Mapping and Performance Check of the Supply of Accessible Tourism Services

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

Final Report

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1. EXECUTIVE SUMMARY

This document is the final report of the study regarding **"Mapping and Performance Check of Accessible Tourism Services in Europe"**.

MAPPING THE SUPPLY OF ACCESSIBLE TOURISM SERVICES AND FACILITIES

The first objective of the study was to identify and count, as accurately as possible, those tourism services that can cater for the accessible tourism market, which includes seniors, people with disabilities, families with small children and people with various specific access requirements. Source data for the identification and calculation of accessible services was derived partly from the suppliers listed in so-called *Accessibility Information Schemes (AIS),* which are published databases of facts and measurements related to the accessibility of tourist venues and services in regions and countries of Europe. The AIS data set was supplemented by newly identified accessible services collected by *Pantou, the European Accessible Tourism Directory,* a tool which was created for this study at http://pantou.org.

In total, the study has identified 313,286 accessible tourism suppliers in EU Member States. Of these, **224,036 suppliers** were found in the published data from **79 Accessibility Information Schemes in 24 EU Member States.**

The Pantou data collection tool contributed 94,551 accessible tourism suppliers, of which 5,301 were already present in national or regional Accessibility Information Schemes. After subtracting the 5,301 "doubles", **the net total of Pantou registered suppliers is 89,250.**

Adding the number of AIS suppliers and Pantou suppliers together gives the total figure of: 224,036 (AIS) + 89,250 (Pantou) = 313,286 suppliers.

- The above figures are subject to a number of caveats. Firstly, these can only be considered as the "declared" accessible tourism suppliers in these two data pools. The *actual* number of accessible suppliers in Europe will always remain an unknowable number, given that there is no formal Europe-wide registration of such suppliers or the range of services they offer. It is also evident that there are many ways to define and measure "accessibility", which means that complex issues regarding nomenclature and metrics must be reduced to more manageable concepts in order to produce usable statistics. Finally, suppliers may well make simple access improvements that are not recorded or publicised but which may enhance access for one or other customer group.

- Only 4 EU Member States appear not to have any accessibility scheme: Bulgaria, Lithuania, Hungary and Slovakia. In these countries there is therefore less certainty about the frequency or types of accessible tourism services available and the customer groups that are catered for.

- It should be noted that the 79 AISs in European States apply a variety of different approaches to measuring and defining "accessible" venues and services and therefore the data are not directly comparable in terms of the service types or the provisions for the customers groups they address. The AISs that cover the wider range of accessible services tend to be those of National Tourist Organisations, regions and small businesses that have a diverse number of competences and manage a broad range of tourism activities in their particular region.

- The majority of AISs present *audited accessibility data* on their websites – data that has been gathered by trained assessors. Less than one third of schemes use *legislated access criteria* as a basis for defining their access information and about one third use self-assessed data and Access Statements. Objective measurements of access conditions, such as measurements of the height of steps, internal dimensions of lifts and door-openings, are provided in two thirds of AIS websites.

- The map below shows the frequency of accessible tourism suppliers in European Member States in 5 ranges from below 499 to over 10,000.

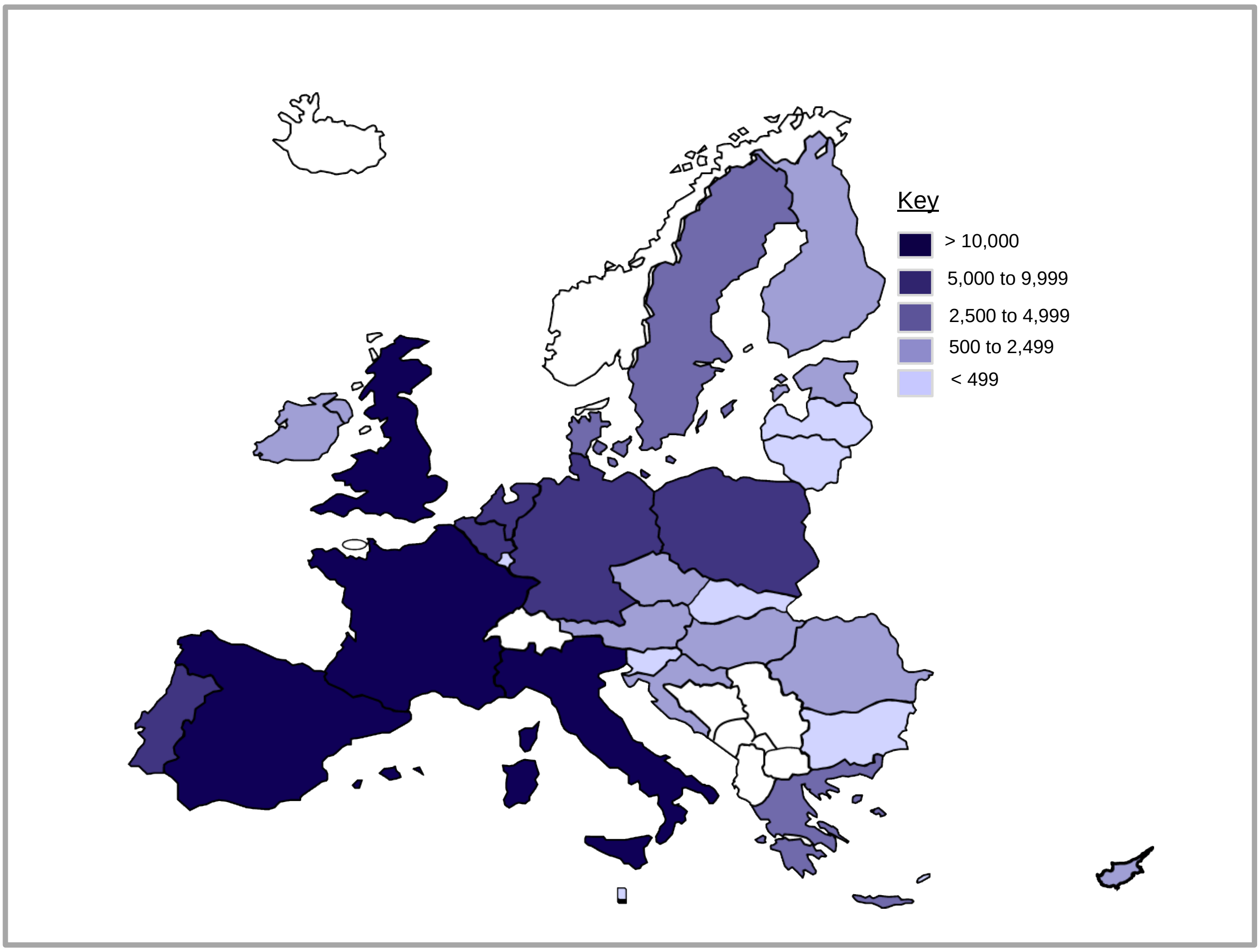

Figure 1: Map: Numbers of Accessible Tourism Suppliers in EU-28 Based on AIS and Pantou Data Sources.

- In the highest range, countries with more than 10,000 accessible tourism suppliers are UK, France, Spain and Italy. In the second range 5,000 to 9,999 are: Germany, Netherlands, Poland, Portugal.

- Countries with under 499 suppliers are: Bulgaria, Czech Republic, Latvia, Lithuania and Slovenia.

- The frequencies of different **accessible services** across all the AIS schemes are shown in the following chart, **Figure 2**.

- The most frequently listed services were: Accommodation (present in 16% of schemes), Physical Accessibility (16%), Attractions (15%), Food and Drink establishments (14%) and Leisure facilities (13%). The least recorded information relates to accessibility of Transport

Services (8%), Booking and Reservations (5%), Equipment Hire (4%) and Personal Assistance (3%).

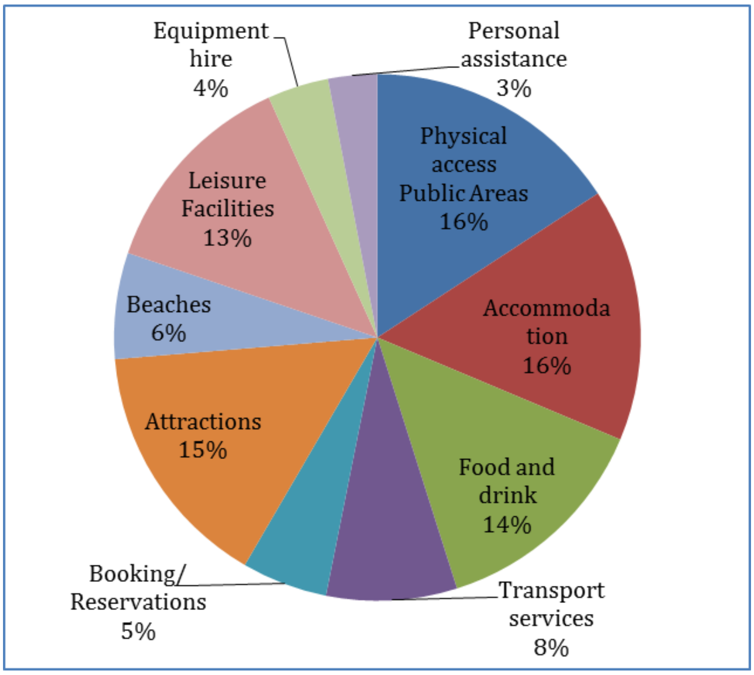

Figure 2: Frequency of Accessible Services Information in 79 National and Regional AIS (%).

- The Pantou sample of suppliers, although smaller in number than the AIS group, gives a more detailed picture of supplier and services data, since it uses a standardised data collection approach.

- The Pantou sample identified a total of **146,760 accessible services** among the 94,551 suppliers in the EU-28. These services include a wide range of service types catering for several customer groups. The top-three service types are *accommodation, wellness and conference facilities* while the top-three customer groups are *people with mobility impairments (including wheelchair users), people of very large or small stature, people who are deaf or have hearing impairments and people who are blind or have vision impairments.*

- Based on the above data, it is estimated that 9.2% of the existing supply of tourism facilities and services have at least some level of provision for travellers with specific access needs. This number is based on the mapping exercise conducted through the study compared to the overall supply of tourism enterprises. This means that over 3 million tourism businesses are not prepared to adequately cater to the accessibility market.

- By 2020, an additional 1.2 million enterprises need to provide accessible services in order to accommodate the lowest forecasted demand.[1] Thus, there is a strong rationale for targeted action, from various levels, to help businesses to provide more accessible services.

[1] Report of the EC Study: Economic Impact and Travel Patterns of Accessible Tourism in Europe. Significant GfK and partners (2014).
http://www.accessibletourism.org/resources/toolip/doc/2014/07/06/study-a-economic-impact-and-travel-patterns-of-accessible-tourism-in-europe---fi.pdf

PERFORMANCE LEVELS IN THE SUPPLY OF ACCESSIBLE TOURISM SERVICES AND FACILITIES

- **There are significant gaps with regard to the performance of accessible service supply across Member States.**

- **The principle dimension of service performance concerns the number and types of customer access needs that are covered by suppliers. The majority of service providers do not adopt a cross-impairment approach.**

- In the Accessibility Information Schemes, 78 out of 79 schemes in EU member states (or 99%), provide information on *accessible services for people with mobility impairments*, yet other disabilities were covered much less frequently.

- Information provision in AIS for other disability groups was as follows, (in descending order of frequency):

  - Information for people with hearing impairments: present in 62 schemes (78%);
  - Information for people with visual impairments: present in 68 schemes (86%);
  - Information for people with learning difficulties: present in 45 schemes (56%);
  - Information for people of very large or small stature: present in 33 schemes (42%);
  - Information for people accompanied by a service animal: present in 28 schemes (35%);
  - Information for people with asthma-allergy: present in 13 schemes (16%); and
  - Information for people with long-term illness e.g. diabetes: present in 12 schemes (15%)

This tendency is confirmed by results of the survey of tourism industry suppliers conducted as part of this project, which found that **only 17% of all industry respondents that have some provisions for accessible tourism reported that they could cater to all disabilities**[2]. In contrast, among businesses that are specialised in accessible tourism, close to 25% of respondents stated that they have provisions for all disabilities.

- **There is little evidence of accessible service integration across the supply chain** in the vast majority of locations. Overall accessibility of the tourism sector depends not just on the action of individual businesses but on the accessibility of the entire supply chain that makes up the visitor journey.

- Typically, accessible services may be "joined up" by specialised travel agents and tour operators who develop and sell special packages or itineraries where each service is checked in advance to ensure the needs of the customer target group(s) are met. Over 50 agents and operators who provide such specialised services can be found in the Pantou online database. In addition, some destinations (NTOs and DMOs at regional, city and local level) are developing local accessible venues, attractions and tours, providing information to visitors about the available facilities and services in "Access Guides" and "Itineraries". Several of the Case Study venues have taken this approach (e.g. Arona, Barcelona, London, Trentino),

[2] Group 1 & 2- See Annex 6 for details on the definition of the groups

usually involving local disability NGOs in the process. Also it is important to note that, potentially, any individual businesses or business chain can take the initiative to gather and disseminate information about local accessible services that would be of interest to their guests. The successful Nordic hotel chain, SCANDIC publishes information on local accessible attractions and transport for its hotels. However, the SCANDIC case is something of an exception and there is scope for much greater development of accessible tourism supply chains by DMOs and suppliers.

- **Three key barriers prevent businesses from becoming increasingly accessible: Infrastructure and physical barriers, financial barriers including the lack of a strong business case and knowledge and information barriers.**
- All Member States have accessibility legislation in place, which addresses the built environment, through general building regulations and laws and, in many cases, through specific access legislation for parts of the tourism sector (e.g. hotels). However, regulatory provisions on accessibility tend to be applied mainly when new buildings are being planned and any conformity assessment procedures appear to be generally weak. Adapting facilities in historical buildings and environments has been frequently mentioned as making accessibility more challenging and a significant barrier to improved accessibility.
- Businesses are largely unaware or cautious of the market potential and the business case for investing in the accessible tourism market. There is some evidence that improvements to accessibility can increase sales, encourage repeat visits and bring higher average spend. Visitor surveys conducted by VisitEngland in 2013, for example, have shown the average length of an overnight stay is 2.9 nights, with an average spend of £184, but where a member of a group or party has a disability or impairment this becomes 3.3 nights and an average spend of £191. However, such studies are still sporadic, especially at local level, being limited to relatively few countries and locations, and there is no systematic data collection across Europe or agreed indicators that can be used to guide businesses and public sector actors.
- **Case studies conducted in the framework of this study show that successful accessible destinations are emerging across Europe through development initiatives conducted by public-private partnerships, often coupled with know-how provided by third sector associations** including, for example, disability and consumer NGOs, chambers of tourism enterprises and stakeholder networks at regional, national and European levels. However, despite an emerging awareness of accessibility, this market is still largely considered a niche market.
- From the evidence in the case studies it can be observed that a minority of tourism suppliers are already seizing the opportunity of the accessibility tourism market by adjusting and differentiating their offers to the diverse needs of customers. Notably, there is a wide spectrum of demand, ranging from customers with relatively low-level access requirements to those with severe disabilities or health conditions, that may require a higher level of customer service, as well as suitably adapted transport and infrastructure. It is clear that the marketing approach taken by a destination or business should be differentiated, so as to attract customers to the specific offers that are relevant to them.
- NTOs and destinations often develop their own Accessibility Information Schemes (AISs) that are used as a dedicated information channel which can be combined with marketing tools and technologies such as mobile apps to create greater visibility for their offers. However, the accessible tourism market lacks visibility and coherence, partly since marketing takes

place via many small, local channels, with few internationally oriented channels. Accessibility Information Schemes are often run purely with an information focus by NGOs, rather than with a commercial focus by actual businesses and they therefore remain underused as a marketing tool. While more than half of providers that specialise in accessible services are affiliated with an AIS, only 26% of *mainstream* providers are affiliated with an accessible scheme, showing that there may be some hesitation to be seen as part of the "accessibility market". This, of course, reduces the visibility of accessible offers in the mainstream supply, which in turn may lead to lower uptake of these services.

- The final barrier for the tourism industry to improve its accessible offer relates to staff knowledge and information. There is confusion among industry players around what accessibility means, how it is defined, what needs to be done to comply with legislation and what can be done to tap into the market.

VISITOR PERSPECTIVES ON ACCESSIBILITY OF TOURISM SERVICES AND FACILITIES

- From a visitor perspective, when performance levels are measured in terms of customer satisfaction, the ratings that are given depend to a large extent on the characteristics of the tourists using the services and facilities, and the type and degree of access requirements that they have.

- Most users with specific access requirements are either "dissatisfied" (28-44% across all sectors) or "neutral" (42-46% across all sectors) and there is no service that scores particularly highly in terms of service satisfaction side. Only 10% of respondents are satisfied with tour operators and almost half (44%) are dissatisfied. Satisfaction was highest for attractions, museums and other cultural venues (31%).
- The most frequent barriers encountered by tourists related to the availability of information on accessible services (66%) and the lack of available services (50%) according to the study's survey aimed at tourists with accessibility requirements.

- Informational barriers relate not only to having access to information but also the reliability of information and being able to have information in various (alternative) accessible formats.

- Accessibility should not only be assessed at the level of individual providers but at a higher level of aggregation, such as the destination, which includes different stages of the supply chain. Accessible destinations, such as those in the case studies, can be best achieved by applying a "holistic" approach that puts the experience of the customer at the centre.

PRACTICES AND TOOLS FOR IMPROVING ACCESSIBILITY

The study examined in detail six different tools or practices drawn from the 15 case studies to identify elements of good and poor practice and analyse strengths and weaknesses of each.

Top down commitment to a cross-sectoral approach to accessibility

- The impact of greater accessibility in one enterprise or at one stage of the tourism supply chain is enhanced by having other accessible businesses around it. As a result of such positive externalities, public intervention can help capture the full potential of investment in accessibility across the entire supply chain.

- The success of various tools in enhancing the accessibility of destinations and businesses depends partly on the commitment within the destination management organisation and/or trade associations to adopt a cross-sectoral (whole-of-supply-chain) approach to accessibility.

- While practical tools and methods can raise awareness, and help develop the business case for accessibility, the tools themselves are not sufficient. Rather they need to be accompanied by support at the political, the sector and the destination levels.

- Weaknesses include cases where there is a lack of commitment from Destination Management Organisations (DMOs), which reduces the incentive for businesses to market and develop accessible products and services to a wider audience. Also, where there are no centralised marketing opportunities for accessibility at destination level, take-up of accessibility can be low because individual enterprises on their own cannot capture the 'whole of supply chain' approach.

Physical infrastructure action plans at destination level

- One of the best tools in order to encourage accessible tourism horizontally at the destination level are physical infrastructure actions plans. Investment in the external environment will increase its attractiveness and thereby increase potential revenues for tourism businesses, act as a 'demonstrator' to local businesses that investing in accessibility can yield economic returns and increase the connectedness of local businesses across the supply chain and thus the potential of network effects taking hold.

- The more potential for interaction between enterprises at different stages of the supply chain and/or in different locations (e.g. through transport links) the greater the impact of one company's investment in accessibility on the rest of the chain.

- Weaknesses associated with such action plans relate mainly to the inherently fragmented nature of the tourism industry and the difficulty to ensure coordinated action across a vast number of sectors and actors. This is compounded in very large destinations (e.g. London).

Cross-sectoral quality labels and standards schemes

- Quality labels, that are part of some Accessibility Information Schemes, are intended to communicate reliability of accessibility standards. Information and labelling schemes can also be used as a valuable business development tool and a point of reference for businesses to understand accessibility. However, every new accessibility labelling scheme presents a potential challenge to the customer, insofar as each scheme uses its own nomenclatures, access standards, customer profiles, pictograms (etc.) and languages. The proliferation of access labels can thus diminish rather than enhance the availability of useful and easily accessed information due to the inconsistency of approaches among well-meaning system designers.

- While some labels differentiate their target groups by impairment (which can be an important incentive for businesses to engage with the label and make the initial investment), this has the drawback of not being consistent with a cross-impairment approach. Destinations and suppliers should recognise that single-impairment labels (e.g. targeting only "wheelchair users") are likely to be insufficient, since many customers have additional access needs that must be accommodated.

- Weaknesses of such tools as they exist now are that they require consistent funding, they tend not to be self-sustaining and they therefore often do not go beyond the pilot phase and fail to achieve scale and replication required to maximise their impact.

- **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 accessibility information at hand, it is more likely that DMOs will be in a strong position to develop effective supply chains for accessible tourism in their respective regions. Conversely, in 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.**

Access statements at the level of individual tourism businesses

- Access statements are a very low-cost tool to help businesses that have made changes to market their activities or offers to potential customers. They are thought to be most useful for those tourists with very high levels of access requirements.

- One weak point in developing access statements is that businesses need to undertake a self-assessment, which presupposes that they have a good notion of accessibility needs. However, this weakness can be offset to some extent by providing a simple, well-structured questionnaire with “closed” questions. , limit the quality in the access statements.

Capitalising on social entrepreneurship

- Where commercial providers do not dare to enter the accessible market, social entrepreneurship can play an important “demonstrator role”, filling gaps in the accessible supply chain and demonstrating the profitability of business models focused on the provision of accessible services.

- These initiatives, if successful, create a multiplier effect which can greatly increase the return on any initial public investment required to start up the social venture in the first place. Social entrepreneurship initiatives are particularly useful in cases where private sector provision is very weak and / or where there is little awareness of accessibility.

Training and staff skills

- Staff skills have a considerable impact on the perceived level of quality experienced by tourists with access needs. Training enables employees to become better aware of the needs of people with disabilities. In addition, the employees are more motivated and less afraid to help people with need for assistance.

- At the same time, project-based awareness and training interventions need to be scrutinised closely because they are often not sustained beyond the initial project period and businesses generally do not move on from awareness raising, training and certification systems to concrete action i.e. investing in accessibility across their services and facilities and marketing their accessible offers.

GAPS IN THE EXISTING PROVISION OF ACCESSIBLE SERVICES

Across EU Member States, there are significant gaps with regard to the quality and prevalence of accessible tourism services. Accessibility should not be assessed at the level of individual providers but at a higher level of aggregation, such as the destination, which includes different stages of the supply chain. The accessibility of the tourism sector depends not only on the action of individual businesses but on the accessibility of the entire supply chain that makes up the visitor journey. Achieving good access requires plans and concerted efforts at the national level, which is the responsibility of governments and NTOs.

Expert assessments of the level of accessible tourism provisions in EU-28 Member States, based on 17 access criteria, have led to the identification of three main groups of countries, as follows:

- **Front-runners** including Spain (Catalonia at regional level), Flanders (Belgium), United Kingdom, Italy;

- **Improvers** including Germany, Portugal, France, Denmark, Finland, Sweden, (Paris and Veneto, at regional level), Czech Republic, Slovenia, Luxembourg, Croatia;

- **Late-starters** including Malta, The Republic of San Marino, Cyprus, Ireland, Poland, Latvia and Austria. Other countries in this group include The Netherlands and Greece, where there are good developments in some areas but no coordinated plans involving the mainstream tourism sector, as yet.

There is an important disconnect between the perceptions of industry and travellers. Indeed, the most frequent barriers encountered by tourists related to **lack of information on accessible services** and the **lack of integration of accessible services across the supply chain** at destination level. On the other hand, industry perceptions suggest that **accommodation** and **information** are the most accessible segments in the supply chain.

RECOMMENDATIONS

The problem of the low prevalence of accessible services and facilities can only be addressed by convincing businesses to invest in the provision of such services. In particular, there is a need to support businesses with making the business case for investment in the field of accessible tourism.

- **In the short term,** this requires working with national and local destination management organisations to gather and disseminate 'hard data' on return on investment. A business case template based on a set of local case studies from across the supply chain should be drawn up to demonstrate the financial and commercial advantages of investing in the accessible tourism market. This information should feed into "awareness-raising" about the accessible tourism market potential at all levels and across all sectors of the tourism industry.

- Second, DMOs need to work internally to ensure there is top-down commitment from local policymakers, the tourism (and related) industries and other stakeholder organisations to market their destination from an accessibility perspective. Such marketing will require managing (with the participation of businesses) and linked databases that include information on accessibility in all parts of the service chain. This would allow customers to access information on the accessible offer and businesses to market themselves to this specific target market. Ideally, local and regional accessibility databases should be integrated on a unified platform such as Pantou (or a similar portal) at European level, which would be managed with a strong industry involvement and it would allow bookings to be completed directly on site. The platform would include *specialised suppliers* who target customers with middle to severe access requirements but would also be open to *mainstream suppliers* who have accessible offers and services for one or more target groups, perhaps with lesser access requirements.

- Third, DMOs will need to identify and highlight links and interdependencies between different providers in the supply chain to identify the key spill-overs and positive externalities between the investment of individual businesses and the overall accessibility of the supply chain. This can be done, through consultation of relevant stakeholders but also, for instance, through analysis of user traffic on the central information database, which indicates those services users are interested in and where the key interdependencies lie.

- **In the medium to longer term,** destination management organisations then need to take a much more active role in coordinating the supply of accessible services in their destinations from an accessibility perspective. This will require, for instance, targeting funding and financial support to those areas with the highest spill-over potential and investing in segments of the supply chain that act as bottlenecks for capturing the positive externalities of private sector investment from the tourism industry.

Regarding improvements in the performance of the existing supply of accessible services and facilities, recommendations focus again on the role of DMOs in raising awareness of quality issues as well as targeted support to fill gaps in the market where required.

- **In the short term,** it is important for all stakeholders (DMOs, industry and other stakeholders) to understand where the main performance breakdowns are. At present, there are still differences between industry and customers regarding the level of performance of the sector and the segments in the supply chain where the key barriers lie.

- Systematic consultation of stakeholders at destination level is important to agree a joint action plan between policymakers, industry and the disability community.

- There is a need for DMOs to support businesses in the use of high quality access statements. This can be done through training administered via the local industry associations or guidelines issues by the DMO and distributed to businesses. Where access statements are of high quality and the information provided can be verified this should be marketed through the dedicated accessibility database (see above) and/or through a quality label/access scheme which certifies that the information has been checked and found to be accurate. Furthermore, labelling schemes should allow for user feedback on the accuracy of access information as well as further specifications to be provided to ensure that those with the best understanding of needs (i.e. the travellers themselves) can affect the level of detail of information provided.

- **In the medium to longer term**, public authorities (including at local, national and European levels) should consider expanding the role of social entrepreneurship regarding accessible tourism through funding and co-funding demonstration projects to address specific bottlenecks in the supply of accessible services and facilities. This can be done though dedicated calls for proposal or calls for tender and it should always require the development of a business and sustainability plan beyond the funding period

- Public – Private Partnerships (PPPs) are of vital importance when developing accessible destinations, not least because the public sector has a responsibility and possesses the necessary tools for ensuring overall accessibility of the public outdoor environment and the duty to oversee that businesses and premises, public transport systems and other infrastructure are accessible. Destination management organisations should bring together businesses and NGOs of people with disabilities, older people, other citizens' groups and the voluntary sector to develop tourism products through "hands-on" experience, meeting the needs of a diverse range of customers. Social enterprises can also play a valuable role in connecting areas of user experience, tourism expertise and business know-how, in new and innovative ways. Within the current EU funding period, 2014-2020 the "tourism accessibility agenda" must be mainstreamed across all relevant areas of European and national tourism policies, including:

    - Enhancing quality of tourism services, through greater personalisation and customer-centred approaches;

    - Tourism product development addressing the diversity of customer needs and interests, especially focusing on tangible and intangible cultural heritage;

    - Extending tourism marketing efforts to the growing market segments of seniors, youth and group travellers; as well as targeting emerging world regions;

    - Strengthening European identity through freedom of movement for all tourists, enabled by ensuring Accessible Tourism for All;

    - Fostering innovation through new technologies and services, meeting the tourism and travel needs of all visitors; and

    - Stimulating growth, employment and entrepreneurship by supporting skills development and new business opportunities in the area of accessible tourism.

2. INTRODUCTION AND STUDY OBJECTIVES

This document is the final report of the study regarding **"Mapping and Performance Check of Accessible Tourism Services"**. The report includes all findings of the research and data collection, the full analysis of results and a set of conclusions and recommendations. To facilitate dissemination the 15 stand-alone case study reports are provided in a separate annex together with the methodology behind the study. Following the requirements of the terms of reference, **Table 1** sets out the structure of this final report:

Table 1: Report Structure

Section	Content	Reference to Terms of Reference
Section 1	Executive Summary	-
Section 2	This Section	-
Section 3	Mapping of accessible tourism services across Europe.	**Task a.i:** To assess the presence of accessible tourism services and facilities along the tourism supply chain. The aim of this task is to quantify, as accurately and as widely as possible, the existing stock of accessible tourism services, and compare it to the overall supply of tourism services.
Section 4	Analysis of the performance levels from user and industry perspectives.	**Task a.ii:** To assess the performance of existing accessible tourism supply services and facilities.
Section 5	Analysis of best practices	**Task b:** Assessing the effectiveness of existing best practices and tools to foster tourism accessibility
Section 6	Conclusions and Recommendations	**Task c:** Analysing results, proposing recommendations and priorities for actions.

2.1. EU Policy Context and Background

Europe is the world's leading tourist destination with the tourism industry playing an important role in the European economy. It is estimated that tourism generates over 5% of EU-27 GDP, while employing 10% of the European workforce (including indirectly related jobs)[3]. In 2010, it was estimated that 3.4 million enterprises were active in sector which are predominately Small and Medium-sized enterprises (SMEs)[4]. When related sectors are taken into account, the estimated contribution of tourism to GDP creation is much higher: tourism indirectly generates more than 10% of the EU's GDP[5]. In 2013, Europe received 52% of all international tourists of which 39.8% visited a Member State in the EU-28 making it the most visited region in the world[6].

With the entry into force of the Lisbon Treaty, the European Union has powers *"to support, coordinate and complement action by the Member States"*. Article 195 grants powers to the EU *"to complement the action of the Member States in the tourism sector, in particular by promoting the competitiveness of Union undertakings in that sector"*. To that end EU action is aimed at:

[3] The World Travel and Tourism Council. (2014). "Travel & Tourism: Economic Impact 2014": http://www.wttc.org/-/media/files/reports/economic%20impact%20research/regional%20reports/european_union2014.pdf

[4] Eurostat. (2013). "Tourism industries - economic analysis": http://ec.europa.eu/eurostat/statistics-explained/index.php/Tourism_industries_-_economic_analysis

[5] The World Travel and Tourism Council. (2014). "Travel & Tourism: Economic Impact 2014": http://www.wttc.org/-/media/files/reports/economic%20impact%20research/regional%20reports/european_union2014.pdf

[6] European Commission. "What is the European Tourism Market Like?": http://www.wttc.org/-/media/files/reports/economic%20impact%20research/regional%20reports/european_union2014.pdf

- Promoting the competitiveness of undertakings in this sector and create an environment conducive to their development;

- Encouraging cooperation between the Member States, particularly through the exchange of good practice; and

- Developing an integrated approach to tourism, ensuring that the sector is taken into account in its other policies.

Leading from these new competences, the Commission Communication **"Europe, the world's N°1 tourist destination – a new political framework for tourism in Europe"** lays down an ambitious set of actions aiming at helping the European tourism industry to promote sustainable, responsible and high-quality tourism, to enhance its competitiveness and to consolidate the image and visibility of Europe and its destinations, as the main objectives of European tourism policy.

Tourism is, without doubt, one of the major industry sectors in the world economy today. The UN World Tourism Organisation reports that:

> "International tourist arrivals grew by 5% in 2013, reaching a record 1,087 million arrivals. Of all world regions, Europe led growth in absolute terms, welcoming an additional 29 million international tourist arrivals in 2013, raising the total to 563 million. Growth (+5%) exceeded the forecast for 2013 and is double the region's average for the period 2005-2012 (+2.5% a year). This is particularly remarkable in view of the regional economic situation and as it follows an already robust 2011 and 2012. By sub-region, Central and Eastern Europe (+7%) and Southern Mediterranean Europe (+6%) experienced the best results".[7]

One of the tourism markets in Europe that still remains largely untapped is the accessible tourism market. This market constitutes one of the key areas where the tourism sector in Europe can increase its offerings of sustainable, higher quality products and services. This objective, when pursued effectively by destinations and businesses, can improve the European tourism sector's competitiveness and lead to increased market share. Far from being targeted only towards a supposed "niche" market of people with disabilities, accessible facilities and services can ensure comfortable and safe tourism experiences for the growing numbers of older travellers, people with long-term health conditions and families with small children.

The introduction by the European Parliament of a budget line for an EU "Preparatory Action on Tourism Accessibility for All" in 2012 marked a significant step in the growing recognition of the economic value of this sector as well as a turning point in the thinking about the wide range of "visitors with disabilities and other access requirements" and their place as tourists in Europe. For the first time the European Commission, acting on behalf of the Parliament, has embarked on a coordinated action, which gives accessible tourism its own focused programme of activities, while bringing it in touch with the other policy areas of the Commission Services. This report is one of three exploratory studies examining the demand, supply, skills requirements and training needs in relation to accessible tourism in Europe.

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[7] http://media.unwto.org/press-release/2014-01-20/international-tourism-exceeds-expectations-arrivals-52-million-2013

Worldwide, it is estimated that there are over 1 billion people with disabilities, or one in seven of the world population.[8] While far from all of these have the means and opportunity to travel today, this large segment represents a significant potential source of tourism business, which can benefit host countries and destinations if they take the necessary steps to improve their accessibility. Travelling for business or for pleasure is no less relevant for a citizen who has disabilities but the barriers are far greater. The list of difficulties is extensive and every part of the visitor's journey can be affected.

A recent study by GfK and partners[9] has shown that the market size for accessible tourism in Europe amounts to over 740 million trips per year (day trips and overnight trips combined) based on analyses of the travel propensity of disabled and elderly persons in the EU Member States. The direct economic contribution, in terms of gross turnover (output), of EU's accessible tourism by people with access needs within EU was estimated as €351,936 million in 2012. From the input-output tables available from Eurostat, an EU-wide gross value added (GVA) rate for accessible tourism related products is calculated as 42.6%, which equates to a direct economic contribution, in terms of gross value added (GVA), of €149,947 million in 2012. The direct economic contribution, in terms of employment, is 4 249 000 persons.

From the needs expressed by tourists with disabilities and access requirements, there is a clear and growing demand for a greater range of offers and services. This fact is confirmed by a growing awareness on the part of some tourism operators who are increasingly attentive to the fact that all kinds of tourism offers - gastronomy, religious tourism, sport, adventure, heritage and cultural events, festivals, conferences, educational tours - and so on – have a greater appeal to a wider market if offers are able to cater for the diversity of potential customers.

There have been numerous surveys of disabled customers' booking and travel experiences over the last 5 to 10 years which corroborate this picture of frustrated demand and inadequacies in supply, both in Europe and overseas (Open Doors Organization 2005, OSSATE 2006, Neumann 2009, Buj 2010, Fundación ONCE 2010, Significant GfK and partners 2014 (op.cit).[10]

In addition, the ageing population is becoming recognised as a powerful "driver" for the accessible tourism market. The population of Europe is rapidly changing towards a society with a higher proportion of older citizens. Demographic ageing is increasing in Europe and developed countries worldwide. Currently, more than 75 million people in Europe are over 65 years of age and the total number of elderly citizens is estimated to increase to nearly 35% by the end of 2025. This number has huge implications for every aspect of the tourism sector, not least regarding access issues. It is well known that the incidence of disability increases with age. At age 60 to 64, 60% of the population has some kind of permanent health problem or disabilities. As pointed out in the Commission's communication, this demographic group encompasses individuals with greater than average purchasing power and available leisure time throughout the year.

There is a growing opportunity to cater to senior tourists, not only within Europe itself but also globally. Besides older visitors travelling within Europe, North America, Brazil and other countries have a growing proportion of older citizens who are attracted to European

[8] WHO and World Bank (2011) World Report on Disability.
[9] Report of the EC Study: Economic Impact and Travel Patterns of Accessible Tourism in Europe. Significant GfK and partners (2014). Op cit.
[10] The ENAT Website's Theme page present these and additional references at: http://www.accessibletourism.org/?i=enat.en.themes.428&type=3

destinations. Increased marketing efforts to reach these global travellers should also be matched by improvements in the quality and accessibility of the tourism product if long-term growth is to be assured.

There are destinations and areas of the world which are beginning to realise the competitive advantage that accessibility can offer in the future and are looking to adapt their product accordingly. The USA has for some time been a frontrunner with the Americans with Disabilities Act (ADA) setting obligatory requirements for ensuring disabled access to environments, products and services. In Canada the province of Ontario has also put in place extensive access legislation, with policies and strategies that flow from this to ensure that businesses change and become more accessible to all. Following the publication of the UNWTO Recommendations on Accessible Tourism for All (2013)[11], there is growing interest in this sector and competition between world regions can be expected to increase.

Accessible tourism policies and practices have the potential to contribute to every area of tourism. Bearing in mind that human diversity, an ageing population and accessibility for all are "horizontal" issues which must be considered in the design and delivery of all forms of services, policies for accessibility in tourism can play a leading role in helping to shape and guide the direction of EU tourism policies as a whole.

Understanding the different models of disability also helps to act as a lever for change. In the past disability has been viewed as people being disabled by their impairments or differences. This view is referred to as the 'medical model of disability', which looks at what is 'wrong' with the person and not what the person needs. The social model of disability however, says that disability is caused by the way society is organised, rather than by a person's impairment or difference. It looks at ways of removing barriers that restrict life choices for disabled people. When barriers are removed, disabled people can be independent and equal in society, with choice and control over their own lives. When addressing the development of tourism policies in respect of disability it is within the framework of the Social Model, which requires removal of environmental and attitudinal barriers and applying appropriate support measures for visitors with access needs throughout their travel and stay at the destination.

Access requirements are very different for each individual, giving rise to different impacts on how people travel. Some access requirements may have a low impact on travelling, in that the person can take a holiday but access issues might affect the quality of the experience in some way, so addressing accessibility can help to improve that experience. Others, especially those with higher level access needs, are more likely to encounter gaps in the provision of services and facilities across the supply chain, which may prevent them taking a holiday or trip at all.

The diagram below, based on research undertaken by VisitBritain in 2003 reflects this spectrum of needs and the corresponding responses that are required by providers.

[11] UNWTO (2013). Recommendations on Accessible Tourism for All.
http://www.accessibletourism.org/resources/accesibilityen_2013_unwto.pdf

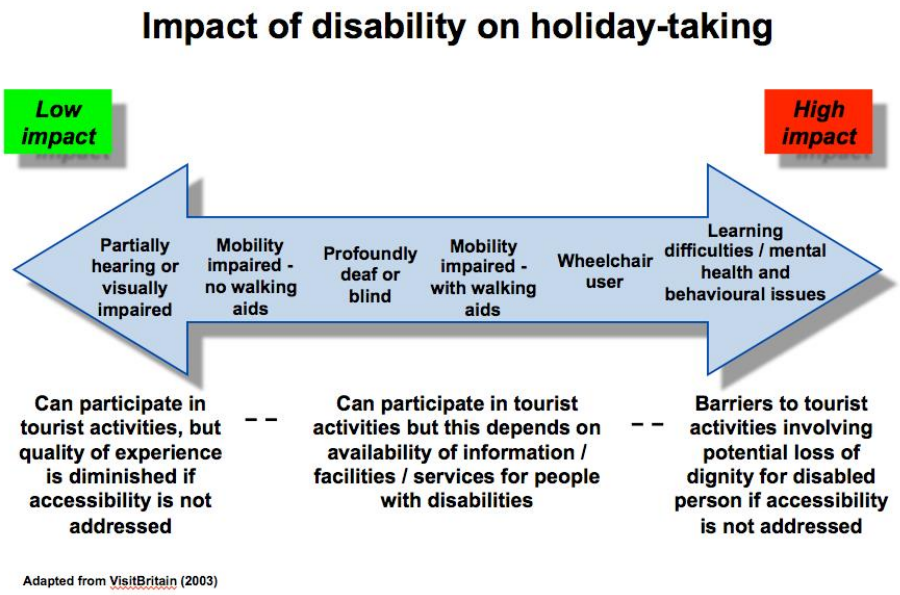


Figure 3: Impact of Disability on Taking Holidays

It is important to emphasise that by addressing access needs in the design of tourism products and services, tourism providers can deliver a quality service to customers with different access needs. **Policies to encourage the integration of accessible services in tourism supply need to address how the supply chain can support suppliers in catering for both "low' and "high" level access requirements**. Some suppliers may wish to specialise in serving those with high-end needs but, in general, accessible and inclusive tourism policies call for extending tourism offers to all those who are presently excluded, due to poor access conditions and the lack of accessible services and training.

"Mainstreaming" accessibility requirements across all areas of tourism policy, starting with raising awareness of the problem, needs to be built on the understanding that not all customers have high-level access needs, which may be difficult or expensive to solve. Since customers' access requirements are different, there are opportunities for all suppliers to serve parts of this market, both in the short term and, with additional resources and training, also for the wider market over the medium and longer terms.

It is also important to recognise how accessible tourism can play a crucial part in supporting other EU policy aims. *Social tourism*, for example, whilst not adopted in every country in the EU, depends on having accessible offers for all target groups – not only for people with disabilities but also older people, youth and families. Access is a horizontal issue and must be present in all these venues and offers to ensure an inclusive product. Similarly, marketing Europe as a *Senior Tourism destination* depends greatly on destinations having genuinely accessible offers; otherwise a large part of the target market will be inconvenienced, given the prevalence of diverse age-related access requirements among the senior population.

2.2. Study Objectives, Research Questions and Approach

This section briefly lists the key study objectives, the research questions for each step in the study and the methodological approach to answer these questions. Further detail on the methodological approach, challenges encountered and remedial action can be found in Annex 6.

Furthermore the annex also includes a glossary of key concepts that have informed the research.

The overall purpose of this study is to:

- **Assess the presence and the performance of accessible tourism services** and facilities along the tourism supply chain;
- **Assess the effectiveness** of existing best practices and tools to foster tourism accessibility;
- **Analyse results, propose recommendations** and prioritise actions; and
- **Disseminate and validate** the results.

The table below presents the research questions of the study as set out in the terms of reference and it describes the methodological approach to answering these questions.

Table 2: Overview of Research Questions and Study Approach

Research Question	Approach
What is the current supply of accessible tourism services and facilities across Europe in quantitative terms?	▪ Pantou – online register ▪ Desk research
How does the current supply of accessible tourism services and facilities across Europe compare with the overall supply of tourism services?	▪ Pantou online register ▪ Desk research
How effective is the current supply of accessible tourism services and facilities in dealing with the needs of tourists with accessibility needs?	▪ Traveller survey ▪ Desk research ▪ Workshop (Blankenberge)
How useful is the current supply of accessible tourism services and facilities to tourists with accessibility needs?	▪ Traveller survey ▪ Desk research ▪ Workshop (Blankenberge)
How satisfied are tourists with accessibility needs with the current supply of accessible tourism services and facilities?	▪ Traveller survey ▪ Desk research ▪ Workshop (Blankenberge)
In which segment of the supply chain do tourists encounter the greatest / most frequent obstacles?	▪ Case studies ▪ Traveller survey ▪ Desk research ▪ Workshop (Blankenberge)
What types of barriers and bottlenecks are there?	▪ Case studies ▪ Traveller survey ▪ Desk research
What are industry's (including SMEs) main difficulties and barriers in providing accessible services?	▪ Case studies ▪ Supplier survey ▪ Desk research
What are good practices and tools which have proven successful in enhancing accessibility?	▪ Case studies ▪ Desk research
What are poor practices or tools which have not worked in enhancing accessibility?	▪ Case studies ▪ Desk research

Research Question	Approach
Why did these practices work / not work?	▪ Case studies ▪ Desk research
What are the gaps in terms of the provision of accessible tourism services and facilities?	▪ Pantou – online register ▪ Supplier survey ▪ Traveller survey
What recommendations can be made to improve the availability and quality of accessible tourism services (in the short, medium and long term)?	▪ Conference
How can the results be validated and disseminated?	▪ Brussels conference ▪ Conference video ▪ World Tourism Market panel discussion, 2013 and 2014 ▪ Dissemination throughout ENAT's communication and awareness activities.

3. MAPPING THE SUPPLY OF ACCESSIBLE TOURISM SERVICES

This section of the report answers all research questions related to the current supply of accessible tourism services and facilities. It draws on data from 79 Accessibility Information Schemes in Europe combined with the *Pantou European Accessible Tourism Directory*[12] data set and information from the Supplier Survey conducted as part of this study.

3.1. Current Supply of Accessible Tourism Services and Facilities Across Europe

Three types of information were collected over the course of this study to answer the above research question:

- Membership of existing accessibility information schemes (AIS). These schemes bring together large numbers of suppliers with accessible services and they make information about those services available to travellers with specific access needs. The review of AIS data is presented in Section 3.1.1 below and in more detail in **Annex 8**.
- Individual registrations of suppliers that claim to provide accessible services / facilities via the web tool Pantou.org which was specifically designed for this study;
- Suppliers and services collected from identified third-party sources offering accessibility information of tourist venues. These sources are: hotels.com which is an affiliate of Expedia, Inc., handistrict.com, an online database developed by the French firm Kernix and several other AISs and national or regional tourism online services (the full list is provided in the section 3.1.2);

Pantou was specifically designed for this study (as a data collection tool and to provide a study legacy beyond the contract period). Because it was designed to answer the research questions of this study and to collect comparable data from all of the EU-28, the Pantou data model provides a detailed picture of the supply of services across Europe and was applied throughout the performed data collection, including the Pantou.org crowd-sourced self-registration, third-party data importing and desk research based manual collection.

At the same time, it is important to include information on the existing accessibility information schemes because together they gather information from a very large pool of suppliers and they often implement at least some level of "quality control" of the services they list to ensure that they are actually accessible. Such quality control is not available under Pantou or other self-registration sources which rely on self-assessment only. The drawback of accessibility information schemes is that they often focus on one stage of the supply chain and on a single country and the data they collect is not comparable across different schemes nor can it searched by tourists via a unified search interface.

3.1.1. Review of Tourism Accessibility Information Schemes (AIS)

The research team carried out a review of 79 accessibility information schemes across all EU countries. These schemes list services and facilities that have identified themselves as

[12] Pantou Directory http://pantou.org

accessible and they often provide a (formal or informal) quality check of these services. A list of AISs reviewed for this study can be found in **Annex 7.**

3.1.1.1. Overview of AIS Schemes

In total, 97 accessibility information schemes were identified from desk and online research, providing accessibility information in 23 EU Member States plus 4 other countries, Iceland, San Marino, Switzerland and Serbia. Most of the schemes are national or regional in scope though some contain data from more than one EU country and can be considered "European" in scope. From this research it was found that there are:

- Seventy-nine (79) schemes covering either a whole EU Member State, country or a region within an EU MS, (hereunder: 52 national schemes and 57 regional, local destination or city-based schemes);
- Seven (7) schemes at European level (covering more than one EU MS); and
- Eleven (11) schemes at international level[13].

National and regional schemes are represented on the following map of Europe (Figure 4) with a graduated colour scheme, indicating the aggregated numbers of registered venues per country. While this sample cannot purport to cover all the existing AIS in Europe, it can be considered as a very full and representative one, given that ENAT experts[14] in every EU member state have recorded these AIS during the period 2013 – 2014, to which there added AIS that were collected by ENAT during the previous 5 years.

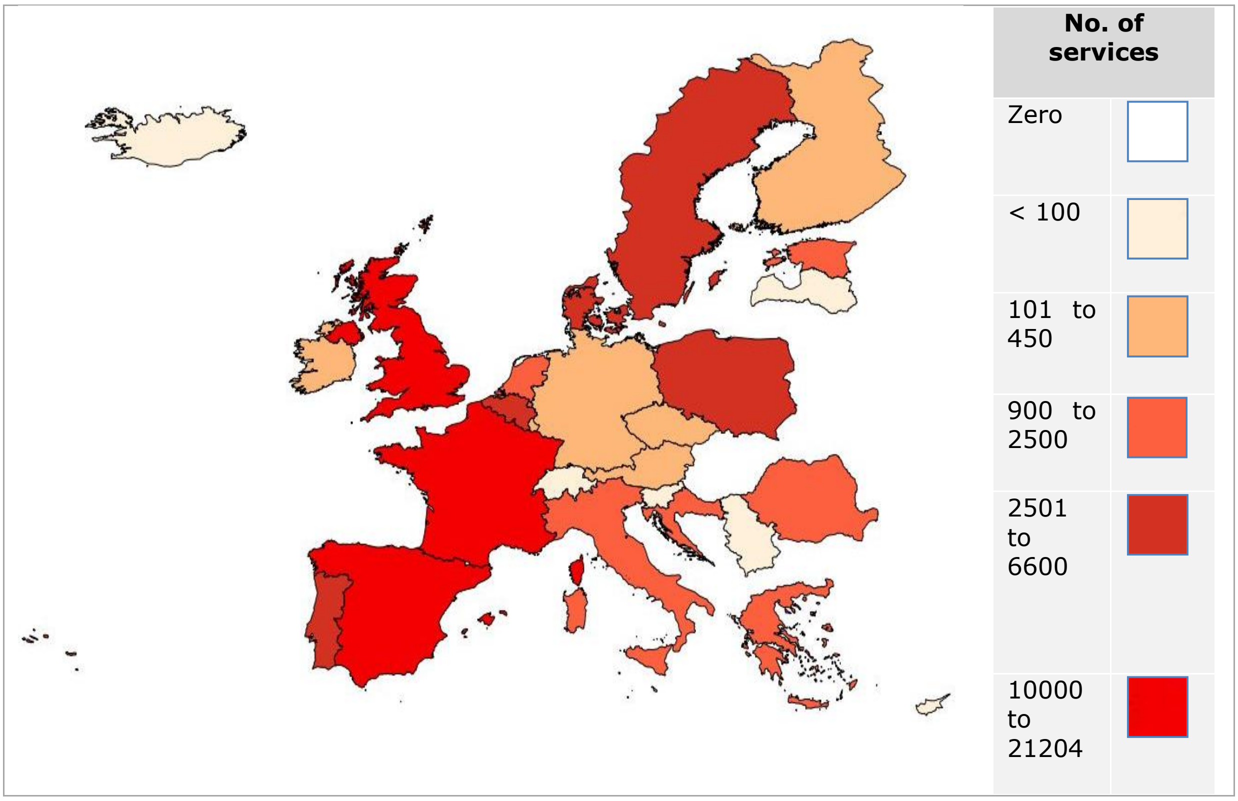


Figure 4: Number of Services Listed in National and Regional AIS

[13] Total numbers exceed 97, as some AIS schemes both geographical levels (national & regional)
[14] See Annex 6 for details of methodology of the study.

In the above map, it should be noted that neither the 7 Europe-wide AIS schemes nor the 11 International schemes are aggregated with these national and regional data to avoid possible "double-counting" in various countries.

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 an Accessibility Information Scheme.

- 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 in 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.

- Countries that have between 2,501 to 16,000 venues take up the higher end of the scale: Sweden, Portugal, Denmark, Poland, Belgium, Spain, France and the United Kingdom. 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 because the large database of over 4,000 venues, which was created under the STARe project (1999 -2001)[15] has recently been taken off-line. Meanwhile, there are tourism accessibility information services offered by NGO *Superabile* and *ROMA per Tutti*, for example, the latter having processed over 61,000 enquiries (20% in English) since 1996, covering a wide range of accessibility questions.[16]

[15] 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.
[16] Presentation by A-G Laura, IV International Tourism for All Congress, Ávila, Spain, June 2013.

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, (including schools, municipal buildings and other public venues) 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:

1. 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.[17]

2. 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 tourism business culture.

3. 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.

3.1.1.2. Service Types in AIS

Based on the review of country and regional AIS across Europe this section and the following sub-sections describe the AIS with regard to the following key parameters:

- The types of services present in each AIS by country;
- The target groups for whom access information is provided (listed by disability and other access needs);
- The reliability factors concerning accessibility measurement techniques used for data collection; and

[17] It may be noted that **all EU Member States** are signatories to the UN convention on the Rights of Persons with Disabilities (2007) and have or will have to revise their existing legislation in the matter of accessibility and equality and non-discrimination of persons with disabilities. However, legislation alone is not the only or sufficient driver of access improvements.

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

The 79 AIS that were clearly assignable to a single European country were assessed to determine whether accessibility information was present for 10 key accessible tourism services. (**NOTE:** Pan-European and International AIS were not included in this review as was not possible to obtain consistent country-by-country breakdowns of supplier types and numbers from cross-national AIS).

The services that could be identified reliably from the AIS were:

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

The total number of service types covered by all the 79 AIS was 399, giving an average of approximately 5 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 chart (Figure 5) shows the frequency of occurrence of accessibility information in all the AIS combined for the key services.

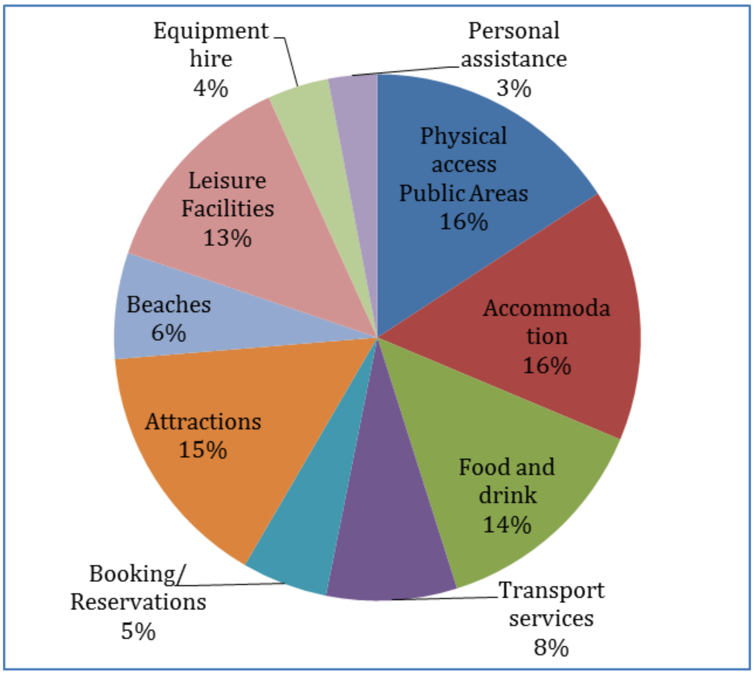


Figure 5: Frequency of accessible services information in 79 National and Regional AIS (%).

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, in 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.

Types of Disabilities and Access Needs Covered by AIS

The study has identified 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; and
- People accompanied by a service animal.

The overall coverage of customers with specific access needs in the 79 AIS is shown in the table and chart below:

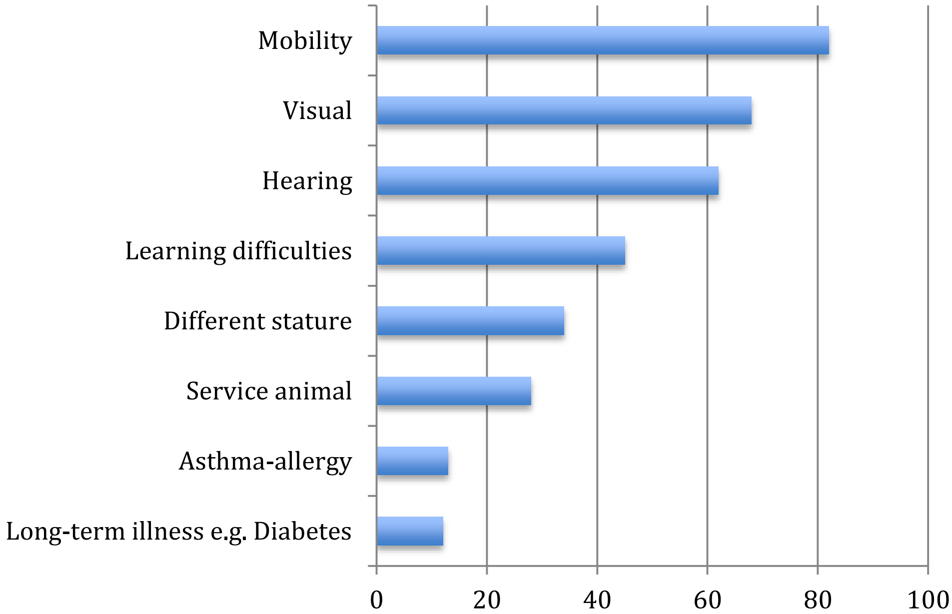


Figure 6: Frequencies of Types of Access Needs Covered by National and Regional AIS

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, 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.

3.1.1.3. Reliable Information

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"; and

- 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.

All AIS (79 out of 79) focus on presenting *data that incorporates user requirements*, that is relevant to visitors with specific access needs.[18]

Considering their overall reliability, it was found that **68 out of 79 schemes present *audited access data on their websites.*** A trained technician or expert in accessibility gathers this data. 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 79) use *legislated access criteria* as a basis for defining their access information and about one third (24) 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 79 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.

3.1.2. Mapping the Supply of Accessible Services and Facilities via Pantou.org and Third-Party Sources

The Pantou Directory was developed for the mapping study in order to provide a coherent and consistent method of gathering data on accessible suppliers and their respective services across Europe. Until now it has not been possible to aggregate and compare data on accessible services across regions and countries of Europe in a reliable manner, since the main data sources – Accessibility Information Schemes – gather their data in many different ways and present the results in a multiplicity of formats.

The Pantou Directory introduces a standardised nomenclature for tourism service types, **customer categories** (reflecting a variety of specific access requirements) and **cross-referencing to existing Accessibility Information Schemes,** together with **metadata standards for identifying the suppliers' locations and contact details.** These features provide, for the first time, the possibility of gathering harmonised data and producing more reliable analyses of the accessible services provided across all the EU Member States.

The Pantou database was populated by two methods:

1. Online registration by individual tourism suppliers at http://pantou.org

[18] This was a criterion for selection in the sample

2. Data collection from existing third-party databases of accessible suppliers (AIS) by matching relevant data fields to the Pantou database.

From the aggregated data collected and stored in the Pantou database over time, statistical analyses will be able to show comparative trends in the prevalence of services within Member States and the relative rates of supply, for example, related to the different customer categories.

In this section the accessible data collected using the Pantou data fields is used to demonstrate how services can be recorded, mapped and analysed. Overview of Total Number of Suppliers

The collected sample of suppliers spans across all EU-28 countries and includes a wide range of service types. The sources that have been registered according to the Pantou data fields and nomenclature are shown in **Table 3**.

As indicated, a total of **94,551 suppliers** have been recorded in this study and submitted as part of the deliverables, in an accompanying spreadsheet (delivered as a digital MS Excel file).

Table 3: Pantou Data Sources and Number of Suppliers

Pantou Data Sources (EU only)	No. of Suppliers
ACCESSIBILITY PASS	5
Accessible Portugal	140
Agencia Catalana de Turisme	22
ANGOLOGIRO	1
Barcelona-access.com	1
Barcelona, for accessible tourism	49
Catalan Tourist Board	299
Destination Germany - holidays for all (Barrierefreie)	330
DisabledGo	549
DisabledHolidays4U	1
Disway	1
Düsseldorf Marketing & Tourismus GmbH	70
Frankfurt Tourist+Congress Board	4
FREEDOM TO MOVE	1
Handistrict.com	8,225
HANDY SUPERABILE	1
Hotels.com	84,394
Jedemetaky (We are going too)	1
Like Home	6
Motivation Accessibility Map	2
NATIVE Hotels	1
OpenBritain	1
Pantou Access Statement	108
Portugal acessivel	2
Puedo Viajar	98
Scandic	21
Südtirol für alle	8
Tenerife Accesible SINPROMI	12

Pantou Data Sources (EU only)	No. of Suppliers
Toegankelijk Vlaanderen / Accessible Flanders	15
Tourism for All UK	5
Tourisme et Handicap	84
Travabled	1
Turismabile	1
Village for All	41
www.urlaubfueralle.at	50
TOTAL	**94,551**

With the registration of over 84,000 accessible suppliers from Hotels.com, the Pantou sample covers a broad sample of the accessible tourism sector in Europe, covering all Member States. The collected data is in a compatible form with the Pantou data model but not all the data is available at the Pantou client-facing website, since each supplier must first be contacted and give their consent for publishing.

A "Pantou Access Statement" was developed as an accessibility self-assessment tool for suppliers who are not part of an AIS. This is used particularly by suppliers in regions and countries where no AIS exists. The self-assessment questions and Access Statement template were developed from the earlier EU-funded project OSSATE, One-Stop-Shop for Accessible Tourism in Europe which has been used VisitBritain and other AIS to develop similar access auditing and information instruments.

A Note on Crowd-sourcing

Pantou was conceptualised as a crowd-sourcing platform that would attract the attention of suppliers by offering the added value of promoting their services via a unified, pan-European interface. This is a very valid and unique concept but one of the lessons learned during this study is related to the over-flow of tourism-related information resources and the barrier this creates for a new online service to gain visibility in a short period of time. Pantou requires time and considerable online advertising to establish itself as the one-stop-shop European accessible tourism search engine. It also needs to overcome the language barrier and become a multi-lingual service because most of the suppliers and tourists prefer to use their language in their business and searches (see also **Annex 6** for further comments on Methodology).

3.1.2.1. Breakdown of Pantou Registered Suppliers and Services in EU-28

Table 4: Pantou Registered Suppliers and Services in EU Member States

Country	Total No. of Suppliers	Sum of Services
Lithuania	83	155
Estonia	123	198
Romania	179	310
Latvia	193	284
Bulgaria	234	463
Luxembourg	255	471
Slovakia	301	585
Malta	373	690
Slovenia	424	783
Finland	482	942
Hungary	974	1,790

Country	Total No. of Suppliers	Sum of Services
Croatia	1,018	1,590
Denmark	1,059	1,656
Cyprus	1,137	1,991
Czech Republic	1,670	2,829
Ireland	1,972	3,689
Belgium	2,256	3,774
Austria	2,394	4,176
Sweden	2,508	4,492
Poland	2,564	4,360
Greece	3,220	4,774
Netherlands	4,137	6,830
Portugal	4,259	7,026
Germany	5,038	8,439
United Kingdom	8,654	15,916
Italy	13,880	20,644
Spain	14,630	23,358
France	20,534	24,545
Totals	**94,551**	**146,760**

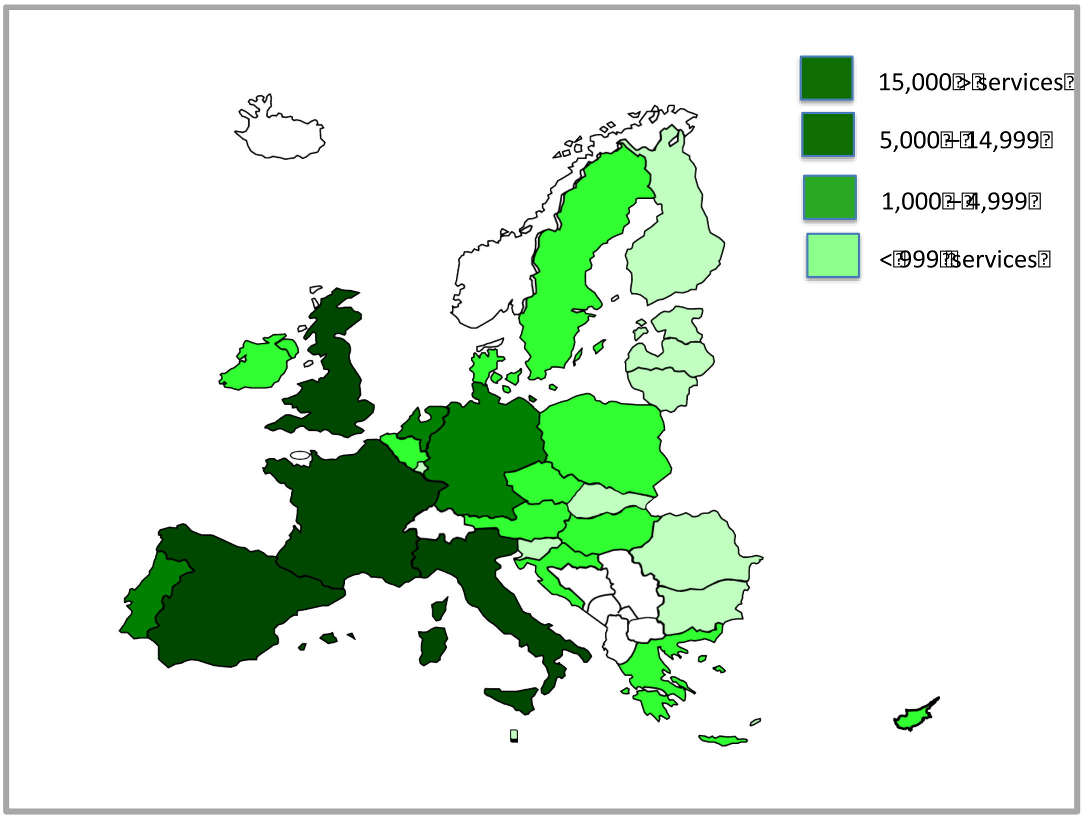
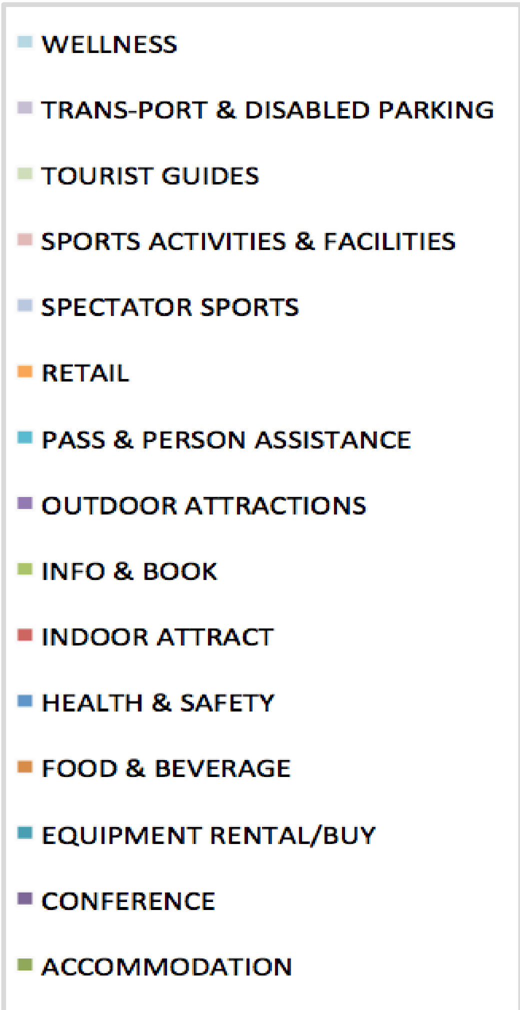


Figure 7: Map: Accessible Tourism Services in Europe (Pantou Data)

Figure 8 shows the distribution of services by country (EU-28) based on Pantou data. Each type of service is aggregated to indicate totals. In the top range, the leading countries are France, Spain, Italy and UK, with 15,000-25,000 services, while the second group of countries (with 5,000-14,999 services) includes Germany, Portugal, the Netherlands. Eleven countries have between 1,000 and 5,000 services and ten countries have under 1,000 Pantou-registered accessible services. Actual figures *per Member State per Service* cannot be presented in this report's format but can be found in the accompanying Excel spreadsheet file titled: **euts-merged-totals-and-graphs-final.xlsx.** Within this Excel file, larger versions of the figures below can also be found for better readability.

Figure 8, below, shows the incidence of total accessible services per EU Member State, based on data in the Excel spreadsheet referred to above.

The stacked bar chart represents the services as shown in the following legend.



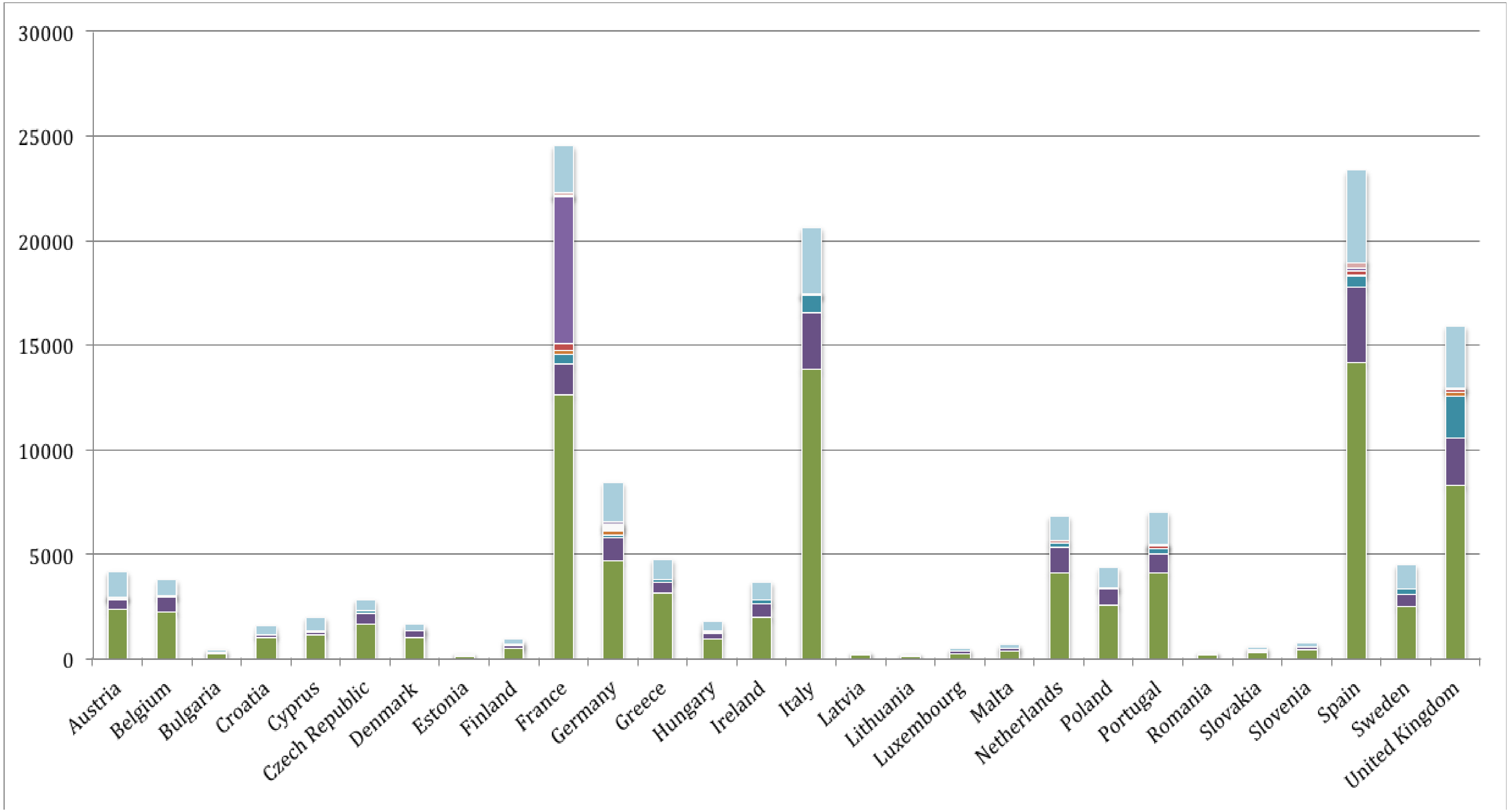


Figure 8: **Bar chart: Accessible Services by Country based on Pantou Data**

Figure 9 shows the same numbers unstacked. It indicates that most accessible services are in the category **accommodation** while there are several **conferencing facilities** and **wellness** services which, in most cases, are combined services offered by hotels.

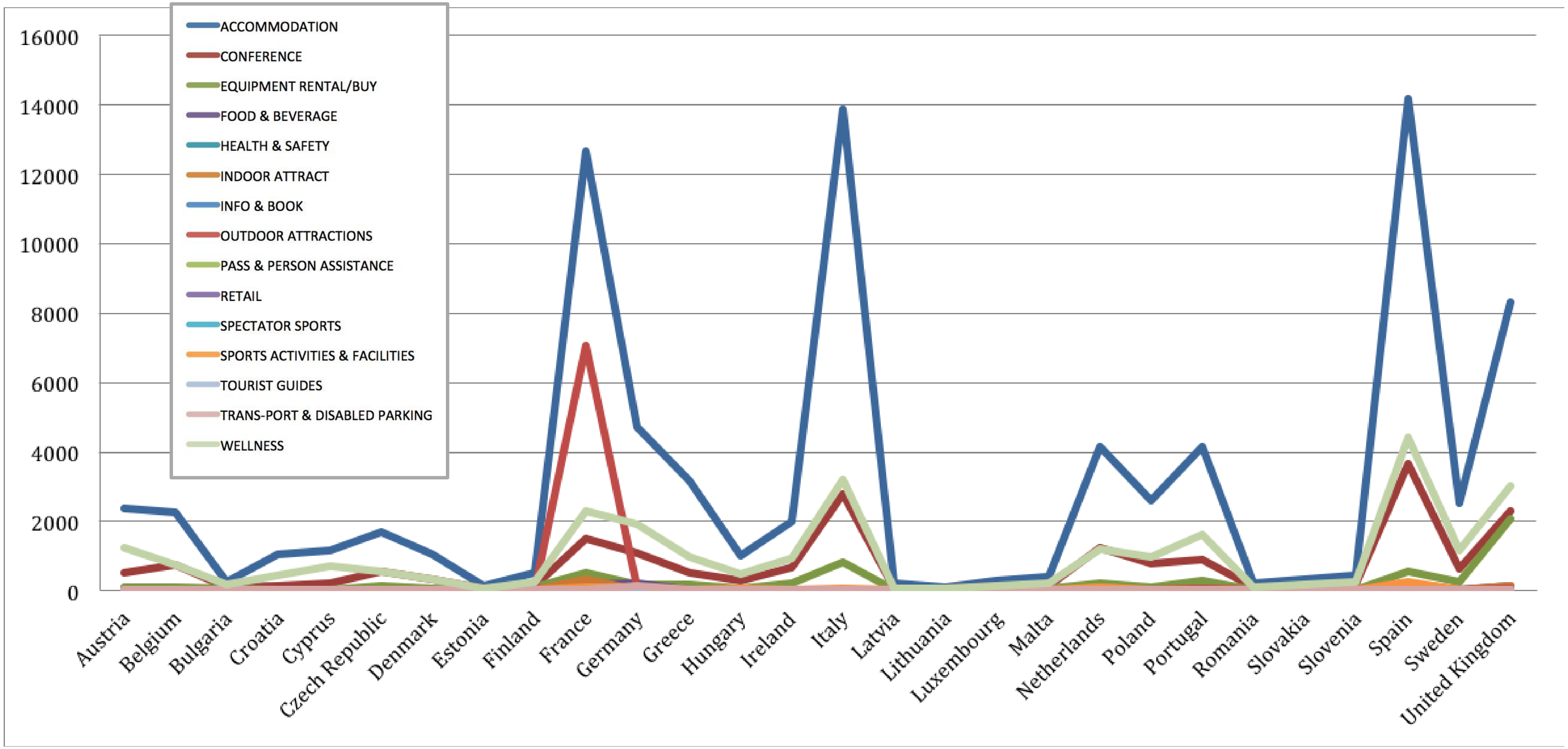


Figure 9: Line chart: Service Distribution by Country based on Pantou data

3.1.2.2. Overview of Suppliers by Type of Service

Figure 10 and **Figure 10** depict the distribution of service types of the collected suppliers.

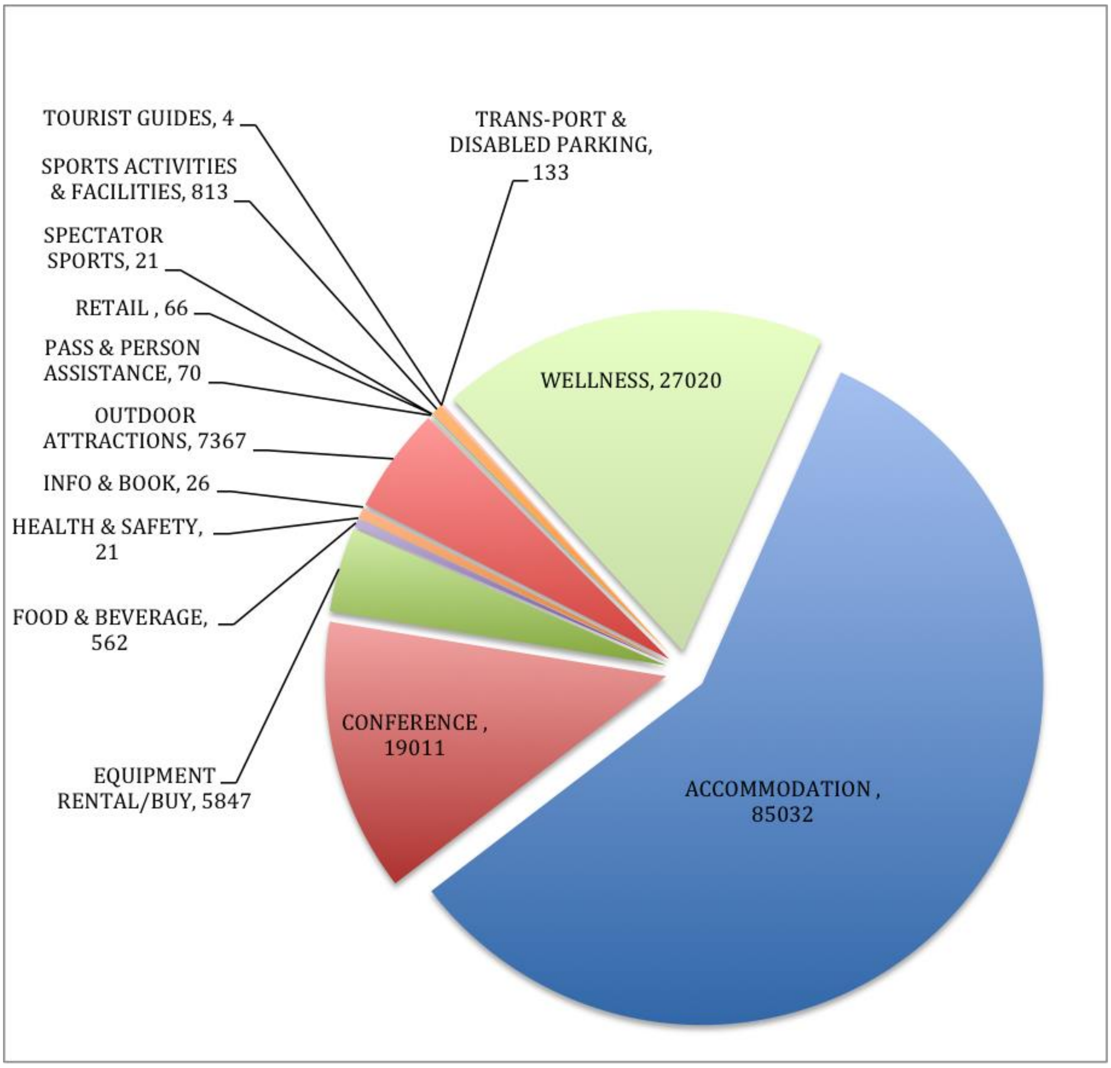


Figure 10: Services Distribution - pie chart, absolute numbers, Pantou data

The majority of services offered are the various types of accommodation while wellness and conference services are followed by outdoor attractions and equipment rental/buy. Conference and wellness services are, in several cases, offered in combination with accommodation, from medium to large-sized hotels.

Figure 11 and **Figure 12** show the frequency of services in a bar chart and pie diagram, with absolute numbers and percentages. Here it is evident that accessible services such as accessible tourist guides, transport & disabled parking, spectator sports, retail, health and safety and passenger and personal assistance are very limited in the Pantou sample. These services also feature less frequently in the published AIS, as described in the previous section.

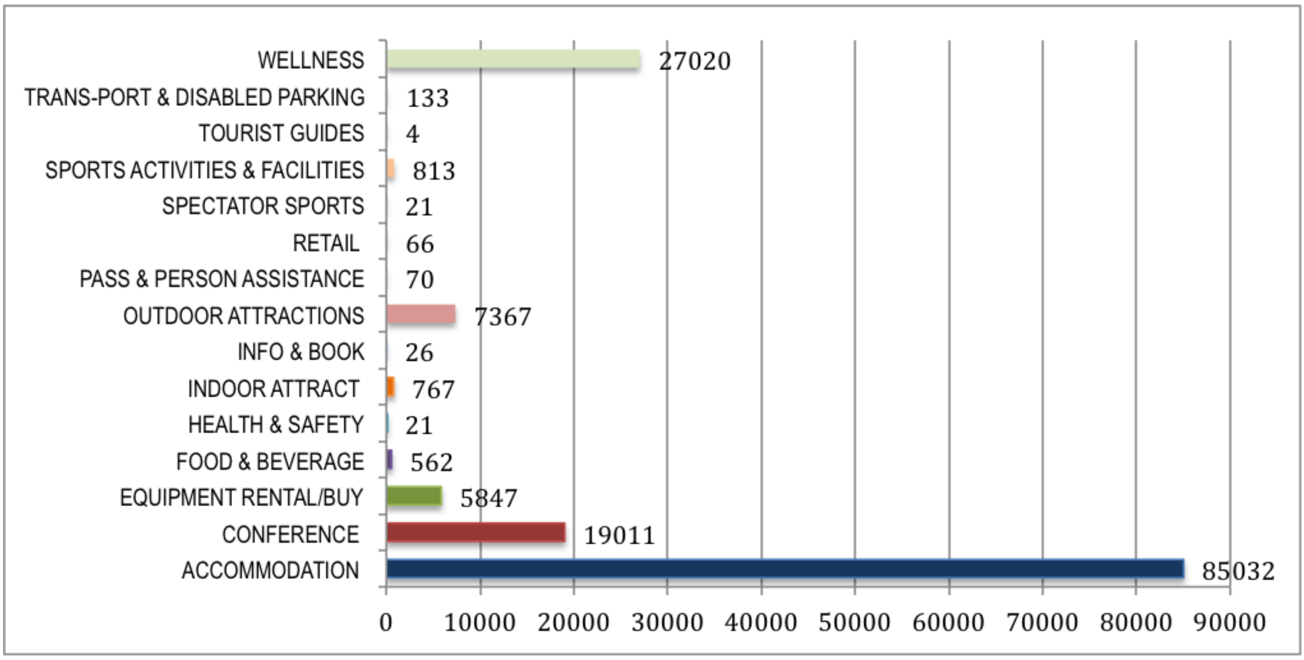


Figure 11: Services Distribution – bar chart, Pantou data

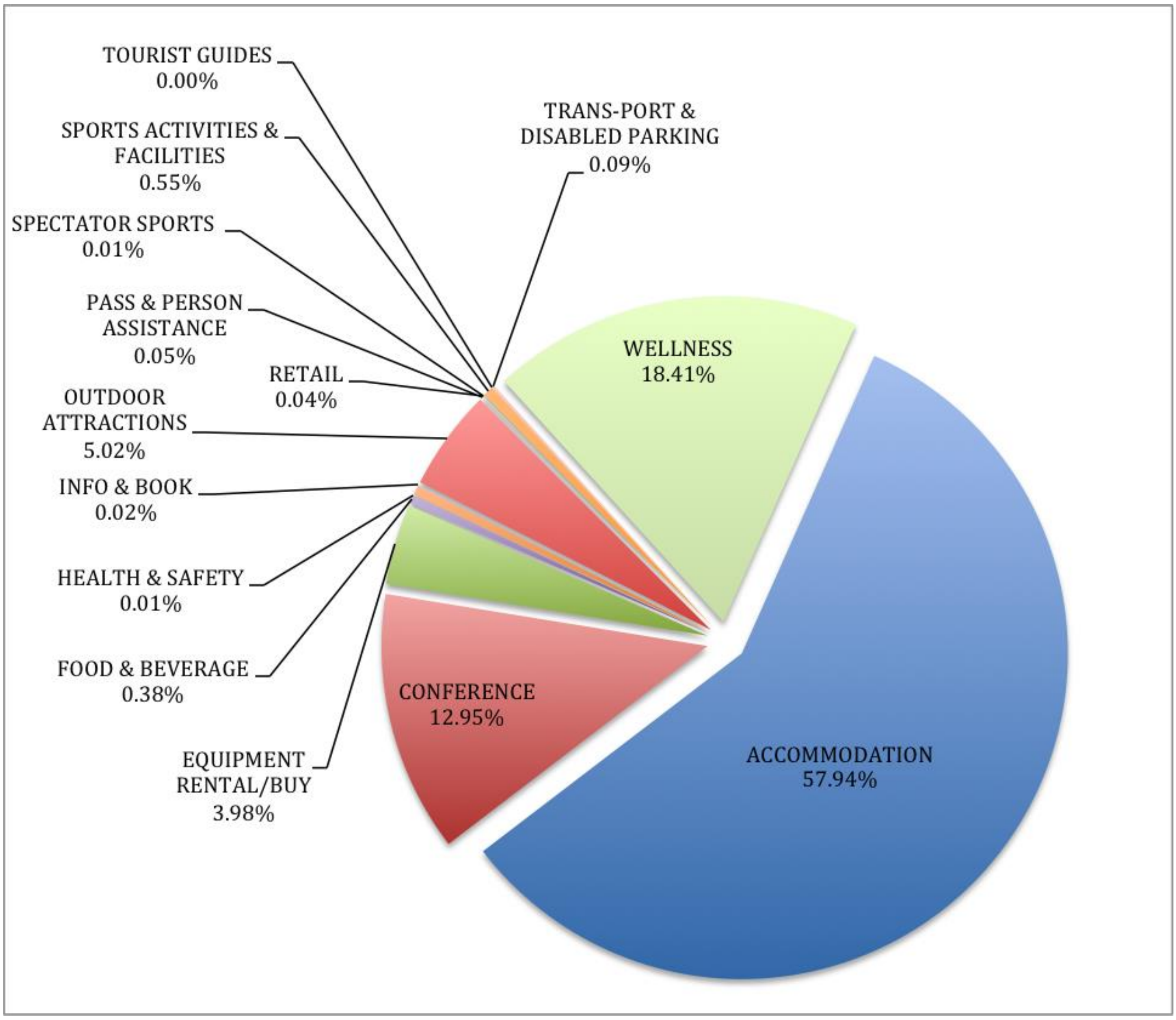


Figure 12: Services Distribution – pie chart, percentages Pantou data

3.1.2.3. Overview of Suppliers by Customer Type

Table 5 shows which customers' needs are being addressed by supplied services in each EU Member State, based on the Pantou data set.

The embedded blue bars indicate cells where there are higher values. People with mobility impairments, including wheelchair users, are the most widely addressed groups.

It should be noted that the absence of information, in many cases, may not necessarily imply that the respective groups will not be adequately serviced by accessibility conscious suppliers. In cases which may not require physical infrastructure-based facilities, specific groups' needs may be serviced on customer request, sometimes called "soft" access requirements (e.g. preparation of special meals for people with allergies, child-minding facilities and so forth).

On the other hand, there can be reduced supplier awareness of the less visible types of disabilities. Customers who require physical accessibility provisions (ramps, accessible toilets etc.) are the most widely addressed and mobility impairment is what most suppliers understand by the term accessibility. Given the diversity of customer groups and needs this understanding may lead to misconceptions and deter the provision of accessible services to the other, less known groups.

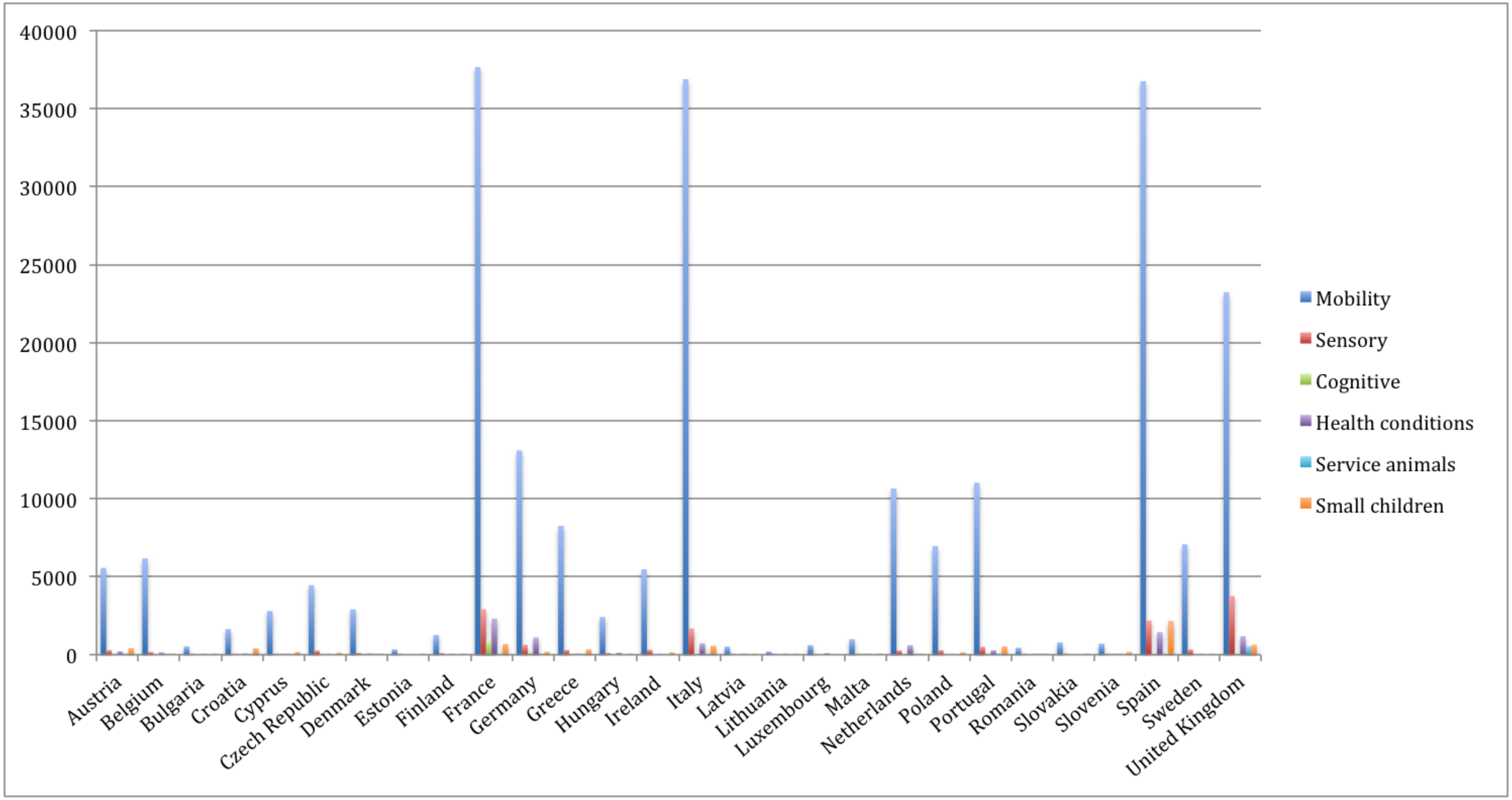
Table 5: Supplier Services by Type of Disability Served per Country

Country	People with motor impairments	People who use a wheelchair	People of very large or small stature	People who are deaf or have hearing impairments	People without speech or with speech impairments	People who are blind or have vision impairments	People with learning difficulties, autism, other cognitive and developmental impairments	People with allergy or asthma or requiring special diets	People with long-term health problems (e.g. respiratory and circulatory conditions or invisible disabilities)	People who are frail, lacking in strength or stamina	People who use any kind of technical assistive devices	People with service animals	People requiring personal assistance (non-medical care/support)	Small Children
Austria	2013	2015	1533	111	18	173	24	20	16	81	13	1	82	421
Belgium	2190	2195	1791	95	6	77	5	5	8	65	3	4	68	13
Bulgaria	189	190	151	24	0	10	0	1	0	3	0	0	2	74
Croatia	625	625	393	22	2	42	1	0	1	41	0	1	41	415
Cyprus	1077	1079	646	14	2	34	2	2	1	2	3	2	1	170
Czech Republic	1572	1573	1311	130	3	136	3	1	0	10	0	0	13	129
Denmark	1040	1020	849	31	23	60	23	1	23	15	2	2	37	20
Estonia	122	123	95	4	0	4	0	0	0	0	0	0	0	8
Finland	475	475	319	91	0	8	0	0	0	9	0	0	9	4
France	12931	12943	11790	1437	63	1412	872	66	31	1686	32	38	498	685
Germany	4806	4795	3493	228	116	292	107	100	263	283	121	78	345	191
Greece	3004	3015	2241	171	13	126	14	13	11	22	7	8	19	348
Hungary	863	863	685	52	0	56	0	0	0	64	0	0	64	67
Ireland	1938	1937	1603	192	0	133	0	0	0	4	0	0	3	153
Italy	13298	13316	10277	805	12	861	16	31	12	334	11	39	344	583
Latvia	188	188	144	12	0	3	0	0	0	5	0	0	5	4
Lithuania	72	72	57	9	0	7	0	0	0	9	0	0	9	3
Luxembourg	215	215	184	0	0	0	0	0	0	48	0	0	48	0
Malta	367	367	259	25	1	43	1	0	1	0	0	0	0	72
Netherlands	3860	3863	2938	201	2	74	2	2	2	302	2	2	302	57
Poland	2504	2504	1956	96	0	202	1	0	0	29	0	0	29	150
Portugal	3945	3949	3131	288	5	220	6	6	1	67	140	2	68	536
Romania	168	170	112	12	1	9	0	0	1	4	1	1	3	15
Slovakia	283	283	218	42	0	30	0	0	0	0	0	0	0	22
Slovenia	280	281	146	2	2	5	2	2	0	0	2	4	3	181
Spain	13110	13127	10530	715	165	1311	44	17	40	490	252	70	652	2161
Sweden	2488	2488	2103	249	0	92	0	0	0	13	0	0	13	5
United Kingdom	8276	8278	6684	2292	28	1437	15	18	14	238	353	555	560	650
	81899	81949	65639	7350	462	6857	1138	285	425	3824	942	807	3218	7137

Note: Pantou data, tables and charts produced for this study are provided in the Excel file referred to above entitled: **euts-merged-totals-and-graphs-final.xlsx.**

By aggregating the above data across the main disability/needs categories, the following chart, Figure 13**,** shows the frequencies of services provided under the headings: Mobility, Sensory, Cognitive impairments, Health conditions, Service animals and Small children.

Figure 13 Supplier Services by Types of Disabilities Catered for by EU Member State

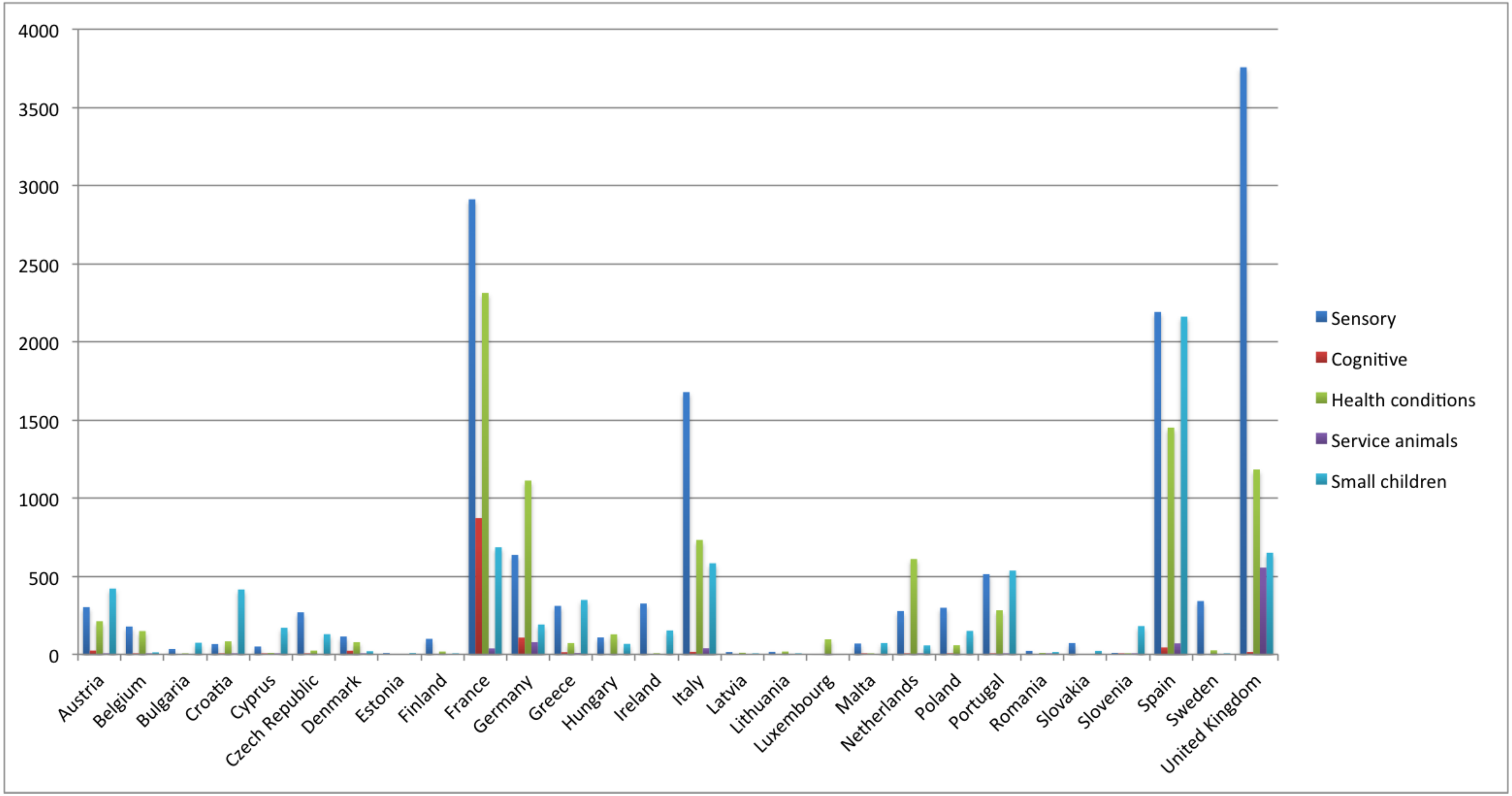


NOTE aggregated categories: **Mobility** = sum of (Motor impairments + Wheelchair users +Large/small stature). **Sensory** = sum of (Hearing + Speech + Vision impaired). **Health conditions** = sum of (Allergy, Long-term health problems, Frail, users of technical devices).

As the above chart shows, in the Pantou sample, **people with mobility impairments are catered for 10 and even 20 times more often than, for example, people with sensory impairments.** Services for people with cognitive disabilities, health conditions, service animals and small children are catered for even less frequently, on the whole.

For greater clarity Figure 14, below, shows an expanded view of the above chart, with the data for *Mobility Impairment* removed. The large differential between provisions for different types of disabilities is apparent, with extremely low incidence of services for people with cognitive impairments, visitors with service animals and parents or groups with small children.

Figure 14 Supplier Services by Types of Disabilities, EU Member States, with Mobility Data Removed



3.2. Share of Accessible Tourism Services and Facilities across Europe in the Tourism Sector

One of the key tasks of this study involves quantifying, as accurately and as widely as possible, the existing stock of accessible tourism services, and comparing it to the overall supply of tourism services.

It has been estimated that about 3.4 million enterprises were active in the EU tourism industry in 2010[19]. These enterprises accounted for 11 % of the persons employed in the non-financial business economy and 29 % of persons employed in the services sector. In addition, more than one in two enterprises in the tourism industries operated in the accommodation or food and beverage serving sector. Italy hosts the largest number of tourism companies in the EU-27. According to Eurostat data, 56 % of all tourism-related enterprises are located in four Member States: Italy (561 319 enterprises), Spain (473 932 enterprises), France (438 861 enterprises) and Germany (426 330 enterprises).

The mapping exercise conducted as part of this study has uncovered 313,286 accessible tourism services across the EU Member States (EU-28). As shown in Section 3, existing Accessibility Information Schemes list 224,036 accessible facilities and services. This is complemented with the Pantou Directory gathering 89,250 additional accessible services[20].

While the study found that the aggregation of services published in the AIS, together with Pantou, provides the best available estimate of the supply of accessible tourism services across Europe there are conceptual and methodological caveats that need to be considered

First, assessing the overall number of accessible tourism services across the EU is directly linked to the concept of "accessibility". This leads to a number of limitations that need to be taken into account when interpreting the robustness of the above figures.

1. **Accessibility in practice is highly dependent on the specific needs of the individual tourists.** Individuals with the same *formal access requirements* may have different needs and capabilities. For instance, individuals using wheelchairs may have varying requirements depending on the type of wheelchair used (e.g. electric or manual wheelchair). This means that a service or facility which is suitable for some customers with sensory, mobility or intellectual disabilities may not be accessible for all who are in the same "category". Generally, it is found that the higher degree of accessibility requirement, the less services may be available.
2. **Accessibility provisions often do not adopt a cross-impairment perspective.** For instance, a restaurant may provide a gluten-free menu or menus available in Braille. At the same time, there may be physical barriers which makes the restaurant inaccessible for individuals with mobility impairments.
3. **Some access barriers may be overcome with the assistance of staff or temporary solutions**, for instance, help with reading the menu or providing temporary ramps. Thus, the question arises whether these services (e.g. made accessible through

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[19] Data from Eurostat: http://ec.europa.eu/eurostat/statistics-explained/index.php/Tourism_industries_-_economic_analysis; A 2009 study on the competitiveness of the tourism industry found that the tourism industry is very complex with a highly fragmented value chain which is difficult to size. http://ec.europa.eu/enterprise/sectors/tourism/files/studies/competitiveness/study_on_tourism_competitiveness_2009_en.pdf

[20] The Pantou database has been scanned to control for double-entries. However, there may still be a small number of services that have been counted twice. See Annex 6 for more information on the data collection process.

the application of the appropriate staff skills or temporary measures) should be legitimately considered accessible.

4. **Many businesses equate accessibility with physical access or wheelchair accessibility**. The parallel study[21] carried by the European Commission on training and skills confirmed that mainstream businesses are generally unaware of the holistic concept of accessibility. Thus, there may be a large number of enterprises that provide some level of accessibility, but would not consider themselves accessible nor would they advertise as such.

5. **There seems to be a discrepancy in regards to user experiences and business perceptions of accessibility.** Business that advertise accessibility may not prove to be accessible in practice or unsuitable for the particular needs of individual tourists. This is the main reason why information on accessibility is important in order for tourists themselves to judge whether a service or facility is appropriate for them.

In addition to these conceptual issues, there are also methodological caveats in relation to estimates on the supply of accessible services.

1. Not all accessible services are captured by AIS or by Pantou which suggests that the study provides a conservative estimate of the number of accessible services. The accuracy of the estimate provided by Pantou will increase over time as more businesses register their services as accessible with the website.

2. Despite efforts to identify and eliminate double counting, there may be some services which are present in both Pantou and the AIS considered in the study. The ability to provide a "best available" figure on the share of tourism services that offer at least some level of accessibility is one of the major values of continuing to develop Pantou beyond the duration of this study contract.

3. There is variation in terms of the standards applied across the different AIS considered in the study. For the purpose of this study, all suppliers listed in national AIS are considered valid insofar as the schemes apply explicit accessibility norms, even though these norms are not standardised across the tourism sector and certain categories of disabilities and user requirements are not considered in some AIS.

Keeping in mind the above methodological and conceptual caveats, **the study finds that accessible tourism services constitute approximately 9.2% of the overall supply of tourism services[22]**.

While this study has focused on the supply of accessible services, the potential demand for such services has been estimated in a parallel study[23] with the following key conclusions:

- There are around 55 million tourists with access needs with a propensity to travel in the EU-28[24] (estimates are based on 2012 figures).

[21] European Commission. (2014). "Mapping of Training and Skills Needs to Improve Accessibility in Tourism Services": http://ec.europa.eu/DocsRoom/documents/5568/attachments/1/translations/en/renditions/native

[22] This estimation is based on the share of 313,591 accessible services found in the mapping of the 3.4 million active enterprises in the tourism sector.

[23] European Commission. (2013). "Economic Impact and Travel Patterns of Accessible Tourism in Europe". http://ec.europa.eu/DocsRoom/documents/5566/attachments/1/translations/en/renditions/native

[24] This figure is calculated based on the estimated accessibility market and the propensity to travel. See further: European Commission (2013).

- Demand for overnight trips for the accessible tourism sector was estimated to close to 390 million trips[25]. This includes demand from tourists with some type of disability as well as senior travellers.
- Based on figures from 2012[26], 260 million Europeans[27] travelled for leisure taking over 1 billion trips[28].

Taking these estimates as a starting point suggests that **demand for accessible services may be as high as 37% of the total travel market estimated in number of trips.**

Contrasting this figure with the estimated supply of 9.2% of services catering to tourists with access needs suggests that **today there is a significant gap in the supply of accessible services of 27.8 percentage points**.

Furthermore, it is likely that the gap between the provision of accessible services and demand for such services will increase further over the coming years. According to the parallel demand study, expected future demand for accessible services will be at least 24.2% higher in 2020 than it is today.[29] In the absence of any changes in the supply of accessible services at least an **additional 1.2 million tourism enterprises will need to provide accessible services to meet future demand**.

Taking these figures into account, it is clear that there is a strong rationale for targeted action, from various levels, to help businesses to provide more accessible services. Indeed, this is one of the key factors to consider with respect to the European Commission's priorities of sustaining Europe as the premier tourist destination in the world. These considerations are further discussed in detail in section 6 of this report.

3.3. Key Findings of Mapping the Supply of Accessible Tourism Services

- **In total, the study has identified 313,366 suppliers of accessible services in EU Member States.** Of these, 224,036 suppliers were identified by aggregating supplier data from 79 Accessibility Information Schemes (AISs) based in the EU-28 Member States.
- The Pantou data collection system registered 94,551 accessible tourism suppliers, of which 5,301 were already present in national or regional Accessibility Information Schemes. Subtracting the 5,301 "doubles", the net total of Pantou suppliers is 89,250.
- Adding the number of AIS suppliers and Pantou suppliers together gives the total figure of: 224,116 (AIS) + 89,250 (Pantou) = 313,286 suppliers.
- All countries are represented in the total count but, as expected, those with higher population and that are most visited by tourists offer the greater number of accessible services.

[25] 169,656,000 million trips for tourists with disabilities and 217,586,000 million trips for senior tourists. See further: http://ec.europa.eu/DocsRoom/documents/5566/attachments/1/translations/en/renditions/native
[26] Figures derived from Eurostat: http://ec.europa.eu/eurostat/statistics-explained/index.php/Tourism_statistics_-_characteristics_of_tourism_trips
[27] 259 259 million Europeans (EU-28) made at least one tourism trip for personal purpose (with an overnight stay). Data derived from Eurostat: http://ec.europa.eu/eurostat/statistics-explained/index.php/Tourism_statistics_-_top_destinations
[28] Total of 1 036 million trips. This figure includes domestic, EU and International travel.
[29] This figure is based on the most conservative demand forecast in the recent European Commission study: http://ec.europa.eu/DocsRoom/documents/5566/attachments/1/translations/en/renditions/native

- Only 4 EU Member States appear not to have any AIS scheme: Bulgaria, Lithuania, Hungary and Slovakia.

- In addition to the 79 AIS in the EU, other AIS were identified in the study, 7 of which have a European scope and 11 International, making a total of 96 AIS.

- 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.

- 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 majority of AIS that were identified present audited access data on their websites; less than one third of schemes use legislated access criteria as a basis for defining their access information and about one third use self-assessed data and Access Statements. Objective measurements of access conditions, such as measurements of the height of steps, internal dimensions of lifts and door-openings, are provided in two thirds of AIS websites.

- At least 9.2% of the total supply of tourism facilities and services offer some level of accessibility. This number is based on the mapping exercise conducted through the study compared to the overall supply of tourism enterprises. This means that over 3 million tourism businesses are not prepared to adequately cater to the accessibility market.

- There is an estimated 27.8% gap between the current supply and demand for accessible tourism services. By 2020, an additional 1.2 million enterprises need to provide accessible services in order to accommodate the lowest forecasted demand. Thus, there is a strong rationale for targeted action, from various levels, to help businesses to provide more accessible services.

- The mapping of services shows that accessible tourism provisions are not evenly distributed across the different tourism sectors. Proportionally, the greatest number of accessible services can be found in the *accommodation sector*, where "accessible rooms" are mandatory in at least the higher hotel categories in most – but not all - EU Member States. Next, in terms of accessible provisions, come *tourist attractions* and *leisure establishments*, followed by the *food and drink* sector (restaurants, cafes, bars and pubs). Meanwhile, *accessible travel information* and *accessible booking services* are relatively infrequent, thus creating an additional barrier to those who seek accessible tourism and travel possibilities.

- The variable pattern of accessible provisions across the different tourism sectors is further substantiated by the analysis of the Accessibility Information Schemes, referred to above. The study showed that the most prevalent accessibility information in AIS relates to *Tourist Attractions* (- addressed by 22% of schemes), *Physical access to public areas* (16% of schemes), *Tourist Accommodation* (16% of schemes), *Food and drink establishments* (16% of schemes) and *Leisure Facilities* (14%). Those sectors that are least represented in AIS are *Transport services* (in 8% of schemes), *Booking/ Reservations* (5% of schemes), *Equipment hire* (4%) and *Personal assistance* (3%). It should be noted that service levels across the different tourism sectors can vary widely both within and between countries, cities and regions. For example, *wheelchair accessible taxis* can be difficult for tourists to find in most European countries but individual countries (such as Spain) or cities (such as London) are exceptions, with better service levels. In the case of Spain this is largely due to the long-running national taxi adaptation programme, "Eurotaxi", co-funded by the State and the

ONCE Foundation; whereas in London the ubiquitous “black cab” or London taxi has been modified to make it wheelchair accessible, (and with high visibility support handles and other design features) giving a high level of accessibility for all customers.

4. Performance Levels in the Supply of Accessible Tourism Services and Facilities

This section of the report answers all research questions related to the performance of the current supply of accessible tourism services and facilities, both from the point of consumers and industry. It draws on a wide range of data including an online survey of travellers, an online survey of industry, desk research, case studies as well as several workshops with experts in the field of disability and accessible tourism. These experts were consulted through a physical workshop held in Blankenberge. Further information on the methodological approach to this research is available in Annex 5.

Before examining performance levels in more detail it should be noted that the accessible tourism market spans a wide range of needs from people with minor impairments to severe disabilities. At one end of the spectrum there are the "niche" suppliers who serve visitors with very specific requirements e.g. holidays for adults with severe learning difficulties, families with an autistic child, or special tours for the hearing or the vision impaired. It is important to recognise this market and the fact that there will always be a requirement for this. At the other end is the "mainstream" supply in which every person should enjoy suitable surroundings, facilities services and offers, even if they may have slight or temporary access needs. These different types of businesses offer quite different services and they are likely to have very different perceptions on the barriers associated with becoming more accessible. The online survey differentiated between Group 1 - niche businesses catering exclusively to the accessibility market and Group 2 - mainstream suppliers with some accessibility provisions. As a result, the analysis differentiates these two groups where possible throughout the text[30].

4.1. Effectiveness of Current Supply of Accessible Tourism Services

Effectiveness in this study is defined as the extent to which the available supply of accessible services matches the specific needs of tourists. There are two key elements to effectiveness of the current supply.

1 The existing accessible tourism supply needs to be pervasive and sufficiently varied to cater to the multiple needs of tourists with accessibility needs. This means, for instance, that the supply should not focus on specific impairments but adopt a **cross-impairment approach** and that it should be flexible in that suppliers are able to adapt their offer taking into account the needs of their customers.

2 The existing supply needs to be **integrated across the supply chain**. It is not sufficient for accessible services to be available. Rather it is important that the different service providers "talk" to each other to provide an integrated accessible experience to customers throughout the visitor journey (from booking to trip to accommodation and subsistence to other services (entertainment, leisure, sights, transport, etc.) in the destination.

[30] The online survey as well as information on the response rate and distribution is available in Annex 6. Please note that for each question there were a different number of responses since not all businesses answered all the questions.

Section 3 has shown the distribution of accessible services across Europe based on the most extensive mapping exercise for such services ever carried out in Europe. The maps also indicate where providers are able to cater to different accessibility needs. Two elements stand out:

- There are **significant gaps with regard to the pervasiveness of accessible service supply across Member States.** Gaps in accessible service provision in this regard have been described at length in Section 3 of this report.
- Equally worryingly and perhaps more importantly from the point of effectiveness, the majority of service providers covered in accessibility information schemes and/or registered in Pantou **cater to specific needs without, however, adopting a cross-impairment approach**.
- Finally, the mapping exercise through Pantou and AIS, as well as case studies and surveys with suppliers confirm that there is **very little integration of accessible services** across the supply chain in the vast majority of locations.

4.2. Lack of a Cross-Impairment Approach

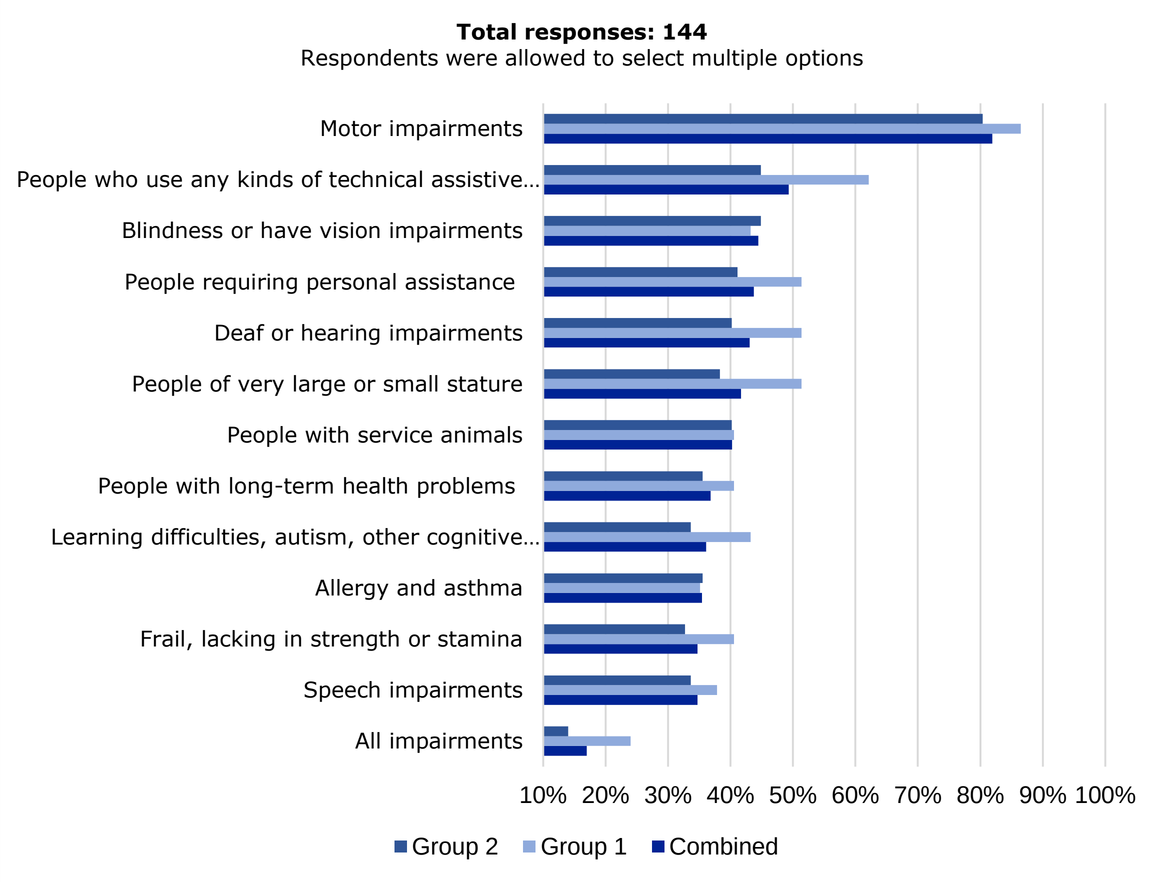
The evidence of the Case Studies AIS review and Pantou data analysis all indicate that **the majority of suppliers of accessible services focus on a limited number of customer groups and have not adopted a cross-impairments approach to their business**. This means for instance that when making adaptations to the business, suppliers tend to focus on specific impairments, e.g. blindness or wheelchair access, rather than analysing the service they provide from a holistic accessibility perspective. This is shown, for example in the Accessibility Information Schemes, where 78 out of 79 schemes in EU member states (or 99%), provide information on accessible services for *people with mobility impairments*, other disabilities were covered much less frequently. Information provision in AIS for other disability groups was as follows, (in descending order of frequency):

- Information for people with hearing impairments: present in 62 schemes (78%);
- Information for people with visual impairments: present in 68 schemes (86%);
- Information for people with learning difficulties: present in 45 schemes (56%);
- Information for people of very large or small stature: present in 33 schemes (42%);
- Information for people accompanied by a service animal: present in 28 schemes (35%);
- Information for people with asthma-allergy: present in 13 schemes (16%); and
- Information for people with long-term illness e.g. diabetes: present in 12 schemes (15%)

This is confirmed by results of the survey of tourism industry suppliers conducted as part of this project which found that **only 17% of all industry respondents that have some provisions for accessible tourism (group 2) report that they cater to all disabilities**[31]. At the same time, among businesses that are specialised in accessible tourism (group 1), close to one-quarter of respondents stated that they have provisions for all disabilities.

[31] Group 1 & 2- See **Figure 14** (note) and **Annex 6** for details on the definition of the groups

Motor impairments, including those with difficulties walking and wheelchair users, are best covered across all businesses with at least some accessibility provision, with 82% of respondents stating that they provide services to these tourists (group 1 - see figure below). Overall businesses that specialise in accessible services (group 2) provide a more diverse range of accessibility requirements than businesses that only have some accessible provision. The least covered disabilities include speech impairments across both groups.



Note: Group 1 = businesses which cater exclusively or mostly to the accessibility market; Group 2 = businesses which cater to everyone including (some or complete) provisions for accessible tourism

Figure 15: Access Requirements Catered For (Suppliers' survey)

For any other accessibility requirements, such as hearing and vision impairments, those with long-term illnesses, those with learning difficulties and those using service animals or requiring personal assistance, **less than half of businesses with some accessibility provisions stated that they cater to tourists with these disabilities**. Although the survey sample size is not very large, it signals that there is a lack of "mainstream" businesses providing services to tourists with access needs beyond motor impairments.

A good example of this impairment specific approach is the Hotel Stars Union[32] which covers the accommodation sector across the following countries: Austria, Belgium, Czech Republic, Denmark, Estonia, Germany, Greece, Hungary, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Sweden and Switzerland. This partnership harmonises quality criteria for hotels and awards stars which are checked regularly and developed further according to the expectations of the guests. The table below shows the list of criteria pertaining to facilities for disabled persons.

[32] http://www.hotelstars.eu/index.php?id=about_us

Area	No.	Criterion	Points	★	★★	★★★	★★★★	★★★★★
Facilities for disabled persons	20	Barrier-free – Category A[9]	5					
	21	Barrier-free – Category B[10]	8					
	22	Barrier-free – Category C[11]	5					
	23	Barrier-free – Category D[12]	5					
	24	Complete barrier-free – Category E[13]	5					

Notes (9): Disabled persons who are partially dependent on a motorized wheelchair or an assistance; (10) Persons with walking disabilities and who permanently need a wheelchair; (11) Blind or visually handicapped persons; (12) Persons who are suffering under numbness or rare visually handicapped [sic]; (13) Matching categories B, C, and D

Figure 16: Hotel Stars Union Criteria (Extract)

In all cases, the precise requirements in each country are **based on an agreement with the national associations for the interests of disabled persons**. While this is a laudable approach it means, effectively, that there is no uniform standard or single set of accessibility criteria under the Hotel Stars system. Furthermore, there is no requirement for hotels to provide accessibility information for guests with disabilities in the Hotel Stars system.

Similarly, for example, the Danish HORESTA association specifies 10 criteria for accessibility based on different impairments in its points system. Only **three out of the 10 criteria can be considered to adopt a cross-impairment approach** ("hotel is marked for accessibility", "availability of systematic staff training", "signs in Danish and at least one foreign language").

#	Description	Points	Stars
250	Accessible for wheelchair users* **	3	
251	Accessible for persons with leg, arm or hand disabilities* **	3	
252	Accessible for visually impaired persons* **	2	
253	Accessible for hearing disabled persons* **	1	
254	Accessible for persons with asthma and allergies* **	2	
255	Accessible for persons with development dis-abilities* **	1	
256	Accessible for people with reading difficulties* **	1	
257	The hotel is marked for accessibility	3	
258	The hotel is working systematically to train staff in first aid	5	
259	Signs and relevant instructions regarding the facilities shall be available in Danish and in at least one major foreign language	1	

Notes: (*) Refers to minimum requirements for accessibility to existing buildings in accordance with the rules of the scheme for accessibility [www.godadgang.dk]. The scheme has been developed by Dansk Standard and approved by both the disability organizations and tourism industry players including HORESTA. The Danish Accessibility Association manages the scheme. Criterion number 8 is omitted if criteria 1-7 are included. Every category is given points, although a maximum of 5 points (overall) can be awarded. (**) The hotel can obtain a maximum number of 7 points for the various accessibility criteria.

Figure 17: Danish HORESTA criteria for Hotel Accessibility (Extract)

4.3. Lack of Integration Across the Supply Chain

The second element of effectiveness relates to the integration of accessible provision along the supply chain. Indeed, as is pointed out elsewhere in this report **overall accessibility of the tourism sector depends not just on the action of individual businesses but on the accessibility of the entire supply chain that makes up the visitor journey.** An effective supply chain, from the perspective of accessibility, allows visitors to seamlessly cut across different service providers along the visitor journey without facing obstacles to accessibility. This requires that individual providers in the same sector as well as providers across sectors coordinate their action to ensure an accessible experience.

In addition to the Pantou data presented in section 3 above, the industry survey also confirms that there is **very little coordination and integration of accessible tourism service provision across the supply chain**. For instance, only 28% of suppliers with at least some accessibility provisions (group 2) and only 26% of specialised suppliers in the field of accessibility (group 1) stated that they had widened or changed business partners in order to become more accessible.

The **interdependence of suppliers to provide accessible services and the perception of poor accessibility of other sectors may also have a bearing on the supply of accessible tourism services and business willingness to invest in further accessibility measures**. As some suppliers responding to the survey suggested: there is a *"lack of suitable suppliers, accessible places and accessible transport",* "[There are] *not enough suitable hotels and restaurants*", or *"there are not enough tourist attractions, where accessibility is good".* Such under investment by individual enterprises, due to a lack of coordination across the sector points to a market failure, which can be remedied by targeted public intervention.

Furthermore, the survey asked specialised accessible providers (group 1) and those with at least some accessibility (group 2), to indicate which sectors impacting on their businesses they perceived as the least and most accessible. The figure below confirms that, at the level of individual tourism providers, there is little coordination across different segments of the supply chain in terms of accessibility. Accommodation and information are seen as most accessible, while transportation and attractions are seen as least accessible by tourism businesses.

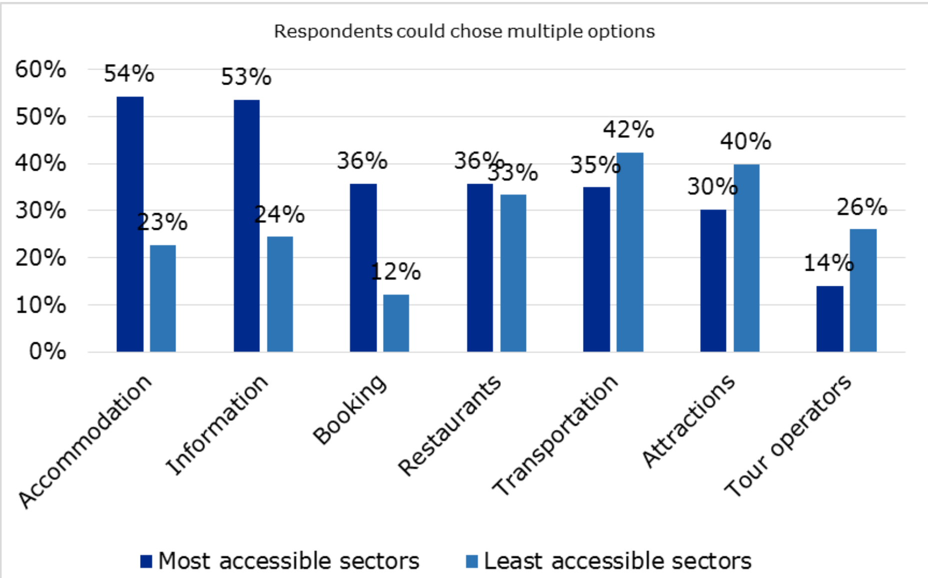


Figure 18: Business Perceptions of Accessibility of the Tourism Sector

In addition, this indicates that it is very difficult to generalise the accessibility performance of the tourism supply chain across Europe. Indeed, **accessibility seems to be a very local phenomenon.** As one respondent suggested: "some accommodation [tend to be accessible, however] not all - it tends to be excellent or poor" and there is not one outstanding sector outperforming the others. As commented by one respondent: "None is particularly accessible".

In addition to the survey, our team has also drawn up Country Reports based on the assessment of accessibility experts in all EU Member States (see Annexes 2 and 3 for details). Each major category of service relevant to accessible tourism was scored by the national experts to give an indication of the prevailing level of accessibility.[33]

While this method of assessing accessibility has limitations it provides a useful additional source of information and triangulation of the desk research data. The ranked average scores show that for the EU-28 the lowest performing services are: Long-distance coaches (1.44), Internet websites and ICT services (1.64), followed by Taxis (1.70) and Accessibility information (1.71). The most favourable average scores are given to accessibility of: Transport terminals (2.42), Metro/Underground (2.40), Buses (2.39), Banks (2.36), Post Offices (2.29), Public buildings (2.29), and Trains (2.04). It can be noted that the scores generally occupy the lower half of the 4-point scale, with no services reaching the average classification "Good" (3.00).

Effectiveness is here defined as the extent to which the available supply of accessible services matches the specific needs of tourists.

[33] Given the very general nature of these assessments, the experts' views can only be considered as contributing a general idea about the level of accessibility of tourism services in any given country. In the absence of any other reliable assessment tools, this is a first attempt to make cross-national baseline assessments on key criteria using a common survey protocol. Repeating the survey at regular intervals and correlating this data with structured visitor feedback from each Member State could be a useful for monitoring accessibility performance in the tourism sector.

Table 6: National Experts' Combined Assessments of Accessibility of National Tourism Services

Based on Experts' evaluations in EU-28 Member States

Scores: 1 = Poor, 2 = Fair, 3 = Good, 4 = Excellent

Services	Average Scores *
Transport terminals	2.43
Buses	2.39
Banks	2.36
Post offices	2.29
Public buildings	2.29
Ferryboats	2.05
Trains	2.04
Leisure facilities & attractions	2.04
Suburban railways	2.00
Shops	2.00
Public outdoor environment	1.96
Hotels	1.96
Accessibility information	1.71
Taxis	1.70
Internet websites & ICT services	1.64
Long-distance coaches	1.44

The individual scores for each country are shown in the following table.

Table 7: National Experts' Individual Assessments of Accessibility National Services

Scores: 1 = Poor, 2 = Fair, 3 = Good, 4 = Excellent

COUNTRY	All Serv-ices, Aver-age scores	Public outdoor environment	Hotels	Taxis	Buses	Long-distance coaches	Trains	Metro / Under-ground	Suburban rail-ways	Ferry-boats	Transport terminals	Shops	Banks	Post offices	Public buildings	Leis-ure facilities & attractions	Internet web-sites & ICT services	Access-ibility information
FI	**3.12**	3	3	3	3	3	3	3	3	3	3	3	4	3	4	3	3	3
DK	**2.88**	3	2	2	3	2	3	4	3	3	4	2	2	4	4	3	2	3
ES	**2.71**	3	3	4	4	1	4	3	3	1	2	3	3	3	2	3	2	2
IRL	**2.63**	3	2	4	3	2	1	0	3	3	3	3	4	3	3	2	2	1
LU	**2.59**	2	3	2	3	2	4	0	4	3	2	3	2	2	3	3	3	3
CY	**2.58**	3	3	2	3	0	0	0	0	0	4	2	3	3	2	2	1	3
MT	**2.42**	2	2	0	3	0	0	0	0	3	4	2	3	2	2	2	2	2
LT	**2.25**	2	2	1	3	1	2	0	2	3	3	3	3	3	2	1	3	2
FR	**2.13**	2	2	3	4	0	2	1	2	0	3	2	3	3	2	3	1	1
PL	**2.13**	2	2	1	3	1	2	3	1	0	3	2	2	2	2	2	3	3
AT	**2.12**	3	1	1	2	2	3	4	2	1	2	2	3	3	2	2	2	1
UK	**2.12**	2	2	2	2	2	2	2	2	2	2	2	3	3	3	2	1	2
LV	**2.06**	2	3	1	3	1	1	1	1	1	2	3	3	3	3	3	2	2
NL	**2.00**	2	2	3	2	2	1	2	1	3	3	1	2	2	3	2	1	2
PT	**1.94**	2	2	2	2	2	2	2	1	2	2	2	2	2	2	2	2	2
GR	**1.94**	2	2	1	2	1	3	4	2	2	2	1	1	3	2	3	1	1
SE	**1.94**	2	2	1	2	1	2	2	3	2	2	2	2	2	3	2	2	1
CZ	**1.87**	2	1	1	2	1	3	2	0	0	1	2	3	3	3	2	1	1
DE	**1.80**	2	2	1	2	2	3	2	0	0	3	1	2	1	2	2	1	1

COUNTRY	All Services, Average scores	Public outdoor environment	Hotels	Taxis	Buses	Long-distance coaches	Trains	Metro / Under-ground	Suburban rail-ways	Ferry-boats	Transport terminals	Shops	Banks	Post offices	Public buildings	Leis-ure facilities & attractions	Internet web-sites & ICT services	Access-ibility information
SLO	**1.80**	2	2	1	1	1	1	0	0	1	2	3	3	2	3	2	2	1
HU	**1.65**	1	1	1	3	1	1	2	2	2	1	2	3	1	1	2	2	2
EE	**1.64**	1	2	1	2	1	2	1	3	0	3	1	0	0	2	2	1	1
SK	**1.60**	2	1	2	2	1	1	0	1	0	3	2	2	3	1	1	1	1
BE	**1.56**	1	2	2	2	2	2	1	2	0	1	1	1	1	2	2	1	2
BG	**1.53**	1	2	1	1	1	1	3	1	2	2	2	2	2	2	1	1	1
IT	**1.47**	1	1	1	1	1	1	2	1	2	2	2	2	2	2	1	1	2
HR	**1.41**	1	2	1	2	1	2	1	1	2	2	1	2	2	1	1	1	1
RO	**1.27**	1	1	1	2	1	1	3	0	0	2	1	1	1	1	1	1	1
Ave.	***2.04***	**1.96**	**1.96**	**1.7**	**2.39**	**1.44**	**2.04**	**2.40**	**2.00**	**2.05**	**2.43**	**2.00**	**2.36**	**2.29**	**2.29**	**2.04**	**1.64**	**1.71**
Scores: 1 = Poor, 2 = Fair, 3 = Good, 4 = Excellent																		

From the expert assessments, a simple characterisation of countries and regions in terms of the overall effectiveness of the supply of accessible services, can be made in three groups, as follows:

1. **Front-runners**: FI, DK, ES, IRL, LU, CY, MT, LT, FR, PL, AT, UK

   In this group, countries and regions have carried out one or more accessibility development programmes at either national or regional levels, encouraged either by public support and/or legislation. Accessible tourism is being promoted with some success from NTO level and through regional and business networks. However, the overall average score is from Fair to Good – and none is considered to show "Excellent" performance cross the board.

2. **Improvers**: LV, NL, PT, GR, SE, CZ, DE, SLO

   The "improvers" are those countries that are rated as being successful in a few areas but still have further to go in many respects: Latvia, Netherlands, Portugal, Greece, Sweden, Czech Republic, Germany and Slovenia. In these countries accessible tourism has been nurtured in significant, professionally led projects that have created positive results and examples for other destinations and SMEs in the country to follow. They have typically developed accessible tourism in specific sectors or regions but have not achieved a critical mass of suppliers or supply chains.

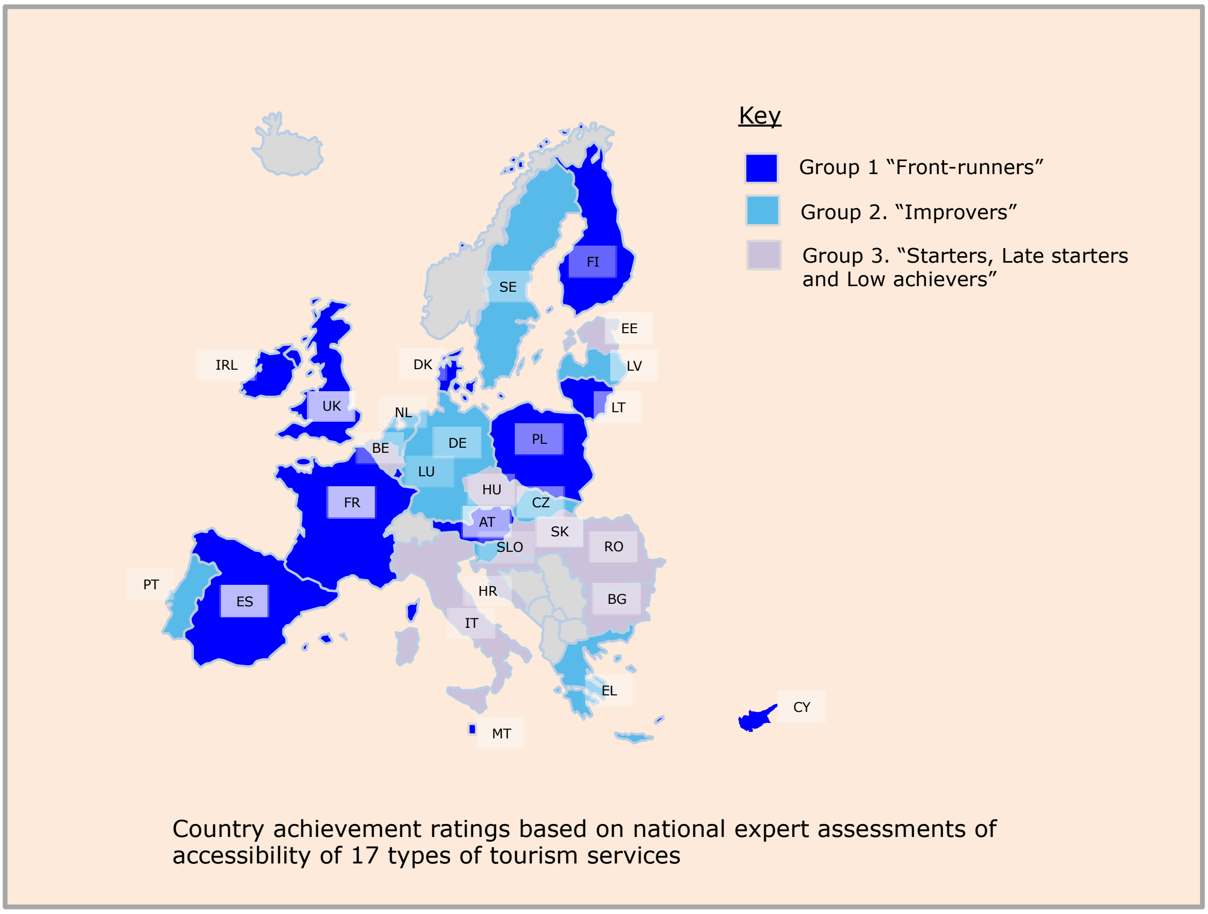
3. **Starters, Late-starters and Low achievers**: HU, EE, SK, BE, BG, IT, HR, RO.

   Hungary, Estonia, Slovakia, Belgium, Bulgaria, Italy, Croatia and Romania are those countries that make up the 3rd group, having the lowest average scores. Most of these countries are still waiting for a significant breakthrough to win their reputation as an accessible tourism destination, hence the short-hand description "Starters" and "Late-starters".

   The "Starters" and "Late-starters" are those that are progressing from a low starting position in terms of the proportion of available accessible services compared to the tourism sector as a whole. In countries such as Hungary and Estonia some initiatives have taken place to improve offers through small-scale business development and gradual improvement along the supply chains. Within this group, Belgium and Italy also appear as "Low achievers" despite having some well developed accessible offers and services, especially in regions such as Flanders, Veneto, Tuscany and Piemonte. However, their scores reflect the great variation in accessible provisions across these two countries and their overall performance rating is brought down by the under-performance of less developed regions and sectors. Italy, in particular, possesses a great number of historical environments and cultural sites which are not yet generally accessible (and perhaps never can be fully accessible for people with mobility impairments), which results in a lower overall score.

   Finally, a number of Eastern European countries have yet to make their mark in terms of accessible tourism provision, these being Bulgaria, Croatia and Slovakia and Romania.

The three groups are shown on a colour-coded map, Figure 18 overleaf.



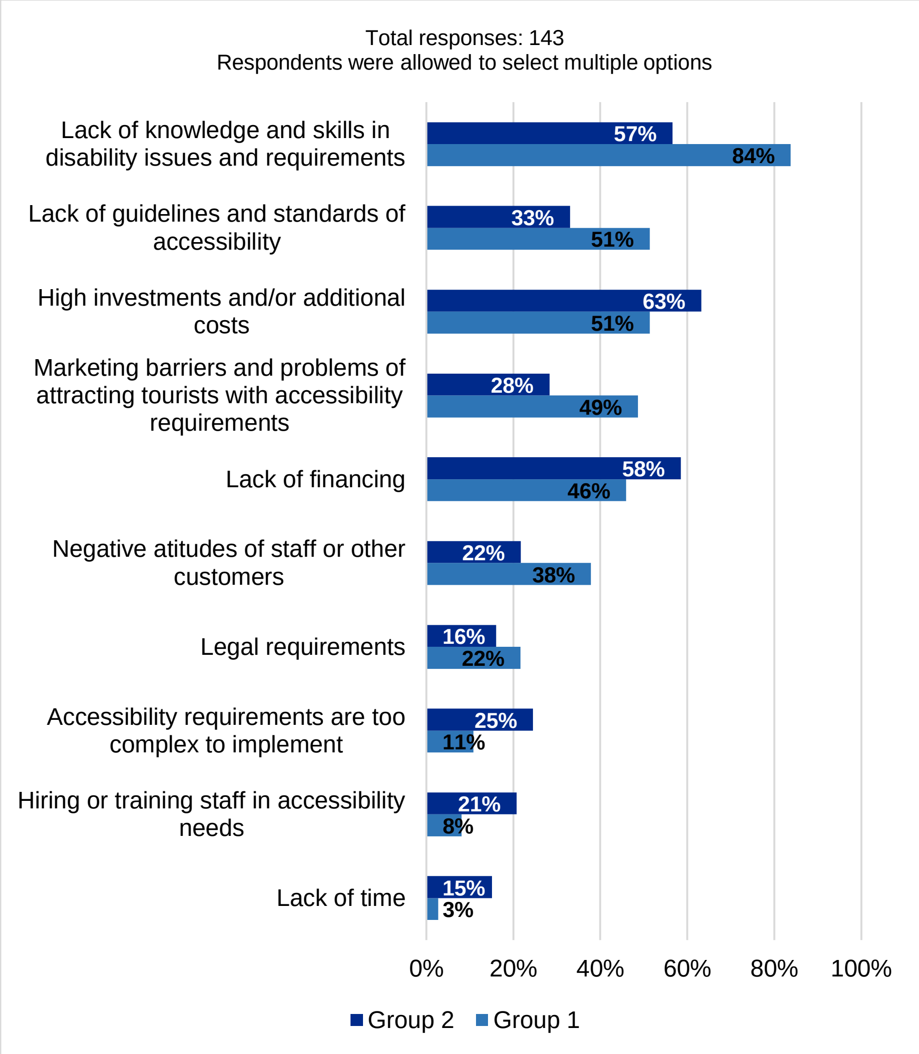
NOTE: Expert ratings are shown in Table 7.

Figure 19: Map of Accessible Tourism Achievement in EU Member States, 2014

4.4. Main Difficulties and Barriers for Industry (including SMEs) in Providing Accessible Services

This section looks at industry's main difficulties and barriers in providing accessible tourism services. In particular, the focus is on better understanding the difficulties of SMEs in developing accessibility in their business operations. The analysis is based on an interview programme with national industry association representing businesses active in the tourism sector as well as an online survey directed to individual tourism businesses.

The figure below summarises the results of a survey of businesses that indicated the main barriers to providing accessible services for them. Specialised accessible providers saw the main barrier in provision of these services for themselves and other businesses in a lack of knowledge about accessibility and a lack of skills among staff. While knowledge and skills ranked highly for businesses with at least partial accessibility as well, it is noteworthy that for this group investment costs and lack of financing seemed to be a greater concern. There was also a large difference across the two types of businesses in the importance of marketing barriers with specialised providers (which engage in marketing directly to the accessible market) seeing this as a greater concern than other businesses which do not specifically market their services to the accessibility community. Finally, it is interesting that legal requirements, guidelines and regulation did not figure highly among the barriers to accessibility.



Note: Group 1 = businesses which cater exclusively or mostly to the accessibility market; Group 2 = businesses which cater to everyone including (some or complete) provisions for accessible tourism

Figure 20: Suppliers' Perceptions of Barriers Inhibiting Accessible Tourism Services

Despite the differences above across the two types of business, in general 3 key barriers were identified that prevent businesses to become increasingly accessible. These include:

- Infrastructure and physical barriers;
- Financial barriers and lack of a strong business case; and
- Knowledge and information barriers

Each barrier is examined further in detail below.

4.4.1.Infrastructure and Physical Barriers

One of the most frequently cited barriers in the consultation with tourism-related sector associations relates to difficulties with infrastructure. This includes old structures pre-dating accessibility building legislation and historical buildings where adaptations are prohibited and public infrastructure remaining inaccessible and thus acting as a disincentive for businesses to expand on their tourism offer.

Box 1: The Concept of Universal Design

'Universal design is the design of products and environments to be usable by all people, to the greatest extent possible, without the need for adaptation or specialized design. The intent of the universal design concept is to simplify life for everyone by making products, communications, and the built environment more usable by more people at little or no extra cost. The universal design concept targets all people of all ages, sizes and abilities'.[34]

Across all research elements of the study (case studies, interviews, surveys), there is little evidence of destinations implementing universal design principles. Where providers are making changes to the physical environment this is mostly limited to mobility impairments, i.e. "Accessible Design". To achieve truly inclusive and accessible tourism for all, it is important to educate tourism stakeholders in Universal Design / Design for All and demonstrate solutions that address the wide range of human functioning and impairments and not only three or four major disability types

All Member States (see also Annex 2 for an overview national legislation) have accessibility legislation in place which addresses the built environment, either through general building regulations and laws and, in some cases, additionally through specific legislation for parts of the tourism sector (e.g. hotels). For example, in Sweden accessibility legislation states that "easily remedied barriers" should be removed. However, interviews with sector associations have indicated that such legal provisions can led to problems because tourism businesses often leasing their business premises rather than owning them outright. As a consequence, there can be disagreements on whether the responsibility lies with the property owner or the businesses to make the necessary adjustments to comply with legislation.

In addition, these regulatory provisions on accessibility are **most often only applied when new buildings are being planned.** Where universal design principles can be applied from the outset when physical infrastructure is built thus can reduce costs significantly. For example, the hotel chain Scandic (see case study on Stockholm) takes universal design into account in the building stage of a hotel facility where possible and thus, accessibility is not seen to require costly additions or adaptations. In this vein, some interviewees argued that as the accessibility of the built environment gradually increases through replacement by new buildings and renovation of old buildings, it will inevitably make it easier for the tourism sector offer more accessible services.

At the same time, **adapting facilities in historical buildings and environments has been frequently mentioned as making accessibility more challenging** and a significant barrier to improved accessibility. Indeed, redesigning older buildings to increase accessibility often requires costly physical alterations to the premises (redesigning, construction work or installation of expensive technical appliances). Particularly sector organisations representing the hotel and restaurant industry have commented that many of these businesses are located in older buildings that predates any national accessibility legislation. As noted by one respondent

[34] Ron Mace: Centre for Universal Design, See: http://universaldesign.ie/What-is-Universal-Design/The-7-Principles/

in the online survey: "Being a historical preserved building the regulations around planning permission is restrictive as to how much we can change the building to provide accessibility".

4.4.2. Financial Barriers and Lack of a Strong Business Case

As show at the beginning of this section, financial barriers (e.g. cost of investment and lack of financing) figure among the most frequently cited obstacles to increasing accessible service provision for industry. This is particularly the case for **SMEs, which face higher constraints both in terms of financial resources and in terms of access to finance than larger enterprises.** Given these constraints, accessibility is seen as an expensive additional cost burden on companies.

For instance, comments through the industry survey indicated that **accessibility is not seen as a business opportunity but as involving high costs with little return.** Concerning the overall business plan, some respondents commented: "many providers of touristic services have recognized the needs of physically handicapped people but very often it is a question of money, "[Barriers to accessible tourism are] high cost with little return", there is a high "cost in promotion to reach [the] target audience" or "there are not so many clients with "full" accessibility needs to justify a full adaptation". This is confirmed by the case studies which show that businesses may believe that any increase in profits following from higher demand will not necessarily cover their costs. In the example of Hérault (France) suppliers noted that adapting facilities and acquiring accessible equipment for people with mobility impairments requires higher maintenance costs while increasing only marginally the number of tourists with disabilities.

In addition to scepticism about the overall return on investment, there are particular **concerns about perceived upfront investment costs** which work as inhibiting factor, especially for micro-businesses or SMEs which often face the dual challenge of restricted cash availability and little access to finance. For instance, interviews with industry associations confirmed that businesses engaged in activities that require specialised equipment (e.g. in some outdoor activities) will have difficulties in adapting their services due to high costs.

The above comments suggest that businesses are largely unaware or cautious of the market potential for accessibility and the business case for investing in the accessible tourism market. This is consistent with the fact that there is very little systematic research (outside of individual case studies or anecdotal evidence) regarding the business case for accessible tourism. Instead the case for accessibility tends to be made on a normative basis which is a tough argument to win in uncertain economic times.

There are two actions require to overcome the financial and business case barriers to greater accessibility: providing systematic evidence to support the business case for accessibility and helping businesses reach out to the potential market of tourists with specific access needs.

4.4.2.1. Evidence to Support the Business Case

As mentioned above, prior to this and other EU studies in 2014, **there has been little systematic collection of evidence regarding the business case for accessible tourism.** Perhaps most closely, parallel research commissioned by the European Commission has shown that there is a large demand for accessible services and that this is likely to grow significantly over the next 10 to 20 years.[35] However this study did not relate this demand to the behaviour of businesses, although it analysed the behavioural aspects of the demand of accessible services. The study demonstrated that there is a direct correlation between investments in accessible tourism facilities and impact on GDP and employment: higher investments in this sector trigger stronger growth.

Most business research has focused so far on customer service generally but without a specific focus on accessibility. Recent research in Ireland by the Centre of Excellence in Universal Design showed positive cost-benefits to tourism service providers after improving the quality of their customer communications.[36] This has shown for instance that fifty-two per cent (52%) of customers purchase more from a business as a result of a good customer experience. Two-thirds of customers are willing to spend an average of 13% more with a business they believe provides good customer service; and twenty-four per cent (24%) of customers will continue to use service providers for two or more years after good experiences (see box, below). While **early indications show positive results** this remains anecdotal to date. For instance one hotel and restaurant owner in the west of Ireland reported that: "We implemented training using the Toolkit to improve our customer engagement; this has resulted in a 46% increase in our food sales."

Box 2: Setting Standards for Customer Engagement in Accessible Tourism

In conjunction with the National Standards Authority Ireland (NSAI) and the Equality Authority, the CEUD co-chaired the development of Irish Standard (I.S.) 373:2013 **'Universal Design for customer engagement in tourism services'**. This is the first standard nationally or internationally that provides an industry best practice reference on design requirements for the application of Universal Design by tourism service providers. The standard was launched by the National Disability Authority and NSAI on 30th May 2013. In order to maximise the impact from I.S. 373:2013, the National Disability Authority identified the need for a practical Universal Design Toolkit for applying the guidance outlined in the standard.

The result is a *"Universal Design for Customer Engagement Toolkit"*[37] including a Business Case, Objectives and Overview; Written Communication; Face-to-Face, Telephone & Video Communication; and Electronic & Web Based Communication

The business case, to be developed by the provider of the service should inform all communication activities with regard to the market for accessible services. The aim of the toolkit is to help tourism service providers to:

- Increase their number of repeat customers;
- Improve word of mouth referrals and online reviews;
- Improve how to successfully communicate to a wider market; and

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[35] Economic Impact and Travel Patterns of Accessible Travel in Europe (GfK, University of Surrey, ProA Solutions and Neumann Consult, 2014). http://ec.europa.eu/DocsRoom/documents/5566/attachments/1/translations/en/renditions/native

[36] Centre of Excellence in Universal Design, Dublin, Ireland: Universal Design Toolkit for Customer Engagement Research Report (2014). See:http://universaldesign.ie/Products-Services/Customer-Engagement-in-Tourism-Services/Universal%20Design%20Toolkit%20for%20Customer%20Engagement%20Research%20Report.pdf

[37] The Toolkit is downloadable from http://www.universaldesign.ie/tourism

- Increase spend by customers.

A key message of the Standard and Toolkit is that there are no typical tourism customers. All businesses have a broad range of customers with different needs and difficulties. The Toolkit is intended for use by all businesses that provide services to tourism customers. These range from local B&Bs to large hotels, from small coffee shops to large restaurants as well as music venues, cultural institutions, tour and transport operators, and everything in-between.

Furthermore, investments in accessible services do not only attract disabled customers. For instance, evidence in the case study of Arona, showed that **94% of tourists with disabilities are accompanied by at least one person**[38] **(so-called "multiplication factor")**. The research on the economic impact of accessible tourism in Europe (see footnote 17) commissioned by the European Commission estimated the average "multiplication factor" in Europe at 1.9 (almost two persons per each traveller with special needs). For some non-EU inbound travellers to Europe, such as the Chinese, the average multiplication factor has been estimated at around 3.

In the UK, the National Tourist Authority, VisitBritain, revealed in 2011 that **online bookings were on average 26% higher for 8,000 hotels and bed & breakfast establishments that showed accessibility information on their websites**, as opposed to sites which show no access information. Booking rates were also higher in areas like the Northeast of England where the regional tourist boards had run campaigns to encourage business owners to join the Visit Britain Quality Scheme and make self-assessments of the accessibility of their premises.[39]

In addition, VisitEngland has shown the average length of an overnight stay at 2.9 nights, with an average spend of £184, but **where a member of a group or party has a disability or impairment this becomes 3.3 nights and an average spend of £191.**[40]

However, the vast majority of tourism businesses are not aware of such economic evidence, making it is difficult for them to understand the advantages of making investments in accessibility. Furthermore, in the absence of systematically collected evidence – other than anecdotes or case studies – it is difficult for businesses to understand the business opportunity of providing accessible services. In parallel, misconceptions about the size of the market which undermine the business case continue to persist. It is therefore crucial that hard evidence on the business case for accessibility be collected.

Given the above considerations, it is imperative that the business case for accessibility is situated in the local context. As pointed out earlier, accessibility is very much a local phenomenon. Thus, it is vital to look at the specifics of the local market and to understand what demands for accessibility there are. Businesses are more likely to become convinced of the market opportunity where it is possible to demonstrate locally or regionally that there is profit to be made from providing accessible services. The Lousã case study provides a good illustration of how locally-based initiatives increase the concrete understanding on how accessibility can result in higher profits. During the accessibility project carried out in the municipality more than 130 businesses joined the local accessibility scheme, which was very

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[38] See the case study on Arona for complete reference.

[39] Information provided by New Vision Group based on analysis of VisitBritain data in panel discussion at the IFITT Conference, Innsbruck, 28 January 2011, (later confirmed in correspondence with ENAT).

[40] VisitEngland accessibility market data Infographic, October 2014 See: http://www.accessibletourism.org/?i=enat.en.reports.1662

much incentivised by the local authority's effort and businesses not wanting to be "left out". The town holds various accessible events throughout the year such as Gastronomy weekends featuring seasonal local produce, and an annual Arts Festival. This has established Lousã as an accessible destination and these events are largely attended by visitors from the central Portugal area.

In addition, the Herault case study also pointed towards positive spill-over effects of local authority efforts to increase the accessibility of the beaches in the area. In this vein, local case studies or examples are believed to be more effective than macro-economic or EU-wide statistics or studies. It also calls for DMOs and local authorities to be in the forefront of data collection and market efforts to increase the supply of services. A good example of this, is Visit England who produce the statistics quoted above.

4.4.2.2. Support in Reaching Out to the Potential Market

Across the industry survey, **a little more than half of respondents said they had changed or widened their information and marketing channels in order to attract more tourists with access requirements**. Given that reaching out to potential customers is one of the key day to day activities for many providers, this is a very low share. At the same time, this response is consistent with the need for information about accessible services highlighted by disabled travellers in our survey of travellers. While physical access is argued to be a pre-condition for accessible tourism, it is information that is often the key and driver to embarking on the journey.

Investigating the reasons for this apparent lack of marketing activity, stakeholder interviews indicated that **it is difficult for businesses to capture the accessibility market due to the lack of a coordinated, centralised marketing structure for accessible tourism**. Where specific marketing channels for the accessible tourism market do not exist or are not well known, individual businesses, and especially SMEs, have limited capacity to create such channels.

Of course there are in fact existing information channels regarding accessible tourism which could function as marketing outlets. Indeed, as section 3 has shown there are a large number of accessibility information schemes across many countries which provide information to potential customers about the accessibility of service provided in their country. Accessibility information schemes aim specifically to help customers identify services and facilities that are accessible.

However, these **schemes are often run purely with an information focus by NGOs, rather than having been developed with a commercial focus and run by actual businesses.** As a result, they are not used to the extent possible by businesses. For instance, across industry survey respondents membership in accessibility schemes varied with more than half of providers that specialised in accessible services stating they were affiliated with a scheme, whereas the same figure for providers with only some accessible services was only 26%. Thus while Accessibility Information schemes could play a significant role in helping businesses tap into the market for accessible tourism, this is potential is under-used to date.

There is therefore an **important role for destination management organisations, tourism boards and commercial organisations (particularly umbrella organisations that cover multiple sectors) to play in promoting and ensuring the coherence of information along the supply chain.** Initiatives such as Pantou (created in the context of this study) can further help with marketing the supply of accessible services, especially if they are run by commercial providers who are active in the tourism sector.

4.4.3. Lack of Staff Knowledge and Information.

The final key barrier for the tourism industry to improve its accessible offer relates to staff knowledge and information. Lack of knowledge and information covers three main areas:

- Lack of knowledge about accessibility itself;
- Lack of knowledge about how to become more accessible; and
- Lack of staff skills and knowledge about how to engage with customers with specific access needs. This is an important barrier which is addressed in a parallel study carried by the European Commission on training and skills with respect to accessibility in the tourism sector.[41]

Put differently, there is **confusion among industry around what accessibility means, how it is defined, what needs to be done to comply with legislation and what can be done to tap into the market**.[42] All of this is particularly problematic for SMEs because they have fewer resources to gather information and expert advice than larger enterprises such as hotel and restaurant chains.

Indeed, for providers that do not specialise in accessibility (group 2), the complexity of existing guidelines was perceived to act as a deterrent to further accessibility. For instance, one respondent commented that: "[There are..] no clear rules and [there are] a lot of different disabilities, therefore too many different measures need to be taken". Similarly, a national industry association representing hotels and restaurants argued that due to the diversity of needs relating to different accessibility requirements the suggested remedies are often conflicting. This leaves businesses unsure as to how to best cater to individuals with access needs. For example, in regards to lighting, some individuals with vision impairments may be in need of very strong lighting to overcome obstacles. However, for other individuals with vision impairments needs may be different, such as dimmed lightning.

In addition, it was also commented that **there are a lot of relatively low cost alternatives to make services increasingly accessible.** But, in particular, SMEs are generally unaware of these measures. As many case studies as well as anecdotal evidence from experts show, a lack of information to businesses about how to improve accessibility in relatively cheap and easy ways is a major barrier to increased supply of accessible services. Furthermore, some interviewees argued that while there is an improvement in the amount of information available, this is often too scattered over many places to get a comprehensive overview of what can be done.

On the positive side, **knowledge and skills are one area where businesses seem very willing to make (and, in many cases are already making) improvements.** According to

[41] European Commission Study on training and skills with respect to accessibility in the tourism sector Ref. http://www.accessibletourism.org/?i=enat.en.reports.1620

[42] Indeed, lack of knowledge around the concept of accessible tourism has also been highlighted by tourists in the online survey, in the case studies as well as in the stakeholder consultation as a major barrier to the development of accessible tourism.

industry survey data, more than two thirds of providers are implementing staff training measures to meet accessibility needs. Training, if done properly, can be a highly cost-efficient way of making services and facilities more accessible. Where businesses indicated barriers in providing training this was mostly explained by lack of time. Again, this could indicate that, given the right resources in terms of information and financial support, businesses are not unwilling to spend time on developing accessibility, if this can be shown to yield results.

4.5. User Perspectives on Usefulness of and Satisfaction with Current Supply

Sections 4.1 and 4.2 have investigated in detail the views of industry stakeholders regarding the performance of the current accessible tourism supply offer. This section and the next examine similar issues from the perspective of users of these services (i.e. customers with specific access needs). The analysis is based on a qualitative survey of national disability organisations[43] as well as an online survey directed to individual travellers with accessibility requirements. The rationale behind the survey and the interview programme was to understand the performance of the tourism sector in regards to accessibility and users' perception of usefulness and satisfaction with the current supply. Further details on the methodology are available in Annex 6.

As pointed out previously in this study, it is imperative to take into account that **performance levels and satisfaction depend to a large extent on the characteristics of the tourists using the services and facilities, the type and degree of access requirements that they have**. In addition, performance levels are greatly influenced by customer service which may, for instance, depend on the staff on duty on the day when the service or facility is being used. Finally, each element of the tourist value chain comprises a wide range of services and generalisations / extrapolations need to be made with care. For example, the accommodation sector includes high-end to budget services, as well as specialised services, which may have varying degrees of accessible provisions. To increase the reliability of results received, this section has been cross-checked and augmented with evidence received from a qualitative systematic survey with national organisations representing persons with disabilities from across the EU Member States.

The online travellers' survey asked the respondents to rate their levels of satisfaction with the availability and quality of accessible tourism services during the visitor journey. Overall it seems that **most respondents remain between "dissatisfied" and "neutral" and there is no sector that scores particularly high on the satisfaction side.** Between 26 and 34% of respondents are dissatisfied with the offer across all sectors, and between 20 and 30% of respondents are generally satisfied.

The **main exception is for tour operators where only 10% of respondents are satisfied and almost half (44%) are dissatisfied.** Dissatisfaction with tour operators relates mainly to the inability of tour operators to provide the required information for the decision-making process and the agents' lack of knowledge of the accessibility of the destination.

[43] See complete list of interviews in Annex 6.

Satisfaction was highest for attractions, museums and other cultural venues (31%) which was also the only category where satisfaction outweighs dissatisfaction. Some respondents highlighted that many attractions and museums do not charge the assistant or carer for the visit, thereby reducing costs.

Similarly, **one of the better performing sectors in terms of satisfaction is the transport sector** with airports and air transport, for instance, believed by most national disability organisation to be close to 100% accessible due to EU and national legislation. However, it is important to note that there seem to be stark regional differences within the Member States and particularly capitals enjoy a higher degree of accessible public transport. At the same time, most qualitative comments in the survey[44] suggested that there were still difficulties around the accessibility of transport, especially around local transport such as taxis. As one typical respondent indicated, they had experienced "especially lack of proper taxis with lift or safe ramp in short order when needed". Similarly, comments such as "rail staff don't understand that even without a wheelchair I cannot climb steps" imply that even where facilities are increasingly accessible, there is still a lack of staff knowledge to provide an efficient service to tourists with access needs.

Across all segments of the supply chain, **42 to 46% of respondents indicated that they did not have a strong opinion either way** regarding satisfaction with accessible services. At the same time, some respondents acknowledge that there has been some progress in regards to the availability of accessible tourism services in the past years.

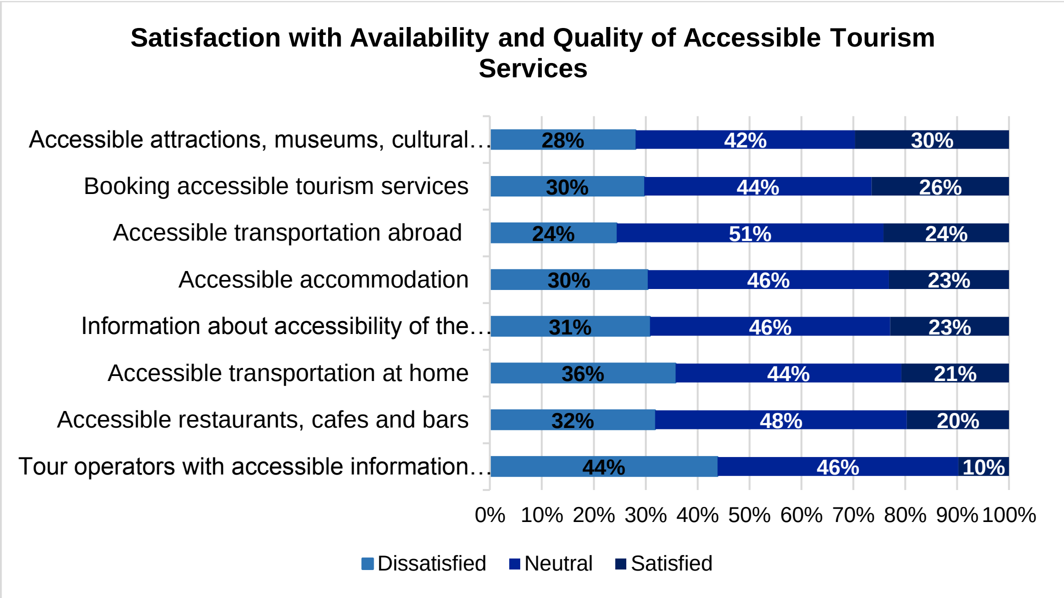
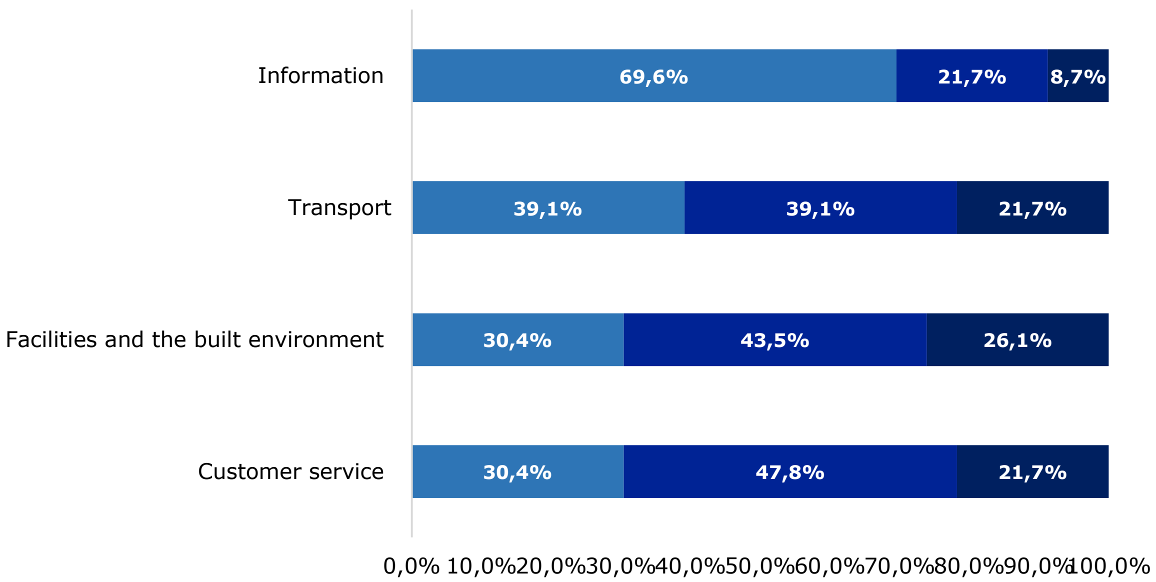


Figure 21: Satisfaction Level with Availability and Quality of Accessible Tourism Services

The overall satisfaction with the current supply of accessible services was also gauged through the consultation with national disability organisations. Similarly, to the online survey, there is no elements of the visitor journey that score 'excellent'. Overall, most organisation indicated that satisfaction was either poor or fair across the different elements. 'Information' was the segment with the lowest satisfaction with close to 70% of organisations indicating that this is generally poor. Facilities and the built environment scored the highest satisfaction across the

[44] These were open-ended questions making an exact quantification impossible.

four areas examined. The transport sector is considered equally both "poor" and "fair". This relates to the wide range of modes that is included in this element of the visitor journey. For instance, airports and air flights are considered one of the best prepared modes of transport due to the presence of EU legislation in the sector[45]. However, 6[46] of the surveyed organisations expressed dissatisfaction with public transport particularly mentioning the lack of adapted coaches and taxis as a problem. This contrasts with organisations from Austria and Croatia stating that public transport has been improved to meet the needs of travellers with access needs. This again indicates that the quality of accessible tourism services, geographically and across the value chain, cannot be generalised, but is a much localised phenomenon. In a similar vein, customer services are also very much dependent on the individual tourism services used and on individual staff skills. However, the fact that customer services scoring in low in general indicates that there is a need to increase staff awareness and skills in catering to customers with access needs.



	Customer service	Facilities and the built environment	Transport	Information
Poor	30,4%	30,4%	39,1%	69,6%
Fair	47,8%	43,5%	39,1%	21,7%
Good	21,7%	26,1%	21,7%	8,7%
Excellent	0,0%	0,0%	0,0%	0,0%

Poor Fair Good Excellent

Note: 23 National Disability Organisations responded to this question. More information in Annex 5.

Figure 22: Satisfaction Levels According to Disability Organisations

Following up on the above, respondents to the online survey were also asked to provide an indication of the "ease of travelling" across the visitor journey. This type of analysis is a useful

[45] 6 organisations from CY, FI, GR, HR, IT, PL indicated that the air transport was one of the best prepared sectors to cater to tourists with accessibility needs.
[46] This figure includes organisations from CY, IE, GR, IT, GR, PL, UK

cross-check with information provided in the map of services and the industry survey regarding any gaps in integration of the accessible tourism supply chain.

The following table sets out the respondents' perception of the ease of travelling based on the median value of answers given. On average, **all sectors received either 2 or 3 stars** (indicating a "neutral" response) with very few respondents giving any of the sectors either a very bad mark (1 star) or a very good rating (5 stars).

Nevertheless comparing answers at both extremes shows that there were **more highly dissatisfied responses** (between 15 and 35% of responses awarded only 1 star) **than there were 5-star ratings** (less than 10% of responses across all segments). These results are consistent with the satisfaction question above which also indicated that most users are neither highly satisfied nor highly dissatisfied with the current offer but they also suggest that dissatisfaction among users is particularly high with pre-journey information, tour operators, and public spaces at the destination.

Rating	Stages of the Visitor's Journey
★★☆☆☆	Before travelling: Information about accessibility of the destination
★★★☆☆	Booking accessible services (transport, hotels, attractions etc)
★★★☆☆	Accessible transportation in your home country
★★★☆☆	Accessible transportation abroad (if applicable)
★★☆☆☆	Public spaces at the destination (cobbled stones, lack of ramps)
★★★☆☆	Accessible accommodation
★★★☆☆	Accessible restaurants, cafes and bars
★★★☆☆	Accessible attractions, museums, cultural venues
★★☆☆☆	Tour operators with accessible information and offerings

Figure 23: Ease of Travelling Across Different Stages of the Visitor Journey

4.6. Types of Barriers and Bottlenecks

Following on from the general satisfaction questions, the survey of travellers also investigated the reasons for these responses in more detail. Specifically, the study asked which types of barriers and bottlenecks in the accessible tourism supply chain affect the usefulness of existing accessible service provision and customer satisfaction with these services.[47]

The analysis is based on an extensive interview programme with national disability associations representing persons with specific access needs as well as an online survey directed to individual travellers. This part of the study mirrors section 4.2 where barriers in provision of such service were investigated from an industry perspective.

[47] It should be noted that the types of barriers and bottlenecks does not only differ from different types of disabilities, but also differs in regard to the individual capabilities of the tourists travelling. It is more likely that those individuals with higher degree of access needs will experience bottlenecks and barriers more severely than those with lighter access needs. The following assessment is therefore a generalisation of the most frequently mentioned barriers.

On the whole, barriers that were reported frequently included lack of staff knowledge which was mentioned by almost half (48%) of respondents to the survey and also by a large number of disability organisations consulted as part of the study. For instance, one survey respondent indicated that "tour operators in general are not able to say whether a place is accessible or not, even when you're at the destination"[48]. The issue of staff training and skills has been presented in depth in a parallel study commissioned by the European Commission on accessible tourism training.

However, the most frequent barriers encountered by tourists related to:

- **Information on accessible services** available to tourists with specific needs which was mentioned by 66% of respondents to the survey; and

- **Lack of available services (50%) and physical barriers (61%).** This second point relates to the issue of integration of accessible services across the supply chain at destination level i.e. the extent to which travellers with specific access needs can independently use a variety of services in the destination as opposed to being "stuck" using only the very limited and isolated services that are accessible.

Each of these most commonly mentioned barriers is discussed in more detail below.

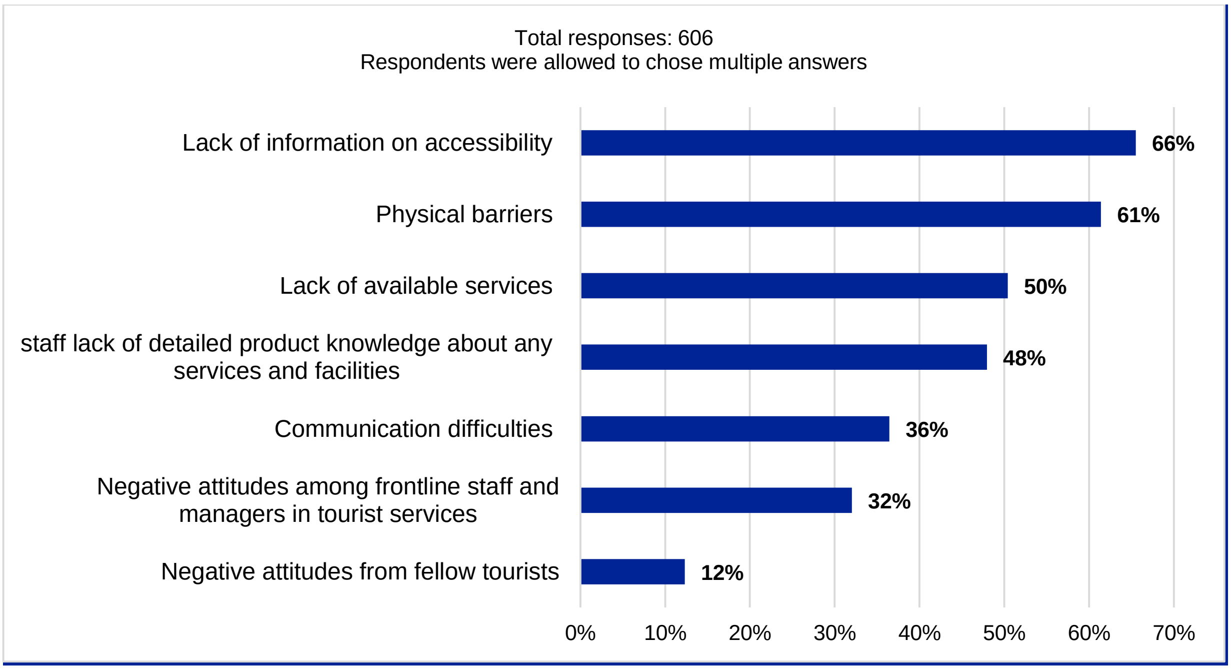


Figure 24: Perception of Accessibility Barriers from a User Perspective

4.6.1.Information on Accessible Services

Tourists with disabilities require a much higher degree of information and preparation before travelling than tourists without specific access needs. As one respondent to the survey clearly indicated: "for round trips we travel with a tour-operator for disabled people, with guide. We look for hotels with adapted room. So, the more information there is easier it becomes!"

[48] From online survey

If tourists do not have access to relevant information on available services, they do not know which choices are available. Without sufficient information regarding accessible destinations, people with disabilities are unsure if their needs can be met and may therefore refrain from travelling. As a result, they become excluded from the social and psychological benefits that travelling can bring. Thus, access to information is a precondition to travel.

In both the online survey and the consultation with national disability organisations **lack of information on accessibility along the journey or at the destination was the most frequently given barrier encountered by all respondents.** As mentioned above, in the survey, 66% of responses across all groups of accessibility needs highlighted the difficulties encountered due to information.

The online survey to travellers found that the informational barrier is multifaceted with different root causes and consequences which require different responses and which need to be clearly distinguished. The qualitative comments to the survey revealed that more specifically the informational barrier relates to:

- Access to information;
- Reliability of information; and
- Accessible formats of available information

Access to Information

Accessibility information is often not included in mainstream tourist information nor do staff at mainstream tour operators know where to acquire information regarding accessibility. According to a majority of disability organisations consulted, this lack of information is the most important reason why key tourism actors such as travel agents are poorly prepared to cater for people with disabilities. For example, the Austrian disability expert noted that knowledge of accessible offers at tourist information points, travel agents and tour operators is limited. This is reinforced by lack of staff knowledge and lack of training in making appropriate internet searches. Thus, even where appropriate offers exist for tourists with specific access needs, these services are often not marketed and made known to the relevant tourism market.

Lack of access to information about the existing offer was confirmed in survey results and qualitative comments as one of the main barriers. These included for instance, the following typical statements covering different stages of the value chain:

"The main problem I have is getting the information I need before making a booking – I will not book accommodation unless I know it is accessible, but this is very hard to find and can be expensive" or "I find it so difficult to get satisfactory information for my needs [and] I therefore seldom travel at all. Information that says there is hotel rooms for people with disabilities does not tell me anything!" or "access may be available, but it is not advertised making booking difficult across Europe" or "booking facilities of accessible rooms on booking sites is in urgent need of improvement. "There is no filter for disabled rooms as these room are not specifically stated in the booking"

To overcome the limited access to information through intermediaries such as tourist offices and tour operators or travel agents, disability organisations suggested that **it is common for tourists with access needs to communicate directly with the service providers to confirm the level of accessibility and availability.** At the same time, the lack of access to marketing channels as well as poor information provision by individual businesses have also been highlighted as barriers to travel, which suggests that going directly to the service provider does not fully solve lack of access to information about accessibility.

As a result, **word-of-mouth recommendation** and travel experiences from other people with disabilities play an important role in helping tourists understand whether a journey is accessible and choosing a travel destination. Stakeholders noted that since individuals with access needs perceive that they have limited choice in the marketplace they tend to go to familiar destinations and accommodation.

Reliability of Information

In addition to access to information, another important barrier uncovered in the qualitative comments to the survey relates to **low reliability** of that information. As one respondent pointed out, Insufficient or bad information is worse than a lack [of information]". Where information is inaccurate, this can lead to significant problems for customers who may not be able to use the services they booked, complete their travel plans or derive satisfaction from their travel experience.

The root cause of low reliability seems to be insufficient knowledge of what constitutes accessibility on the side of the service providers. Qualitative comments collected through the survey related to the problems of inaccurate information include: "I wanted an accessible hotel room and they told me not to worry. The bathroom door was 65 centimetres!" or "hotels say they are accessible. But when I come to that hotel it is not accessible to the extent they told me" or "Inaccurate details on the accessibility of the hotel - often they will say they are accessible yet have some huge barrier within the room. [For example]….a 300mm pillow mattress higher than the wheelchair!"

Format of Information

Finally, qualitative comments from tourists with accessibility needs revealed that **barriers in terms of access to information also included the *format* in which this information is provided**. For example, people with hearing impairments frequently mention the difficulties of staying informed in airports or railway stations when information is given via tannoy, especially in regards to changes made to departure times, gates or platforms. Similarly, qualitative comments from those with vision impairments referred to accessibility information on websites not being compatible with assistive technology. More systematic visual and written information was cited as an appropriate way to overcome this problem.

4.6.2.Lack of Available Services and Physical Barriers

In addition to information, **physical barriers prove to be a major bottleneck for tourists at the destination.** For instance, sixty-one per cent (61%) of responses to the online survey stated that physical barriers such as the presence of steps and stairs and the lack of provisions for blind people are still very persistent. This figure is even higher when looking at responses from tourists with motor impairments (90%).

The lack of available services was also confirmed by disability organisations as having a significant impact on the experience of travellers with specific access needs. Indeed, **even where accurate information on single accessible providers can be obtained, this is of limited usefulness unless a wider range of suppliers at different stages of the tourism value chain** (e.g. local transport, restaurants, entertainment, attractions, etc) **are also accessible**. For instance, in the UK one respondent indicated that "many wheelchair users can and do travel independently, but this is totally dependent on variants of service and facilities provided in the supply chain, which need to be researched well in advance of travel to have assurance". As several disability organisations pointed out in interviews, accessibility should not be assessed at the level of individual providers but at a higher level of aggregation, such as the destination, which includes different stages of the supply chain. Accessibility, according to these organisations, must mean a "holistic" approach that puts the experience of the customer at the centre.

4.7. Key Findings of the Performance Assessment

- Effectiveness requires that the supply of accessible services be pervasive, aimed at a cross-impairment approach and integrated across the supply chain.

- There are significant gaps with regard to the pervasiveness of accessible service supply across Member States. The majority of service providers do not adopt a cross-impairment approach. Only 17% of all industry respondents that have some provisions for accessible tourists reported to cater to all disabilities.

- Motor impairments are best covered across all businesses while less than half of businesses with some accessibility provisions stated that they cater to tourists with hearing and vision impairments, long-term illnesses, learning difficulties and those using service animals or requiring personal assistance

- There is very little integration of accessible services across the supply chain in the vast majority of locations and accessibility seems to be a very "local" phenomenon. Overall accessibility of the tourism sector depends not just on the action of individual businesses but on the accessibility of the entire supply chain that makes up the visitor journey. Interdependence of suppliers to provide accessible services and the perception of poor accessibility of other sectors may also have a bearing on the supply of accessible tourism services and business willingness to invest in further accessibility measures

- 3 key barriers prevent businesses from becoming increasingly accessible: Infrastructure and physical barriers, financial barriers and lack of a strong business case and Knowledge and information barriers.

- All Member States (see also Annex 2 for an overview national legislation) have accessibility legislation in place which addresses the built environment, either through general building regulations and laws and, in some cases, additionally through specific legislation for parts of the tourism sector (e.g. hotels). But these regulatory provisions on accessibility are most often only applied when new buildings are being planned. Adapting facilities in historical buildings and environments has been frequently mentioned as making accessibility more challenging and a significant barrier to improved accessibility.

- Accessibility is today not seen as a business opportunity but as involving high costs with little return. This is especially the case for SMEs which have lower financial resources and access to finance.

- There is little to no systematic evidence regarding the business case for accessible tourism and businesses are largely unaware or cautious of the market potential and the business case for investing in the accessible tourism market. There is some evidence that accessibility can increase sales, repeat custom, or average spends. However, most information on the business case remains anecdotal and devoid of "hard evidence".

- Actions required to overcome the financial and business case barriers to greater accessibility include providing systematic evidence to support the business case for accessibility and helping businesses reach out to the potential market of tourists with specific access needs

- From a marketing perspective, it is difficult for businesses to capture the accessibility market due to the lack of a coordinated, centralised marketing structure for accessible tourism.

- Accessibility Information Schemes are often run purely with an information focus by NGOs, rather than with a commercial focus by actual businesses and they therefore remain underused as a marketing tool. While more than half of providers that specialise in accessible services are affiliated with a scheme, the same figure for providers with only some accessible services was only 26%.

- There is an important role for destination management organisations, tourism boards and commercial organisations to play in promoting and ensuring the coherence of information along the supply chain. Initiatives such as Pantou (created in the context of this study) can further help with marketing the supply of accessible services, especially if they are run by commercial providers who are active in the tourism sector.

- The final barrier for the tourism industry to improve its accessible offer relates to staff knowledge and information. There is confusion among industry around what accessibility means, how it is defined, what needs to be done to comply with legislation and what can be done to tap into the market

- From a user perspective, performance levels and satisfaction depend to a large extent on the characteristics of the tourists using the services and facilities, the type and degree of access requirements that they have.

- Most users are either "dissatisfied" or "neutral" and there is no sector that scores particularly high on the satisfaction side. Only 10% of respondents are satisfied with tour operators and almost half (44%) are dissatisfied. Satisfaction was highest for attractions, museums and other cultural venues.

- The most frequent barriers encountered by tourists related to information on accessible services available to tourists with specific needs and the lack of integration of accessible services across the supply chain at destination level.

- Informational barriers relate to access to information, reliability of information and accessible formats of available information

- As several disability organisations pointed out in interviews, accessibility should not be assessed at the level of individual providers but at a higher level of aggregation, such as the destination, which includes different stages of the supply chain. Accessibility, according to these organisations, must mean a "holistic" approach that puts the experience of the customer at the centre

5. PRACTICES AND TOOLS FOR IMPROVING ACCESSIBILITY

This section draws primarily on the case studies, complemented with additional desk research. Furthermore all practices and tools identified in the case studies were discussed with experts at a face-to-face workshop in Blankenberge, Belgium and at the final conference of the project in Brussels. Further information on the methodological approach to this research as well as the full case study reports are available in the Annexes.

5.1. Overview

Each case study conducted in the framework of this study examined various tools used by policy-makers and/or DMOs as well as individual businesses to foster and improve accessibility, both horizontally at the destination-level as well as vertically throughout the supply chain. The rationale for developing case studies within the context of a destination, (rather than focussing solely on the performance of individual enterprises), relates to the importance of ensuring a seamless stream of accessible services for visitors rather than isolated examples of accessible services that are not fully integrated in the wider supply chain.

Overall the case studies conducted for this study illustrate that most destinations make use of a variety of explicit tools to encourage the uptake of accessible tourism. **Table 8**: below shows the different tools that were applied in various destinations, listed in alphabetical order.

Table 8: Tools Used in Case Study Locations to Encourage Accessibility

Access audits, analysis of current situation
Access legislation and/or standards
Accessibility Information Scheme / Access Statements
Accessible itineraries for visitors (packages)
Accessible routes
Accessible Tourism awards
Accessible Tourism Management Committee or similar
Conferences and workshops
Destination brand, label/certification
Information in multiple formats
Involvement of target groups as advisors
Local transport improvements
Market analysis
Marketing initiatives: advice, plans
Marketing materials, e.g. brochures, leaflets, video, multimedia
Mobile apps / devices
Physical infrastructure access improvements / Action plans
Political guidelines / policy documents
Study visits
Test activities with target clients
Tourist information centre
Training and awareness-raising
Use of accessibility / Universal Design standards, guidelines
Visitor surveys
Volunteers

It is beyond the scope of this study to produce a detailed inventory of these tools or to describe them all. Rather, this study focuses on providing a number of examples from a limited selection of 15 destinations to try and identify what worked and didn't work and why. It should be noted that none of the practices identified in the case studies was 100% good or 100% poor. Rather there are elements of good and poor practice in all interventions discussed here.

5.2. Top-Down Commitment to a Cross-Sectoral Approach to Accessibility

The impact of greater accessibility in one enterprise or at one stage of the tourism supply chain is greatly enhanced by having other accessible businesses around it (a so-called 'network effect'). Generally, the existence of such a network effects suggests that there is a strong rationale for intervention and coordination by umbrella organisations (e.g. industry associations) or the public sector to ensure prevent under-investment by individual enterprises. While an individual enterprise will generally only consider costs and benefits to itself when deciding to invest in improving accessibility, these purely private impacts underestimate the value of one enterprise's investment to the sector as whole (and of course to society). In other words **there are positive externalities in the investment decisions of individual tourism enterprises**. Public intervention is justified in these cases to capture the full potential of investment in accessibility across the entire supply chain.

In line with this network effect, the case studies have shown that the success of various tools in enhancing the accessibility of destinations and businesses depends partly on the commitment within the destination management organisation and/or trade associations to adopt a cross-sectoral (whole-of-supply-chain) approach to accessibility.

Typically, the most successful destinations incorporate accessibility into their marketing and communication activities as well as work actively with businesses to promote accessible tourism. The commitment to accessibility of an organisation that takes a strategic view of accessibility is imperative as businesses are dependent on public sector actors or DMOs to coordinate accessibility along the supply chain. In addition, the tourism boards also have an important role to play in advancing the understanding of accessible tourism as an important tourism product. While practical tools and methods can raise awareness, and help develop the business case for accessibility, the tools themselves are not *sufficient*. Rather they need to be accompanied by support at the political, the sector and the destination levels.

The case studies in **Arona, Barcelona, Ile-de France, Lousã and Trentino** illustrate the importance of commitment from the political level to improve accessibility. Evidence from these case studies suggests that political strategies and policy guidelines in regard to accessible tourism are the precursor as well as the support structure laying the basis for overall accessibility work. Without a supportive policy framework targeted to removing barriers along the supply chain and in the built environment there will be little incentive for businesses, except for the most specialised, to develop accessible services.

One best practice example highlighted in the case studies is the work of the tourism board of Ile-de-France which has taken up the strategic importance of accessibility for the competitiveness of the destination.[49] The ambition of the tourist board is to make Paris (Ile-de-France) accessible to all kinds of visitors. In doing so, the tourism board has been cooperating with associations representing people with disabilities in order to improve communication and to learn about the specific needs related to each disability. The board also works with businesses and support them in their efforts to improve accessibility through assistance, training and guidance documents. The tourism board was also involved in the development and the roll-out of the "Tourisme and Handicaps" label described above, which, in the French context, is seen as a successful tool in advancing accessible tourism.

Similarly, the case study on Arona found that the town's constant development towards delivering increased offers of accessibility would not be possible without the commitment of the tourism board. For example, in the tourism board there is a permanent department on accessible tourism signalling the destination's commitment to this market. In addition, the approach taken by *Transport for London*, providing advice and guidance for customers with mobility, sensory and/or intellectual impairments, makes a strong contribution to the destination's accessibility as a whole.

The Municipality of Lousa, Portugal developed a political strategy and action plan for creating an "accessible tourism destination", developed with the help of the national funding programme for Human Resource Development. A structural committee was set up with a broad-based representation of tourism business owners, local retailers, NGOs and a project office, which developed and coordinated a programme of research, training, infrastructure improvements and marketing, in cooperation with the Mayor's office.

The case study of Trentino, Italy, describes how the Mountain Academy provided technical coordination and support for an action committee and the eventual development of an accessibility certification scheme in the local region. One of the main aims was to promote the Ski World Cup event as "accessible for all", building on the experience of local volunteers, NGOs and businesses and engaging experts with knowledge of destination management and development and promotion.

Where a "top-down" decision has been taken by a local public authority or Destination Management Organisation, tools such as the following have been used to guide and stimulate appropriate policy actions:

- Set up an Accessible Tourism Management Committee or similar decision-making body
- Develop an accessible tourism policy document for the destination
- Develop accessible tourism guidelines for public and private sector actors
- Involve target groups of disabled people's organisations as advisors
- Hold stakeholder meetings, workshops.

[49] The **Ile de France** Paris destination management organization changed its name to VisitParisRegion (http://en.visitparisregion.com/) since the case study was carried out.

Box 3: Localised Interventions Fail to have an Impact

In cases where there is a lack of commitment from DMOs, there is little incentive for businesses to market and develop accessible products and services to a wider audience. The Finnish case study on Rovaniemi showed that no particular strategies, policies or even tools existed at a destination level to promote accessible tourism. Instead, where basic accessible infrastructure exists this is localised (e.g. hotels, parks and nature tracks) with little evidence of a knock-on effect on the wider supply chain. A more explicit commitment on a destination level, through an action plan or strategy, could mobilise a wider network of suppliers in improving accessibility and gaining more economic benefits as a result.

In the case of Stockholm there has been little uptake from businesses active in the tourism sector despite a high level of political commitment to accessibility of the urban environment. There are no actors (neither public nor private) who are responsible for marketing the city as an accessible destination. This has resulted in a scattered offer without an integrated supply chain. In this vein, Stockholm is seen as an "under-performing" case where things have not worked out as well as they could have done.

5.3. Physical Infrastructure Action Plans at Destination Level

Following on from the above, in addition to political commitment, capturing the network effects of accessibility investments by individual enterprises will also require financial investment. Indeed, improving physical infrastructure is a pre-condition for accessible tourism.

Investment in the accessibility of the public outdoor environment will:

- increase its attractiveness and thereby increase potential revenues for tourism businesses,
- act as a 'demonstrator' to local businesses that investing in accessibility can yield economic returns and
- increase the connectedness of local businesses across the supply chain and thus the potential of network effects taking hold.

Indeed, the more potential for interaction between enterprises at different stages of the supply chain and/or in different locations the greater the impact of one company's investment inaccessibility on the rest of the chain.

Evidence from the case studies suggests that one of the best tools in order to encourage accessible tourism horizontally at the destination level are **physical infrastructure actions plans**. Through short of committing funds directly, action plans are detailed descriptions of what actions to be taken in order to achieve a pre-defined goal. More specifically, an action plan firstly announces a commitment to bring about change and offers a vision of what that change or success should look like. This allows, in particular, DMOs to benchmark performance and well-developed action plans often include performance indicators in order to measure progress and achievements.

The case studies - London, Frankfurt am Main, Arona, Hérault, Paris, Barcelona and Lousã - where centrally-led action plans have been implemented, illustrate that these are valuable tools to maintain accessibility *over time* and one of the most successful ways to formulate needs and achieve desired results of a specific destination.

In the case of **Arona**, the tourist board's Action Plan was implemented in 2002 with the result that Arona has a long-track record of including accessibility in most activities of the tourism board. This plan has also provided the foundation for essential networking between users (NGO's and entities representing people with disabilities), the private sector and other public bodies. In the context of Arona, the plan has been useful to involve the tourism board in different actions regarding accessibility even outside the direct tourist sector.

In the case of **Lousã**, the town's Action Plan was based on a participative approach with the view to involve a large numbers of stakeholders across the destination in order to gather the necessary support for the accessibility project. The plan included measures in regards to the accessibility of the urban environment, training and skills upgrade for businesses, certification and management of accessible tourism destination, as well as activities to foster support of the accessible destination in the local community. This was believed to help foster accessibility in various sectors as well as help raise awareness among both local residents and businesses on the benefits of accessible tourism for the local economy.

Similarly, in **Barcelona**, which has gained a strong reputation for accessibility for disabled and senior visitors, the 10-year accessibility action plan, 1995 – 2004 was a fundamental tool for enhancing access across all sectors of city planning and enterprise. While the city's hosting of the Paralympic Games in 1992 provided the starting point for enhancing accessibility, it has been the sustained efforts of the action plan that delivered many of the access improvements such as the expansion of accessible public transportation, the development of a marketing approach towards persons of all ages and with any kinds of disabilities and the integration of the *design-for-all* approach in infrastructure planning at all levels.

Box 4: Watching Out for Sectoral and Stakeholder Fragmentation

The weaknesses associated with Action Plans relate mainly to the inherently fragmented nature of the tourism industry and the difficulty to ensure coordinated action across a vast number of sectors and actors. For example, the **London** case study shows that Action Plans can be scattered across different sectors without a holistic approach to destination management.

The difficulty that the tourism sector in London is facing relates to a lack of a specific accessible *tourism* action plan that pulls together different initiatives from all the sectors that make up the tourism industry. For instance, some parts of accessibility improvement plans will be in the public transport sector, building guidance and in the policy of different boroughs, but an overarching London action plan is lacking. This points to the **difficulty to implement coordinated action plans across very large destinations** such as London.

5.4. Cross-Sectoral Quality Labels and Standards Schemes

Turning to the marketing side of accessibility, there are tools which can assist with raising and (importantly) communicating quality standards of accessible service provision to potential customers. In particular, quality labels, part of some accessibility information schemes, are seen to communicate reliability of accessibility standards.

One of the leading examples of labels investigated in the case studies is the "Tourism and Handicap label" introduced in 2001 in **France**. The quality label is awarded to institutions and businesses that have made their services and facilities accessible. Evidence from the case studies on Hérault and Ile-de-France suggest that the label is successful and helps to increase the visibility of businesses services for disabled customers.

Specifically, the "Tourism and Handicap label" is divided into four categories:

- Physical disabilities;
- Sight impairments;
- Hearing impairments; and
- Learning difficulties.

The standards and criteria are high and, although the application process may be considered cumbersome for businesses, the process is important to guarantee high quality and ensure accessibility of the services and destinations.

Evidence from the case studies shows that the division of the label into four categories may be seen as an important incentive for businesses. Through this system they can gradually aim to make their establishments more accessible, addressing one category of visitors at a time. This approach will spread out the investment of resources over a longer time period and will therefore be less burdensome for the business. In comparison, a single label for all main types of disabilities would require a larger amount of money and time for the business to obtain the label. The categories may also enable the business to see results quicker, and this may as a consequence, result in the business making further efforts to qualify for the label in the other categories. One example from the case study on Ile-de-France relates to *Maison Victor Hugo* in Paris which underlined this as an important incentive, now striving to achieve the fourth and last category. At the same time it is of course important to ensure that the label is structured so that businesses have a strong incentive continue their efforts to become accessible to all categories of visitors – not just those who are easiest to accommodate.

Generally, the Tourism and Handicap label has played a positive role for the development of accessible tourism in France. Throughout the case studies conducted in France[50], it has been mentioned as one of the principal drivers to increased accessibility[51]. As a result of the thorough application process and checks, the label guarantees quality and accessibility, while rewarding the business for efforts and investments made.

Information and labelling schemes can also be used as a valuable business development tool and a point of reference for businesses to understand accessibility. In **England**, the National Accessible Scheme[52], (NAS) and the published NAS standards are frequently used by architects and builders for guidance on accessibility without tourism providers necessarily joining the scheme. The NAS has a fairly small membership take up and is therefore not seen as being successful. However, the London case study argues that the NAS meets the needs of those visitors who may use it and rely on it. For example, in a survey of disabled travellers, 62% said that the National Accessible Scheme would positively influence their decision to visit

[50] Hérault, Paris and Disneyland

[51] The uptake of the label has also been supported by legislation. See the Hérault and Paris case study for further information.

[52] This scheme is directed to accommodation providers.

London[53]. In addition, the NAS provides a good practice standard against which businesses can measure their performance and is therefore believed to be valuable in itself.

Box 5: Need for Continued Commitment, Funding and Updating

The **Athens** case study includes an examination of the ERMIS-scheme for retail premises, which was an initiative of the ATHENS 2004 Organising Committee for the Olympic Games and the Athens and Thessaloniki Chambers of Commerce and Industry and the Chambers of Magnesia, Irakleio and Achaia (Olympic Municipalities). This certification scheme was created specifically for the Olympic and Paralympic Games to help disabled and other visitors with specific access needs to find disability-friendly services. In addition, it acted as an information campaign, directed towards shopkeepers and small businesses, advising and encouraging them to make their premises accessible for all customers. It was believed to be relatively easy and inexpensive for businesses to comply with these schemes, based on clear and specific criteria. For promotional purposes businesses had their name, address and other details listed in the *Ermis Accessible Choice Guide* and received a label.

According to stakeholder interviews, the Ermis Guide was a very successful tool for engaging SMEs. It was presented as a business opportunity while capitalising on the positive feeling towards accessibility for the Paralympics. However, funding stopped when the Games started in 2004 and neither the Athens Chamber of Commerce nor any other agency or public office has since taken over the scheme. Some shops that were accessible, temporarily, for the Olympic and Paralympic visitors have since become inaccessible again. For example, temporary ramps at entrances have been removed. The Ermis Guide is no longer published or available from any source (only private copies exist) and the access information in the guide is now outdated.

The fact that it has not continued points to a lack of understanding by the authorities and Chambers of Commerce of the opportunity around the accessibility market, rather than the tool in itself being unsuccessful. This shows the importance of engagement of public and private sector actors to maintain a seamless stream of accessible services.

Another example of a project based approach which failed to lead to the expected impacts is the accessible destination certification. The *Accessible Tourism Destination Certification Programme* (in Lousa) was designed to be based on an extensive audit of the DMO's accessible tourism policies, infrastructure, transport, services and visitor information, and includes accessibility assessments of the outdoor environment, overnight accommodation, attractions, activities and offers for visitors including persons with disabilities, older persons and families with small children. In particular, this tool was meant to be well suited to smaller destinations, such as **Lousã**, where the value chains are more geographically concentrated. Both qualitative and quantitative indicators were incorporated to gauge the accessibility of the destination. The idea behind establishing a certification scheme was not only to score the accessibility of the destination, but also to lay the foundations for knowledge-transfer from the expert organisation (in this case the Toegankelijkheids Bureau, a Belgian accessibility consultancy[54]) to the destination management or public authority. The certification set out to identify weaknesses and strengths and sets out a comprehensive accessibility strategy similar to an Action Plan, in order to monitor the destination's progress and create new objectives for the continuous improvement of the destination. In this vein, the ATDCP was only valid for a 2 year-period and was to be renewed every 2 years assessing the progress made.

This tool was first piloted in connection with the accessible tourism project that took place in Lousã during 2008-2010. To date Lousã remains the only destination which has benefited from this certification

[53] http://www.visitengland.org/busdev/accreditation/nas/index.aspx
[54] http://www.accessibletourism.org/?i=enat.en.enat_projects_and_good_practices.1191

programme. Even in Lousã, the tool was initiated on a project basis and due to the financial crisis and the end of funding for the project, Lousã did not seek to renew the certification for another 2-year period. What could have been a very promising tool, in the vein of the good practices around Quality Labels presented in the previous section, failed to achieve the required sustainability, scale and replication across different locations to be considered a success.

5.5. Access Statements at the Level of Individual Tourism Businesses

Of course, not all good practices identified in the case studies took place at the destination level, nor were they all led by the public sector. Indeed, ultimately, the above interventions will only work if they engender behavioural change among individual tourism enterprises. Access statements are one very low-cost tool to help businesses that have made changes to become accessible market their activities to potential customers.

Access Statements are descriptions of facilities and services offered by tourism businesses with the aim to provide objective information in order to equip the potential visitor with information on whether the business would be suited for his or hers specific needs. These statements are compiled by the businesses themselves, usually following a certain format, such as the Pantou Access Statement.[55]

This approach is promoted by, for instance, **Visit England**[56] which provides an online tool to help businesses through the process of producing their own access statement. Anecdotal evidence collected in the study suggests that the value of an access statement lies in the fact that it attracts the attention of tourists with access needs who will then contact the venue or service provider directly for more detailed information.

Access statements are thought to be the most useful for those tourists with very high levels of access requirements, as they are in greater need of more detailed information to determine the level of accessibility. Research in the **UK** shows that 76% of consumers are influenced by the presence of access statements in the decision making process[57]. Similarly in the **Schönbrunn** case study, stakeholder interviews indicated that access statements in written text and in sign-language videos were good at providing initial indications of accessibility, though this had to be complemented with more detailed information about all access features that could be expected at the venue.

Box 6: Need to Increase Take-Up and Improve Quality

One weakness of access statement relates to the uptake of this tool by tourism providers which experts believe to be very low even in the UK where they are probably most developed[58]. In addition, access statements require businesses to undertake a self-assessment which presupposes that a) businesses have a good notion of accessibility needs or b) leads to varying degrees of quality in the access statements.

[55] http://pantou.org/access-statement
[56] For further information see the case study on London.
[57] Report from LiveTourism to London Development Agency. (2010). "Is London Ready to Welcome Disabled".
[58] UK Expert assessment

Given their low cost and potential marketing value, the case studies have shown that, where they are used properly, access statements can play a significant role in demonstrating the benefits of targeting the accessibility market. To help them become effective, they must be sufficiently detailed to be valuable to the tourist. The provision of good guidance is required to help businesses use access statements to access the market for accessible tourism. Wider take-up needs to be encouraged at destination level and through marketing and information campaigns around the potential benefits.

5.6. Capitalising on Social Entrepreneurship

Where commercial providers do not dare to enter the accessible market, social entrepreneurship can play an important "demonstrator role", filling gaps in the accessible supply chain and demonstrating the profitability of business models focused on the provision of accessible services. The case studies on **Slovenia** and on the **Czech Republic** found that social entrepreneurship can foster and complement the activities pursued by private businesses. Not only can they compensate for the lack of services at specific stages of the supply chain (e.g. communication, tour operator, transport) and improve the offer of private suppliers for example through training, but they can operate themselves on a market basis by selling their products and services. For instance, the case study on Slovenia featured a social enterprise tour operator providing relevant information to disabled tourists. Effectively, by offering brochures and tailor-made information on destinations and their accessibility levels, it filled a gap in the market. Often, these social entrepreneurs will initially focus on special services or higher access needs to establish a presence in the market from which they can then build out.

Furthermore, because they aim to be emulated by the private commercial sector, these initiatives, if successful, create a multiplier effect which can greatly increase the return on any initial public investment required to start up the social venture in the first place. In addition, these initiatives are supported by a business plan and they aim to become self-financing after an initial period which again increases the leverage of initial public investment.

Social entrepreneurship initiatives are particularly useful in cases where private sector provision is very weak and / or where there is little awareness of accessibility. In these cases the potential multiplier is largest and the risk of distorting an existing private sector, commercial market is lowest. Indeed, in the two case studies in the Czech Republic and Slovenia where such initiatives were analysed, the research found that social entrepreneurship should be nurtured when accessible tourism services need to be developed from "scratch". The case studies did not find any evidence of weaknesses relating to this type of provision of accessible services.

Box 7: Social Entrepreneurship Supports Training and Awareness

The social enterprises examined in the case studies on Slovenia and the Czech Republic illustrate that these organisations have a positive effect on awareness raising around the market potential of accessible tourism along the supply chain. As a consequence of the expertise of these enterprises, they assist business partners and companies to become more accessible. This is of particular importance in those destinations where there are no other organisations, such as DMOs, active in disseminating information and awareness. In addition, these social enterprises may also help to increase staff skills in catering to tourists with access needs. This is of particular importance as the lack of staff skills were identified in the parallel study on training and skills needs[59] as a considerable barrier inhibiting accessible tourism. These considerations provide an additional rationale for why social entrepreneurship should be nurtured in markets with low uptake of accessible tourism.

5.7. Training and Staff Skills

Finally, staff skills have a considerable impact on the perceived level of quality experienced by tourists with access needs. A parallel study on skills and training carried out by the European Commission further highlighted the importance of adequate skills provision in the context of accessible tourism, including 20 case studies that outline detailed examples of good and poor practice in terms of accessibility training for staff. In this study, the case study in Schönbrunn highlighted that training of employees led to increasingly satisfied customers in regard to the service quality. Training enables employees to become better aware of the needs of people with disabilities. In addition, the employees are more motivated and less afraid to help people with need for assistance.

Box 8: Avoiding Project Based Awareness and Training Interventions

Two case studies, **Moravia-Silesia** and **Lousã**, examined European and nationally funded accessible tourism projects and some of the tools that were developed within the context of these projects. The conclusion drawn from these cases is that particularly sustainability beyond the funding period is uncertain with the implication that the impact of the projects is often limited.

The case study of Moravia-Silesia found that businesses generally do not move on from awareness raising, training and certification systems to concrete action i.e. investing in accessibility across their services and facilities and marketing their accessible offers. In the Czech case this seems to indicate that there needs to be awareness and promotion of accessible tourism among the general public, policy-makers and businesses outside the limits of the project. This finding suggests that accessible tourism projects without any connection to the wider policy or business framework may not gain sufficient traction with the business community and this will jeopardise any long-lasting impact on the supply chain.

5.8. Key Findings on Practices and Tools

This section examined six different tools or practices used in the case studies carried out as part of the study to examine whether these practices were good or not and why. It should be noted that none of the practices identified in the case studies was 100% good or 100% poor. Rather there are elements of good and poor practice in all interventions discussed here.

Top Down Commitment to a Cross-Sectoral Approach to Accessibility

[59] European Commission. (2014). "Mapping training and skills needs to improve accessible tourism services". http://ec.europa.eu/DocsRoom/documents/5568/attachments/1/translations/en/renditions/native

- The impact of greater accessibility in one enterprise or at one stage of the tourism supply chain is greatly enhanced by having other accessible businesses around it. As a result of such positive externalities, public intervention can help capture the full potential of investment in accessibility across the entire supply chain.

- The success of various tools in enhancing the accessibility of destinations and businesses depends partly on the commitment within the destination management organisation and/or trade associations to adopt a cross-sectoral (whole-of-supply-chain) approach to accessibility.

- While practical tools and methods can raise awareness, and help develop the business case for accessibility, the tools themselves are not sufficient. Rather they need to be accompanied by support at the political, the sector and the destination levels.

- Weaknesses include cases where there is a lack of commitment from DMOs, which reduces the incentive for businesses to market and develop accessible products and services to a wider audience. Also, where there are no centralised marketing opportunities for accessibility at destination level, take-up of accessibility can be low because individual enterprises on their own cannot capture the 'whole of supply chain' approach.

Physical Infrastructure Action Plans at Destination Level

- Capturing the network effects of accessibility investments by individual enterprises will also require financial investment. Indeed, improving physical infrastructure is a pre-condition for accessible tourism.

- One of the best tools in order to encourage accessible tourism horizontally at the destination level are physical infrastructure actions plans

- Investment in the external environment will increase its attractiveness and thereby increase potential revenues for tourism businesses, act as a 'demonstrator' to local businesses that investing in accessibility can yield economic returns and increase the connectedness of local businesses across the supply chain and thus the potential of network effects taking hold.

- The more potential for interaction between enterprises at different stages of the supply chain and/or in different locations (e.g. through transport links) the greater the impact of one company's investment inaccessibility on the rest of the chain.

- Weaknesses associated with such action plans relate mainly to the inherently fragmented nature of the tourism industry and the difficulty to ensure coordinated action across a vast number of sectors and actors. This is compounded in very large destinations (e.g. London)

Cross-Sectoral Quality Labels and Standards Schemes

- Quality labels, part of some accessibility information schemes, are seen to communicate reliability of accessibility standards. Information and labelling schemes can also be used as a valuable business development tool and a point of reference for businesses to understand accessibility.

- While a distinction in such labels by impairment can be an important incentive for businesses to engage with the label and make the initial investment, this has the drawback of not being consistent with a cross-impairment approach.

- Weaknesses of such tools as they exist now are that they require consistent funding, they tend not to be self-sustaining and they therefore often do not go beyond the pilot phase and fail to achieve scale and replication required to maximise their impact

Access Statements at the Level of Individual Tourism Businesses

- Access statements are one very low-cost tool to help businesses that have made changes to become accessible market their activities to potential customers.

- Access statements are thought to be the most useful for those tourists with very high levels of access requirements

- Weaknesses of access statement relates to the low uptake by tourism providers and the need for businesses to undertake a self-assessment which either presupposes that they have a good notion of accessibility needs or it leads to varying degrees of quality in the access statements.

Capitalising on Social Entrepreneurship

- Where commercial providers do not dare to enter the accessible market, social entrepreneurship can play an important "demonstrator role", filling gaps in the accessible supply chain and demonstrating the profitability of business models focused on the provision of accessible services.

- these initiatives, if successful, create a multiplier effect which can greatly increase the return on any initial public investment required to start up the social venture in the first place

- Social entrepreneurship initiatives are particularly useful in cases where private sector provision is very weak and / or where there is little awareness of accessibility.

Training and Staff Skills

- Staff skills have a considerable impact on the perceived level of quality experienced by tourists with access needs.

- Training enables employees to become better aware of the needs of people with disabilities. In addition, the employees are more motivated and less afraid to help people with need for assistance.

- At the same time, project based awareness and training interventions should be avoided because they are often not sustained beyond the project period and businesses generally do not move on from awareness raising, training and certification systems to concrete action i.e. investing in accessibility across their services and facilities and marketing their accessible offers.

6. Results, Recommendations and Priorities for Action

This section of the report brings together the key results of the previous sections to conduct a gap analysis in the provision of accessible tourism services and facilities and to identify recommendations to improve the availability and the quality of such services in the short, medium and longer term. The section draws on all research activities conducted over the course of the study. In addition, this section sets out an approach to validate and disseminate the results of the study. Further detail on each information source is in the Appendix.

6.1. Gaps in Provision of Accessible Tourism Services and Facilities

There are evident and considerable gaps in the absolute provision of accessible tourism services in Europe, as shown by the analyses of multiple sources of supplier data (AIS and Pantou). Adding the number of AIS suppliers and Pantou suppliers together gives the total figure of: 224,036 (AIS) + 89,250 (Pantou) = 313,286 suppliers.

Comparing this data with the total number of service providers in the European tourism sector it is estimated that at least 9.2% of the existing supply of tourism facilities and services have at least some level of provision for travellers with specific access needs. In gross terms, this means that over 3 million tourism enterprises may not be suitable to the needs of tourists with accessibility requirements.

There is an estimated 27.8% gap between the current supply and demand for accessible tourism services. If Europe is to keep pace with the projected demand from the market of seniors, people with disabilities, long-term health conditions, families with small children and others, an additional 1.2 million enterprises with accessible services will be needed by 2020.

The top-three types of accessible services are accommodation, wellness and conference facilities, where accommodation constitutes over 50% of all services.

The top-three customer groups currently catered for are people with mobility impairment (including wheelchair users), people of very large or small stature, people who are deaf or have hearing impairments and people who are blind or have vision impairments. Member States with the larger number of accessible services are France, Spain, Italy and the UK and the least represented are Bulgaria, Latvia, Romania, Estonia and Lithuania. However, relative to the provisions for visitors with mobility impairments there are very low levels of provision for people with other access needs, in particular for the large numbers of customers with long-term health conditions.

In addition to the above gap in the actual provision of accessible services and facilities, there are also **major concerns regarding the performance of the above supply both from the perspective of users and industry**.

First, across Member States, there are significant gaps with regard to the prevalence of the accessible service supply.

Front-runners include Spain and Catalonia at regional level, Flanders, United Kingdom, Italy, which are countries and regions that have been through one or more accessibility development programmes, encouraged by government support and/or legislation, which promote accessible tourism successfully from NTO level and through their regions and business networks.

Improvers include Germany, Portugal, France, Denmark, Finland, Sweden, (Paris and Veneto, at regional level), Czech Republic, Slovenia, Luxembourg, Croatia. In these countries accessible tourism has been nurtured in significant, professionally led projects that have created positive results and examples for other destinations and SMEs in the country to follow

Starters and Late-starters: are those countries that are still waiting for a significant breakthrough to win their reputation as an accessible tourism destination. **Political will** to embrace and promote tourism accessibility is perhaps the critical requirement to start a virtuous development cycle in this regard. Some countries are working hard in this direction (e.g. Malta, The Republic of San Marino, Cyprus, Ireland, Poland, Latvia and Austria). Others include, e.g. The Netherlands and Greece, where there are good developments in some areas but no coordinated plans involving the mainstream tourism sector, as yet.

Second, at the level of providers themselves, the majority of service providers do not adopt a cross-impairment approach not is there much integration across the supply chain. Only 17% of all industry respondents that have some provisions for accessible tourists reported to cater to all disabilities. In addition, accessibility still seems to be a very "local" phenomenon based on the isolated investment decisions of individual providers. From a customer perspective, this lack of integration leads to widespread dissatisfaction with the current provision of accessible services.

Third, one of the key gaps in the current provision of accessible services and facilities is the lack of integration of accessible services across the supply chain in the vast majority of locations. This was clearly exemplified in the case study research which showed that even in the destinations that are to be considered best practices, accessibility is often a specialised field. This was best shown in the case studies on Athens, Slovenia, Herault, Rovaniemi and Moravia-Silesia. These case studies point towards individual suppliers are often being isolated hampering the incentive for individual business to engage in accessibility. Overall, the result of the study show strongly that accessibility should not be assessed at the level of individual providers but at a higher level of aggregation, such as the destination, which includes different stages of the supply chain. The accessibility of the tourism sector depends not just on the action of individual businesses but on the accessibility of the entire supply chain that makes up the visitor journey.

Three key barriers prevent businesses from becoming increasingly accessible: Infrastructure and physical barriers, financial barriers and lack of a strong business case and Knowledge and information barriers. Accessibility is today not seen as a business opportunity but as involving high costs with little return. This is especially the case for SMEs which have lower financial resources and access to finance. In addition, from a marketing perspective, it is difficult for businesses to capture the accessibility market due to the lack of a coordinated, centralised marketing structure for accessible tourism.

Finally, in addition to the above gaps in the provision of accessible services and facilities, there is also an important disconnect between the perceptions of industry and travellers. Indeed, the most frequent barriers encountered by tourists related to information on accessible services and the lack of integration of accessible services across the supply chain at destination level. On the other hand, industry perceptions suggest that accommodation and information are the most accessible segments in the supply chain.

6.2. Recommendations to Improve the Availability and Quality of Accessible Tourism Services in the Short, Medium and Long term

Based on the results of the study, the following recommendations can be put forward to address the key gaps identified above:

The problem of the low prevalence of accessible services and facilities can only be addressed by convincing businesses to invest in the provision of accessible services and facilities. In particular, there is a need to support businesses with making the business case for investment in the field of accessible tourism.

In the short term, this requires coordinated efforts by the EU, National authorities, Member States, regions and local authorities working with national and local destination management organisations to gather and disseminate 'hard data' on return on investment. A business case template based on a set of local case studies from across the supply chain should be drawn up to demonstrate the financial and commercial advantages of investing in the accessible tourism market.

Second, DMOs need to work internally to ensure there is top-down commitment from local policymakers, the tourism (and related) industries and other stakeholder organisations to market their destination from an accessibility perspective. Such marketing will require managing (with the participation of businesses) a central database or Directory that directs visitors to reliable sources of information on the accessible offer and permits businesses to market themselves to this specific target market. Ideally, this database should be integrated with Pantou (or a similar portal) at European level, it would be managed with a strong industry involvement and it would allow bookings to be completed directly on site. Having an **Accessible Tourism Directory** for the European tourism sector helps to promote Europe as an "accessible tourism destination" and at the same time serves as a reminder and example to all businesses to encourage them to make their offers accessible for all. The experience of "mainstreaming disability requirements" in other sectors of society, such as employment, transportation and education, over the past 10 to 20 years, has shown that mainstreaming needs to be encouraged by specific and positive actions to achieve broad change. It can be surmised that the ultimate goal of **"mainstreaming accessibility" in all tourism destinations and businesses** will be achieved more rapidly by having a dedicated resource such as Pantou, which can support and enable suppliers and service providers to create effective accessible tourism supply chains.

Third, DMOs will need to identify and highlight links and interdependencies between different providers in the supply chain to identify the key spill overs and positive externalities between the investment of individual businesses and the overall accessibility of the supply chain. This can be done, through consultation of relevant stakeholders but also, for instance, through analysis of user traffic on the central information database which indicates those services that interest users and where the key interdependencies lie.

In the medium to longer term, destination management organisations then need to take a much more active role in coordinating the supply of accessible services in their destinations from an accessibility perspective. This will require, for instance, targeting funding and financial support to those areas with the highest spill over potential and investing in segments of the supply chain that act as bottlenecks for capturing the positive externalities of private sector investment from the tourism industry.

Regarding improvements in the performance of the existing supply of accessible services and facilities, recommendations focus again on the role of DMOs in raising awareness of quality issues as well as targeted support to fill gaps in the market where required.

In the short term, it is important for all stakeholders (DMOs, industry and other stakeholders) to understand where the main performance breakdowns are. At present, there are still differences between industry and customers regarding the level of performance of the sector and the segments in the supply chain where the key barriers lie.

First of all, systematic consultation of stakeholders at destination level is important to agree a joint action plan between policymakers, industry and the disability community.

Second, there is a need for DMOs to support businesses in the use of high quality access statements. This can be done through training administered via the local industry associations or guidelines issues by the DMO and distributed to businesses. Where access statements are of high quality and the information provided can be verified this should be marketed through the dedicated accessibility database (see above) and/or through a quality label which certifies that the information has been checked and found to be accurate. Further, the labelling scheme should allow for user feedback on the accuracy of access information as well further specifications to be provided to ensure that those with the best understanding of needs (i.e. the travellers themselves) can affect the level of detail of information provided.

In the medium to longer term, public authorities (including at local, national and European levels) should consider expanding the role of social entrepreneurship regarding accessible tourism through funding and co-funding demonstration projects to address specific bottlenecks in the supply of accessible services and facilities. This can be done though dedicated calls for proposal or calls for tender and it should always require the development of a business and sustainability plan beyond the funding period.

Within the European Union’s *Multiannual Financial Framework (MFF) 2014 – 2020,* a wide variety of programmes and funds may be used to support the further development of accessible tourism supply. Relevant MFF programmes and themes include, for example:

- **Consumer programme:** Consumer information and education; consumer rights and effective redress
- **Competitiveness of Enterprises and SMEs (COSME):** competitiveness, growth and sustainability of EU's enterprises, in particular SMEs, and promoting entrepreneurship and jobs
- **ERASMUS +:** boosting skills and employability by providing funding for the professional development of education and training staff, as well as youth workers and for cooperation between universities, colleges, schools, enterprises, and NGOs

- **HORIZON 2020:** science and technology - funding the entire value creation chain from fundamental research through to market innovation, with support for SMEs

- **Rights, Equality and Citizenship:** promoting the rights of *inter alia* people with disabilities

- **Economic, Social and Territorial Cohesion:** Themes under the European Regional Development Fund.

The European Commission's "Guide on EU funding available for tourism", (October 2014) provides advice and guidance on the available funding instruments. Available from this webpage:

http://ec.europa.eu/enterprise/newsroom/cf/itemdetail.cfm?item_id=7847&lang=en

6.3. Validation and Dissemination of Results

Over the course of the contract, the results of the study have already been disseminated through the following channels.

- Expert Validation Workshop, Blankenberge, Belgium (2 October 2013)
- "Mind the Accessibility Gap" conference, Brussels;(6 June 2014)
- Conference video and additional videos produced by ENAT;
    - http://youtu.be/U9mWvWocYFQ?list=PLC648CE68AB900757
- World Tourism Market panel discussion (5 November 2013, November)
- World Tourism Market panel discussion (4 December 2014, London); and
- Dissemination through the ENAT website
    - http://www.accessibletourism.org/?i=enat.en.enat_projects_and_good_practices.1414
    - http://www.accessibletourism.org/?i=enat.en.presentations.1578

In addition, beyond the duration of this contract, the following dissemination activities should take place:

- **Publication of this report** on the Commission's website and further presentations of the study results in different sector specific fora, e.g. NTOs, DMOs, Chambers of Tourism and others;

- **Maintenance and further growth of the Pantou Directory of European Accessible Tourism Suppliers**, developed specifically for this project. To be successful as a marketing tool, Pantou can add value to the existing Accessibility Information Schemes and address some of the concerns of industry and consumers regarding the availability of a central marketing outlet targeting the accessible tourism market. Pantou should be marketed by a management team with strong links to tourism businesses. This could be either an existing organisation, such as an umbrella industry group or a new entity that combines participation from various stakeholders. Further funding will need to be made available in the short term to allow the tool to grow and acquire critical mass but this should be contingent on the existence of a fully-fledged business plan which will lead to self-financing of the tool (e.g. on the basis of fees or advertising revenue or other);

- **Continued linkages with existing Accessibility Information Schemes** to ensure their cooperation with the study team and to take into account their feedback.

Annex 1. Accessible Tourism Destination Case Studies

List of Case Studies

Destination	Country
Arona	Spain
Athens	Greece
Barcelona – Cruise port destination	Spain
Disney Corporation	France
Frankfurt	Germany
Hérault, le Languedoc	France
London	United Kingdom
Lousã	Portugal
Moravia-Silesia and Tešín	Czech Republic
Paris - Ile de France	France
Rovaniemi	Finland
Schloss Schönbrunn / Vienna	Austria
Slovenia NTA, ŠENT NGO and Premiki	Slovenia
Stockholm	Sweden
Trentino	Italy

ANNEX 2. EU-28 COUNTRY LEGISLATION REPORTS

See separate document

Annex 3. Country Reports

See separate document

ANNEX 4. PANTOU.ORG SOCIAL MEDIA & USER STATISTICS REPORT

See separate document

ANNEX 5. PANTOU.ORG TECHNICAL HANDOVER REPORT

See separate document

ANNEX 6. METHODOLOGICAL APPROACH, CHALLENGES AND MITIGATION STRATEGIES

The methodological notes for this study are provided in a separate stand-alone document.

ANNEX 7. LISTS OF REVIEWED ACCESSIBILITY INFORMATION SCHEMES

Table 9. Accessibility Information Schemes in European Countries and Regions

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
HRV001	Croatia	Association for Promotion of Equal Opportunities (APEO - UPIM)	17	http://www.upim.hr/category/15/subcategory/15/136
HRV002	Croatia	Kvarner County Tourist Board	42	http://www.kvarner.hr/en/tourism/What_to_do/Vacation/Offer_for_Persons_with_Special_Needs
HRV003	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/
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

Code	Country	Name of scheme or information provider	No. of listed services	URL
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	Ireland.com	31	http://www.ireland.com/about-ireland/once-you-are-here/accessibility
IR002	Ireland	National Q Mark	3	http://www.eiqa.com/
IR003	Ireland	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	Luxem-bourg	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
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/

Code	Country	Name of scheme or information provider	No. of listed services	URL
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/
CH001	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
UK009	United Kingdom	Visit Wales	615	http://www.visitwales.com/accommodation-search
UK010	United Kingdom	Disability Onboard (National Rail)	2,516	http://www.disability-onboard.co.uk/
UK010	United Kingdom	Euan's Guide	1,296	www.euansguide.com
UK011	United Kingdom	Rough Guides - Accessibility	177	http://www.accessibleguide.co.uk/
UK012	United Kingdom	Changing Places	669	http://www.changing-places.org/find_a_toilet/location_map_and_national_register.aspx
UK013	United Kingdom	Isle of Man Accessible Accommodation	11	http://www.visitisleofman.com/accommodation/disabled.xml
UK014	United Kingdom	Official London Theatre Access Guide	70	http://www.officiallondontheatre.co.uk/access/
UK015	United Kingdom	Accessible-Property.org.uk	151	http://accessible-property.org.uk/holidays/accessible-accommodation.htm
		TOTAL	**224,179**	

Table 10. Accessibility Information Schemes: Pan-European

World region	Name of scheme or information provider	No. of listed services	URL
Europe	EuropeforAll	580	www.europeforall.com
Europe	Accessibility Pass	19	http://www.accessibilitypass.org/
Europe	Clear Project	83	www.clear-see.eu/values
Europe	Scandic Hotels	225	http://www.scandichotels.com/Always-at-Scandic/Special-needs/
Europe	Pantou *	318	http://pantou.org
Europe	MapAbility-map **	70	www.exchangeability.eu/mapability-map
Europe	ECARF Travel	12	http://www.ecarf-travel.org/
	TOTALS	**1,307**	

* Pantou: Individually registered suppliers, November 2014.
** Estimated total suppliers, 2014

Table 11. International Accessibility Information Schemes

Country of site provider	Name of scheme or information provider	No. of listed services	URL
International	DisabledHolidays4U	500	http://www.disabledholidays4u.com
International	Australia for All (+ International section)	150	http://www.australiaforall.com
International	Planat.com	31,634	www.planat.com
International	Travabled	41,727	http://travabled.com
International	Access All Rooms	13	www.accessallrooms.com
International	HandyCairn	46	http://www.handycairn.com/index.php
International	NATIVE Hotels	53	www.nativehotels.eu
International	Wheelmap.com	450,000 *	www.wheelmap.org
International	Sage Traveling	437	www,sagetraveling.com
International	Able Road	**	http://ableroad.com
International	Hotels.com	250,000	www.hotels.com
	TOTALS	**774,560**	

* Estimated
** Total number of services cannot be identified

ANNEX 8. INFORMATION ON THE REVIEW OF TOURISM AIS

See separate document