

Mapping and Performance Check of the Supply of Accessible Tourism Services

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

Annex 6: Methodological approach, challenges and
mitigation strategies

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1. METHODOLOGICAL APPROACH

The methodological approach that has been applied in the present study to ensure that the study objectives are met is outlined in detail in this Annex. The approach was elaborated on the basis of a thorough analysis of the terms of reference and related objectives and information. In addition, the methodology was validated at the kick-off meeting which took place in the premises of the European Commission in Brussels in March 2013.

In accordance with the research objectives set out in the terms of reference, the methodological approach is divided into five main separate tasks.

Table 1: Methodological Overview

Study Tasks	Methodological Approach
Task 0 – Inception tasks	<ul style="list-style-type: none"> ▪ Scoping interviews ▪ Conceptual review
Task a – Mapping Analysis	<ul style="list-style-type: none"> ▪ Pantou – online register ▪ Desk research
Task b – Performance Analysis	<ul style="list-style-type: none"> ▪ Conceptual analysis of performance criteria ▪ Customer online survey ▪ Interviews with national disability organisations ▪ Industry online survey ▪ Interview with tourism sector industry associations ▪ Legislative analysis
Task c – Examining best practices and tools	Case studies <ul style="list-style-type: none"> ▪ Desk research ▪ Interview programme
Task d – Validation and dissemination	<ul style="list-style-type: none"> ▪ Expert validation workshop (Blankenberge), October 2013 ▪ Stakeholder conference in Brussels June 2014

The figure below graphically represent the fieldwork plan for all primary and secondary research conducted under the contract. This roadmap outlines the different fieldwork activities, their timing, the research questions they aim to answer and it sets out how different data collection activities address the study research questions.

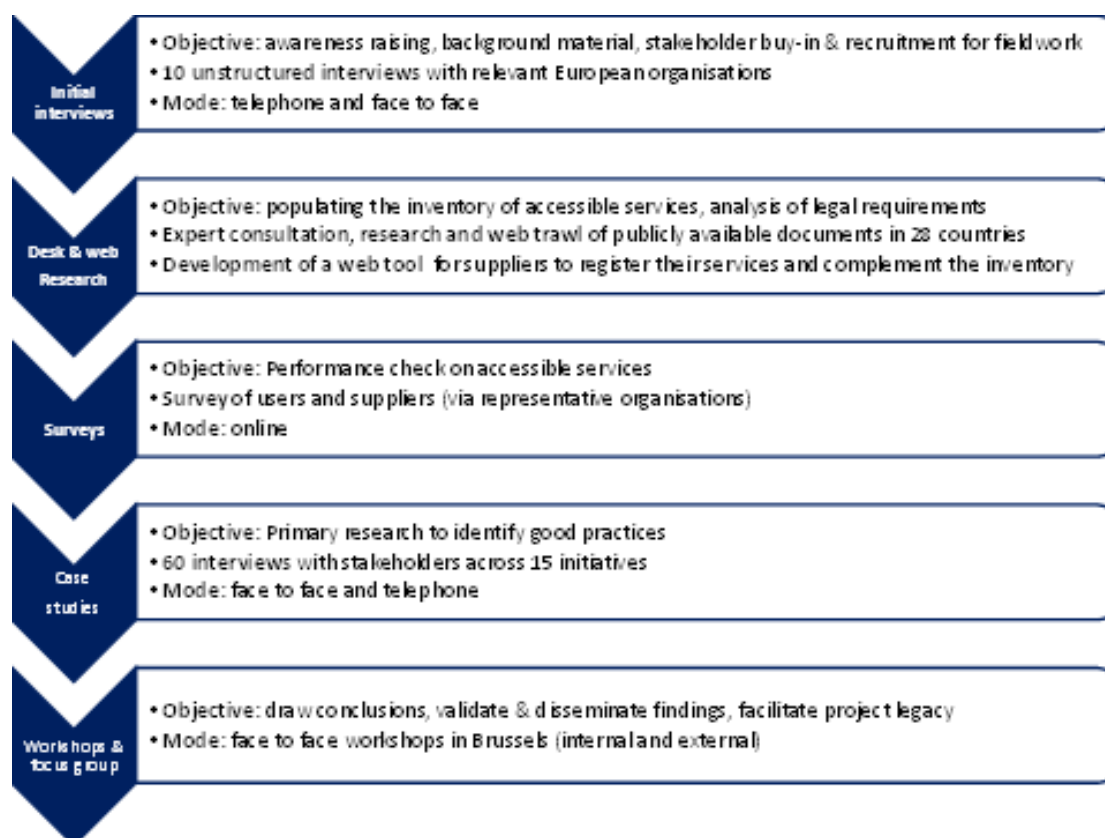


Figure 1: Overview Fieldwork Plan

The following sections describes the methodological approach taken with each individual tasks as well as any problems and mitigation strategies taken during the research.

1.1. Inception Tasks

The methodological objective of this research strand was to fine-tune the methodology and research tools based on the refined conceptual definitions set out below.

1.1.1. Initial Scoping Interviews

Immediately following the kick-off meeting in March 2013, 10 scoping interviews were carried out with a number of relevant European-level stakeholders and experts on accessible tourism. The objectives of these discussions were to:

- Comment on the overall study methodology including the conceptual framework and the proposed approach.
- Provide further input into the detailed work plan for the study. In particular, the case selection and the draft content of research tools such as questionnaires and topic guides were discussed.
- Ensure that the research team were aware of all relevant background documentation and contact details that these stakeholders held.

- Help refine the research team's conception of the ultimate benefits of the study to different stakeholder groups, coordinate efforts with other teams and prevent duplication while getting a good understanding of stakeholder needs.
- Raise awareness among stakeholders of the study and its benefits and enlist their cooperation with the research team particularly in regard to the survey dissemination and case study research.

The scoping interviews were carried out with the following organisation:

List of Scoping Interviews
HOTREC - the Umbrella Organisation for Hotels, Restaurants and Cafes in Europe
IHRA - International Hotel and Restaurant Association
Tourism for All UK
ERMES Airports, Cyprus
Cyprus Paraplegics Organisation,
SCANDIC Hotels
Greek National Tourism Organisation
European Travel Commission
Necstour
Visit Flanders

1.1.2. Conceptual Definition

1.1.2.1. Defining the Supply Chain and Performance Criteria

This study examined and defined the accessible tourism supply chain through the analytical concept of the "Visitor Journey" as described by Lane¹, which sets out the different steps or stages that a visitor will go through when undertaking a visit to a destination.

The stages are:

- **Decision making** – Sufficient relevant information to make an informed decision
- **Booking** – Transparent and easy
- **Journey to the destination** – Transport / Hospitality providers
- **Stay at the destination** – The facilities they will use while staying at a place dependent upon motive for travel. These could include, for example:
 - Accommodation
 - Local transport – buses, trains, trams, ferries etc.
 - Hospitality (Cafes, Restaurants, Bars, Pubs)
 - Attractions
 - Conference facilities
 - Sports / Leisure facilities

¹ Lane, M. (2007) The Visitor Journey: the new road to success. *International Journal of Contemporary Hospitality Management*, 19(3), 248–254.

- Public areas

- **Return home**

- **Reflection and recollection**

The study considered the availability of appropriate accessible services at each stage of the journey to be determining for the success – or otherwise – of the journey. A key aspect through all of these stages to help enhance the visitor's experience is sufficient, relevant and easily accessible information. Moreover, a key aspect of the information content for disabled and other visitors is that it provides them with high quality and timely accessibility information throughout the journey. This in turn relates to the performance criteria for the accessible tourism supply, as set out below.

1.1.2.2. Defining Performance Criteria

Performance criteria are evaluative statements, which specify what is to be provided and the required level of performance. They detail the activities, skills, knowledge and understanding that provide evidence of competent performance of each element.

In the European tourism sector a single set of performance requirements for “accessible tourism services” has not yet been established, despite several efforts to do so. It should be noted that the development of complete sets of performance criteria and indicators of international validity cannot be achieved by this or any project team alone (even with additional experts, as here), as it requires industry-wide consensus to reach formalised standards and criteria.

In order to assess the performance of accessible tourism suppliers in Europe, the study defined an approach which takes advantage of the accessibility information schemes given the importance for the availability of accessibility information in the supply chain. The study team made a careful examination of 83 accessibility information schemes which are currently in use in European countries today.

These accessibility information schemes were uncovered through desk research and internet searches to create a current inventory of “Accessibility Information Schemes” related to tourism in European countries, available in Annex 7. The analysis of these schemes provided a clear impression of the variety of performance criteria that are used for different services and the methods by which accessibility information is collected and then presented to visitors. The analysis is set out in section 3 of the main report.

1.2. Task a: Mapping Analysis

A wide investigation of Accessible Information Schemes (AIS) was carried out based on a review of Web and off-line sources in order to identify and analyse mechanisms for gathering, organising and publishing accessibility information in the tourism sector. This study sought out and examined AIS at national and regional levels in the EU-28 and other European countries as well as at international level.

AIS were review and placed in an inventory, recording their:

- Organisation;

- Geographical area;
- Access auditing approaches;
- Scope of tourism services covered;
- Reliability factors;
- Types of customer groups covered (disabilities and access needs); and
- Languages.

A total of 83 national and regional schemes was analysed, as well as 7 Europe-wide schemes and 12 international schemes; the inventory being gathered in a spreadsheet. Statistical and conceptual analysis was performed and data was described and mapped.

1.2.1. Development of Tourism for All Register (Pantou.org)

The analysis of AIS (above) was used to establish functional requirements for a novel Tourism for All Register whose purpose was to establish a pan-European Directory of Accessible Tourism Suppliers, creating a single point of reference covering all EU member states.

This directory was branded and marketed under a new website as Pantou.org following a typical web development approach as used for database driven websites. The Pantou website was not intended to display accessibility information but would signpost users (travellers and accessible tourism suppliers) to the respective AIS for each registered supplier, thus providing a source of accessibility information for those who needed it.

A “Pantou Access Statement” was developed and published on the site as a downloadable template which is used by suppliers who have no AIS affiliation, (either due to the lack of such an audit and information service in their region or because they might be new to the field).

Integration of large data/sets from other AIS

All the identified AIS operating in European countries and regions were approached to invite their cooperation with Pantou. AIS were asked to contribute to populating Pantou by two methods:

1. Informing their members and encouraging them to register themselves;
2. Organising a transfer of members’ data to Pantou, following a template provided by the Pantou technical development team.

The incentive for AIS owners and their Members would be the additional publicity and outreach provided by this unique and free-of-charge service, where providers’ respective contact details, location, range of tourism services offered, customer/target groups and AIS affiliation would be presented in a profile page unique to their respective business. This would create new business opportunities both in terms of potential sales to customers and new networking opportunities within the accessible tourism supply chain.

While many AIS promoted the Pantou service to their members leading to online “self-

registrations”, the take up of directory registrants by the massive transfer of data from AIS Pantou was not achieved as expected. Reasons cited for this lack of uptake (given by the AIS who were approached for this task) were due to the relative complexity of the task of aligning contact and service data to the format required by Pantou and also to the lack of resources on their part for carrying out this task. While some technical difficulties had been anticipated in achieving the sharing of AIS data with Pantou, the widespread inability of AIS owners/managers to cooperate in this venture were – it turned out – underestimated, so-much-so that the targets set for populating Pantou with 2,500 suppliers’ data could only be achieved towards the very end of the contract period. The ‘massive’ transfer of supplier data into the desired Pantou format was eventually demonstrated with the introduction of over 90,000 service providers obtained from Handibooking.com and hotels.com (the latter having developed its own access data fields which are now appearing in increasing numbers of hotel profiles worldwide). These data only became available in autumn 2014 and were added along with individually registered Directory members’ data to the Pantou database during the latter stages of the project implementation period.

1.2.2. Analysis and Presentation of Data

Analysis of the Pantou supplier data was performed at several stages during the latter half of the project implementation period, giving statistical and descriptive reports of a large number of data points. These reports include map views and tables of the regional distribution of the suppliers, the types and numbers of accessible services registered, the breakdown of different customer types by service and by region/country, and other salient parameters required for the study. These data are not published in the present report as they contain information which could be commercially sensitive to the development or marketing of the Pantou Directory Service.

Having established the processes and methods for data analysis, the Pantou management team would be able to produce periodical reports that will allow for the monitoring of development trends in the supply of accessible tourism in Europe. To make this process as smooth and easy as possible, an administrative “front-end” should be designed in cooperation with the public officials who would use the database, thus allowing public policy-makers to observe these developments over time, both at EU and member state levels.

1.3. Task b: Analysis of Performance Levels

The objective of this second task of the study is to understand the performance levels in regards to effectiveness, usefulness and satisfaction of the current supply of accessible tourism services. In addition, as agreed during the inception meeting, the study also examined where along the supply chain bottlenecks lie from the travellers perspective and what sort of difficulties are encountered during the journey. For businesses, the key research questions to be answered in this research strand also involved what sort of barriers prevent businesses from becoming more accessible and the root causes of these barriers. The methodological tools designed for this task also aimed to investigate the business case for accessible tourism.

1.3.1. Online Surveys

Two surveys were launched in June and July 2013 with qualitative and quantitative questions relating to performance levels in Europe.

The surveys were directed to:

- People with disabilities and other who have access requirements when travelling; and
- Tourism businesses.

The following sections provides further details on each of the surveys such as tool development, response rate and distribution lists.

1.3.1.1. Traveller Survey

The online questionnaire to tourists with access needs was designed to gauge the satisfaction levels with the current supply of accessible to tourism services. The aim was to better understand what sort of barriers may prevent tourists from travelling and more specifically, where in the supply chain the most frequently encountered obstacles could be identified.

The English version of the questionnaire was drafted by the ENAT Expert team to correspond to the conceptual approach of the “Visitor Journey” employed throughout the study. In order to contextualise the responses, the respondents were asked to indicate where they had travelled in the past two years. In addition, respondents were prompted to highlight the three most accessible countries they had visited in Europe, as well as the least accessible countries in order to gather further qualitative feedback on obstacles and possible ways of overcoming barriers to travelling with disabilities and other access requirements.

After one month pilot, the survey was subsequently translated into German, Italian and French. In total the survey gathered 646 completed responses from across the four available languages.

The respondents were highly fragmented geographically with 38% replying from Italy, 14% from Germany and 10% respondent stated they resided in the UK, 8% in France,

6% from Belgium and Denmark respectively. While the 24% of responses came from the rest of Europe². The respondents were not asked for their age in the survey.

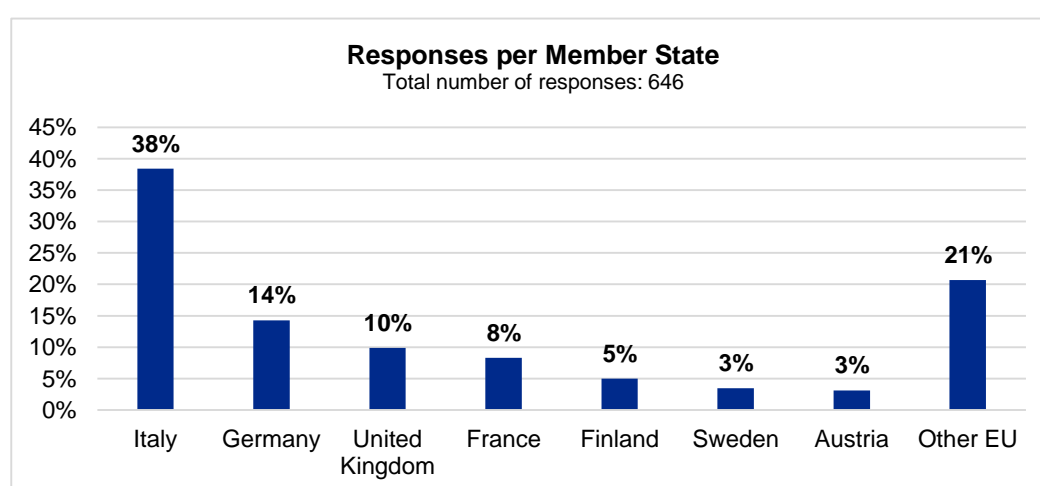


Figure 2: Geographical Location of Respondents

² No respondents answered from Hungary and Romania. This was due to the difficulties of dissemination in those two Member States.

The survey allowed for respondents to indicate cross-impairments and more than 34% stated that they had more than one access need. Fifty-six percent (56%) stated that they suffered from motor impairments such as difficulties walking or were wheelchair users. The second largest group stated that they had hearing and/or speech impairments (32%), while 22% of respondents indicated that they required personal assistance. Eighteen percent (18%) recorded a vision impairment and 4% stated that they (or the person they were replying on behalf of) had learning difficulties. Fewer respondents said they needed to be accompanied by a service animal, suffered long-term illness or had asthma and other allergies, constituting between 8-3% of all respondents. Other access requirements mentioned were incontinence and large/tall stature as debilitating factors for travelling.

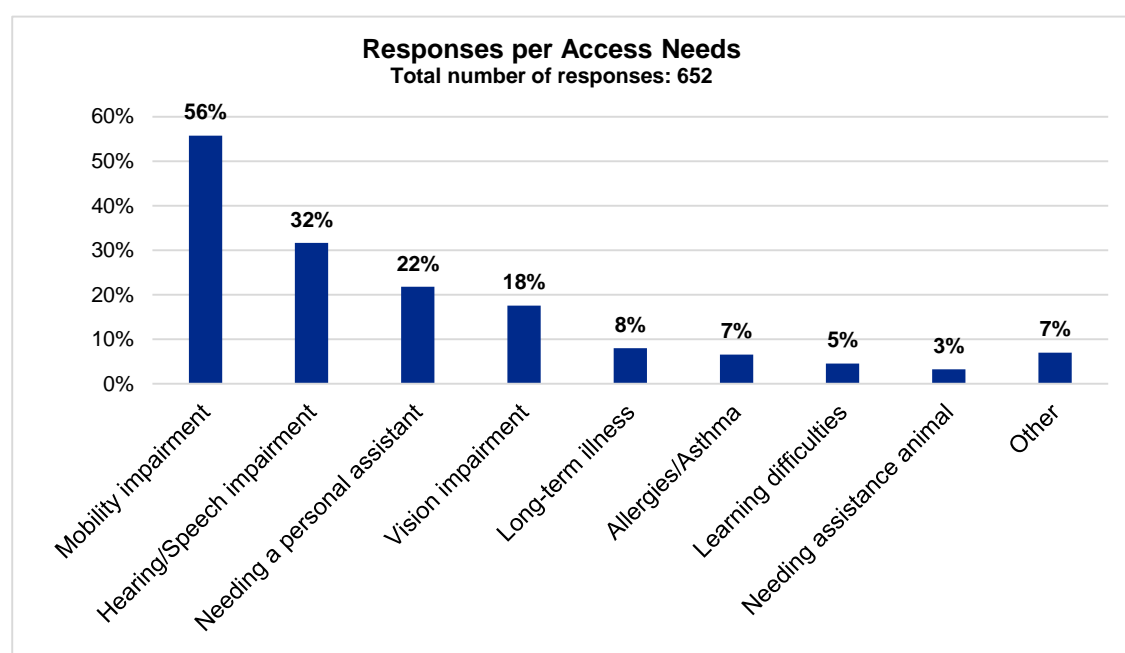


Figure 3: Responses per Access Need

Respondents stated that they travelled on average 2.4 times a year within their own countries spending at least one night away from home and travelled on average 2.4 times abroad annually.

Customer survey distribution list

The online survey was distributed through the following organisations:

Table 2: Customer Survey Distribution List

Customer Survey Distribution List	
EDF	+ national associations
Age International	+ national associations
Istituto Italiano per il Turismo per Tutti, Italy	
ENAT and national ENAT experts	+ 1000 of individuals and organisations
ONCE Foundation	
Tourism for All UK	
Horizon UK	

Customer Survey Distribution List	
J'accède	
Native Hotels	
Roule Nature	
FNATH – Association des accidents de la vie;	
Associazione di Volontariato "Handy Superabile".	
Leonardo Chesire Disability	
Disabled People's International Europe	

1.3.1.2. Industry Survey

The questionnaire to industry was designed to better understand the perceptions of tourism businesses on the current state of accessible tourism provisions across Europe. In particular, the survey design had in mind the emphasis on understanding the root causes of different barriers which limits the provision of accessible services. The ENAT expert team was responsible for the development of the survey following the conceptual idea of the "visitor journey" according to the study's key analytical framework.

Bearing in mind that the tourism market is divided into different degrees of accessibility provisions, the questionnaire was structured with three batteries of questions depending on the scope of accessibility provision of the respondent.

The following options were given to respondents based on their self-assessment:

- **Option 1** was directed to businesses which cater exclusively or mostly to the accessibility market.
- **Option 2** was directed to businesses which cater to everyone including (some or complete) provisions for accessible tourism.
- **Option 3** was directed to businesses which cater to everyone without any special provisions for accessible tourism.

The breakdown of the respondents according to these three groups shows that the majority of businesses placed themselves in group 2, as shown in the following diagram. The analysis of the industry survey followed this broad typology of respondents

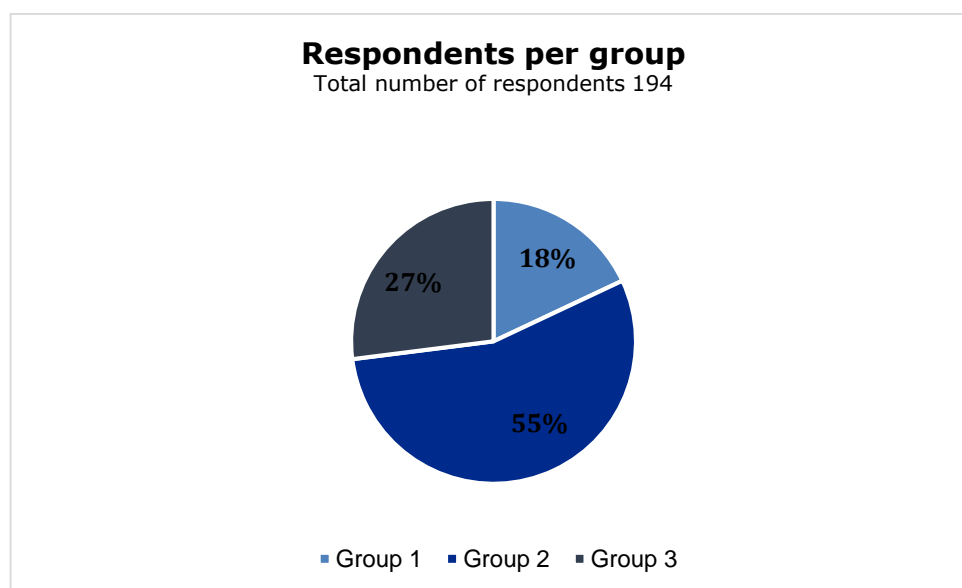


Figure 4: Survey Respondents per Group

Responses were received from 22 Member States with a concentration of responses from Ireland, Germany, the UK, Hungary and Italy. However, some respondents did not state where their businesses were located and a handful indicated multiple locations.

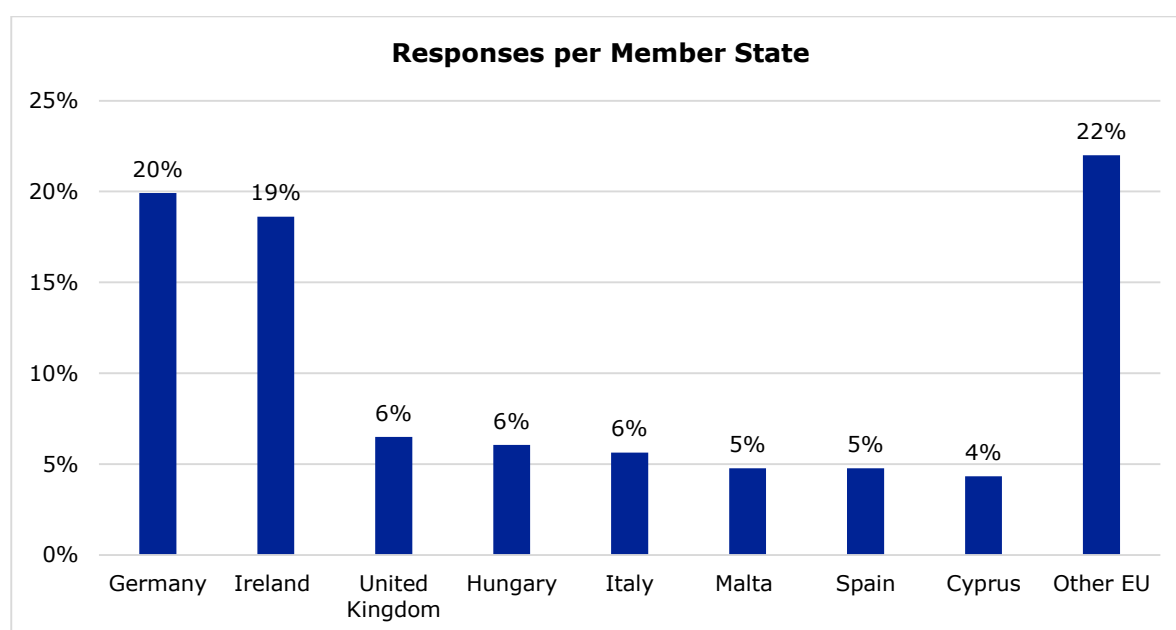


Figure 5: Responses per Member State

The survey asked respondents to indicate in which sector of the tourism industry they were active. Respondents were asked to choose all sectors which applied, thus allowing for diversified services to be indicated. Approximately three-quarters of respondents (73%) stated that they were businesses relating to accommodation services. The second largest group, less than half (48%) of respondents, stated that their activities related to information services. High response rate was also given for the restaurant, café and bar sector, whereas booking, attractions, tour operator, transport and entertainment sectors obtained lower rates between 36%-16%.

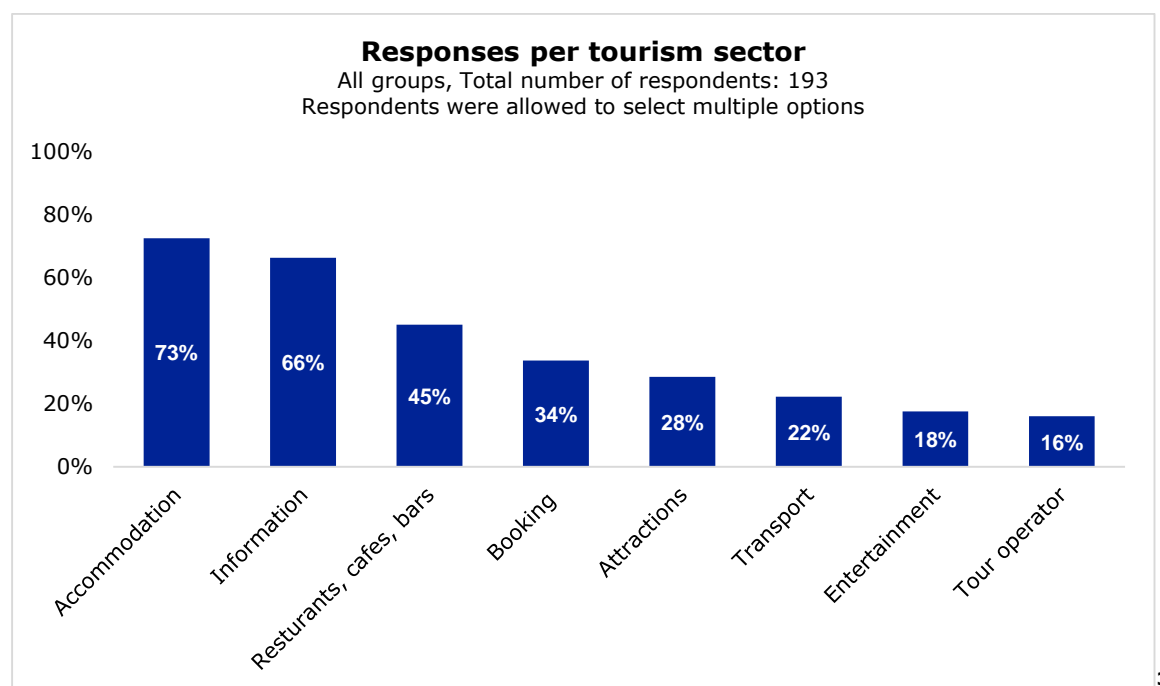


Figure 6: Respondents per Sector

The English version was complemented with a German version.

At the end of the data collection period, the total response rate for the supplier survey was 194 responses, despite extensive dissemination efforts. The survey responses from both surveys were analysed quantitatively using excel and qualitatively synthesising the comments.

Industry survey distribution list:

The survey was distributed through the following organisations:

Table 3: Supplier Survey Distribution List

Supplier Survey Distribution List	
European Festivals Association	+ National associations
ECTAA - European travel agents and tour operators association	
EFCO, the European Federation of Campingsite Organisations and Holiday Park Associations	+ National associations
European Federation of Farm and Village Tourism (EUROGITES)	+ National associations
ETAG – European Tourism and Travel Action Group	+ National associations
European Cities Marketing	+ National associations
EUROCITIES (Working Group on Barrier-Free City for All)	+ National associations
European Lift Association	
Federation of Tour Operators (UK)	

³ Note that not all respondents answered all the questions in the survey, thus, each question may have a different number of respondents.

Supplier Survey Distribution List	
FEG – Federation of European Tourist Guides Associations	+ National associations
Hostelling International	
IAAPA, the International Association of Amusement Parks and Attractions	
Inclusion Europe, Belgium	
HOTREC	+ National associations
IHRA – International Hotel and Restaurant Association	
ITT – Institute of Travel and Tourism	
LCA – Leading Cruise Agents (UK)	
NATKO, Germany	
ANEC, Belgium. The European consumer voice in standardisation	
EUREGIO Kompetenzzentrum für Barrierefreiheit e.V.	
FEJIDIF, Spain	
Istituto Italiano per il Turismo per Tutti, Italy	
PREDIF (Plataforma Representativa Estatal de Dicapacitados Fisicos), Spain	
Red Estable, Spain	
ECTAA – European Travel Agents’ and Tour Operators’ Associations	+ National associations
IATA – International Air Transport Association	
European Regions Airline Association (ERA)	
Community of European Railways (CER)	+ National associations
EuCAN - European Concept for Accessibility Network	+ National associations
HOTREC	+ National associations
European Travel Commission	+ National associations
NECstour	
European Association of Service Providers for Persons with Disabilities;	
Tourism for All UK;	
ENAT	+ 1000 of individuals and organisations
Access Dublin	+ 1000 businesses
Native Hotels	+ 50 individual businesses

1.3.1.3. Research Difficulties and Mitigation Strategies

The surveys were initially disseminated in the summer months (June and July 2013) which resulted in a low response rate. Thus, the surveys were distributed in 2 waves in order to circumvent the summer months, the high season for the European tourism sector. The first wave consisted in distributing the survey through the ENAT network as well as national ENAT contact points and experts. In addition, other representative organisations such as HOTREC, EDF and AGE International also agreed to disseminate the survey to their national chapters and through their websites.

The second attempt to increase the dissemination efforts began in September 2013. All European major stakeholder organisations were contacted and asked to help with the dissemination efforts. The exact return rate of this list is not known, as some organisations have been very active in assisting in marketing the survey, whereas others were less active. In addition, the ENAT network and other accessibility experts have been helpful in distributing the surveys through their personal network of contacts and through social media. In addition, to European-level organisations, the project team has also contacted national chapters of industry representative to disseminate the survey. Despite these efforts the response rate was lower than anticipated.

It is, however, important to point out that low response rates are not unique to this project, for instance, Euan's Guide - a well-known AIS website, only managed to get 104 respondents to their online survey despite their customer-facing nature and direct contact with users.

In order to complement the survey responses and get a fuller picture of the state of play of accessible tourism from both user and industry perspective, an extensive consultation with tourism-related sector organisations and national disability organisation was organised (see below).

1.3.2. Complementary Sector Interviews

Qualitative interviews were conducted with tourism-related sector organisation and national disability organisation in order to fill the data gaps of the online survey and strengthen the robustness of the research process. The interviews were conducted by phone and were semi-structured following an interview guide available in sections 1.6.5 and 1.6.6.

The following 29 organisations participated in the industry sector consultation.

Table 4: Industry Association Interviews

Member State	Industry Associations
BG	Bulgarian Tourist Federation
BG	BDŽ Holding
BG	Bulgarian for all-Cluster for accessible tourism
CY	Cyprus Hotel Association
DK	Association of Danish Travel Agents and Tour Operators
ES	Federación Española de Empresarios de Campings y Parques de Vacaciones FEEC (Spanish Camping Association)
ES	Federación Española de Hostelería
FI	Finnish Hospitality Association
FR	Aéroports de Langue Française Associés à ACI (ALFA-ACI)
FR	Syndicat National des Agences de Voyages
IE	Restaurants Association of Ireland (RAI)
IE	Falite
IT	AIAV Associazione Italiana Agenti di Viaggio – Italian Association of Travel agents
IT	Associazione Italiana Gestori Aeroporti (Assaeroporti)
IT	ASSONAT Associazione Nazionale Approdi e Porti Turistici (Italian Association of touristic ports)
IT	ASSOVIAGGI Associazione Italiana Agenzie di Viaggi e Turismo (Italian Association of Travel Agencies)

Member State	Industry Associations
IT	FIAVET
IT	FS, Rete Ferroviaria Italiana
IT	Federazione delle Associazioni Italiane Alberghi e Turismo
LT	Lietuvos Geležinkeliai (Lithuania Railway System)
LT	Lithuanian Hotel and Restaurant Association
LT	Association of Latvian Travel Agents
PL	Polish Chamber of Tourism
PT	APAVT (Associação Portuguesa das Agências de Viagens e Turismo)
RO	Societatea Națională de Transport Feroviar de Călători, CFR Calatori
SE	Association of Swedish Travel Agents
SE	Visita - Swedish Hospitality Industry
SL	Slovenian spas and thermal spas (SSNZ)
UK	ATOC Association of Train Operating Companies

The following organisations participated in the national disability organisation consultation.

Table 5: Disability Organisations Interviews

Member State	Organisation	Expert
Austria	IBFT	Angelika Laburda
Belgium	ENTER vzw	Kathleen Polders
Bulgaria	Bulgaria for All - Cluster for Accessible Tourism (CET)	Dimitar Dimitrov Yana Elenkova
Croatia	University of Pula	Tea Golja
Cyprus	Cyprus Tourism Organisation, ERMIS Airports and National Paraplegics Organisation	Savvas Hadjikyrou Dimitris Lambriniadis
Czech Republic	Národní rada osob se zdravotním postižením CR (NRZP)	Ondrej Folk
Denmark	Dansk Handicap Forbund	Bente Rødsgaard
Estonia	The Estonian Chamber of Disabled People (EPIK) Estonian Ministry of Tourism	Monika Haukanomm Monika Karu
Finland	National Council of Disabled People's Associations	Pirkko Mahlamäki
France	Tourisme et Handicaps	Annette Mason and Marine Giraudeau
Germany	NATKO S.R.	Ruediger Leidner
Greece	Nat. Assoc. of Disabled People's Organisations (ESAMEA)	Marilyn Christofi
Hungary	Foundation for Leisure MEOSZ	Gabor Nagy Eva Caesar Ersebet Szollosi
Ireland	Irish Disability Federation	John Dolan
Italy	FID - Italian Disability Federation	FID officers /Anna Grazia Laura
Latvia	SUSTENTO The Latvian Umbrella Body for disability organisations	Gunta Anca
Lithuania	LNF and Municipality of Kaunas and Accessible Baltics	Irena Bulotaite Els Bobkov
Luxembourg	Info-Handicap	Silvio Sagramola
Netherlands	ANGO - Algemene Nederlandse Gehandicapten Organisatie	Fini de Paauw
Portugal	Centro de Educação Para o Cidadão com Deficiência, CRL and ARCIL	Carmen Duarte and Cristina Silva

Member State	Organisation	Expert
		(Contact person: Ana Garcia)
Poland	Accessible Poland Tours	Margaret Tokarska
Romania	Motivation Foundation	Cristian Ispas
Slovenia	Zavod Premiki	Dolores Kores
Sweden	Access Sweden	Lilian Muller
United Kingdom	Tourism for All	Carrie-Ann Lightly

1.3.3. Legislative Country Reports

A set of 28 national reports on the legislated access requirements for tourism facilities and suppliers were compiled through desk research and national expert survey. The objective of this exercise was to give an indication of what the level of provisions should be in the supply chain, if legislation is followed.

This task gathered and reviewed general and specific legal requirements placed on providers in the main links of the tourism supply chain, indicating where EU and national legislation makes specific demands on accessibility of facilities and services (e.g. proportion of “disabled rooms” in 3, 4 and 5 star hotels). These reports were drawn up by the national ENAT experts for each Member States by identifying:

1. the existing legislation which covers accessibility of tourism services, if any
2. reference to obligatory standards and guidelines related to accessible tourism services
3. which types of services are covered and their respective requirements
4. which target groups are covered
5. the level of implementation of the legislation (- evidence about what is generally achieved, or not, in practice)
6. if there is an official National (regional or local) Accessibility Information Scheme for tourism suppliers?
7. are there incentives for improving accessibility of tourism services
8. any data sources about accessible services that are available at national level
 - which criteria are used?
 - how has this information has been collected; e.g. expert audits, self-assessment, self-declaration, etc.?
 - if the data is checked and if so, by whom, and how often?
 - if the data is used for marketing or other purposes.

9. any other (non legislative) accessible tourism schemes that may be operating in the country at national, regional or local level
10. if any other data or information about tourism accessibility collected and managed by NGOs, enterprises or other organisations reference to Good Practice suppliers (enterprises, facilities or destinations that may be suitable for Case Studies).

The completed national reports are available in Annex 2.

1.4. Task c: Best Practices and Tools

The major research task of the study consisted in carrying out and analysing 15 in-depth case studies. The case studies identified how businesses and public authorities create and manage accessible tourism products and services, showing how contextual factors such as acquisition of new skills, legislation and other factors can contribute to new business opportunities.

1.4.1. Case Study Selection

Being mindful that no single practice can be wholly “good” or wholly “bad”, the study identified several cases which contain certain elements of failure or “unfulfilled promise”, due to things which may or may not have been done in the development process – or perhaps because of some external factors which de-railed the actors from their intended path.

The selection of 15 proposed case studies was based on a number of criteria which are relevant to any business case example, namely:

- The degree of innovation;
- Relevance to the market sector;
- Demonstrated impact;
- Documented strengths and weaknesses;
- Sustainability of the approach or solution; and
- Transferability to similar contexts or business sectors.

The proposed cases also take into account the specific criteria for case studies set in the Tender specifications, **Section 1.3.1** which requested a representation of different types of suppliers, including:

- Accommodation (hotels, B&B, farmhouses, camping, etc...);
- Food and beverage (restaurants, cafés, fast foods, bars etc...);
- Entertainment, recreation, attractions (museums, galleries, sports, leisure activities, shopping areas, etc...);
- Transportation at final destination (taxis, trains, buses, car-rentals etc...). More specifically, the means of transport likely to be used by the traveller with special access needs to reach

the accommodation, restaurant, entertainment, cultural, leisure activity etc...at the place of holiday destination;

- Travel services (travel agencies, tour operators, tourists' info points, etc...).

And:

- At least 4 different segments of the tourism supply (information, booking, transport, accommodation, entertainment/leisure, culture, etc...);
- At least 2 different types of barriers (physical, operational system, information and social norms);
- Solutions which have addressed a cross - impairments approach (mobility, sensory, hidden impairments); and/or
- Implemented "Universal Design" principles.

The 15 cases present a broad and balanced set of European tourist destinations that, when taken together, serves to exemplify how successful accessible destinations and businesses can be encouraged and created. The selection of destinations includes:

- A geographical spread of countries and regions across Europe, bearing in mind that not all EU-28 countries can be included;
- Urban and rural destinations, with a variety of tourism offers, attractions and events for people who have different interests, ages and abilities;
- Older and newer destinations;
- Destinations of different sizes, operating with or under either National, Regional or Municipal authorities;
- Destinations, enterprises and third sector actors that have won major awards for accessible and inclusive tourism (e.g. EDEN Destinations 2013 and UNWTO Ulysses Award);
- Destinations which include World Heritage Sites and other sites or monuments with protected status;
- Destinations which have a reputation of success in attracting tourists with disabilities, their families and friends;
- Destinations which include notable supply chains and networks including (accessible) transport systems, accommodation, venues, itineraries, etc.; and
- Inclusion of destinations where some failures or missed targets have led to less than optimal results, from which lessons can be learnt.

Each case study was also assessed against 5 good practice indicators⁴:

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

This assessment was made in the form of a “traffic light” system, which indicates the performance of each case study against the good practice indicator (in a qualitative manner) available at the end of the case study reports.

The following cases were approved by the European Commission to figure as the 15 examined destinations:

⁴ The case study reports are provided as separate documents in the Annex.

	Case		Supply Chain					Strengths & Weaknesses	
Case	Country	Destination	Accommodation	Food and beverage	Entertainment - Attractions (Featured)	Transport	Travel services	Strengths	Weaknesses
1	UK	London	Full range, access info scheme	Full range	Paralympics, Theatre, Shopping, Events	Accessible public transport, taxi	Packages, Accessible Events, Tourist Guides	International destination, Paralympic experience, Accessibility info schemes, Equality Act, SME support. Accessible black cab taxis partly offset transport weaknesses.	London Underground's older parts present access problems for mobility impaired.
2	Germany	Frankfurt	Full range, access info scheme	Full range	City breaks, Conference	Accessible public transport	DMO offers	Online marketing, Accessibility info scheme, Accessible activities, promotion by German NTO	
3	Spain	Arona - Tenerife	Full range, info scheme	Full range	Sun, sand, rehabilitation	Accessible public transport, taxi	Packages	Highly developed accessible infrastructure and supply chains, esp. for mobility impaired	
4	Sweden	Stockholm	Full range including Scandic Hotels, audited	Full range	City breaks, Groups & Business	Accessible public transport, taxi	DMO offers and Hotel offers	City Access Plan, hotel access standards & information scheme, access. metro, water taxi	City marketing lacks focus on accessibility, despite good access conditions
5	Portugal	Lousã	Rural, B&B, Camping, Heritage	Full range, Gastronomy	Nature, arts & crafts, sensory experiences, active holidays, heritage	Some accessible transport - some gaps	Adventure, Family, Accessible Events, Tourist Guides	Public-private partnership, unique rehabilitation expertise, local access audit label, access info scheme, retail fully involved, adapted activities for visitors	Weak on-line marketing. Some gaps in local accessible transportation provisions.

6	France	PARIS - ILE DE FRANCE	Full range, audited	Full range, Gastronomy	Heritage, Museums - 'Trip Advisor' Top Ten	Urban transport system	Access guide books, Mobile apps, Tourist guides, Packages	Top tourism destination. Regional plan for tourism for all. Access database, actions by NGOs and businesses. Good accessible taxi service partly offsets public transport weaknesses	Paris Metro's older parts present access problems for mobility impaired.
7	France	Disney Corporation	Hotels	Full range	Leisure Park	Transportation and personal mobility	Packages for groups & families	World leader in leisure infrastructure design, management and inclusive customer service for all ages	
8	Slovenia	Slovenia NTA, ŠENT NGO and Premiki	Hotels	Full range	Holidays for people with learning difficulties	Varies	Offers for visitors with learning difficulties	UNWTO Ulysses award, Learning difficulties included Access info scheme, Packages	
9	Czech Rep.	Moravia-Silesia and Tešín	Full range, info scheme	Full range	Nature, active holidays, gastronomy	Some accessible transport - some gaps	Adventure, Family, Accessible Events, Tourist Guides	Regional development project, EU funded, in former industrial area, Development of local accessible tourism products, high SME involvement	Lack of accessible transportation hinders development of rural SMEs' tourism offers.
10	Greece	Athens	Hotels	Full range	Heritage, City Breaks, Conference	Accessible public transport, taxi missing	City breaks, culture, heritage, guides, conference	Accessible - Acropolis World Heritage site, pedestrian route, archaeological sites, museums, & public transport in a unified scheme, Olympic legacy	Good accessibility in historical centre is not actively marketed to tourists. Access in rest of city and in shops is at a lower standard and very variable.

11	Italy	Trentino	Hotels, chalets, B&B	Full range	Summer & Winter Sports, Nature, Wellness	Transportation and personal mobility	Tour operators and DMO - Adventure, Sports, Nature	Winter sports for people with disabilities, infrastructure, guiding, accommodation, outdoors	
12	Austria	Schloss Schönbrunn / Vienna	City hotels, info scheme	Off-site	Heritage, Cultural events	Transportation and personal mobility	Culture Heritage	Heritage site and concerts, accessible for all.	
13	France	Hérault, le Languedoc	Hotels, camping, Rural, B&B	Full range	Nature, active holidays, heritage	Transportation and personal mobility	Family and group holidays and tours	Municipality-led access plan with NGO involvement. Tourism et Handicap "destinations for all" national scheme, supply chain audit	
14	Spain	Barcelona, Catalunya	Full range, cruise, city, rural, info scheme	Full range, Gastronomy	City breaks, heritage, active holidays, culture	Cruises, local transport, accessible taxi	Cruise lines, shore excursions, accessible tourist guiding	Exemplary accessibility standards, high tourism levels, adapted activities	
15	Finland	Rovaniemi	Hotel and holiday village	Full range	City, outdoor, accessible art museum, international family attraction (Santa Claus Village)	Airport, accessible public transport, taxi and outdoor adventure	Winter & summer, nature, packages for groups & families	Arctic destination presents particular access challenges, Family holidays & seniors, Access & inclusion not highly legislated but successful through NGO & supplier involvement	Lack of accessibility information for tourist attractions.

1.4.2. Case Study Research Process

The methodological tools used in the case study consisted in desk review and a programme of interviews with key stakeholders at the concerned destinations.

Desk Research

Firstly, the desk research involved a review of available documentation on each case study destination. Especially, the background research related to policy documents, guidelines and labels to assess the approach of the destination together with other relevant contextual information and statistics having a bearing on the success and rationale of the destination as accessible.

The objective of the desk research was to focus on the key conditions that may have had a bearing on the drive, success and sustainability of the destination. The review was based primarily on local sources including project documents and evaluations where available.

Interviews

In-depth interviews were conducted with the main stakeholders at the destination-level. These interviewees included:

- industry stakeholders;
- destination management organisations;
- local authorities;
- regional and/or national tourism authorities; and
- organisations representing people with disabilities.

The interviews were semi-structured in order to allow for an informative and fluid discussion to take place between the researcher and interviewee. The researcher was equipped with a primary interview guide in order to make cross-comparisons between the 15 cases. The interview guide is available in **Section 1.6.7** of this annex.

1.5. Task d: Validation and Dissemination

This phase of the study related to the full development of findings of the different research strands as well as expert validation.

1.5.1. Expert Validation Workshop

On 2 October 2013, the project team held an interim expert validation workshop to collect feedback on the interim findings as well as gather expert input for the final report.

The workshop took place “behind closed doors” and involve only the project team and 7 selected experts, the latter being bound by a confidentiality clause in their contracts. The workshop was held in connection with the European Social Tourism Forum in Blankenberge, Belgium 1 – 3 October 2013.

The validation workshop discussed and reviewed the following:

- Conceptual performance criteria.
- Survey results, conclusions and recommendations.
- Case study methodology and selected cases.
- Review of a sample of initial case studies.
- Recommendations for possible adjustments or modifications to the study.
- Recommendations for dissemination and marketing actions, as necessary.
- Identification of additional stakeholders who may benefit from or provide support for the uptake of project results.
- Recommendations for policy actions in the tourism sector at EU-level arising from the results of the study.

Eleven (11) participants took part in the interactive workshop composed of the following:

Expert Panel

- Ana Grazia Laura, COIN
- Ana Garcia, Accessible Portugal
- Mieke Broeders, ENTER vzw,
- Bart Simons, European Disability Forum, Belgium
- Stéphanie Herman, ANLH, Belgium
- Claudia Ventrella, ANLH, Belgium
- Chris Veitch, ENAT

Project Team

- Ivor Ambrose, ENAT
- Katerina Papamichail, ENAT
- Kei Ito, VVA
- Pierre Hausemer, VVA

The Forum programme also included an open workshop session led by ENAT for international delegates on the subject of Accessible Tourism, with around 60 participation aiming to raise awareness of the study.

1.5.2.Validation and Dissemination Conference

A Stakeholder Validation Conference "Mind the Accessibility Gap" was held in Brussels on 6 June 2014, with the support of the European Commission. It was attended by 227 participants representing a wide range of tourism-related organisations as well as disability organisations.

The main objectives of the workshop were to:

- Validate the findings of the study.
- Disseminate the results and raise awareness among key stakeholders.
- Encourage take-up of the main conclusions, recommendations and best practices for developing accessible tourism destinations.

Associated Dissemination Activities

ENAT arranged for the production of two videos, one short (4 minutes) and one long (8 minutes) - based on interviews and clips taken during the conference. The videos were shot and edited by Meridian Productions (UK) with the support of Chris Veitch from ENAT.

The production is part of the dissemination of the 3 EU Accessible Tourism Studies and was covered by the ENAT budget.

The videos have been edited with the intention that the European Commission could publish them on the "EUTube" video channel (<https://www.youtube.com/user/eutube>) and for use at meetings/conferences. All the speakers gave their permission to be filmed at the time of recording.

In addition, the presentations of the conference are available online⁵.

⁵ The presentations from the conference are available on:
<http://www.accessibletourism.org/?i=enat.en.presentations.1578>

1.6. Research Tools

1.6.1. Business Survey: Option 1



Dear respondent,

This survey asks Tourism Businesses about their services and facilities for those who need good accessibility.

The survey is part of a study conducted for the European Commission which aims to map "accessible tourism services" across Europe and find out how businesses are responding to this market. Please find more information about the study [here](#).

Accessible Tourism refers to tourism services for people with disabilities or others who have specific requirements when travelling or in destinations, accommodation, attractions and restaurants or in other tourist facilities.

The accessible tourism market may include:

- Wheelchair users
- People who use other types of technical assistive devices or need service animals
- People who are blind or visually impaired
- People who are deaf or have a hearing impairment
- People with learning difficulties, autism or other cognitive and development impairments
- People who suffer from long-term health problems
- Senior tourists
- People with invisible disabilities.

If you are a tourism business we are interested in hearing about *your* experiences and perceptions of accessible tourism services.

The survey will only take 5-10 minutes to complete and consists of 5-15 questions depending on your answers.

We are currently preparing a European-wide register for Accessible Tourism businesses. If you would like to have more news and potentially be included in this (free) register, please leave your email address and/or website address at the end of the questionnaire. However, you may also choose to be completely anonymous.

Thank you very much for your help with this important study!

Please indicate:

Survey Version: OPTION 1

Option 1: you provide tourism services especially to visitors with one or more types of disability or specific access requirements

Option 2: you provide tourism services to all visitors, including those with one or more types of disability or specific access requirements

Option 3: you provide tourism services, but without particular provisions or services for visitors with disabilities or specific access requirements

What type of service(s) do you offer?

- ☐ Information
- ☐ Booking
- ☐ Transport
- ☐ Accommodation
- ☐ Restaurant, Cafe and/or Bar
- ☐ Entertainment (Theater, Cinema, Concert venue...)
- ☐ Attractions
- ☐ Tour operator

Other (Please Specify):

Where is your business located?

What is the size of your enterprise in terms of number of employees?

- ☐ Less than 9
- ☐ Between 10 and 49
- ☐ Between 50 and 249
- ☐ More than 250

Which target groups of disabilities and access requirements do you cater for?

(Please click all that apply)

- ☐ People with motor impairments
- ☐ People of very large or small stature
- ☐ People who are deaf or have hearing impairments
- ☐ People who are blind or have vision impairments
- ☐ People without speech / with speech impairments
- ☐ People with learning difficulties, autism, other cognitive and developmental impairments
- ☐ People with allergy and asthma
- ☐ People with long-term health problems (e.g. respiratory and circulatory conditions or invisible disabilities)
- ☐ People who are frail, lacking in strength or stamina
- ☐ People who use any kinds of technical assistive devices
- ☐ People with service animals
- ☐ People requiring personal assistance (non-medical care/support)

Other (Please Specify):

What are the main reasons you are providing accessible services?

(Please click all that apply)

- ☐ Customer demand
- ☐ Business benefits - increased profits
- ☐ Legal requirements
- ☐ Corporate policy
- ☐ Social responsibility

- ☐ Requirements from business partners or suppliers
- ☐ Demands from destination management and/or public authorities

Other (Please Specify):

Please indicate how important disabled tourists or those with other access requirements are to your business profitability?

Neutral

Important

Very Important



Please specify in which of the following fields substantial investments been made in the last 3 years to improve access for disabled visitors and other tourists with special access requirements:

- ☐ Staff skills and customer care training
- ☐ Major building / physical infrastructure works
- ☐ Minor building works and refurbishment
- ☐ Marketing
- ☐ Other improvement of services
- ☐ Investments in marketing and advertisement

How have you adapted your business to meet accessibility needs?

- ☐ Re-designed or restructured the physical environment
- ☐ Trained staff in accessibility awareness
- ☐ Widened/changed business partners
- ☐ Widened/changed information or marketing channels

Other (Please Specify):

What is the measurable impact of providing accessible tourism services?

- ☐ More rate increase in number of visitors

- ☐ Significant increase in number of visitors
- ☐ Moderate increase in turnover
- ☐ Significant increase in turnover

Are you a member of an accessibility scheme or label?

- ☐ Yes
- ☐ No

If yes, please specify:

In your opinion, what are the barriers to providing more accessible tourism services?
(Please click all that apply)

- ☐ High investments and/or additional costs
- ☐ Lack of financing
- ☐ Lack of guidelines and standards of accessibility
- ☐ Lack of knowledge and skills in disability issues and requirements
- ☐ Lack of time
- ☐ Accessibility requirements are too complex to implement
- ☐ Legal requirements
- ☐ Marketing barriers and problems of attracting tourists with accessibility requirements
- ☐ Hiring or training staff in accessibility needs
- ☐ Negative attitudes of staff or other customers

Other (Please specify):

In your opinion, which of the following tourism services impacting your business ARE PARTICULARLY accessible?

- ☐ Information
- ☐ Booking
- ☐ Transportation
- ☐ Accommodation
- ☐ Restaurants
- ☐ Attractions
- ☐ Tour operators

Other (Please Specify):

In your opinion, which tourism services impacting your business are THE LEAST accessible?

- ☐ Information
- ☐ Booking
- ☐ Transportation
- ☐ Accommodation
- ☐ Restaurants
- ☐ Attractions
- ☐ Tour operators

Other (Please Specify):

We are very interested in hearing of any additional comments you may have.

If you would like to stay informed and register your business with the forthcoming Tourism for All Register, please provide further information below.

Name

Email

Website

1.6.2. Business Survey: Option 2



Dear respondent,

This survey asks Tourism Businesses about their services and facilities for those who need good accessibility.

The survey is part of a study conducted for the European Commission which aims to map "accessible tourism services" across Europe and find out how businesses are responding to this market. Please find more information about the study [here](#).

Accessible Tourism refers to tourism services for people with disabilities or others who have specific requirements when travelling or in destinations, accommodation, attractions and restaurants or in other tourist facilities.

The accessible tourism market may include:

- Wheelchair users
- People who use other types of technical assistive devices or need service animals
- People who are blind or visually impaired
- People who are deaf or have a hearing impairment
- People with learning difficulties, autism or other cognitive and development impairments
- People who suffer from long-term health problems
- Senior tourists
- People with invisible disabilities.

If you are a tourism business we are interested in hearing about *your* experiences and perceptions of accessible tourism services. The survey will only take 5-10 minutes to complete and consists of 5-15 questions depending on your answers.

We are currently preparing a European-wide register for Accessible Tourism businesses. If you would like to have more news and potentially be included in this (free) register, please leave your email address and/or website address at the end of the questionnaire. However, you may also choose to be completely anonymous.

Thank you very much for your help with this important study!

Please indicate:

Survey Version: OPTION 2

Option 1: you provide tourism services especially to visitors with one or more types of disability or specific access requirements

Option 2: you provide tourism services to all visitors, including those with one or more types of disability or specific access requirements

Option 3: you provide tourism services, but without particular provisions or services for visitors with disabilities or specific access requirements

What type of service(s) do you offer?

- ☐ Information
- ☐ Booking
- ☐ Transport
- ☐ Accommodation
- ☐ Restaurant, Cafe and/or Bar
- ☐ Entertainment (Theater, Cinema, Concert venue...)
- ☐ Attractions
- ☐ Tour operator

Other (Please Specify):

Where is your business located?

What is the size of your enterprise in terms of number of employees?

- ☐ Less than 9
- ☐ Between 10 and 49
- ☐ Between 50 and 249
- ☐ More than 250

Which target groups of disabilities and access requirements do you cater for?

(Please click all that apply)

- ☐ People with motor impairments
- ☐ People of very large or small stature
- ☐ People who are deaf or have hearing impairments
- ☐ People who are blind or have vision impairments
- ☐ People without speech / with speech impairments
- ☐ People with learning difficulties, autism, other cognitive and developmental impairments
- ☐ People with allergy and asthma
- ☐ People with long-term health problems (e.g. respiratory and circulatory conditions or invisible disabilities)
- ☐ People who are frail, lacking in strength or stamina
- ☐ People who use any kinds of technical assistive devices
- ☐ People with service animals
- ☐ People requiring personal assistance (non-medical care/support)

Other (Please Specify):

What are the main reasons you are providing accessible services?

(Please click all that apply)

- ☐ Customer demand
- ☐ Business benefits - increased profits
- ☐ Legal requirements
- ☐ Corporate policy
- ☐ Social responsibility
- ☐ Requirements from business partners or suppliers

- ☐ Demands from destination management and/or public authorities

Other (Please Specify):

Please indicate how important disabled tourists or those with other access requirements are to your business profitability?

	Neutral	Important	Very Important
Neutral	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please specify in which of the following fields substantial investments been made in the last 3 years to improve access for disabled visitors and other tourists with special access requirements:

- ☐ Staff skills and customer care training
- ☐ Major building / physical infrastructure works
- ☐ Minor building works and refurbishment
- ☐ Marketing
- ☐ Other improvement of services
- ☐ Investments in marketing and advertisement

How have you adapted your business to meet accessibility needs?

- ☐ Re-designed or restructured the physical environment
- ☐ Trained staff in accessibility awareness
- ☐ Widened/changed business partners
- ☐ Widened/changed information or marketing channels

Other (Please Specify):

What is the measurable impact of providing accessible tourism services?

- ☐ More rate increase in number of visitors
- ☐ Significant increase in number of visitors

- ☐ Moderate increase in turnover
- ☐ Significant increase in turnover

Are you a member of an accessibility scheme or label?

- ☐ Yes
- ☐ No

If YES, please specify the title of the scheme or label:

In your opinion, what are the barriers to providing more accessible tourism services?
(Please click all that apply)

- ☐ High investments and/or additional costs
- ☐ Lack of financing
- ☐ Lack of guidelines and standards of accessibility
- ☐ Lack of knowledge and skills in disability issues and requirements
- ☐ Lack of time
- ☐ Accessibility requirements are too complex to implement
- ☐ Legal requirements
- ☐ Marketing barriers and problems of attracting tourists with accessibility requirements
- ☐ Hiring or training staff in accessibility needs
- ☐ Negative attitudes of staff or other customers

Other (Please specify):

In your opinion, which sectors and/or suppliers impacting your business ARE PARTICULARLY accessible?

- ☐ Information
- ☐ Booking

- ☐ Transportation
- ☐ Accommodation
- ☐ Restaurants
- ☐ Attractions
- ☐ Tour operators

Other (Please Specify):

In your opinion, which sectors and/or suppliers impacting your business are THE LEAST accessible?

- ☐ Information
- ☐ Booking
- ☐ Transportation
- ☐ Accommodation
- ☐ Restaurants
- ☐ Attractions
- ☐ Tour operators

Other (Please Specify):

We are very interested in hearing of any additional comments you may have:

If you would like to stay informed and register your business with the forthcoming Tourism for All Register, please provide further information below.

Name

Email

Website

1.6.3. Business Survey: Option 3



Dear respondent,

This survey asks Tourism Businesses about their services and facilities for those who need good accessibility.

The survey is part of a study conducted for the European Commission which aims to map "accessible tourism services" across Europe and find out how businesses are responding to this market. Please find more information about the study [here](#).

Accessible Tourism refers to tourism services for people with disabilities or others who have specific requirements when travelling or in destinations, accommodation, attractions and restaurants or in other tourist facilities.

The accessible tourism market may include:

- Wheelchair users
- People who use other types of technical assistive devices or need service animals
- People who are blind or visually impaired
- People who are deaf or have a hearing impairment
- People with learning difficulties, autism or other cognitive and development impairments
- People who suffer from long-term health problems
- Senior tourists
- People with invisible disabilities.

If you are a tourism business we are interested in hearing about *your* experiences and perceptions of accessible tourism services.

The survey will only take 5-10 minutes to complete and consists of 5-15 questions depending on your answers.

We are currently preparing a European-wide register for Accessible Tourism businesses. If you would like to have more news and potentially be included in this (free) register, please leave your email address and/or website address at the end of the questionnaire. However, you may also choose to be completely anonymous.

Thank you very much for your help with this important study!

Please indicate:

Survey Version: **OPTION 3**

Option 1: you provide tourism services especially to visitors with one or more types of disability or specific access requirements

Option 2: you provide tourism services to all visitors, including those with one or more types of disability or specific access requirements

Option 3: you provide tourism services, but without particular provisions or services for visitors with disabilities or specific access requirements

What type of service(s) do you offer?

- ☐ Information
- ☐ Booking
- ☐ Transport
- ☐ Accommodation
- ☐ Restaurant, Cafe and/or Bar
- ☐ Entertainment (Theater, Cinema, Concert venue...)
- ☐ Attractions
- ☐ Tour operator

Other (Please Specify):

Where is your business located?

What is the size of your enterprise in terms of number of employees?

- ☐ Less than 9
- ☐ Between 10 and 49
- ☐ Between 50 and 249

☐ More than 250

In your opinion, what are the barriers when it comes to providing accessible services and facilities?

(Please click all that apply)

- ☐ High investment costs or additional costs
- ☐ Lack of guidelines and standards of accessibility
- ☐ Lack of knowledge and skills in providing accessible services and facilities
- ☐ Lack of time
- ☐ Lack of accessible business partners or suppliers
- ☐ Accessibility requirements are too complex to implement
- ☐ Difficulties in finding skilled staff in accessibility and safety requirements

Other (Please Specify):

Which of the following measures might encourage you to make your business or offers more accessible and therefore more attractive to the accessible tourism market?

	1 Unimportant	2 Neutral	3 Important
Availability of support grants or tax breaks for access-related investments (e.g. infrastructure, training, marketing, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Availability of clear guidelines or standards of accessibility	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Availability of advice on accessibility issues and requirements from disability organisations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Availability of staff training to cater for guests with disabilities or other access needs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Possibility to join a local or regional accessible tourism	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

marketing initiative

Recognition in the form of
business awards for accessible
tourism at Regional, National or
EU level



None of the above



1.6.4. Customer Survey

Dear respondent

This survey asks tourists with disabilities and other accessibility needs about their experiences before and when travelling, as well about their stays in accommodation, restaurants, cafes, museums, attractions and other facilities at a destination.

The survey is part of a study conducted for the European Commission which aims to map "accessible tourism services" across Europe and find out whether tourists with accessibility needs are satisfied with the ease of travelling and what barriers they might face. Please find more information about the study [here](#).

The questionnaire consists of 14 questions and should take no longer than 5-7 minutes to fill out.

Thank you very much for your help with this important study!

About you

1

Please indicate your accessibility needs or of the person you are answering on behalf of:

- ☐ Mobility impairment
- ☐ Blind or vision impairment
- ☐ Hearing or speech impairment
- ☐ Learning difficulties
- ☐ Long-term illness
- ☐ Allergies or Asthma
- ☐ Needing a personal assistant
- ☐ Accompanied by an assistance animal

Other (Please Specify):

2

What is your home country?

3

How often do you stay away from home one or more nights in your own country?

4

How often do you stay away from home one or more nights abroad?

Your experiences

5

In general, which barriers do you face most frequently while travelling?

(Please click all that apply)

- ☐ Lack of information on accessibility along the journey and at the destination
- ☐ Physical barriers (for example, lack of ramps, presence of stairs and steps, safety markings, etc)
- ☐ Communication difficulties (for example, lack of accessible formats, inability to use sign language etc)
- ☐ Lack of available services (for example: wheelchair suitable rooms, vibrating alarm clock, equipment hire)
- ☐ Negative attitudes among frontline staff and managers in tourist services
- ☐ Negative attitudes from fellow tourists
- ☐ staff lack of detailed product knowledge about any services and facilities that you require

Other (Please Specify):

6

In your opinion, how can these barriers be overcome?

7

On average, in your experience, how would you rate the ease of each of the following stages of your journey in terms of accessibility?

(5 stars=very easy, 1 star= not easy at all)

Before travelling: information about accessibility of the destination



Booking accessible services (transport, hotels, etc)



Accessible transportation in your home country



Accessible transportation abroad (if applicable)



Public spaces at the destination (cobble stones, lack of ramps, etc)



Accessible accommodation



Accessible restaurants, cafes and bars



Accessible attractions, museums, cultural venues



Tour operators with accessible information and offerings



8

Which countries have you visited in the last 2 years?

- ☐ Austria
- ☐ Belgium
- ☐ Bulgaria
- ☐ Croatia
- ☐ Cyprus
- ☐ Czech Republic
- ☐ Denmark
- ☐ Estonia
- ☐ Finland
- ☐ France
- ☐ Germany
- ☐ Greece
- ☐ Hungary

- ☐ Ireland
- ☐ Italy
- ☐ Latvia
- ☐ Lithuania
- ☐ Luxembourg
- ☐ Malta
- ☐ Netherlands
- ☐ Poland
- ☐ Portugal
- ☐ Romania
- ☐ Slovakia
- ☐ Slovenia
- ☐ Spain
- ☐ Sweden
- ☐ United Kingdom

Other (Please Specify):

9 In your experience, which 3 countries are the easiest to travel in?

- ☐ Austria
- ☐ Belgium
- ☐ Bulgaria
- ☐ Croatia
- ☐ Cyprus
- ☐ Czech Republic
- ☐ Denmark
- ☐ Estonia
- ☐ Finland
- ☐ France
- ☐ Germany
- ☐ Greece
- ☐ Hungary
- ☐ Ireland
- ☐ Italy
- ☐ Latvia
- ☐ Lithuania
- ☐ Luxembourg

- ☐ Malta
- ☐ Netherlands
- ☐ Poland
- ☐ Portugal
- ☐ Romania
- ☐ Slovakia
- ☐ Slovenia
- ☐ Spain
- ☐ Sweden
- ☐ United Kingdom
- ☐ Don't know

Other (Please Specify):

10

Why do you think these countries are easy to travel in as a tourist with accessibility needs?

11

In your experience, which 3 countries are the most difficult to travel in?

- ☐ Austria
- ☐ Belgium
- ☐ Bulgaria
- ☐ Croatia
- ☐ Cyprus
- ☐ Czech Republic
- ☐ Denmark
- ☐ Estonia
- ☐ Finland
- ☐ France
- ☐ Germany
- ☐ Greece
- ☐ Hungary
- ☐ Ireland
- ☐ Italy
- ☐ Latvia
- ☐ Lithuania

- ☐ Luxembourg
- ☐ Malta
- ☐ Netherlands
- ☐ Poland
- ☐ Portugal
- ☐ Romania
- ☐ Slovakia
- ☐ Slovenia
- ☐ Spain
- ☐ Sweden
- ☐ United Kingdom
- ☐ Don't know

Other (Please Specify):

12

Why do you think these countries are more difficult to travel in as a tourist with accessibility needs?

13

Thinking about the country/countries you have visited in the last 2 years, please indicate your level of satisfaction with accessible tourism services in the following:

	Dissatisfied	Neutral	Satisfied
The availability and quality of information about accessibility of the destination before travelling	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The ease of booking accessible tourism services (such as transport, hotels, attractions etc)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The availability and quality of accessible transportation at home	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The availability of accessible transportation abroad (if applicable)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The availability and quality of accessible accommodation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

The availability and quality
accessible restaurants, cafes and
bars



The availability and quality of
accessible attractions, museums,
cultural venues



The availability and quality of
tour operators with accessible
information and offerings



14

We would be interested in hearing any additional comments you may have on travelling with accessibility needs

1.6.5. Industry Consultation Interview Guide

Introduction

ENAT – the European Network for Accessible Tourism together with VVA have been commissioned by DG Enterprise and Industry (Unit E2 - Tourism and Cultural Instruments) to conduct a study mapping and assessing the performance of accessible tourism supply in Europe. The study aims at understanding the barriers and challenges of providing and using accessible tourism services from the perspective of tourists as well as businesses. In addition, the study analyses supply chains and performance in all the EU Member States and proposes recommendations and priorities for actions to increase and improve the supply of accessible tourism services.

This interview/written input constitutes an important input into this study and asks industry associations active in the tourism sector about the challenges and difficulties in accessing the accessibility market and providing accessible services to tourism with specific access needs. We will use the information from the interview in our report to the European Commission. We will however not quote you directly, nor attribute any statements to you as an individual. With your agreement the name of your organisation will be included in the report as part of a list of stakeholders consulted during the study.

Do you have any questions?

Organisation interview guide	Responses
Overview accessible tourism supply	
<ul style="list-style-type: none"> To the best of your knowledge, what is the share of the supply of accessible tourism services in your sector and country in comparison with the overall market? (e.g. <1%, 1%-5%, 5-10%, >10%) 	
Drivers	
<ul style="list-style-type: none"> What are the main reasons businesses in your sector are providing accessible services? Please provide specific examples and figures where possible (e.g. <i>accessibility has led to a rise in hotel occupancy rates of x%, etc</i>) 	
Barriers	

<p>What are the main barriers and difficulties encountered by businesses in your sector(s) in providing accessible tourism services? Please provide <u>specific examples</u> for each one of the barriers you consider important. Please include figures where possible (e.g. costs)</p> <p>Are there any problems or barriers which are specific to SMEs operating in your sector? Specific examples?</p>	
Overcoming barriers	
<p>How can these barriers be overcome? (e.g. financial incentives guidance, training, marketing, business case development)</p>	
Best practices	
<ul style="list-style-type: none"> For your sector(s), are there any tools available (e.g. labels, access statements, accessibility schemes, strategies, policies)? What, if any, is the impact of such practices on the provision of accessible tourism services? (e.g. the range of service provided, the quality of those services, connections across the supply chain, the business case for accessible tourism, etc) How can this be measured? 	
Other remarks	
<ul style="list-style-type: none"> Do you have any other comments or remarks to be taken into account for the study? 	

1.6.6. National Disability Organisations Consultation Interview Guide

Introduction

ENAT – the European Network for Accessible Tourism together with VVA have been commissioned by DG Enterprise and Industry (Unit E2 - Tourism and Cultural Instruments) to conduct a study mapping and assessing the performance of accessible tourism supply in Europe. The study aims at understanding the barriers and challenges of providing and using accessible tourism services from the perspective of tourists as well as businesses. In addition, the study analyses supply chains and performance in all the EU Member States and proposes recommendations and priorities for actions to increase and improve the supply of accessible tourism services.

This interview constitutes an important input into this study and asks disability organisations about the provisions and performance of accessible tourism services and facilities in their Member State. We will use the information from the interview in our report to the European Commission. We will however not quote you directly, nor attribute any statements to you as an individual. With your agreement the name of your organisation will be included in the report as part of a list of stakeholders consulted during the study.

Do you have any questions?

Organisation Interview Guide	Responses
Overview accessible tourism supply	
<ul style="list-style-type: none"> To the best of your knowledge, what is the share of the accessible tourism market in comparison with the overall market in your sector & country? (e.g. <1%, 1%-5%, 5-10%, >10%) 	
Effectiveness, usefulness and satisfaction of current supply	
<ul style="list-style-type: none"> Thinking about the whole tourism sector, to what extent are the needs tourists with accessibility needs fulfilled in the market today? How satisfied are travellers using services offered that specifically cater to them? Can you provide specific examples: <ul style="list-style-type: none"> Satisfaction surveys Figures on repeat custom by travellers with access needs (compared with other travellers) Increased travel by people with access needs How independently can tourists with access needs use current services? What sectors are the most well-prepared to cater to tourists with accessibility needs? (prompt: booking, transportation, accommodation, restaurants, bars, cafes, attractions, museums, cultural venues, tour operators). Which 3 sectors do you think are the best prepared to cater to tourists with accessibility needs? <ul style="list-style-type: none"> Why do you think these 3 sectors are particularly well-prepared? 	

<ul style="list-style-type: none"> Which 3 sectors do you think are the least prepared to cater to tourists with accessibility needs? <ul style="list-style-type: none"> Why do you think these 3 sectors are not very well-prepared? How would you rate the satisfaction with the following: (i.e Poor, Fair, Good, Excellent) <ul style="list-style-type: none"> Information (how easy is it to find information about the type and level of accessible provisions tourists in your country require in "specialised" and mainstream offers) Transportation (including flights, rail, taxis, public transport) Facilities and built environment (including hotels, leisure facilities, attractions, cultural venues) Customer service and the way visitors are treated 	
Barriers	
<ul style="list-style-type: none"> Which are the most frequent barriers tourists face while travelling in your country? To your knowledge, where in the supply chain do tourists encounter the major bottleneck? Could you provide specific examples? How can these barriers be overcome? 	
Best practices	
<ul style="list-style-type: none"> Are you aware of any specific examples of best practices relating to improving accessible tourism in your country? (prompt specific tools such as labels, access statements, accessibility schemes, strategies, policies etc). 	
Other remarks	
<ul style="list-style-type: none"> Do you have any other comments or remarks to be taken into account for the study? 	

1.6.7. Case Study Interview Guide

Interview Guide

Topic 1: Introduction to the EU Study and relevant background

Topic 2: About you

Could you please tell us a little bit more about you and your role as a supplier/tourism businesses?

- Experience in the tourism sector
- Tell us a bit about your relationship with other suppliers and public authorities at the destination.

Topic 3: The origins of the service / facility

What facilities / services are included in the offer?

What was the original rationale/objective to include accessible services? *Prompt: was accessibility a focus?*

What were the expectations when the facility / service first came into being?

What were the main drivers for the facility / service initially? *Prompt: unique offer / increase market share?*

What were the main obstacles to get the facility / service off the ground?

What effect, if any, did the external economic, geographic environment and/or personal relationships have on the facility / service?

How did these change over time?

Topic 4: Implementation to date

Who are your main customers?

Customers with access needs? *Prompt: which disabilities/access requirements can you cater for?*

Who are the direct participants in the supply chain – e.g. identify key suppliers? *Prompt: marketing, bookings, transport, customer services, local activities, attractions,*

Who are the key external stakeholders? *Prompt: authorities, business/industry, NGOs?*

How does the design of the facility / service reflect its initial objectives? *Prompt: which stakeholders or suppliers have contributed to your business? (made it a*

success)?

What have been the main drivers and obstacles to date?

Prompt. Physical, informational, organisational, attitude difficulties..

Are there any specific successes that you would like to highlight?

Are there any gaps in the supply chain? *Prompt: How do you intend to address these?*

Did you follow specific guidelines? Did you receive any help? If so, from where?

Did you become a member of any accessibility scheme? *Prompt: any other business award, certificate scheme?*

Topic 5: Evidence of impact/costs

How much investments have been made in providing accessible services?

What were those investments intended for?

What are the measureable impacts of providing accessible services?

What are other impacts noticed but not measureable in profits? *Prompt: return visits, increased customer satisfaction.*

Topic 6: Recommendations/ Lesson learned

What are the key features of a successful accessible tourism service?

What would you do differently if you could start again?

Do you have any recommendations regarding further development of accessible tourism supply?

