



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

Case Study 13

Hérault, France

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**European Commission
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Case Study: Hérault

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Executive Summary

The department of Hérault provides leisure opportunities in a wide range of locations, which span from coastline shores to cities with considerable historic heritages. Tourism offer is therefore varied and dispersed among destinations of different sizes and capacity.

The interaction between state level legislation and regional initiatives has proven fruitful in raising awareness among businesses. The existence of unexploited opportunities is acknowledged by Hérault's authorities, who have striven to put in place the necessary adjustments throughout the supply chain. Detailed communication exists about accessible destinations and sites, which makes use of the latest technologies. Both national and local authorities make use of the labels "Tourisme & Handicap" and "Destination for All" to inform potential demand.

The case study describes simultaneously the presence of business opportunities and of not yet exploited market potential. Local authorities do make a positive contribution towards making tourism offer accessible. This has been achieved by providing relevant information about businesses and designing support services local initiatives. Information is available on numerous platforms and addresses most needs. Communication could be expanded by strengthening existing services, such as those available online, and by opening up to new platforms, such as those available on social networks.

Following a number of interviews with businesses, particular attention has been drawn on the role of public transportation in making destinations geographically accessible. While larger cities, such as Montpellier, are well connected with French and foreign cities and present a more sensitive offer with respect to cross-impairments, minor destinations have not yet developed satisfactory standards. Interviews with businesses suggest that lack of potential demand can be ascribed to the relative difficulty of reaching certain destinations. This has important repercussions on the perceived benefits that businesses expect to reap from accessibility enhancing investments.

The main strength of Hérault lies in the region's efforts into making the coastline accessible. The "Open Sea for All" initiative, approved by the "Tourism & Handicap" association, can indeed be considered a good practice in the design of accessible seaside tourism services. Not only does the project take into account cross-impairments, but also the importance of an integrated service throughout the supply chain, which involves accessible transports, parking spaces, ad-hoc services and general support. In this area, a number of practical improvements have been put in place which have increased business profitability for beaches by appealing to customers with special disabilities.

Interviews with stakeholders make explicit the role that national initiatives in relation to existing regulation, the most important of which was passed in 2005 and will impose accessibility requirements on public and private services by 2015. A number of important tourism destinations are currently taking

active steps in order to acquire the “Destination for All” label, which rewards outstanding efforts in improving accessibility. Although a direct, quantifiable economic impact is yet to be realised, suppliers’ interest in accessible tourism as a profitable business opportunity can be observed from anecdotal evidence.

Overall, a good lesson can be learnt from Hérault’s policies addressing accessibility in the coastline. In fact, they present innovative features and have led to a significant increase in the visibility and quality of accessible services. These are easily replicable, despite being specific to maritime areas, and address a number of disabilities. Hérault’s weaknesses lies in insufficient infrastructure and institutional capacity which hinder the business potential for expanding further supply.

1.0 Introduction

Hérault is a French department in the Languedoc-Roussillon region. Being a geographically diverse territory, it encompasses mountains in the north, coastline in the south and a number of small cities immersed in the rural areas in the centre. The majority of the population is concentrated along the coastline, which benefits from a Mediterranean type of climate.

Tourism is considered “the driving force of the economy” by the General Council of Hérault¹. Indeed, the area excels on a number indicators for tourism development. According to Eurostat, Hérault lies in the EU-27 top 20 regions by accommodation capacity with almost 250,000 bed places available, most of which come from campsites, followed by other accommodation establishments and hotels. The number of collective tourist accommodation establishments has been increasing since the second half of the last decade and amounts to about 600 beds. Moreover, the region of Languedoc-Roussillon, which Hérault is part of, lies in the top 20 of EU-27 regions for the number of night spent in accommodation establishments, and ranks first overall for the highest number of overnight stays on campsites². These figures indicate that tourism is an essential driver of economic growth in the area.

Within this context, accessible tourism has gained increasing relevance and attention over the last years. As will be shown in the next sections, a number of accessibility related policies have been introduced at the regional and national levels that require the involvement of tourism suppliers. As of today, more than 80 facilities and services have the “Tourism and Handicap” national label, which is provided conditional on offering accessible services. In addition, 48 beaches are equipped with tools and services that favour accessibility³ as a result of policy efforts at the local level. This is suggestive of the keen interest that businesses in Hérault have in expanding and developing this highly profitable market segment.

This case study will explore the provisions for accessible tourism . It will frame the state of play within the set of existing policies that have been enacted by both national and regional authorities. The case study will also focus on the “Tourism and Handicap” and “Destination for all” labels, which have been launched by the French Tourism Ministry, as well as communication-intensive and sector-specific initiatives backed by regional institutions. Among others, the “Sea for All” initiative stands out for its effectiveness. By building on social policy premises, it had positive indirect repercussions on other sectors, and sparked an interest among private sectors providers.

Interviews with stakeholders have informed the case study. They have provided a thorough account of the strengths and weaknesses of the accessible tourism offer at the destination. Based on this information, the case study shows that while the Hérault region successfully unlocks the potential of

¹ <http://www.osddt.eu/en/partners/conseil-general-de-l-herault/>

² Eurostat, 2011, 2012.

³ <http://www.herault.fr/tourisme/tourisme-handicap>

the coastline and larger centres, it presents room for improvement in developing the infrastructure required to service all disability needs throughout the supply chain, especially with regards to transportation services. Moreover, special needs associated with certain disabilities appear to be better met than others. (Can you have one last sentence saying something like: overall....- assessing the state of accessible tourism in Hérault? – so the readers get a good idea whether it is a good example destination or not.

2.0 Overview and background information

Tourism plays a crucial role in the economy of the department of Hérault. On a monthly average, 132 000 tourists visit Hérault, with peaks of 491 000 during high season⁴. Such demand creates substantial employment opportunities, with a labour force of 22 000 workers employed in the sector in 2007, which amounts to 16 employers per every 100 tourists on an annual basis. Similar figures show that tourism employment makes up 7 percent of overall employment levels (up to 10 percent in high season). All this is indicative of the relevance that the tourism sector deserves in shaping regional policy. In fact, tourism is the first industry⁵ in the region, followed by the wine making industry, which mostly develops in inland Hérault. However, other regions along the French coastline reap greater employment benefits, such as Alpes Maritimes (40 000 workers), Bouches-du-Rhône (33 000) and Var (25 000). This shows at the same time the importance of this sector and the greater potential that can be achieved by strengthening tourism offer

In Hérault, tourism is mostly directed towards domestic tourists. According to the economic observatory of Hérault Tourisme⁶, 80% of tourists are French, while the remaining 20% consists predominantly of tourists from Spain, Italy and Northern Europe. The French market is therefore an important source of employment and income for tourism services. This segment presents a huge unexploited market that Hérault enterprises could harness to target more customers. According to a report by the Agency of Tourism Development (Hérault Tourisme)⁷, 40% of the French population reports at least one disability or difficulty in daily life which could be ascribed to health problems. This calls for targeted action across the supply chain in order to meet the potential demand of this large market segment. This translates in a market opportunity that goes beyond social policy rationales.

Existing state-wide regulation already provides incentives and obligations for both private and public providers. The 2005 Law established principles of accessibility aimed at integrating tourism supply to the benefit of disabled people with physical, visual, hearing or mental impairments. Such regulation applies to both public and private ERPs (Établissements Recevant du Public) or IOPs (Installations Ouvertes au Public). The timeline for the implementation of the new rules involved the realisation of accessibility diagnostics in 2010 and 2011 for public and private ERPs. By 2015, all IOPs and ERPs will have to comply with accessibility guidelines, which already takes into account the cross-cutting dimension in accessible tourism by prescribing accessibility enhancing measures in roads, public spaces and transportation.

⁴ Insee (2012) Repères Synthés pour l' économie du Languedoc-Roussillon.

http://www.insee.fr/fr/insee_regions/languedoc/themes/synthese/syn1203/syn1203.pdf

⁵ <http://www.beziers.cci.fr/files/bezierscapdagde/docs/agglohm.pdf>

⁶ <http://www.adt-herault.fr/docs/1586-1-obs-la-depense-touristique-en-herault-pdf.pdf>

⁷ Hérault Tourisme (2012), Mémento pour les professionnels du tourisme et les collectivités.

Legislation is not the only policy instrument used by the French government to improve the quality and the provisions of tourism for disabled people. The labels “Tourisme & Handicap” and “Destination pour Tous”, designed by the Ministry of Tourism, intend to promote accessible tourism offers in an integrated and reliable way. While the “Tourism and Handicap” label acts as a guarantee for the quality of care and facilities of tourist sites, the “Destination for all” label provides information on the ease of access to geographic areas.

The Tourism & Handicap was created in 2001 by the Ministry of Tourism. According to the program, entrepreneurs, managers or providers of tourism services can apply for the use of a logo (see Figure 1), which is awarded contingent on inspection by especially trained professionals. Each region has a Ministry of Tourism representative which operates as a point of contact for applicants. The initial phase of the application process consists of a self-evaluation questionnaire to be filled by providers. The label lasts for 5 years and can be issued for two to four disabilities (see disability-specific labels in Figure).

Figure1: The “Destination pour tous” and “Tourisme & Handicap” labels



Source: DGCIS, Direction générale de la compétitivité de l'industrie et des services.

The label has two main objectives:

- For disabled tourists, it becomes easier to identify tourism providers which are accessible and how. .
- For tourism professionals, it provides a mark of recognition for their efforts into making facilities accessible. Moreover, it creates a potential source of competitive advantage over places without an official label.

the “Destination Pour Tous” (DPT) label is provided to local territories, which are required to provide a coherent and comprehensive offer for disabled customers. It is awarded for three years and only to the extent that the territory provides satisfactory services for at least two of four disability types (motor impairment, vision impairment, hearing impairment or learning difficulty). It requires fulfilment of three criteria:

- The geographic area must demonstrate to have a special provisions (?) vocation for tourism and a focus the quality of life of tourists;
- The area must mobilise stakeholders through various initiatives in order to set up a strategy to welcome people with disabilities.
- Essential tourism services must be provided, spanning from accommodation to cultural and sport activities, transportation and shop accessibility.

The final decision is made by a national commission, which is composed of representatives of a number of French ministries⁸.

The first criterion is of particular interest for this case. Despite its below average size, the Hérault department is characterised by sharp contrasts due to the heterogeneous nature of its territory. The figure below shows the existing variety of areas that exists in Hérault.

Figure 2: Map of Hérault (by area)

⁸ Ministry representatives must have the following competences: disability, tourism, accessibility, sport, culture, local affairs.



Source: Hérault le Languedoc, “Tourisme accessible 2013”.

As of 2013, a number of important destinations in Hérault are involved in the initiative.

- Thau, Balruc-les-Bains, a commune whose activity relies on thermal and seaside tourism:
- Carnon, a historic seaside resort, has planned resources required to obtain the label.
- The communes of Lunel and Vallée de l’Hérault are in the process of being validated the “Tourism & Handicap” label.
- Cévennes Gangeoises and Domitienne also showed an interest in obtaining the prerequisites for qualifying for the label. The deadline for application submission was 31st December 2013, while the first round of labels will be assigned in May 2014.

Relevant stakeholders suggest that Hérault’s geographic diversity may both be:

- A source of comparative advantage, since it allows to offer a varied mix of holiday destinations including beaches, natural landscapes, health resorts, historic cities etc;
- An administrative hurdle, since it may complicate the planning of a coherent offer and the coordination of destinations that are associated with different needs.

In regards to the second point, it has been observed that a real mobilisation of private and public structures has been made possible at the departmental (Hérault) and regional (Languedoc) level. It has been suggested that the presence of both the law of 2005 on equality of disabled people and the possibility of signalling the presence of accessible tourism facilities has been used as a leverage for a number of private and public investments. The label was in fact designed with a view to facilitating the convergence process initiated by national legislation and rewarding “first-movers”.

However, interviews with stakeholders suggest that the 2005 law and the existence of the labels operate on different levels. On the one hand, the 2005 law is based on citizenship and on individuals’ rights. The Act would shape the policy agenda based on the willingness to eliminate physical as well as social barriers. The objectives are therefore not founded on a notion of profitability but rather solidarity. On the other hand, the label incentivises individual businesses’ initiatives by promising economic returns.

In addition to business related motivations, the possibility of acquiring the “Tourism & Handicap” label was perceived as an occasion to comply with the law, which will impose quality standards by 2015. Feedback from stakeholders was positive and confirmed that the “Tourism & Handicap” label was successful and helped to increase the visibility of business services for disabled customers. However, it was noted that greater emphasis and resources should be devoted to monitoring of participating enterprises, especially in regards to the “Tourism & Handicap” label, which requires auto-certification in the initial phases of the application process.

3.0 The integration of the supply chain

The enjoyment of a holiday destination requires careful planning by public authorities and private actors. First, reliable information about accessible destinations must be acquired easily and from a reliable set of sources. Subsequently, booking, travelling and services at the destination must be tailored for specific disabilities.

In this section communication tools, local transportation, accommodation and other services are described and put under scrutiny. Of all destinations, a special focus is set on the provision of services in beaches, both for their geographic prevalence and the special mention deserved by the “Sea for All” initiative, which involved important local stakeholders.

Communication

For all tourists, the first step towards a satisfactory holiday consists of finding relevant information about services (e.g. accommodation, restaurants, local attractions) that will be used once arrived at destination. For disabled people, this process can become more complex due to the need to check whether services are adapted for their specific needs. For Hérault, such information is provided by both national and local organisations. The standard labels that exist at the national level are important in that they inform tourists about disability-specific accessibility. It is moreover important that information about these services is provided in different forms and can be accessed both online and non-digital devices.

A number of information tools are available which allow disabled tourists to obtain information about geographic destinations as well as specific private venues.

Figure 3: Information provision: A snapshot from online services

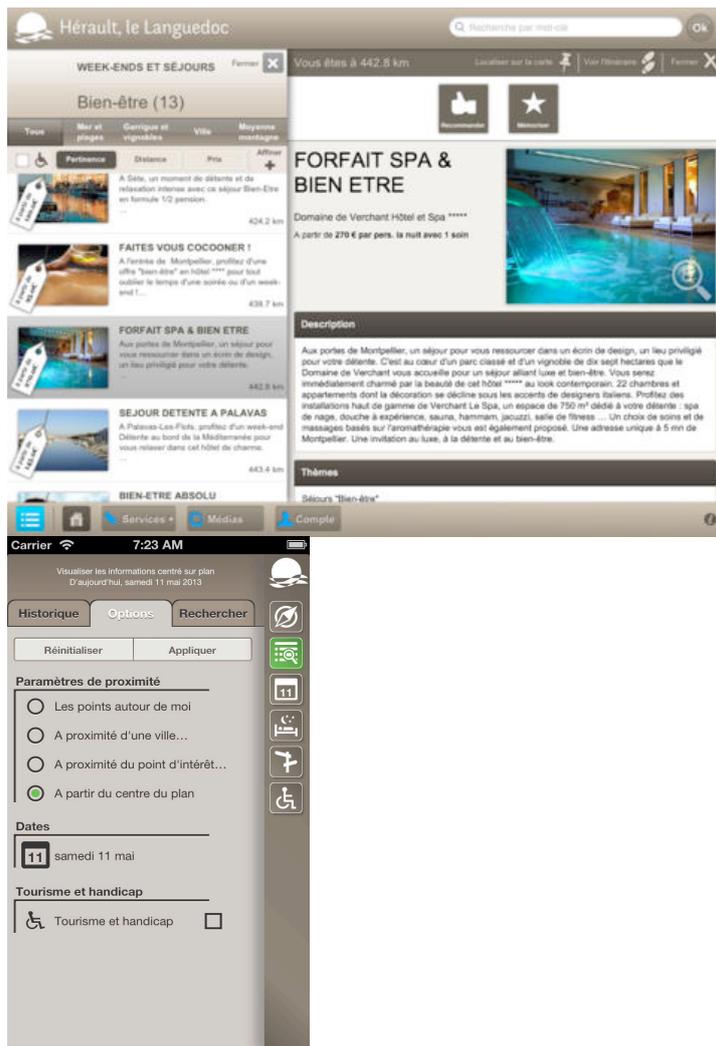


Source: French ministry of tourism, available online.

The Ministry for Tourism offers the opportunity to search for tourism destinations based on hearing, mental, mobility, and visual impairments. The website makes use of disability specific labels that follow national standards and are therefore easy to recognise. It moreover gives the opportunity to determine whether the destination presents the “Tourism and Handicap” label for 16 categories (*inter alia* hotels, sporting sites, tourism offices and camping sites). Although the website is easy to navigate and provides essential information, it lacks a marketing oriented angle. Other than offering a depiction of disabilities addressed through the label, it does not allow to observe and examine in depth specific destinations, (e.g. via specific photos and material). Moreover, the platform is not adapted to the most recent devices.

On the contrary, local information can be easily accessed on smartphones and tablets. An application designed by “Destination Hérault” screens out non-accessible sites (such as restaurants, thermal sites, public buildings) through an ad-hoc option. However, in this case it is not possible to differentiate between different disabilities and to visualise accessibility labels.

Figure 4: Information provision: snapshots from mobile devices



Source: Herault, le Languedoc (various devices)

The official website⁹ of “Destination Languedoc”, which provides information for 5 French departments, including Hérault, can be accessed in various languages (French, English, Italian, German, Dutch, Danish, Spanish, Chinese) and distinguishes between mobility, visual, mental and hearing impairments. Unfortunately, some information is missing and crucial sections of the website are underdeveloped, such as the ones for “practical information” and “useful addresses” (English version). In addition to this, feedback from stakeholders suggests that there has not yet been a comprehensive plan targeting social networks, and that “thematic packages” be developed, since present platforms do not always allow to obtain information based on types of tourism (cultural, sea, wellness etc.). This would be key to the development of businesses in line with the department’s natural competitive advantages.

⁹ It can be found in <http://www.destination-languedoc.co.uk>

Transportation

A mobility scheme was created in 2010 by the department of Hérault. The issue of transport accessibility involves municipalities, the department and the region alike. Stakeholders claim that existing user surveys have shown that basic services work, but that at the same time there is much room for improvement. In Montpellier, public bus transportation is adapted for people with mobility impairments. For blind people, stops and line direction are announced in public through electronic devices. When standard lines are not accessible, some associations, such as the "Groupement pour l'Insertion des personnes Handicapées Physiques" (GiHP), provide alternative transportation services. However, these services are not always available outside of Montpellier, which calls for further action in small but no less popular destinations.

The French national provider offers so called "Saphir" services in airports in Hérault. This involves guidance to the gates as well as assistance in the aircraft. However, interviews conducted show this still remains the "real problem for people with disabilities" and is considered a barrier to mobility, since disabled people are not offered the possibility of moving autonomously from the gates to the aircraft.

SNCF, France's national state-owned railway company, provides the "Accès Plus" service in Béziers, Agde, Bédarieux, Sète, Montpellier-Saint-Roch, Le Grau-du-Roi and Nîmes. The service provides assistance to get on and off trains in selected stations and guarantees the existence of elevators and mobile ramps for people with mobility impairments. Visually impaired can benefit from audio locator signals and guide trails, with information in braille on handrails and other station areas. Special sound signals have been developed to facilitate conversation in the presence of hearing aids. For hearing impaired people, display screens provide information in sign languages. However it was noted that the implementation of such services varies across different locations, and that standards are below average in less active stations. The service is generally praised for its management and is considered less of a hurdle compared to airplanes.

The Accommodation Association Hérault France has created a device for paraplegic or people that can be adapted to wheelchairs, in order to open up mobility opportunities in nature and other environments. This program was supported by the General Council of Hérault and the regional Delegation of Tourism.

Occasionally, other associations operate in the territory to compensate for the lack of public transportation. For example, the association "Groupement for the Integration of Persons with Disabilities Physical" (GIHP), funded by local authorities and the Department of Hérault, provides adapted transportation services. The organisation moreover offers vehicles on hire for short or medium distances, available for periods ranging from one to several days or

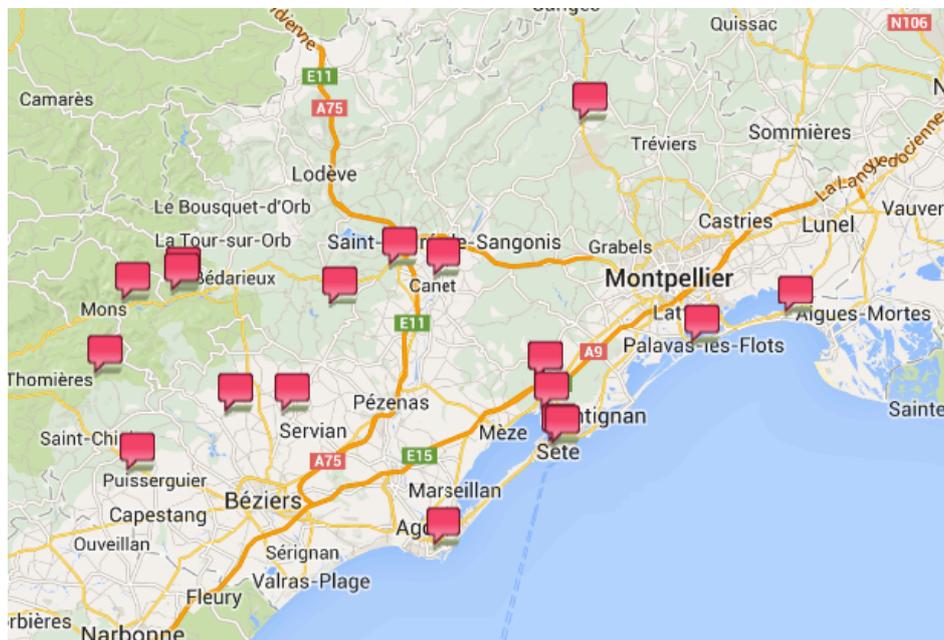
weeks or months (business travel period) and adapted for disabilities such as paraplegia and hemiplegia.

Apart from these important examples, stakeholders suggest that insufficient emphasis has been placed in creating accessible routes accessible for disabled people. These routes are not always integrated with important restaurants, beaches, hotels and do not offer continuity in the quality of services provided within the area. They have been defined by stakeholders as not “consistent” with local destinations and a “sensitive point” in the overall offer. Adequate infrastructures involve large fixed costs and a substantial degree of coordination between authorities, yet they remain crucial for the development of the tourism offer. The lack of accessible connections are perceived as an obstacle to further growth and a pre-requisite for attracting customers with disabilities.

Accommodations (Hotels, campsites)

The figure below provides a map of accessible hotels. The Destination Languedoc website, which collects such information, generates 21 results in total.

Figure 6: Diffusion of hotels with “Tourism & Handicap” label



Source: “Destination Languedoc” website.

By using the accessibility label “Tourisme & Handicap”, it is possible to map hotels by the specific disabilities provided. As the map shows, accredited

hotels are mostly located along the coastline and in Haut Languedoc¹⁰. Camping sites are another very important option. The website Campingo.com generates three results for camping sites for the disabled, located in Serignan, Balaruc-les Bains, ad Lattes. Campsites moreover offer dedicated parking space. In one instance a chalet is adapted for the needs of wheelchair users, and has telephone booths in braille. However, interviews with campsites owners suggest that part of this offer is not fully taken up by disabled people. This is attributed to a number of objective barriers that hinder the potential created by these facilities.

- Campsites are hard to reach since there is no suitable transportation. As a result, the low number of disabled customers seems to justify under-investment in other facilities. For example, swimming pools are not accessible due to high initial costs of buying equipment and maintenance costs.
- Businesses perceive that customers with disabilities have ingrained preferences for hotels vis-à-vis camping sites. This occasionally creates scepticism with respect to additional investments in this specific area.

Beaches

Hérault's 90 kilometers coastline plays a crucial role in its tourism market. About 200 accessible tourist areas have been identified, while over 70 have been certified by the label "Tourisme & Handicap".

The "Open Sea for All" project, initiated by Hérault's General Council, addresses disabilities in a variety of ways. In Hérault, 45 beaches are equipped with 3 "audioplage" systems that can be used by visually impaired people as a guide through the site (see Figure). Moreover, the "Open Sea for All" methodology has been designed to facilitate the lives of disabled users. This project has three policy goals:

- To improve access to towns, specifically with respect to routes leading to beaches;
- To address peripheral pedestrian traffic, and access must be facilitated through adapted walkways;

¹⁰ <http://www.destination-languedoc.co.uk/hebergements-handicap/~disabled-access~/offres-touristiques-12-2.html>

- To provide a set of essential services, such as accessible toilets, showers and changing rooms, aid stations, sign posts (see Figure) and help to water access^{11,12}.

Figure 7: From “Open sea for all” project: accessible changing room, “Audioplage”, sign posts.



Source: Département Hérault, ENAT, “La mer pour tous”

Box 1: “La mer pour tous”: the “Open sea for all” project

¹¹ Destination Hérault makes swimming accessible by providing especially designed support tools. The “Tiralo”, or “Handiflot” are beach chairs which floats in water and makes bathing comfortable.

¹² From Département Hérault, ENAT, “La mer pour tous”. Available from: <http://www.accessibletourism.org/resources/openseaforall.pdf>.

“La mer pour tous”: the “Open sea for all” project

It can be said that this is the most important and ambitious project put in place at the regional level. It can be considered as an outstanding initiative that has drawn much attention over the years.

Figure 8: An overview of the “Open sea for all” project.



Source: Département Hérault, ENAT, “La mer pour tous”

The departmental program has to date given rise to 48 accessible beaches alongside sea and lakes. As shown above, the main rationale behind this program is to fulfil a right to inclusion. According to a major stakeholder, the main obstacle in the implementation of the project lied in the coordination of various municipalities, which play a role in the design and funding of the new structures. It was in fact important to “determine the role and commitment of each partner in relation to community support”. A charter is currently in progress, which sets out a well-defined methodology and provides a commitment to the provisions of the implementation of the program.

Toilets

Access to toilets is to be provided by both private and public organisations, in line with the prescriptions of the national laws enacted in 2005, which aim at fostering accessibility of many services. The three camping sites that have

been identified all provide toilet blocks for wheelchair users. These consisted of adapted sinks, showers and wash basins. Interviews appear to confirm the availability of these services. However, respondents argue that most providers decide not to invest on them on the grounds that few disabled people choose campsites as their holiday destination, even in the presence of accessible toilets. In fact these providers themselves claim that disabled do not choose them despite being equipped of this basic service. However the reason may lie in the lack of other services that require greater investments and are therefore undersupplied.

4.0 Provisions for cross-impairments

The 2005 legislation stresses the importance of providing accessible services for all types of disabilities. From a theoretical angle, however, policies currently in place stand in an ambivalent relationship with the incentive to provide services for cross impairments. As seen in the previous sections, the “Tourisme & Handicap” label functions as a signalling device for suppliers. In fact, suppliers can apply for disability-specific labels and address those disabilities for which it is possible to reap higher benefits by increasing the customer base. To be sure, disability-specific labels can increase the possibility that enterprises will invest in accessibility, but this may come at the cost of losing sight of the diverse nature of disability. Instead of covering all accessibility needs, supply might tailor made accessibility based on their business needs or to cost effectiveness arguments.

Nevertheless, providing signalling based on cross-impairments presents a number of drawbacks. It may deter investment if the costs required for receiving recognition for accessibility are too high. As we have seen, some services are more popular among people with certain disabilities because of natural barriers.

In the “Open Sea for All” programme, all impairments are integrated in the general offer. As seen in the previous section, the project involves the introduction of facilities that address a variety of disabilities (visual, auditory, mental and mobility related). It has been noted that on some occasions, the topography of land and the depth of some beaches pose some natural constraints on the development of accessible services for people with mobility impairments. Due to budgetary constraints, some services are not fully integrated as they would require above average investments. The “quality of the landscape” and “respect of the environment” has been included as another important factor preventing full integration of services. This is particularly relevant in natural areas, as opposed to urbanised ones where less effort is required to implement the original design guidelines.

Labels also provide with an indication of the coverage of services for specific disabilities among hotels. It is observed that of 21 hotels (or Bed and Breakfast), 19 provide accessibility to people with mental disability, 17 to wheelchair users and only 12 to hearing impairments. From the online sample, none seems to provide services addressing visual impairments¹³.

Figure 9: Hotels with “Tourisme & Handicap” label: disability- specific provisions.

¹³ However, the 2013 document “Tourisme accesible” displays a number of hotels catering for visual impairments (in Balaruc –les-Bains, Cap d’Agde, Montpellier).

	Mental Disability	Wheelchair use	Hearing impairment	Visual impairment
Absolute number	19	17	12	0
Percentage (%)	90%	80%	57%	N/A

Source: Destination Languedoc website. Sample: Total number of hotels (21) in Hérault that display the “Tourisme & Handicap” label.

As we have seen, there is a mixed level of homogeneity across disabilities, with the partial exception of auditory disabilities, which are addressed only 57% of the times in hotels with the “Tourisme & Handicap” label, and visual impairments, for which there are no related results on the “Destination Languedoc” website and only 3 from the 2013 official list. This calls for corrective action with a view to a more varied and comprehensive offer.

Figure 10: Museums with “Tourisme & Handicap” label: disability-specific provisions.

Destination	Mental Disability	Wheelchair use	Hearing impairment	Visual impairments
Cap D’Agde	Yes	Yes	Yes	No
Loupian	Yes	Yes	No	No
Sète 1	Yes	Yes	Yes	No
Sète 2	Yes	Yes	No	No
Montpellier	Yes	Yes	Yes	No
Saint-Pons-de-Thomières	No	Yes	No	No
Sérignan	Yes	Yes	Yes	No
Total (%)	85%	100%	57%	N/A

Source: 2013 document “Tourisme accessible”. Sample: Total number of museums (7) in Hérault that display the “Tourisme & Handicap” label.

Museums are also an important destination to look into, since it may motivate a holiday decision. Only 7 museums present the “Tourisme & Handicap” label. Similarly to hotels, hearing and visual impairments seem to be the most penalised disabilities. However, a number of positive initiatives go in the right

direction and can be used as a positive source of inspiration. In Montpellier, an important museum introduced a scale model, designed and produced by a private company, which can be enjoyed by partially sighted as well as blind people. While the first can make use to explanations in large print and benefit from the enhanced contrast of the colours used, blind people can resort to “codes” in Braille that guide them through the details of the model, which is built with special materials. Moreover, workshops and guided tours are organised specifically for people with visual impairments.

Figure 11: Restaurants with “Tourisme & Handicap” label: disability-specific provisions.

	Mental Disability	Wheelchair use	Hearing impairment	Visual impairment
Absolute number	13	10	11	9
Percentage (%)	92%	71%	78%	64%

Source: Destination Languedoc website. Sample: Total number of restaurants (14) in Hérault that display the “Tourisme & Handicap” label.

5.0 Business approach – building a business case for accessibility

The establishment of “Open Sea for All” is the most successful departmental program. However, according to interviews with stakeholders, this is not based on a notion of profitability, but aims at restoring a fundamental right of all users by improving the accessibility of beaches and bathing. The program is not intended yield economic returns but it was guided by the strong will of local stakeholders. In fact, access to beaches is free, while maintenance remain a responsibility of the municipality under the support of the department of Hérault, as stated in the charter of the program. There is however indirect evidence that the program was successful on a business level:

- It increased attendance to beaches, which had positive spillover effects on neighbouring enterprises (bars, shops, restaurants).
- Interviewees affirm that owners of private resorts have shown an interest in integrating their offer with tools and adaptation techniques that are at the core of the program.

Interviews with businesses suggest that substantial uncertainty over their returns to investments in accessible tourism services lies in the geographical accessibility of their destinations.

Moreover, it is believed that the increase in profits following from higher demand would not necessarily cover its costs. For example, suppliers have noted that having accessible tools for people with mobility impairments require high maintenance costs while increasing only marginally the number of tourists with disabilities. Profitability is hard to quantify and infer from everyday experience, due to the fact that people with disabilities tend to come in groups where substantial support and help is provided by their families and carers. Thereby creating a multiplier effect.

However, the current scenario is marked by instances in which enterprises do not invest in accessible services. A previous study by the European Commission¹⁴ shows that while the tourism sector is one of the strengths of Languedoc-Roussillon, private enterprises' investment efforts on innovation were considered to be a weakness of the area, especially to non-technological sectors, such as tourism. This is consistent with anecdotal evidence collected. Most businesses, due to their small scale¹⁵ and weak

¹⁴ <http://s3platform.jrc.ec.europa.eu/regions/FR81/tags/FR81>

¹⁵ The same study stresses the importance of micro and small enterprises in the regional economy, which represent about 97% of the overall figure.

financing opportunities due to the current economic conditions refrain from widening their business offer.

However, there are clear success cases in which positive advancements were underpinned by a business mentality. In 2012, Hérault Tourisme provided a list of successful business projects carried out in partnership with other organisations. In one case, a hotel and restaurant in Cazilhac, in the north of Hérault, was renovated with additional bedroom, which were developed and adapted for people with disabilities. The restaurant was further adapted for people with reduced mobility. A parallel could be drawn with the provision of adapted transportation. Although the initial investment was made with the support of sponsors, the service is now offered for a fee. By scaling up the service and making it available to the public (the rental) service is currently only available to members of the organisation), it would be possible open up unexploited business opportunities. Both examples can be used as an example of how effective synergies can be created between businesses and institutions. Interviews show that the intervention of regional authorities had the effect of both lowering the burden of investments and opening up the enterprise to new clients.

Conclusions

As the case study shows, Hérault is a small yet geographically diverse French department in which tourism makes up the highest share of income. A number of destinations attract a high number of visitors every year, coming in the largest part from other French departments. The offer for tourists without particular access requirements is satisfactory and major destinations are well connected. Parallel to this, the accessible tourism sector has undergone a number of transformations stemming from regional and state level initiatives. While the 2005 accessibility act and labels designed by French authorities gave visibility to existing good practices and an incentive to invest in improving accessibility, regional initiatives such as “Open Sea for All” focused on strengthening the offer mostly along the coastline. The interaction between state and department level drivers had a positive impact, which is evident from the good reception of the labelling system and the investments made in making beaches and some inland destinations accessible.

However, a number of implementation issues have been identified which prevent the department from exploiting the full potential of these initiatives. The provision of more accurate information would promote its diffusion and avoid informational asymmetries between disabled customers and providers. Second, demand for accessible services is affected by the presence of satisfactory infrastructures, which appears to influence the geographic accessibility of certain destinations and thus their appeal.

There is evidence that a business case can be made from making destinations accessible. Stakeholders state that the “Open Sea for All” project, initially addressed at public beaches, is now under scrutiny among private sector establishments, which therefore recognise the business potential of further accessibility. Interestingly, the underlying rationale of the project was not driven by business motivations, but rather by a more social policy oriented argument. Moreover, a number of instances in inland Hérault suggest that adapting offer for people with disabilities (e.g. with reduced mobility) increases the visibility of the destination as well as sales.

By contrast, a number of concerns were raised with respect to the high costs required to set up certain accessible structures. Hérault’s accommodation capacity is characterised by a large number of camping sites, which occasionally offer adapted services for people with mobility, visual and hearing impairments. The reason why the offer is not yet fully integrated has been ascribed to the low rate of return of potential investments compared to the high initial fixed costs, letting alone significantly high maintenance costs.

Ultimately, the development of accessible tourism offer in Hérault has been characterised by initiatives that involved a large number of private and public

stakeholders. Future efforts will be framed in the context of the requirements set by the 2005 national law, which require adherence to given accessibility standards by 2015. Although evident progress has been made in certain areas of the territory, priority should be given to adapting it entirely through strong political will and a better design of existing schemes. The main challenge will consist of developing adequate infrastructures that can increase potential demand for accessible tourists and in turn incentivise further private investment.

Recommendations

Hérault presents a diverse range of tourism opportunities in a relatively small territory. Policy recommendations are therefore applicable to comparable areas. From an analysis of the development of accessible tourism in Hérault, the following recommendations can be derived:

- The implementation of a widespread and easy-to-understand label for accessible tourism, such as “Tourisme & Handicap”, can provide an incentive to invest and harmonise supply standards. However, this policy must be backed up by effective monitoring of eligibility and political will of local authorities.
- In the presence of a diverse offer, it is important to provide accessible information in a variety of formats. Both the French Tourism Ministry and local authorities have contributed to providing information about accessible destinations available on the latest devices.
- The consistent interaction between different initiatives can mobilise private and public resources. The 2005 national law, which sets a 2015 deadline for the implementation of accessible structures, created an incentive for businesses to acquire the “Tourisme & Handicap” label, which yet retained its autonomous role as a key driver to innovation in the supply of accessible services.
- Touristic offer must be complemented by adequate infrastructures. This is likely to be the major hurdle towards the development of accessible environments in small territories, due to the high fixed costs of setting up roads and satisfactory public transportation. This is perceived to be hindering the full potential of existing businesses in Hérault.
- Publicly funded initiatives, such as “Open Sea for All”, can act as pioneers in their sectors of influence and, if successful, spark an interest among private suppliers. Innovative practices can therefore have a positive spillover effect on providers in the same industry and on closely located services, such as restaurants, bars and private accommodations.
- Extra efforts should be made to counter the scepticism of industry sectors that have little direct experience with disabled tourists. Awareness raising initiatives, or the imposition of regulatory standards might contribute to overturning resistance and giving them a proactive role in broadening their offer.

Annex I: Criteria and justification for best practices

Table 1: Criteria and justification for best practice

Criteria	Justification	On track/off track
Relevance	Relevant information platforms are offered by regional and national authorities. Data show that the adaptation of services is homogeneous across disabilities. Recent improvements in accessibility correspond to demand, which focuses on domestic tourists.	
Transferability	The most successful initiative, “Open Sea for All”, addresses disabilities in maritime areas and consist of tailor made facilities, most of which are not transferable to other environmental settings. The flexible nature of the national level label “Tourisme &Handicap” could be replicated in other member states.	
Efficient & Effectiveness	Regional and national level initiatives have had a measurable impact on local development. While the “Open Sea for All” programme has made accessible more than 40 accessible beaches and lakes, the label “Tourism & Handicap” has genuinely fostered both exposure of and investments in accessible services. The further policy input provided by the 2005 law contributed to making the label effective.	



<p>Sustainability</p>	<p>In the coastline, stakeholders suggest that sustainable monitoring and maintenance of the newly established structures will only be achieved with the mutual commitment of partners that participated in its initial implementation. It is therefore perceived as a future challenge. In other areas, the excessive costs of providing accessible services are claimed to prevent more substantial investments. On a more general level, the sustainability of the offer throughout the supply chain is fraught by difficulties, in particular with regards the provision of satisfactory information and accessible transportation, which does not yet reach satisfactory standards</p>	
<p>Innovation</p>	<p>The approach adopted in broadening the existing offer for disabled tourists indeed presents innovative features. In particular, the “Open Sea for All” initiative had a tangible impact in making Hérault’s coastline accessible by enriching the offer with the latest standards. The program was run at the departmental program and had a pioneering component in both the quality and scope of new facilities implemented and its management.</p>	