



**EU.FOR.ME Project**

Tourist training for a wider target

# **Analysis of the needs in the field of Tourism for All**



Education and Culture



## Tourism for All Concept

**EVERYONE SHOULD BE ABLE TO TRAVEL TO THE COUNTRY, WITHIN THE COUNTRY AND TO WHATEVER PLACE, ATTRACTION OR EVENT THEY SHOULD WISH TO VISIT.**

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## Introduction

Before going into the analysis of the results from the Focus Groups, and into outlining the action plan that will translate the expectations expressed by the Panel of young people with disabilities into initiatives to define the training requirements and the 'training of the trainer' model, it is appropriate to briefly introduce the concepts relative to 'Tourism for All', its evolution from concept to actual initiative, and the quantitative description of the size of the target group of tourists with disabilities, both at national and European levels.

## Accessible Tourism for All: Concept and target group

The demand for tourist products is constantly increasing, despite period of crisis due to the economic or political situation that may temporarily slow down the growth trend. This demand is not limited only to some categories of citizens. On the contrary, it involves a large section of the world population, even those with modest income.

It also involves a segment that is largely underestimated in numeric and economic terms. This segment is constituted by people with disabilities, who want, are able and should be able to access tourist offers designed in such a way to satisfy their need for absence of barriers (architectural, cultural and behavioural).

What is 'Tourism for All'? How did it come about? How has it been evolving in Europe and in the rest of the world? What does it mean in terms of potential economic benefits and returns for the tourism industry?

The concept of Tourism for All was born in Great Britain when the report 'Tourism for All' was published in 1989. It was targeted at the tourism industry and its operators, to encourage them to create offers, in line with the view of quality and integration, that would take into account the needs of all potential clients, including those with special needs because of their personal conditions.

The competitiveness of a tourist destination is directly linked to the services and products that it is able to offer. Tourists will choose those that best meet their expectations, dreams and budget.

If a tourist is a person with disabilities, additional expectations include meeting those conditions that will allow them to enjoy their holiday to their full satisfaction.

A tourist destination is also the result of a series of components coming together: transportation, facilities and human resources. If any one of these components were lacking from the ease-of-access view point, the whole holiday would be compromised.

Tourism for all, therefore, can and must also mean quality tourism. Where quality should mean taking into account all expectations and needs of clients with special needs and offering them comfort, attractiveness and safety.

The idea behind accessible Tourism for All is based on the Design for All philosophy that was developed at European level. Design for All is an approach towards (re-)designing the built environment, products and services such that all persons are enabled to participate equitably in life in the community (cf. EUCAN 2003, p. 22).

This planning philosophy also provides the foundation for the concept of 'Tourism for All': **'Everyone – regardless of whether they have any disabilities – should be able to travel to the country, within the country and to whatever place, attraction or event they should wish to visit'** (NORDISKA HANDIKAPPOLITISKA RÅDET 2002, p. 17).

The group of persons for whom accessibility is a crucial prerequisite for participating in community life includes persons with physical limitations (e.g. persons of limited mobility or manual dexterity, wheelchair users), sensory disabilities (e.g. blind/visually impaired or hearing-impaired/late-deafened persons) as well as those with mental or learning disabilities or chronic diseases. The group of persons for whom an accessible built environment is necessary includes above all persons with activity limitations<sup>1</sup>, e.g. persons who (may) encounter difficulties in terms of mobility or activity both in everyday situations and while travelling. These include e.g. persons suffering temporarily from the effects of an accident, parents with prams or baby carriages, travellers with heavy baggage, families with small children or older persons. Ultimately, the establishment of accessibility in the tourism infrastructure enables all persons to enjoy simple, intuitive and safe access, thereby enhancing the level of comfort, the attractiveness and quality of tourism facilities and services (cf. ZEIMETZ/NEUMANN 2000).

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<sup>1</sup> In the 2001 World Health Organization's International Classification of Functioning, Disability and Health (ICF), the term 'activity limitation' replaces the term 'disability'. In consequence, the term 'people with disabilities' is replaced by 'people with activity limitations', which is defined as follows: 'Those people, of all ages, who are unable to perform, independently and without aid, basic human activities or tasks – because of a health condition or physical/mental/cognitive/ psychological impairment of a permanent or temporary nature.' (cf. WHO 2001).

## The segment's economic potential - The History

The results from the first research study on tourism for disabled with forecasts of its economic development in Europe, if specific conditions were to be guaranteed, was presented in London during the 'Tourism 2000 Tourism for All in Europe' convention in October 1993.

Conducted by Touche Ross, the study 'Profiting from Opportunities – A new market for tourism' stated that the percentage of the entire population in Europe officially declared disabled is about 11%. Another 3 to 4% should be added to this number to include those who, for various reasons, are not accounted for in the official statistics.

14% of the population corresponds to about 50 million disabled people in Western Europe.

For various reasons (type of disability, socio-economic conditions), we cannot, however, consider the whole segment of people with disabilities as potential tourist customers. Touche Ross estimates that 72% of the disabled people are able and willing to travel. This means a market of about 36 million people. 5 to 6 million of them were already regularly travelling in 1993.

Therefore, the total market of people with specific needs interested in travelling, but who are, for various reasons, still excluded from the official tourist system amount to about 30 million individuals.

Many programmes have been started throughout Europe to increase awareness of and develop tourism for all, on the basis of this data. Projects were funded by the European Union to encourage tourist activities accessible by all. Above all, the tourism industry was asked to consider these aspects to create a systematic diversification of its product offering.

However, an element, not at all negligible when it comes to offering a quality product, was taken for granted during this phase of timid but constant opening of the tourism industry to create 'accessible' products. That is the ability of the human resources operating in the mainstream tourism industry to understand, utilise and manage all the elements, technical and relational, necessary for a correct relationship between the service provider and a disabled client.

## Studies and research in Italy

### A) ITER Research

Source: Survey Iter-ENEA 1999

#### THE DEMAND FOR ACCESSIBLE TOURISM

The research was conducted in 1999 by ITER on behalf of ENEA (the Italian National Agency for New Technologies, Energy and the Environment) as part of the project STARe (Tourist Services for Accessibility and a comfortable Stay).

The objective was to collect qualitative data from tourists with special needs. The results, even though accurate from a statistical methodology view point, are not quantitative representations of the specific requirements from the users.

TYPOLGY	N°
<b>Explicit Demand for Accessible Tourism:</b>	
People with special needs	889,330
The Elderly (older than 64 years of age)	2,140,785
<b>Potential Demand for Accessible Tourism:</b>	
Individual that stated that do not travel because of permanent health problems but who would be willing to travel under special circumstances	488,599
<b>TOTAL</b>	<b>3,518,714</b>

**TABLE.1 Travellers with special requirements**

N° of Requirements	Value	%
1 requirement	750,232	84.4
2 requirements	91,659	10.3
3 requirements	42,079	4.7
4 requirements	5,360	0.6
TOTAL	889,330	100

### B) Current Situation

Some more recent studies have been conducted as part of various projects. Some of them are:

- The project CARE, coordinated by the Emilia Romagna Region as lead agency, equally co-financed under the INTERREG III EU programme through the European Social Fund and the Rotation Fund by the Ministry for Transport and Infrastructures, has the objective to create a network of 'Accessible Cities in the European Regions'. The project aims at sharing



strategies at international level for the development of cities where accessibility represents one of the key quality parameters.

- The project "Italy, a country for everyone: quality tourist services for clients with special needs" includes training programmes on the subject of accessible tourism organised by EBIT, Bilateral Tourist Industry Agency, in association with the SiPuò Association.

## Studies and research in Germany

In Germany, accessibility (*Barrierefreiheit*) is a civil right and its establishment is based on the currently applicable legal provisions and standards. The German act on the equality of persons with disabilities (*Behindertengleichstellungsgesetz/BGG*) of 1 May 2002 provides a statutory framework. At *Länder* (federal state) level, acts on equal opportunities apply that are in development or have already been adopted by almost all *Länder*, along with the respective construction ordinances (cf. FREHE/ NEUMANN 2003). The currently applicable DIN standards, e.g. DIN 18024 und 18025, are also relevant to the implementation of accessibility. While they determine the technical standards, they have no direct legal or factual force.

The legal force of DIN standards for the tourism industry is defined by the respective construction codes or other ordinances of the *Länder*.

**The implementation of accessibility affects all areas of society, including the facilities and services in the tourism industry.** These comprise not just construction projects, but also means of transport, electronic, information and communication systems as well as facilities and services.<sup>2</sup>

The accessibility principle is still applied only to one target group, that of persons with disabilities. This is incomprehensible, especially since reports and studies in Germany and across Europe<sup>3</sup> repeatedly find **that implementing accessibility is in the interest of everyone**, not just of one particular group of persons with special needs. For instance, it is a known fact that an accessible built environment is a crucial requirement for around 10% of the population, a necessity for approx. 30 to 40% and comfortable for 100%.

## Economic Impacts of Accessible Tourism for All – The Case of Germany

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<sup>2</sup> Cf. the definition of 'barrier-free' in Section 4 of the BGG: 'Buildings and other installations, means of transportation, technical devices, information processing systems, acoustic and visual sources of information and communication devices as well as other designed environments are deemed barrier-free if they can be accessed and used by disabled persons in a normal manner, without encountering any difficulties and as a rule, without requiring help from a third party.'

<sup>3</sup> Cf., at European level e.g. INSTITUTO UNIVERSITARIO DE ESTUDIOS EUROPEOS/UNIVERSIDAD AUTÓNOMA DE BARCELONA 2002, EUCAN 2003, EUROPEAN COMMISSION 2003 and COMMISSION OF THE EUROPEAN COMMUNITIES 2003.





In November 2002 Germany's Federal Ministry of Economics and Labour commissioned a project group, comprising the University of Münster and the consulting firms NEUMANNCONSULT and Reppel + Lorenz, to conduct a study on the economic impulses of accessible Tourism for All. For the first time reliable data and statements were brought together, which represent the customer's potential and manner regarding accessible Tourism for All in Germany.

The study shows that persons with activity limitations represent considerable customer potential. Assuming confirmed travel intensity of 54.3%, 3.64 million persons with severely mobility and activity restrictions travel each year. On average, each traveller undertakes 1.3 holiday trips a year, taking the total number of holiday trips for this group to 4.74 million.

41.2 % or 1.95 million of these trips are undertaken within Germany. With an average duration of 13.9 days, persons with severe disabilities spend € 27.1 million a year on holiday in Germany. This leads to around 65,000 full-time jobs that are induced by the effects of tourists with disabilities. Thus, the tourism market for travellers with activity limitations is already highly important, and its significance will continue to rise. By 2030, the old-age dependency ratio 60 will rise from currently 42 to 73. As age correlates positively with disability (more than 50 % of persons with severe disabilities are 65 or over), the share of tourists with activity limitations will rise sharply. The tourism activities of this target group are expected to increase, as the future older generations place far higher demands on their holidays and perceive their personal mobility to be far more important than did the previous generations.

This potential can be addressed and transformed into a significant economic factor for Germany's tourism industry by creating accessible tourism facilities and services. The tourism industry is especially called upon to acknowledge and exploit these opportunities. By avoiding and/or removing barriers, tourism service providers can open up new high-growth market segments and gain economic and competitive advantages at domestic and international level.

Tourism in Germany is still far from being in a position to enable all persons including older and disabled guests to enjoy a holiday in an equitable, independent manner. However, accessible Tourism for All has gained far higher significance among the tourism industry and in politics than it used to enjoy years ago. Moreover, the economic impacts of accessible Tourism for All are increasingly being acknowledged. As the results of the study have most impressively confirmed, investments in accessible Tourism for All are worthwhile investments into the future, with the benefits available to all groups of the society:

- Primarily, to older and disabled travellers for whom travelling becomes easier and more attractive,
- to all other holiday-makers as a result of enhanced convenience and quality,



- to tourism service providers as a result of a rising number of guests and higher capacity utilisation,
- to destinations, which improve their competitive standing and gain more value added,
- and not least to Germany as a tourism destination, due to new demand impulses and a stronger tourism industry.

Consequently, further improvements to accessibility must be implemented in order to continue this positive trend, transforming Germany step by step into an accessible tourism destination for all. Planned measures should primarily aim to create a closed tourism service chain in the destinations, thereby enabling as many guests as possible to enjoy a largely independent holiday. Above all, this will require acceptance and implementation of such measures within the tourism industry, along with accompanying measures by the federal government, the *Länder* and local authorities. Accessible Tourism for All is a task that affects all of us, and it can be solved only through concerted action.

### **Results of the German study at a glance:**

- **Overview of the economic significance of Tourism for All in Germany:**
  - Current net turnover: € 2,500 million
  - Potential additional turnover: € 620 million - € 1,930 million
  - Possible economic impact in the amount of € 4,825 million and 90,000 potential extra full-time jobs
  - Additional effects may result from day-trip tourism, foreign customer potential and companions of travellers with disabilities
- **Travel intensity can be enhanced by providing accessible facilities:**
  - 37% of Germans people with activity limitations have previously decided not to travel due to lack of accessible facilities
  - 48% of Germans people with activity limitations would travel more frequently if more accessible services were available
- **There are currently hardly any accessible facilities along the entire service chain in tourism destinations**
- **There is insufficient marketing and information in terms of existing accessible facilities**

## Studies and research in Spain

A recent study on the “Habitos y Actitudes hacia el turismo de las personas con discapacidad fisica” has been completed by PREDIF ( Plataforma Representativa Estatal de Discapacitados Fisicos) in 2004.

The study shows the results of a thorough telephone survey conducted on a sample of 1010 people all over Spain, selected from a total universe of 7440 potential contacts.

With a structured questionnaire, the survey has examined :

- The profile of the target group of people with reduced mobility
- Their motivation to travel
- The access and the use of the different tourist services
- The travel the people realised in comparison with what could have been their ideal choice and/or expectation.

The complete study, in Spanish, is available for download from the EU.FOR.ME website.

## **The youth Focus Group**

The data presented are truly good to introduce the theme of tourism “for all”, including, therefore, people with special needs, and to reflect on the “business” potentials of the idea itself.

It is necessary to highlight that the behaviour and, hence, the requirements of disabled people as ‘tourists’ are very similar to those of any other client. It is, therefore, necessary to have conditions in place to be able to meet the requirements of this client group.

It is also necessary that such requirements are carefully evaluated and taken into consideration when planning training for experts in the various fields of the tourism profession.

### **Objective**

The Youth Panel identified the ‘Focus Group’ as the best methodology for the achievement of the objectives set by the project EU.FOR.ME to analyse the needs of tourists’ with special needs.

The goal of the Focus Group was to identify if, how and to what extent young people with limitations in their physical activity are conditioned by the restrictions and/or problems they meet when they decide to go on a trip.

The needs identified will be used in the next phase of the project to define the requirements for the training of the various professional profiles, that are usually involved in the planning, packaging and offering of the tourist products, on the various aspects related to quality tourist services.

The identification of the young disabled tourists’ specific needs will allow the definition of a training program that includes the subjects related to this specific target customer base. This will, in turn, enable the offering of tourist packages that are generally more attractive to all categories of consumers.

### **Set up of meetings**

One of the objectives of the Focus Group was to involve young disabled who, under the guidance of the Youth Panel, could furnish effective contributions of experiences and arguments for the definition of the requirements.

The involvement of the young travellers with disabilities in the meetings was achieved in various ways.



Schools and associations were contacted, but we also solicited participation through direct contact with potential participants, with effective results. We gathered a higher number of youth involved through this means and through word of mouth, than through the more 'formal' channels.

Many people, even though they cannot be considered 'young' any longer because of their age, having come to know about the meetings, demonstrated strong attention towards the issues being addressed and effectively contributed to the discussion.

Even if they were not directly involved in the meetings, we paid some attention to their contributions, gathering suggestions and experiences that could be valid inputs for the future project phases.

We, therefore, scheduled a series of meetings in the various European countries represented in the project (Germany, Italy, Luxemburg, Spain, and Sweden). These meetings were held before 20 January 2005 according to the pre-set schedule and format.

In order to ensure coherent management of the various Focus Groups and homogenous discussions on the various themes, a discussion grid was prepared (see Annex), with guidelines for the debate, summarising the travel experience. The Grid presents the various topics according to the phases of a typical travel experience: before, during and after. It focuses on what the travellers' expectations are and the hindrances that they meet when trying to create their travel plans.

The Youth Panel created the grid and it was used by all Focus Groups organised by the project partners.

Furthermore, each group had a facilitator whose task was to guide the discussion and input sessions and to act as moderator. Each meeting lasted for about six to eight hours.

During the meetings, the young disabled openly discussed about all themes related to tourism, linking them either to their own experience or referring to the experiences of the group of people that they were representing in the Focus Group. They highlighted problems, critical hindrance factors and requirements associated with the various phases of organising a trip.



## The Participants

In every meeting organised by the project partners directly involved in this activity, we targeted participation by an audience truly representative of all the various types of special needs.

The participants to the various *Focus Groups*, expressed either directly or through the people accompanying them, when necessary, their specific requirements to satisfy their needs.

These needs are directly attributable to the difficulties faced due to their disabilities.

Overall, the various requirements expressed constitute a significant and coherent representation of needs that should be categorised to cover the widest possible range of groups that are, sometimes, very diversified when it comes to requirements from the tourist products.

Specifically, the following categories were represented:

- Mobility related disabilities  
People on wheelchair or with limited mobility capabilities;
- Sensory disabilities  
Visually and hearing impaired people;
- Learning disabilities  
People with learning difficulties such as those with Down syndrome;
- Other types of specific needs  
People with the following problems: allergies,  
dietary,  
diabetes,  
respiratory,  
physical size: excessively tall people.

The variety of disabilities represented allowed us to paint a picture of the various needs of disabled people. Even if we cannot claim that we have completely explored all aspects that can affect the satisfaction of this category of travellers, we can confidently say that we have adequately met the requirements of this phase of the project through the identification of the fundamental aspects that must be at the basis of a training aimed at satisfying the needs of this group of people.



## General Remarks

The discussion on the topic of the Project solicited a significant involvement of the participants. The desire to go on holiday, whether possible or potential was clearly strongly felt by everyone.

It surfaced that a trip is a moment of relaxation and socialising with the family, peers, friends, but also a way to discover new places and cities.

In addition, trips and holidays are lived as a sort of adventure. This is unfortunately due to the experience that has taught many that during a trip or a holiday one is faced with situations that, whether resolved or not, turn the experience into an unexpected adventure with sudden twists and turns hard to foresee.

However, apart from the objective difficulties they met with, all participants relayed the experiences they faced and lived through thanks to their extraordinary spirit of adaptation.

Their ability to adapt was the main element around which all topics revolved. This underlines various important aspects among which:

The disabled tourist is not regarded as well as any other client;  
The disabled themselves are expected to find solutions to make the trip, rather than the stay possible;  
Free and independent time is not automatically recognised as a right of theirs;  
Sometimes people with disabilities must put their foot down in order to **be allowed** to 'be a tourist'.



## Significant results

The results emerged during the meeting contributed to a substantial definition of the set of needs of young travellers, as input to the definition of the training programme.

The first aspect introduced is concerned with the travellers' habits with regard to choice of destinations, timeframe and manner of undertaking the trip.

The other aspects that emerged were, instead, ordered and grouped according to the time phases typical of a holiday.

The same sequence of time phases was used during the identification of the critical hindrance factors.

## Travel Habits

The reasons for travelling are usually associated with tourism and the need for a holiday. Some of them do, however, often travel for business or study. Others undertake travel to undergo medical treatment. There are also those who travel to take part in sports activities.

In so far as the means of transport chosen for their journey are concerned, no particular preferences emerged except for someone who prefers to use their own private car as opposed to train or buses for comparable distances. Flights and trains are equally used. So are buses or public transport within the city or local perimeter. Taxis are, instead, rarely used.

Generally speaking, at least one overseas trip a year is made, preferably to countries in the European Union, for long stays (at least one or two weeks), especially to seaside locations in Southern Europe.

The big or capital cities nearby their own place of residence are instead preferred for short trips or weekend getaways.

Distant locations are also target destinations, despite the larger number of problems that a many-hour-long trip may bring with it. Some of them even made trips to destinations in other continents such as Australia, USA, Mexico, and Egypt.

The great majority of the people travel in a group, with their family or friends, with their school, sport associations or organisations for people with disability.

The presence of familiar people allows them, if needed, to call on their assistance to support their movements and their taking part in recreational activities or for the required medical treatment.

Some shared their experience of travelling on their own in complete autonomy, taking part in tours organised by the various commercial tour operators.

Some of them prefer to travel during the off-peak season, in order to have greater attention and more time given by the tour operators to satisfy their specific needs.

## The time phases defined – the rationalisation of the trip

The content is organised according to the **time phases** of the trip:

Before the trip

During the trip

After the trip

### ***Before the trip***

This phase includes all the necessary preparation and arrangements that precede the undertaking of the trip.

The preparation of the trip usually requires gathering information. The data collected was grouped in two subsets directly linked to the method of its collection, direct and indirect, as follows:

Direct information, autonomously acquired by the tourist:

- *Internet* is the main means of gathering information whatever the kind of disability, destination and type of travel. This allows the surfer to gather information through anonymous direct access. Only when necessary, based on the needs, further information is obtained through direct contact with the tourist facilities and services of interest.

- Specialised guide books are consulted - when available. These guides have information on accessibility of the tourist facilities and the services available at the target destination.

- Information passed on through *word of mouth* is usually quite reliable and enables an informed choice, especially because it is based on direct personal experience.

In this case, however, the determining factor for the choice is the extent of similarity between the requirements of those who relay the experience and the traveller's specific requirements.

In any case, however information is gathered, the true difficulty lies in the subsequent possible need for further information and details to be directly gathered from the tour operators.

In fact, many people seek further details directly from the tour operators in answer to the needs of their own specific disability. Examples include: the width of a door passage, the conditions of floors and pavements, food ingredients, etc. Such pieces of information are usually not available through the Internet or in guide books. Personnel directly contacted are, however, very often not able to adequately and satisfactorily answer this sort of questions. This is due to two main factors:

- Personnel may not know or be sufficiently aware of the problem in order to 'understand' the question
- Personnel cannot find or interpret information possibly available.

Indirect information, obtained through tour operators or organisations for the disabled:

- Information is always gathered through well-established contacts. The relationship of trust already established with tour operators allows one's own special requirements to be recognised.
- Organisations offer tourist packages for people with special requirements, guaranteeing an adequate level of assistance and safety when it comes to requirements for, both, access to the hosting premises and destination offered, and the organisation of the various activities and day programmes during their holiday.

### ***During the trip***

This phase includes the elements that contribute to the actual spending the holiday at the destination. They do not only include the possibility to move around, eating and sleeping but also the possibility to make use of the resources and taking part in the various activities available.

The collected data were grouped according to the various elements that make up the whole 'trip system' as it is undertaken: transfers, stay, activities and their correlations.

The element that characterises this particular phase of the trip is, fundamentally, the incongruence between the various pieces of information gathered during the planning, whatever the method used, and the actual experience on location. In fact, information previously gathered does not usually match what is actually available on location and does not adequately and accurately describe the characteristics of the real-life situation.

### □ The Transfers

The choice of the means of transport necessary for transfer from the place of residence to the destination is linked to the availability of vehicles and infrastructures able to respond to the traveller's specific needs. Such availability is directly proportionate to the importance and the size of the place of destination.

In fact, only the major cities are usually serviced by trains that are easily accessible. Likewise, only the major airports have personnel, means and equipment able to respond to the various needs.

In any case, however, the complex procedures for boarding and alighting or disembarkation, and the use of dedicated equipment, require not only much longer planning and logistics times, but subject people with special requirements to mortifying experiences.

Many people need to regularly use specific medical *tools* and *aids*. They bring these along with them on their travels. These include wheelchairs, comfort chairs, anti-ulcer cushions, glucose testing kits, insulin kits, medications for specific allergies, guide dogs, food with specific ingredients and preparation methods.

It often happens that during their trips due attention is not sufficiently given by staff when handling or storing such tools and aids.

Furthermore, the vehicles of transport themselves do not often adequately cater to their needs. Toilets on board of trains and aircrafts may, for instance, not have adequate hygienic and acceptable facilities or may not be available at all because of being used as storage space. There may also not be separate facilities for male and female patrons.

Finally, in the case of having to make use of more than one means of transport or if there is a need to move around within the locality of the final destination, travellers may be faced with the lack of local transport adequately equipped.

Generally, people who can move independently with their own vehicle, as their disability allows them to do so, and travel regular routes, tend to follow a pattern almost as if compulsory. They would stop at the same places, especially if they have already experienced the availability of services adequately responding to their needs.

Visually impaired people expressed a very specific need. Even though they are highly independent during transfers, they, however, require a higher sense of safety and security in case of dangerous circumstances. One very penalising example is the inability to use the SOS phones on the highways.

### □ **The Stay**

The various components of tourist premises such as parking facilities, entrance, routes and passageways, and the various functional environments, where activities that one wishes to participate in take place, oftentimes present conditions quite different from the ones that were anticipated based on information gathered before leaving.

Furthermore, where restaurant services are concerned, personnel are generally ill prepared or totally unable to furnish specific information neither on the ingredients of the various food items served nor on the way they were prepared. It is always difficult to have meals served according to a personalised time schedule, especially at accommodation facilities.

Another aspect that should not be overlooked is safety. It was gathered that very often, information about safety and procedures to be followed in case of danger or emergency at indoor facilities are given in a way that is not intelligible by everyone, especially by those who either have sensory disabilities or are slow learners.

Many are the premises that do not still allow guide dogs to enter, despite the fact that they are essential to their owners to move about and orient themselves.

Another aspect that emerged is the difficulty to acquire information on the possibility to rent specific aids (e.g. comfort chair), to have personnel able to offer adequate specialised assistance, and, more in general, on the medical facilities (exact location, distance from the place of stay, specific services available).

### □ **The Activities**

During their holiday people take part in various activities. In this case too, problems may arise, both relational and structure-related. The lack of development of specific competencies among personnel in charge of recreational activities, organised especially within resorts, force those with special requirements to either give up participating in those activities or to 'educate' staff on how those activities could be carried out without useless prejudices and delays.

During visits to cultural establishments unnecessary long time is required and wasted. The guides do not know how to communicate but through the verbal language only. DTS-based phone systems are not available, neither are audio guides and optical display panels with information, scaled-down models of the objects, artwork on exhibition or venues to be visited that could be touched, or descriptions using the Braille characters.

Other problems highlighted are those relative to the availability of special equipment at the beach resorts, where particular chairs that allow access to the sea for those with mobility disabilities are not always available.

Seats are usually not available along the routes of cultural visits to cities or museums, or along paths through nature to allow people with lower mobility, elderly or overweight people to rest along the way.

### ***After the trip***

This phase includes both the soft elements that contribute towards the outcome and hence, the final level of satisfaction or dissatisfaction of one's expectations compared to the actual holiday experience, and the hard ones, such as follow up actions that may be required in response to the level of service received, if it did not meet one's specific needs.

In this phase, the holiday experience is assessed by the traveller on the basis of the extent to which it did live up to his or her expectations and whether or not it met their needs.

Generally speaking, the criteria used to assess the holiday experience can be summarised in the following key categories:

- quality of hospitality;
- reliability of information;
- possibility to gather further information, as necessary, at the location;
- ease of access to the various places, facilities and equipment.

When problems are encountered during a trip, actions are immediately taken on location. Objections to the level of service enjoyed are raised if not found to be adequate. The parties contacted for the complaint include local representatives, the tour operator and the local tourism promotion agencies that are usually responsible to uphold the quality of service offered to visitors and tourists.

Alternatively, the travel agencies that organised the holiday trip are contacted by the travellers once back home. A report on what happened is given, highlighting the need to improve the level of service and hospitality and requesting, where contract violations occurred that substantially compromised the quality of the holiday trip, adequate refunds.



## The Critical Hindrance factors

The *results* from the data collected have been summarised highlighting the elements that constitute *problems/critical hindrance factors* at the various stages (before, during, after) of the holiday trip.

Particular attention was given to themes associated with the quality of information and the methodology of its gathering.

### ***Before the trip***

Below is a report of the findings relative to the methodology of information gathering and the quality of information respectively.

#### Direct Information

(autonomously gathered by the tourist)

- ✓ Difficulty in retrieving information online from websites because of the lack of user friendly navigation features. Many sites were also not W3C certified. They were, therefore, not easily accessible by people with sensory disabilities.
- ✓ Lack of equipment for an extended spreading of information (e.g. phone system with DTS, fax, voice transducer).
- ✓ Difficulty in finding specialised guidebooks, the availability of which is oftentimes not even known.
- ✓ Difficulty in assessing the reliability of published information, as the experience and reliability of its sources are not stated.
- ✓ Difficulties encountered because of the lack of willingness from operators to furnish detailed and adequate information.

#### Indirect information

(gathered from tour operators or organisations for disabled)

- ✓ If the information required is not gathered through well-established contacts, operators who are not able to understand the specific requirements expressed by the potential traveller, are unable to gather and furnish adequate replies.
- ✓ Organisations usually offer holiday packages that cater to people with special needs. They guarantee an adequate level of assistance and



reliability, both with regard to ease of access at the accommodation facilities and destinations offered, and to the manner activities and day programmes are organised. However, people are very often tied to pre-set time schedules, limited to off-peak season periods and confined to controlled environment.

Furthermore, despite the high level of awareness of the specific needs, this is often limited to requirements from people with the **same** type of disabilities. The offer is, therefore, not adequate for all possible clients.

### Quality of information

- ✓ Lack of detailed information on the various elements that make up the entire holiday trip and how these can be or are integrated.
- ✓ Lack of information on the availability, at the destination, of specific aids, personnel able to provide adequate specialised assistance or, more in general, of medical facilities (exact location, distance from the place of stay, specific services available).
- ✓ Lack of information on the tourist information desks available at destination and the quality of information that these are able to offer.

### ***During the trip***

- **The Transfers**
  - ✓ Lack of emergency communication systems that are fit for use by people with sensory disabilities (SOS points on highways with audio-only communication features, unavailability of emergency services numbers contactable also via sms).
  - ✓ Little care is used when handling and storing aid equipment taken on a trip, especially when flying. Difficulty in having medical kits equipped with needles, and needed for medical reasons, cleared at check points at airports. Longer access times to trains and flights.
  - ✓ Lack of toilet facilities easily accessible and in acceptable hygienic conditions.
  - ✓ Lack of signage and information sufficient to allow travellers to orient themselves and reach the location of destination or interest.

□ ***The Stay***

- ✓ Choice is restricted to destinations already known and 'safe', and not guided by one's preference, because of conditions of accessibility.
- ✓ Higher costs due to the availability of adequate offers only available in higher class hospitality facilities.
- ✓ Incongruence between information gathered and the real conditions found, in respect of all the various components of the holiday experience.
- ✓ Lack of signage and information sufficient to allow travellers to orient themselves and reach the location of destination or interest.
- ✓ Prejudices due to the lack of knowledge of the client/guest's real conditions.
- ✓ Presence of architectural barriers.
- ✓ Guide dogs are not allowed access to facilities.
- ✓ Lack of information on food ingredients and preparation methods. Meals cannot be served according to a personalised time schedule.
- ✓ Lack of toilet facilities easily accessible and in acceptable hygienic conditions.
- ✓ Lack of allergy related information on the materials and equipment in the rooms. Refusal to provide anti-allergy materials and higher degree of cleanliness.
- ✓ Lack of equipment and guidelines on the behaviour to be adopted for emergency that can be easily understood by people with sensory disability or slower learning abilities.

□ ***The activities***

- ✓ Inability by the facilitators of recreational activities to include disabled people in them.
- ✓ Lack of personnel in museums and galleries able to verbally describe the exhibits and of tourist guides expert in using communications methods adequate for people with sensory disabilities or who are slow learners.
- ✓ Lack of integrated systems and equipment for people with sensory disabilities to communicate with the external environment (DTS-based phone systems), and to adequately communicate information to visitors with special needs (signs using Braille or macro characters, scaled-down models

of the venues, audio guides and optical display panels, the possibility to feel the artwork or exhibits).

- ✓ Guide dogs are not allowed access to facilities.
- ✓ Expectations not met.

### ***After the trip***

- ✓ Expectations not met.
- ✓ Negative publicity to the tourism industry of the country or to the hospitality facilities themselves, and, let alone, to the tour operators.
- ✓ Actions for compensation are undertaken against the tourism industry of the country or the hospitality facilities themselves, and, let alone, the tour operators.

In conclusion, the data gathered allow us to identify two sets of requirements typical of a tourist with special needs:

- the first is relative to their being 'clients' who, in their own merits, have the right to a quality service in general;
- the others are more specific and relative to the personal and individual needs for comfort and safety.

Every tourist has their own attitude and expectations that condition and define their behaviour in every moment of their stay at the hospitality facilities.

## **The Tourist Offer System through the Operators Focus Groups**

The Focus Group for the operators opened a direct dialogue with the offer world with the aim of completing the action plan necessary to define the training programmes that will be part of the train the trainer model.

The interpretation of the requests that the operators themselves put forward in order to enhance the knowledge of those who are currently offering or will want to offer products for tourists with special needs, allowed us to achieve this objective thus integrate the professional competencies and profiles with the specific training activities.

Those who took part in the various focus groups organised by the project partners represent a sample of the various offerings of the tourism industry: operators, entrepreneurs, representatives of trade organisations, representatives from the various players of the supply chain of the industry.

A variety of methods were used by the partners to come into contact with them. Some organised group meetings. Others conducted face-to-face interviews, while others interviewed via telephone.

This range of methods and the heterogeneous characteristic of the group involved, coming from different sectors of the supply chain and experiences, considerably increased the significance of the results obtained, because of the diversity of profiles, rather than diminishing it.

The picture of the training required for tourism personnel already painted by the Youth Focus Group, took an even greater value through the experiences gathered, because it not only represents what the demand wants, but it is also now clear how it compares with the real level of supply.

This double confirmation allowed us to understand how and why the critical hindrance factors emerged from the youth focus group still today do not find an adequate answer from the operators across the supply chain of the tourism sector.

Starting from the grid of discussion topics prepared for the focus groups, which include:

- motivations from those who are currently offering products for everyone vs those who are not yet doing it;
- methods of supplying specific products;
- issues related to accessibility of facilities;
- difficulties in reconciling the management of special facilities with other sectors of the demand;
- the lacking of an adequate knowledge of the target sector;

the elements gathered were rationalised and categorised according to the two main dimensions of the offer identified.

### **The realities of the offer**

The experiences of those representing the offer side, whatever their role in the supply chain, define two distinct realities of the offer. We report here the most significant aspects of each of them with regard to their position in the market, their economic dimension and respective motivations.

The experiences are defined as *targeted* and *occasional*.

### **The targeted experiences**

- The operators that offer products for this particular target group are usually located within associations.
- Economic considerations are not among the reasons that pushed them to undertake activities in this sector. The real reasons essentially lie in their acting in response to a request from a particular association for services that cannot be found in the traditional market system.
- The profit level is decent, even though it essentially comes from clients who are members of associations for disabled.
- Personnel employed by the organisations or the various establishments already possess the competencies to offer a service that is able to meet the specific requirements, both in terms of accessibility of the host premises and of the destinations offered, and in terms of the organisation of activities and day programmes that make up the holiday.
- It is difficult to find specialised personnel that are able to adequately address the requirements at the locations of destination of the trips.
- It is difficult to find the right contacts to construct tourist products that respond to the specific demands of their special target clients. This requires the need to always inspect the place of destination before hand.
- The characteristics proper of the type of offer actually create a strongly protected context.
- It is difficult to push their product offering through the traditional channels of the tourism industry. This is due to the fact that this type of experiences, strongly targeted in terms of facilities and services offered, is not agreeable to target clients with 'normal abilities'.

## The *occasional* experiences

- These experiences are commensurate to the level of accessibility offered by the facilities and to the chance of having casually come into contact with experiences in this sector. In both cases planning is difficult and often improvised in answer to specific requests.
- Marketing efforts are limited to only and simply placing a logo on brochures to indicate access-friendly facilities.
- The motivations put forward by the operators who do not yet offer services targeted at this client group, are mainly attributable to problems of economic nature. Many of them think that offering this type of services requires substantial additional costs to manage the offer and to perform the necessary renovation work to ensure accessibility of the facilities.
- There is a certain level of awareness of the issues related to mobility, and of the need for further information on the actual accessibility level of the facilities and destinations necessary to offer tourist products to this target client group.
- The adequate preparation of personnel for the hosting and management of this target client group is regarded as a potential critical hindrance factor.
- The accessibility of the “territorial system” where the tourist facilities are located was identified as a fundamental problem. It was acknowledged that it is impossible to offer a stay that is really ‘accessible’ to everyone in cities. Cities are full of barriers that make it difficult for disabled to freely move around.
- Collaboration with associations of disabled was seen as an opportunity to bring about some openness towards the specific issues related to them, through the sharing of successful experiences.
- Clear interest and openness towards this client group was registered among the tourist trade associations that, realistically looking at the demand coming from it, foresee it as a potentially strong growth area with consequent economic development.
- Accessibility of the facilities was at the basis of almost every argumentation from the operators. This is due not only to significant economic commitment that many had to undertake to comply with norms relative to the elimination of architectural barriers, but also to the economic effect of the end results of such projects. Bedrooms for the disabled have ended up looking like hospital rooms which makes them not sellable to other clients. This produced,



therefore, a double damage: the impossibility to amortise the costs and the actual reduction of the capacity of the facilities.

It is clear, from what exposed thus far, that the answer to the target client group with special needs can come neither from the *targeted* offer, nor from the *occasional* one. The critical factors are many in both cases. The offer is so targeted in the former that it can almost be interpreted as a ghetto experience, while the latter lacks an adequate preparation.

The motivations and reticence gathered are attributable, above all, to the almost total lack of knowledge of:

- the target group
- the actual ways the services can be offered
- the technical requirements for the ease of use of the facilities.

The desirable integration of the target group can only be achieved through looking at the sector as a new market to be conquered, giving disabled people the right to simply be **clients**.

In order to do this it is necessary to act on the need for qualified capabilities and thus achieve the real target of the process that is quality of service.

The training created through this project will 'produce' professional profiles that will gradually fill this knowledge and conceptual gap.

It will, however, be necessary to intervene in a '**virtual manner**' on those aspects that see the occasional involvement of people not directly linked to the tourist sector such as planners and public administrators. The former should propose more integrable and 'commercially viable' solutions. The latter should create the conditions for cities to gradually become more accessible.

The overall quality that is achieved with offering products for all is the value at the foundation of most elements. However, achieving integration will represent the way to reaching another very important objective: to bring down the barriers associated with diversity.



## The importance of training

In the light of what written so far, training of tourism personnel is of fundamental importance.

In fact, standardisation of the offer can only be referred to the general aspects of the service, while every interaction with clients requires high relational and problem solving capabilities, in order to address the most diverse requests.

The act of welcome takes place every time the client interacts with personnel of a territory or facilities.

The elements that define its quality can be classified in **material/structural** (technical aspect) ones, directly linked to the standards to comply with and the functionality that must be ensured by the environment, and **immaterial** (relational aspect) ones, that is all those intangible elements that influence the assessment and evaluation by the client.

The success, or failure, of a holiday depends directly from the fact that all its components – organisation, decision making, purchase, execution and memory – are tightly related to precise requirements for competence, efficiency and professionalism in all tourism personnel we interact with.

The ability to welcome a guest, making them feel at ease, to listen to them and to be able to furnish all needed pieces of information are minimum conditions, and they determine the first impression and the initial evaluation. In the case of a negative first impression, it will be difficult to reverse the assessment and to turn a dissatisfied client into a satisfied one. Conversely, in the case of a good first impression, the client will have a positive attitude towards whatever is proposed or offered to them.

Necessarily, the starting point is the knowledge of the needs and the identification of the specific requirements of each tourist's.

This allows doing a couple of things:

- in so far as accessibility, intervene on all aspects of one's own services or the services of the tourist facilities involved, that may be lacking but are necessary to guarantee ease of access and comfort to clients with special needs;
- in terms of quality of service, plan suitable training and improvement of the professional capabilities of the resources.

Information that the tourist operator must be able to offer do not only concern the facilities, but also the tourist offers and resources available on the territory, as well as the activities going on.

Therefore, these must be precise and regularly updated.



As for information on accessibility of the premises, personnel should be able to assess its reliability, depending on the collection method, through already established validation methods that should, therefore, offer a high degree of assurance on the various pieces of information furnished.

Correct and detailed information on the characteristic of the facilities allows the tourist to make an informed choice, ultimately always subjective and discretionary, in order to avoid situations of discomfort, disillusion and resentment that would, eventually, have a negative repercussion on the service provider, on its image as trustworthy tourist operator, and on its economic results.



## A summary of some aspects of the training programme

The analysis of the data identified the fundamental aspects that should make up the training.

These aspects are listed below. They are classified according to two main categories, technical and relational, based on their specific characteristics.

<b>CONTENTS</b>	<b>CATEGORY</b>
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<i>Characteristics of accessibility of the information systems</i>	Technical
<i>The technical aspects relative to the architectural barriers that can qualify or disqualify the tourist offer</i>	Technical
<i>Tools and Methods to evaluate accessibility</i>	Technical
<i>The elements of the tourist offer that integrate the range of services with the various possible requirements</i>	Technical
<i>Integrated information related to the various requirements</i>	Technical and Relational
<i>Understanding, validating and furnishing information</i>	Technical and Relational
<i>Knowledge of the special needs that may be expressed by disabled clients</i>	Relational
<i>Customer care and hospitality</i>	Relational

## Training suggestions

In this chapter and the next, titled 'suggestions for sensibilization', we list some reflections that can be useful input to the **Analysis of the training needs** and others more directly concerned with the awareness education of the operators and any other professionals that may have authority over the decisions to implement the necessary changes to the current conditions.

In any case, they represent what the disabled, who took part in all the Focus Groups meetings, highlighted as their priority requirements necessary to plan and execute a trip or a holiday with total peace of mind and in comfort and safety.

Training of personnel from travel agencies, information offices, ticketing establishments, reception and other facilities at museums, and any other establishment that engages in a direct contact with the clients, should include testimonies from the disabled and simulations of the different types of disabilities, while always keeping in mind the whole spectrum of requirements in order to improve both hospitality and the relationship with the client throughout all the phases of preparation and execution of the holiday.

More and better information should be furnished to travel agencies about the special requirements of disabled people's and how to satisfy them during a trip.

Information available on accessibility should also always be kept up to date. It should be integrated, correlating means of transport, reception and non-reception facilities, spaces dedicated to cultural and leisure pursuits (so as to enable a total correlation of all components of the trip) and making it available through the tourism industry system as additional information.

Information on accessibility should be concerning both the single facility and the totality of components that make up the holiday.

For people with specific types of disabilities, it is also necessary to know not only the level of accessibility of the facilities at the destination, but also that of the means of transport required to reach the destination and to move around, and of the places useable during free time.

If we look at the hotel as a single facility, information on its accessibility should, for instance, be concerned with the characteristics of the following:

- car park,
- external path leading to the entrance,
- entrance and reception area,
- internal routes leading to the venues of interest,
- common areas,
- bedroom,
- toilets.

If you look at the whole holiday, instead, information on accessibility that should be integrated, to ensure satisfaction of all requirements, should be concerned with the characteristics of the following:

- transportation vehicles,
- place of destination (or facilities),
- other relevant and correlated facilities.

Each element of the various components that make up the holiday system should be analysed as described above.

Information on accessibility should be made available through the widest possible network and channels.

Tourist operators should have a true knowledge of the level of accessibility of the facilities and their components that they use for their products.

The tourist operators should also be connected with medical service facilities where the necessary medical aids could be rented, bought or serviced during the holiday, and with the associations/organisations that can offer assistance at destination.

It could also be useful and customer friendly for a tour operator to have a disabled among its personnel to whom requirements and needs can be easily explained.

It is particularly important, when a relationship is established between tourism personnel and the traveller with special needs, to take some basic advice into account that would enable a good interpersonal relationship and that should, therefore, be included in the training programme for tourism personnel:

- Address the disabled person directly instead of bypassing them by talking to those who assist them.
- Assume a natural courteous attitude of availability, overcoming the possible initial embarrassment.
- Avoid an excessive zeal when offering help, but discreetly ask the customer. When help is required, follow the instructions given by the customer, without taking any private initiative that may not be welcome.
- Avoid the creation of uneasiness when offering help or in your relating to the disabled.

## Suggestions for sensibilization

In addition to what reported above, quality of hospitality is not only referred to the direct relationship between the traveller and the tour operator, but to the relationship between the traveller and the environment and facilities that host them too.

It is necessary, therefore, to raise awareness among tourism entrepreneurs so that the facilities too may be able to offer a high degree of accessibility through:

- parking areas reserved for disabled and located near the entrance;
- possibly short, straight routes that are well maintained and equipped with rest areas;
- clear information signages that are readable and multi-languages;
- toilets that are easy to find and reach;
- pleasant environments easy to recognise, to navigate and to find one's bearings in.

In fact, when all the characteristics and aspects of a holiday are able to satisfy the needs and expectations of each client, they guarantee the achievement of profitability and economic returns in the long term.

Finally, in order to achieve the goal of promotion of a specific tourist area, it is necessary, to consider that the planning and development of an integrated system to welcome tourists with special needs should be based on the sharing in the same objectives, implementation strategies and co-ordinated interventions, in order to achieve its goals of promotion among the target group.

Both the public and private sectors will, therefore, put in place complementary initiatives, while acting according to their specific institutional competency and authority and individual requirements for economic returns.

The main consideration for the development of an efficient local network is that the following:

- basic knowledge on the theme of tourism for all,
- the level of awareness of the social and economic reality of the market segment represented by tourists with special needs,
- willingness to welcome tourists with special needs,
- the concept of equal opportunities and autonomy for each individual

is embraced by all the players.

The creation of a tourist product **for all** will have, in fact, to hinge on a level of quality and comfort matching the target group's expectations, on the economics of the product itself and on a coherent value for money of the service offered.

