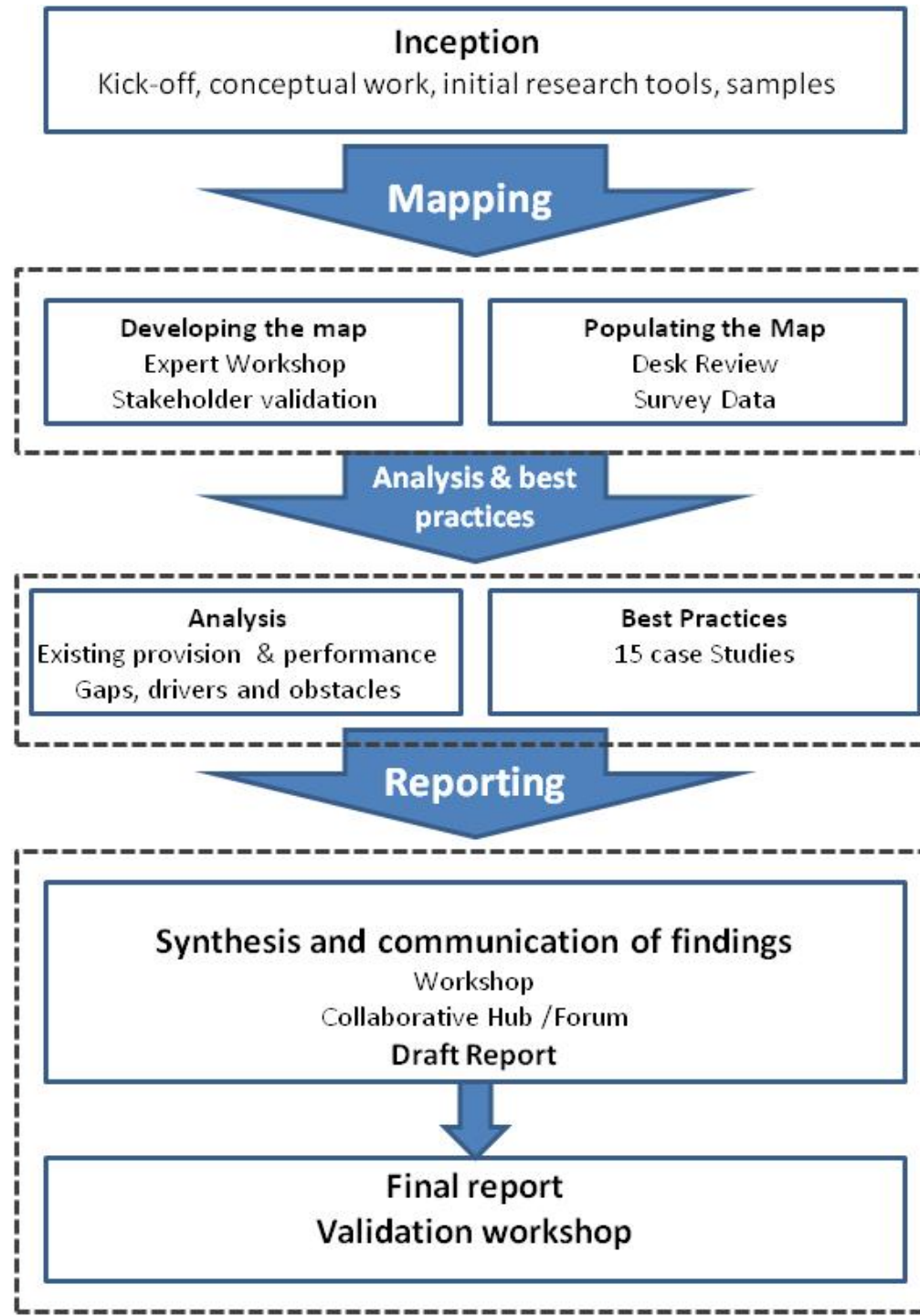
Policy recommendations

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

>>> EU-28 Policies and Practices



Study phases



Approach

1. Inventory of Accessible Tourism Services and Facilities

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

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

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

3. Performance Check

4. Case Studies

5. Conclusions

6. Recommendations

Conceptual approach

Small businesses at the centre of the study

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

The Chain of Accessibility

From arrival to departure, the visitor must be guaranteed an unbroken «chain of accessibility»

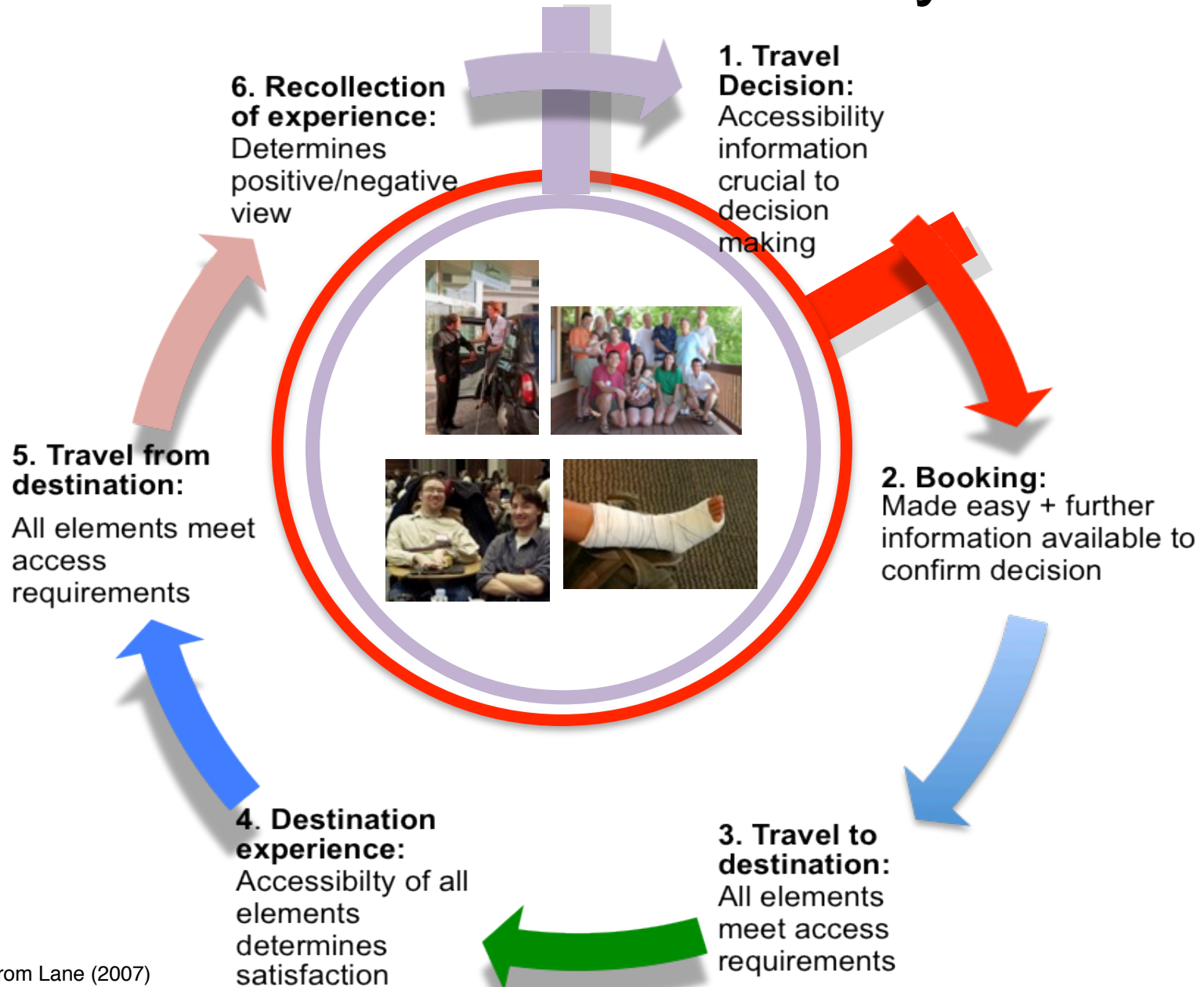


The Chain of Accessibility

If just one link in the chain is broken (inaccessible) the trip will be spoiled...



The Accessible Visitor Journey



Performance Check

Performance criteria for accessibility – How can SMEs respond?

- **Planned accessibility:**
 - What tourism SMEs need to know and prepare for
- **Lived accessibility:**
 - Staff training in customer care, awareness of disabilities and visitors' access needs
- **Epiaccessibility** : the need for society to develop new norms and codes of conduct, “raising the level” of services for everyone
- **Tourism** is uniquely placed to enhance the experience of accessibility
- **Travel enriches our lives!** It should be made accessible and inclusive for all citizens, in safety and comfort.

Accessibility Information Schemes Review

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

Out of 85 identified information schemes:

- 54 are national schemes,

- 22 are regional schemes,

- 9 are schemes at European or international level.

Only 3 EU Member States appeared not to have any AIS

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

ALS review

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

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

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

Types of Venues, types of information

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

AIS: How much, and to what standard?

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

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

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

AIS Review – information types and sources

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

AIS Review – information types and sources

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

Performance criteria in Accessibility Information Schemes

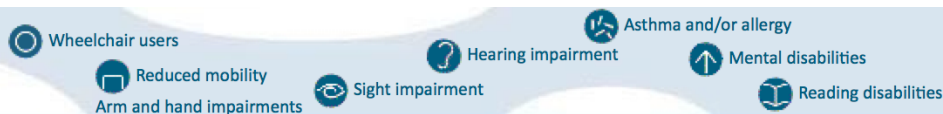
Three basic approaches:

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

Example AIS www.godadgang.dk Denmark



godadgang.dk



Menu

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

You are here: Godadgang.dk > SearchResult

Search Result

Click on the place name for more information.

Quick Search:

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

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

Example AIS: Access in London (Guidebook)

Access in London

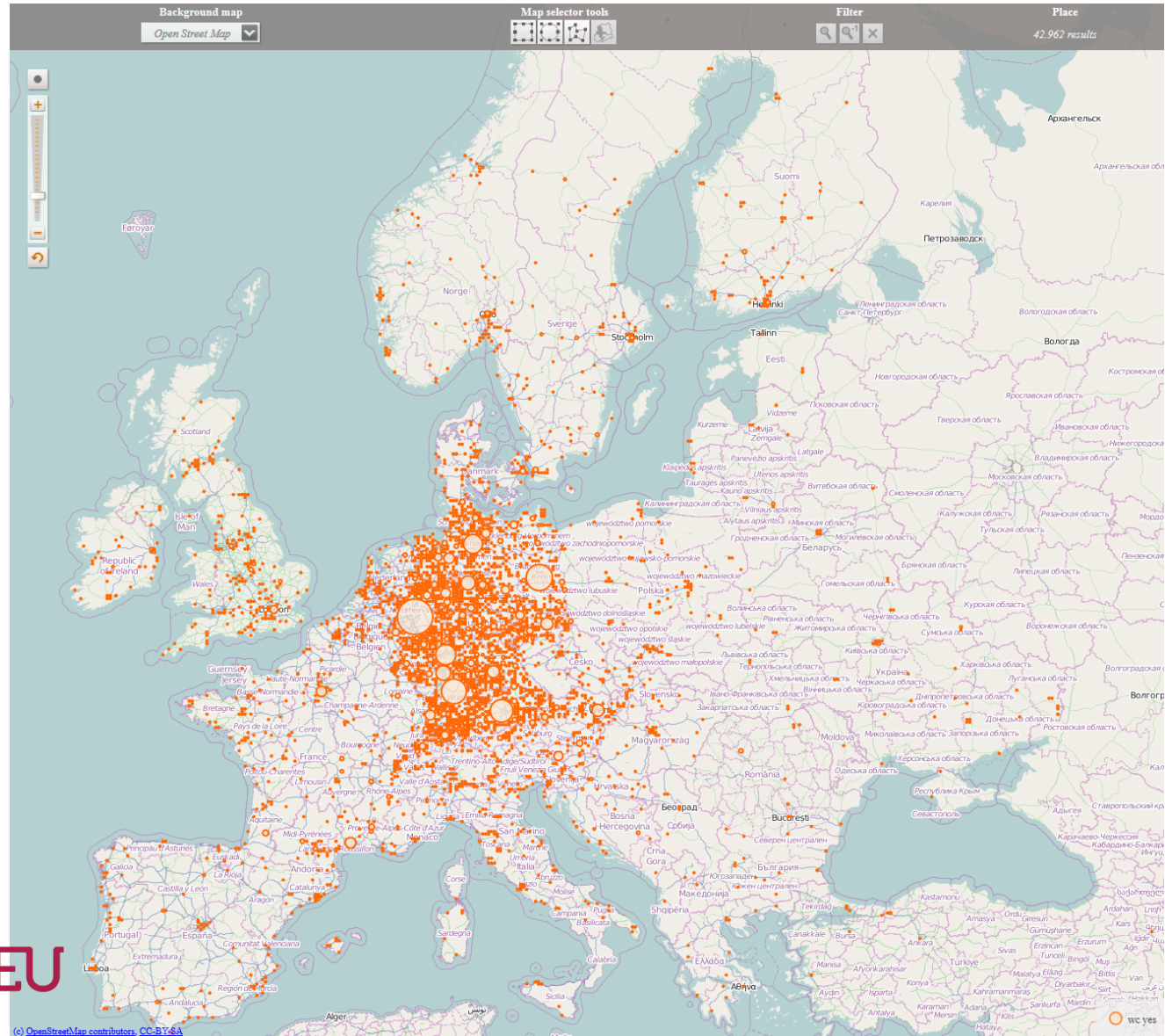
Essential information for anyone who has difficulty getting around

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

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

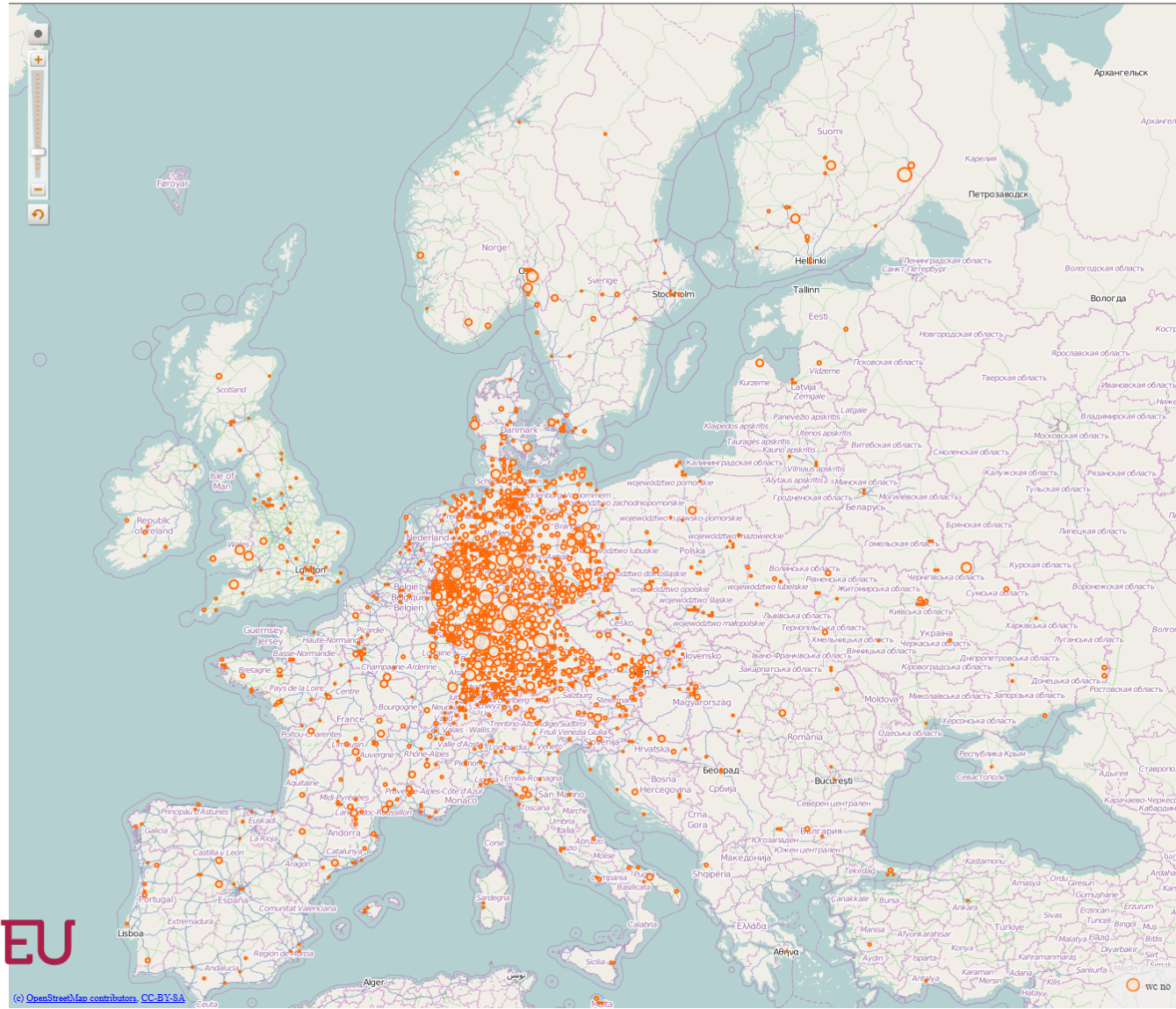
Wheelchair access to shops - YES

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



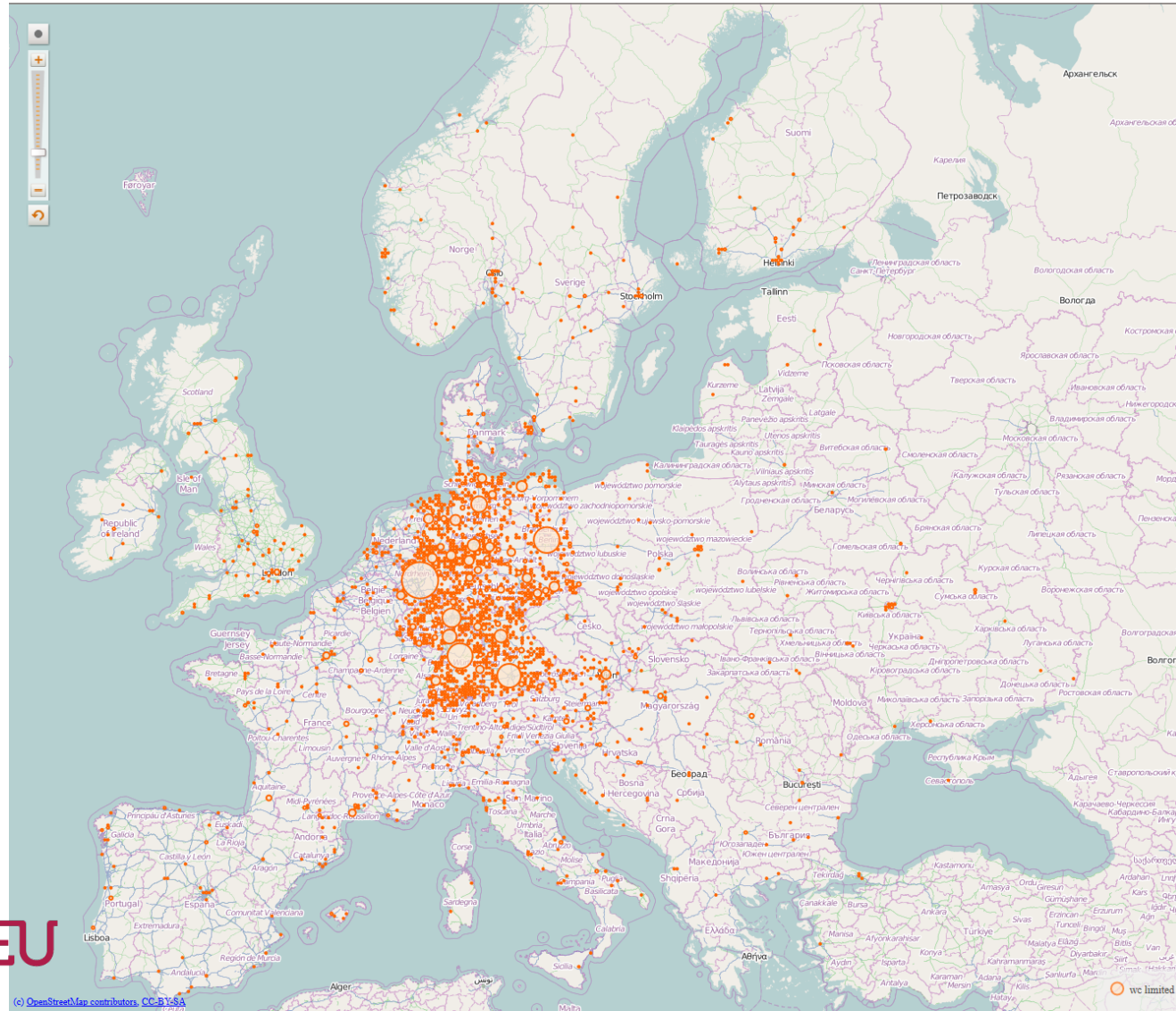
Wheelchair access to shops - NO

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



Wheelchair access to shops – Limited

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



Register of Accessible Tourism Suppliers



- New **European Accessible Tourism Directory** identifies suppliers with accessible services and levels of service guaranteed by international national / regional access schemes.
- Pantou is the Greek word for "everywhere"

www.pantou.org

Pantou

Performance analysis:

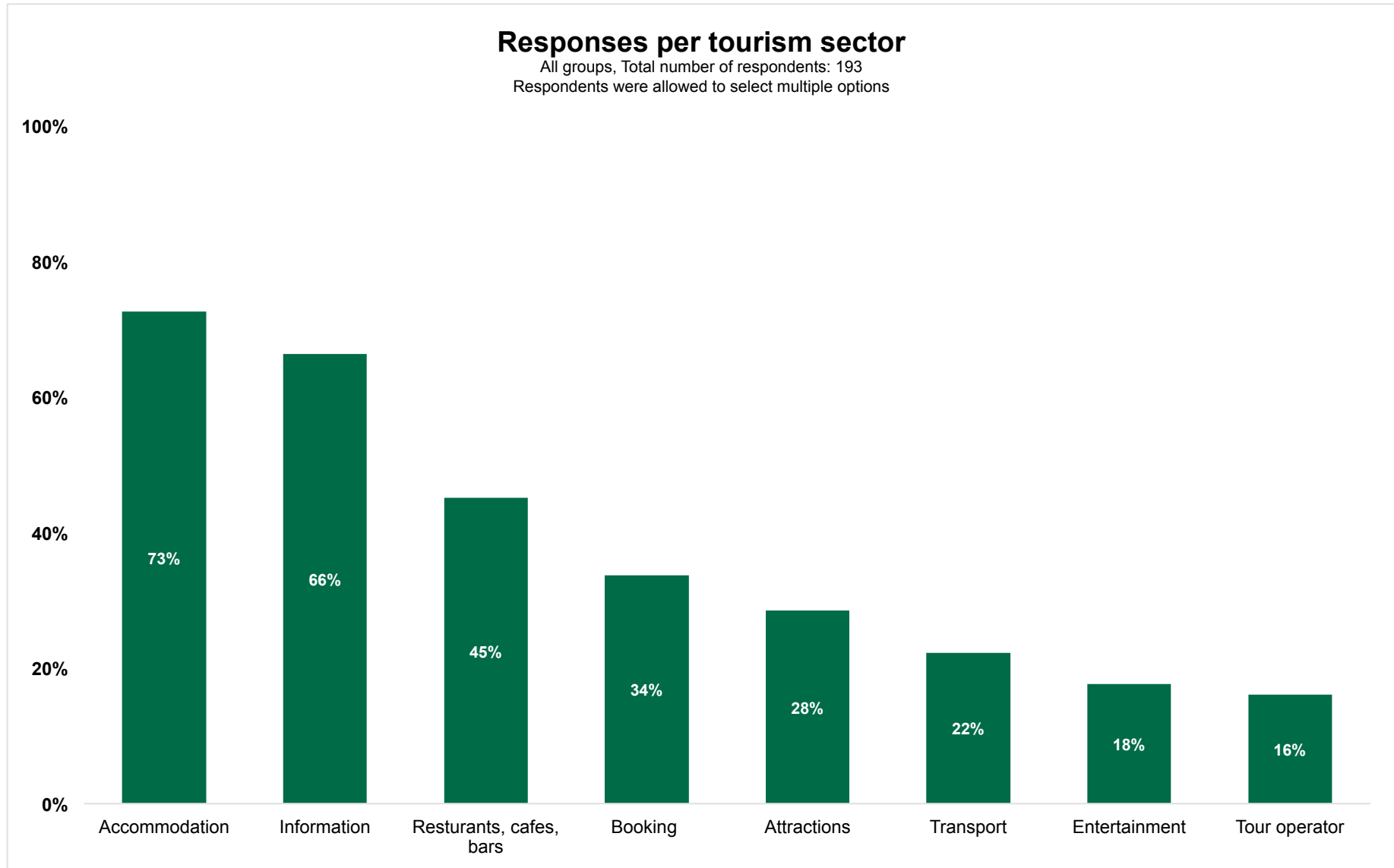
Industry survey

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

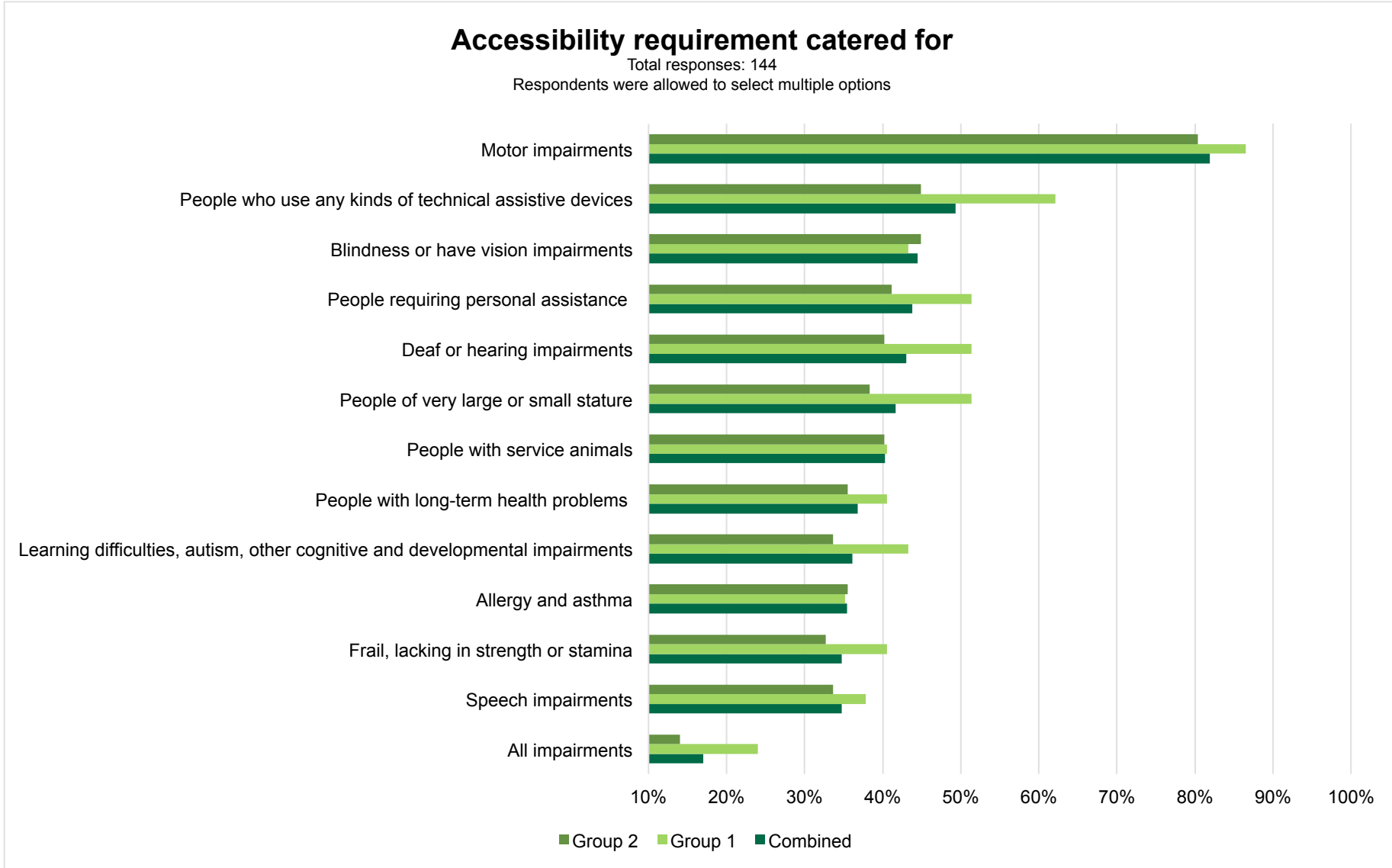
Group 2: Mainstream tourism providers with some provision for accessible tourist; or

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

Industry responses by sector



Access requirements catered for

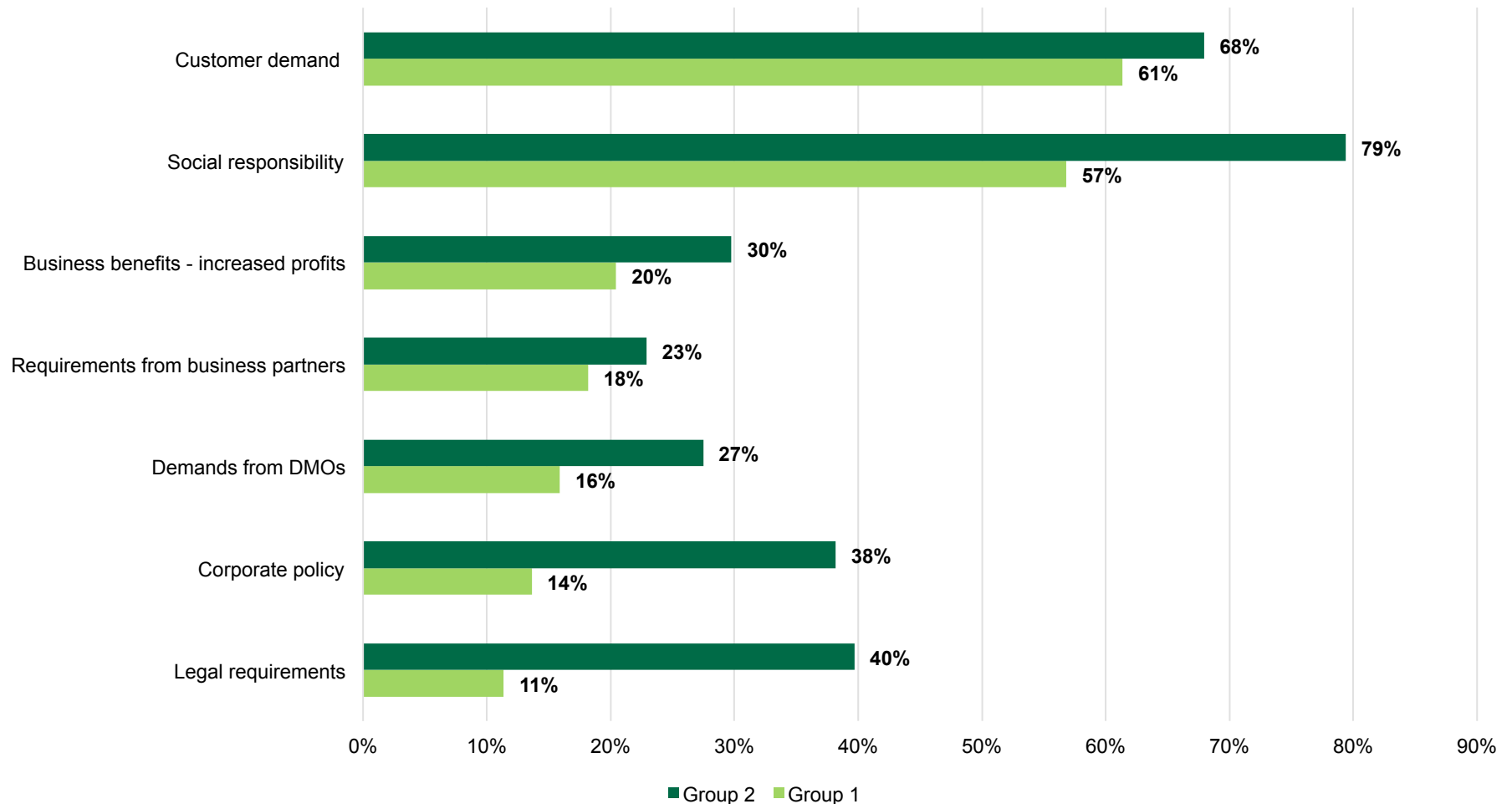


Reasons for providing accessible services

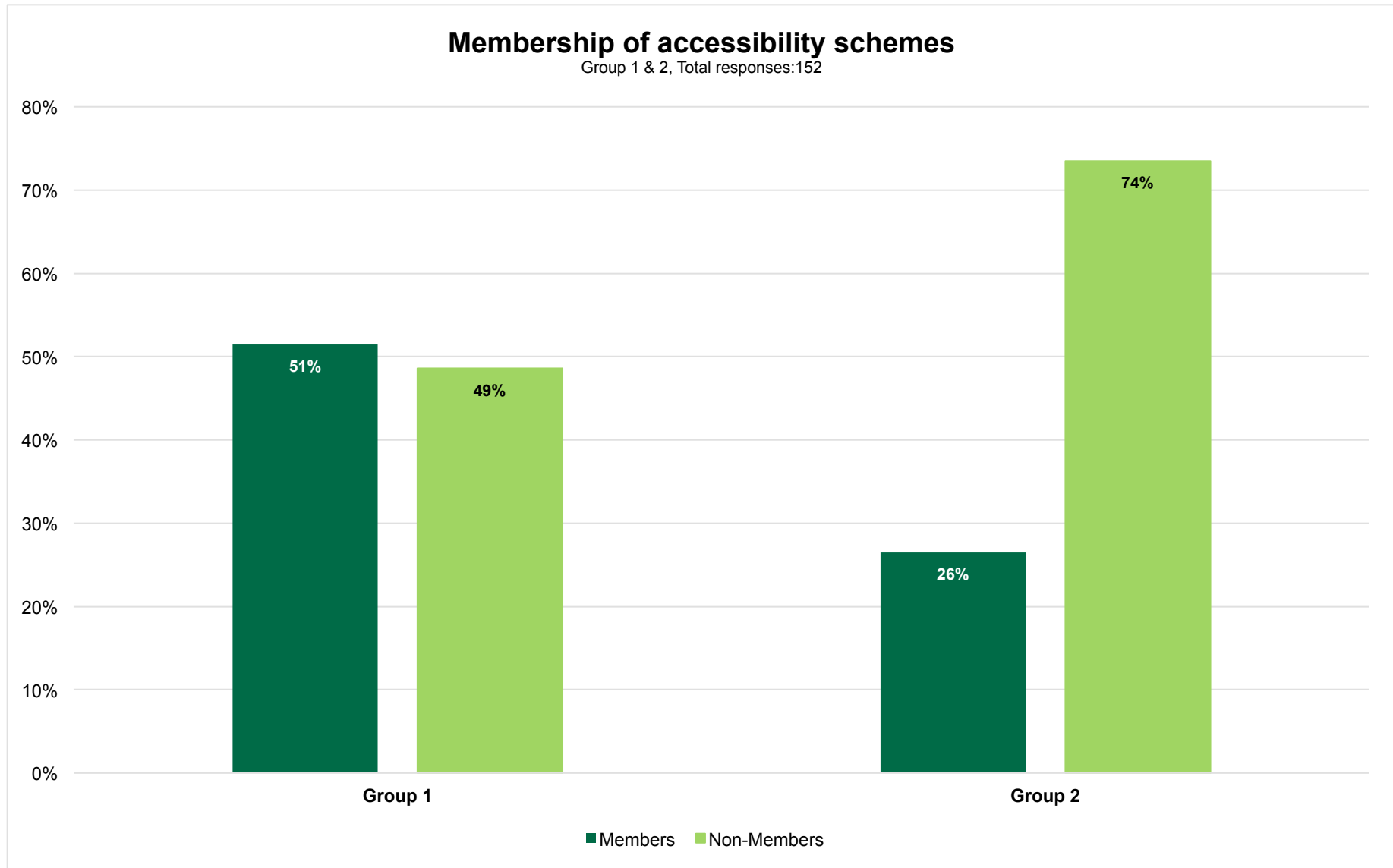
Reasons for providing accessible services

(Group 1 & 2) Total number of respondents: 175

Respondents were allowed to select multiple options



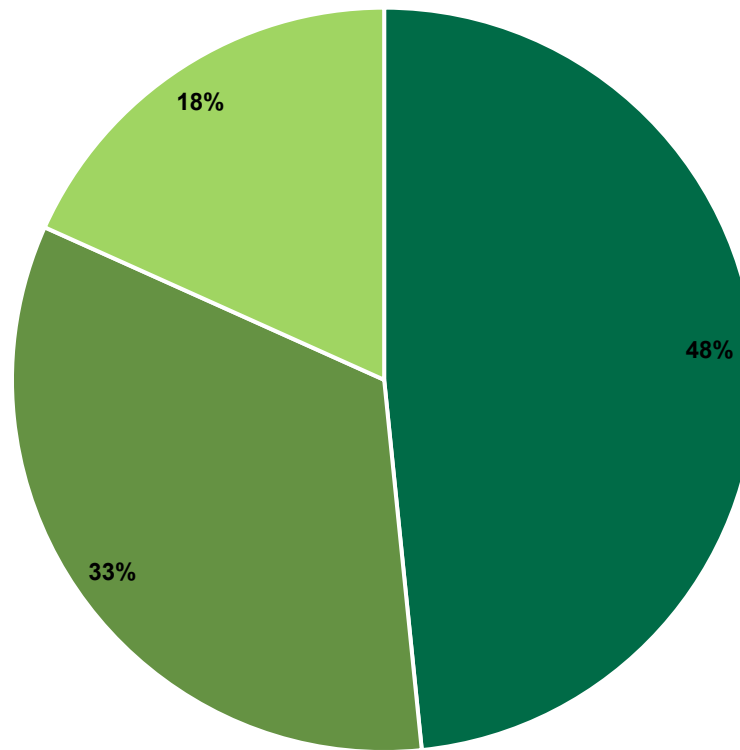
Membership of Access Info Schemes



Disabled tourists affect biz profitability?

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

Only Group 2, Total responses: 93



■ Neutral

■ Important

■ Very Important

Creating Business Opportunities

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

Business & Destination Benefits Through Accessibility

Accessibility



Improve Quality

Market
Opportunities

Civic
Pride

Differentiate

More Competitive

Repeat Visits &
Recommendations

A Better Welcome

Social Responsibility

Respond to Changing Markets

Create a Unique Selling Proposition

Improved Financial
Sustainability

Seasonality

Inward Investment

Case Studies

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

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

Case Studies

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

15 case studies

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

Case Studies

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

Case Studies

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

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

Solutions which have addressed a cross - impairments approach

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

Case Studies – Focus on Destinations

Mapping the supply chains, not only the suppliers

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

Conclusions

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

Accessible Tourism Building Blocks



Recommendations (Short term)

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

Recommendations (Medium-term)

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

Recommendations (Long-term)

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

All about balance



Value to visitors

Achievability
for organisations

Thankyou



Digital Agency

www.eworx.gr



**European Network for Accessible
tourism**

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