PAVING THE WAY TO ACCESSIBLE TOURISM

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ACKNOWLEDMENTS

FOREWORD

People do not normally get interested in the problems of limited mobility, unless they experience the problem themselves or they personally know someone who does.

In my case, it took 28 years of my life until the second possibility occurred. Craig Grimes was that person. But in his case, he not only suffered the lack of access in travel, he also decided to do something about it and created his own company. This was very inspiring.

Soon I realised that not being disabled was nor precisely an advantage to carry out this research. Many 'ableist' misconceptions and misrepresentations were allocated in my imaginary. Moreover, I had to overcome a complete lack of knowledge about disability, impairment and accessible tourism. At the same time, it was so easy to say the wrong word or to make unjustified assumptions.

Although I have not suffered the problem, I started to empathise with those who did and I learn to see with their eyes. I did not like what I saw. For some people, every time they want to travel by public transport, go to the pub, stay in a hotel or enjoy a tour they must ask themselves: is it accessible? And worst of all, most of times the answer is "No" or "I don't know". Even when it's "yes" they cannot really be sure!

According to what I heard from people who suffered the lack of access, despite some advances, there is still a lot of frustration. I felt the gratitude of many when they knew about this research. To them it is dedicated.

TABLE OF CONTENTS

5

1. INTRODUCTION TO THE REPORT

This report aims to generate useful knowledge about the travel needs of people with limited mobility (PwLM) as well as to identify ongoing trends in the unexplored field of accessible tourism as an economic sector. The research carried out for this report is based on literature review, a questionnaire, case studies and interviews with experts. The findings will be discussed and used to shape the final recommendations and conclusion.

The specific needs of people with communication disabilities, those with cognitive/intellectual or psychiatric disabilities and those with sensorial disabilities have not been specifically considered for the primary research, as they imply considerations too complex to be comprised in this report. In other words, only those with a physical mobility concern have been addressed in the questionnaire.

Recommendations and conclusion can be directly found on page 56.

2. AIM AND OBJECTIVES

Aim:

To generate reliable and relevant knowledge about the travel needs of people with limited mobility, and make recommendations on how to meet these

Objectives:

- Find out more about the specific needs and behaviours of travellers with limited mobility

- Assess the current level of accessibility in the tourism sector and identify different approaches to accessibility within the sector

- Identify obstacles to the introduction of accessible tourism and possible solutions to overcome them

- Make recommendations to relevant stakeholders on how to accelerate the introduction of accessible tourism

3. GLOSSARY AND TERMINOLOGY

A significant amount of political and academic debate has been focused on deciding the correct terminology relating to disabilities (Priestley 2001: xviii). Moreover, disability-related phrases and vocabulary have important influence on public perceptions and attitudes.

It is not intended here to explore the complexities of this issue. However, it is important that the terminology used in this report is correctly justified and clarified to the reader.

Disabled person: the so-called "People-first language" is a form of politically correct language which emphasises the person rather than the disability: instead of "deaf people" one would use "people who are deaf", and so on. However, some disabled people have criticised it (Johnston 1999). This form is widely used in in the US, Australia and several other countries.

In the UK, however, "disabled person" is the accepted term and is the one used for this report, for the simple reason that the ICRT is a British institution. A disabled person is officially defined in the UK as "someone who has a physical or mental impairment that has a substantial and long-term adverse effect on his or her ability to carry out normal day-to-day activities" (The Disability Discrimination Act 2005).

Person with Limited Mobility (PwLM): These are individuals with some reduced mobility, whether due to a disability or not. Therefore, the phrase "person with limited mobility"[1] is used in the questionnaire to include also those who temporarily use crutches or and seniors with access considerations.

Accessible Tourism[2]**:** This is tourism which is accessible for PwLM, but also for individuals with sensory disabilities, learning disabilities or chronic diseases.

Although the most obvious action of AT is the elimination of physical barriers –like stairways–, that is only a small part of it. In fact, accessibility affects all areas of the tourism: not only accommodation and attractions but also transport, electronic devices, sources of information, and communication.

Easy access market: The segment within the tourism market that needs or prefers accessing tourism experiences without obstacles or barriers.

Tourism for all (TfA): This is tourism which includes absolutely everybody, independently of race, sexual orientation, social background, economic level or accessibility requirements. This way, the term "TfA" emphasises the inclusive factor.

Universal Design (UD) or Design for all (DfA): this is a school of thought with the goal of achieving "the design of products and environments to be usable by

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[1] This phrase is used by the Disabled Persons Transport Advisory Committee (DPTAC), an independent body established by the Transport Act 1985 to advise Government on the transport needs of disabled people: http://dptac.independent.gov.uk/door-to-door/06/02.htm

[2] Sometimes it is referred to as as "Access Tourism", "Universal Tourism" and "barrier-Free Tourism".

all people, to the greatest extent possible, without the need for adaptation or specialized design" (Center for Universal Design 1997).

Adapted room: means a room of a hotel or apartment that is designed (or has been renovated) in order to facilitate the stay of a wheelchair user.

Other languages: for this report, a questionnaire has been carried out in German, French and Spanish. For these, the most widely accepted and used terms for disabled person and accessible tourism have been used:

Terms used in the questionnaire in other languages		
Language	Terms	
English	*Accessible tourism*	*Disabled person*	*Person with limited mobility*
German	*Barrierefreier Tourismus*	*Behindert*	*Person in Ihrer Bewegungsfähigkeit eingeschränkt*
French	*Tourisme adapté*	*Handicappé*	*Personne avec des problèmes de mobilité*
Spanish	*Turismo accesible*	*Discapacitado*	*Persona con movilidad reducida*

4. BACKGROUND

4.1 DISABILITIES

Some awareness of the schools of thought and the history of disability is useful to better understand this report within a wider context. Disability is a complex concept that holds many perspectives.

Disability has been – and still is to a big extent – deemed as a personal tragedy. It is predominantly considered in terms of the individual pathology and the deficits, functional limitations and disorders associated to it (Barnes & Mercer 2010:1). The academic community was relatively slow to attribute any importance to disabled people's political struggle for a decent life, let alone recognise the potential of disability research. In fact, the cultural and academic narrative supported each other (Linton 1998:1). A related saying used often by disability rights activists is "Nothing About Us Without Us" (Charlton 1998).

Things started to change in the 60s in North America, Western Europe and Scandinavia: the spotlight was moved from the "incapacity" of the individual to the "disabling barriers" as social, economic, cultural and political obstacles (Barnes & Mercer 2010:1). This represented a shift from a medical model, which places disability as being the problem of the individual, to social model, which considers disabilities as a part of life that should be accommodated into social structures as much as possible.

Oliver, a British academic researcher and disability rights activist, developed an influential theory, which represents a big step in the social struggle of disabled people. This theory is the social model of disability (1990), which convincingly suggests the "problem of disability" should be shifted from the person who suffers it to the whole society, which should take responsibility for accommodating the needs of those with special needs.

Without getting into detail, one may say that today we are in a very different, far less appalling situation. The social model of disability has gained a lot of legitimacy.

At national level, some constitutions explicitly demand meeting the needs of disabled people. Additionally, some countries have passed legislation to address the disability issues. The current academic approach has similarly evolved and incorporated disability issues. There are specific journals[3] and even university programmes offering "disability studies", a field that has expanded across different fields including social sciences, law and humanities.

Nussbaum's capabilities approach (Nussbaum 2006), represented a step forward in the theory dealing with disabled people. Her conceptual framework provides a Human Rights theory that values everyone's autonomy and potential.

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[3] Journals Focusing on Disabilities Include: Disability & Society, Life Span And Disability, Disability, Culture and Education, Disability, Handicap & Society, Disability World, International Journal of Disability, Community & Rehabilitation, International Journal of Disability, Development, And Education, Journal of Applied Research in Intellectual Disabilities, Journal of Disability Policy Studies

This approach has led others to propose the inclusion of the disability element to the Human Rights Declaration (Stein 2007).

Some have understood disability as part of people's lifespan (Laplante 1991; Quinn 1998). This approach takes into account the complexity of disability and emphasises that disability, be it temporary or permanent, can happen at any point of life.

4.2. DISABILITIES AND TOURISM

If disabilities have historically been under-researched, this is even more true for the topic of "tourism and disabilities". Whilst the first important work about disabled people, "Stigma" (Hunt 1966), was written in the 60s, it was not until 20 years later that the World Tourism Conference connected the concept of accessibility and tourism for the first time (Manila Declaration 1980). This represented an important milestone on the quest for accessible tourism for disabled people (Pérez y Diego & González Velasco 2003:21), as it recognised tourism as a fundamental right for all and made recommendations to the member states to legislate tourist services.

A decade later two other important documents were released: the UN resolution "Creating Tourism Opportunities for Handicapped People in the Nineties" (UNWTO 1991) and "Tourism for all" (Baker 1989), a report that assessed the progress achieved so far, and promoted access to tourism by everybody, regardless of age, social or cultural background or disability. Meanwhile, in the US, the "Americans with Disabilities Act" of 1990 (ADA 1990) was passed. Its purpose was "to establish a clear and comprehensive prohibition of discrimination on the basis of disability" (idem).

The first academic article focused mainly on disabled people *and* travel is also from this time (LaGrow et al. 1990). 1990 was definitely the starting point of a boom in academic publications, media articles and general attention related to the topic. Since then we have seen other international organisations call for accessible tourism (Community Based Rehabilitation Development and Training Centre 2000; United Nations Committee on Transport, Communications 2000). Additionally the Montreal declaration "Towards a humanist and social vision of tourism" (BITS 1996) represented an initiative by the International Bureau of Social Tourism to demand a more inclusive and social tourism for all.

A few years later the Cape Town Declaration (2002) explicitly demanded Responsible Tourism to be accessible for "physically challenged people" and set as a guiding principle the "endeavour to make tourism an inclusive social experience and to ensure that there is access for all […] ". But this is not the only declaration that connects responsibility in tourism and accessibility for all: the Astana Declaration connected accessible tourism to any "responsible tourism policy" (UN 2009). The overlap between Responsible Tourism and accessible tourism is official.

In Europe, the "European Year of People with Disabilities"[4] took place in 2003, leading to the approval of an action plan in favour of accessible tourism, recommending the suppression of barriers and the exchange of relevant information among the member states. An approach that was reinforced by the resolution "Achieving full participation through Universal Design" (Council of Europe 2007)

More recently, the Declaration on the facilitation of tourist travel (UN 2009) by the UNWTO drew attention once again to the importance making possible for disabled people to travel. Additionally, this time it was added that "the facilitation of tourist travel by persons with disabilities is a major element of any responsible tourism development policy".

Paralympic games have often been accompanied by important public action to improve the situation of disabled people. London 2012 Games bid carried the so-called"Legacy Promise for Disabled People" (DfCMS 2010:legacy), which included an explicit commitment to engage SMEs[5] into improving the way they deal with disability.

4.3 BENEFICIARIES OF ACCESSIBILITY

Accessible tourism is not just about wheelchair users, who represent around 1% of the overall population of Europe (Newdisability 2008). Nor is it only about disabled people, who are believed to make up 15% to 20% of the world's population (UN 2007). All PwLM (including the already mentioned groups) can benefit, as well as other "collateral" beneficiaries — as we are about to see.

To find out the exact number of PwLM is a permanent challenge of research on accessible tourism. There are no specific statistics on PwLM, a wider collective than disabled people. However, statistics exist regarding disabled people. Unfortunately, different countries and statistical bodies around the world show inconsistencies related to cultural differences, diverging definitions, and differing methods (EFD 2008, Dority 2009). Moreover, there are different grades of disability, which may or not be officially acknowledged. The exact boundaries of disability are not internationally defined. Another distorting factor is that of wealth: industrialised countries have a higher official number of disabled people, as they have more resources to acknowledge them. In any event, people with some level of disability are believed to make up 15% to 20% of the world's population (UN 2007).

We know that the proportion of disabled people in a country is affected by war, the rate of traffic accidents, and poverty, especially in the less developed world (UN 2007). In many countries, the increase of incidences of disabilities is directly caused by ageing (WHO 2007; EUROSTAT 2009; Hutton 2008; Tourism Ethical Review 2009). In industrialised countries up to 40% of individuals over the age of 65 suffer from a chronic illness or disability that limits their daily activities. This limited mobility increases with age (Hutton 2008:5). This process is particularly acute in Europe: the proportion of people over 65

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[4] The official website is still online http://www.eypd2003.org/

[5] Small and medium enterprises

years of age in the total population is expected to grow from 17.1% to 30% (EUROSTAT 2009). The following chart (Fig. 1) shows the frequency of disability in different age ranges in Spain[6].

Fig. 1: Disabled people in Spain by Age
(in 1,000s)

Self developed chart. Source: INE (2008)
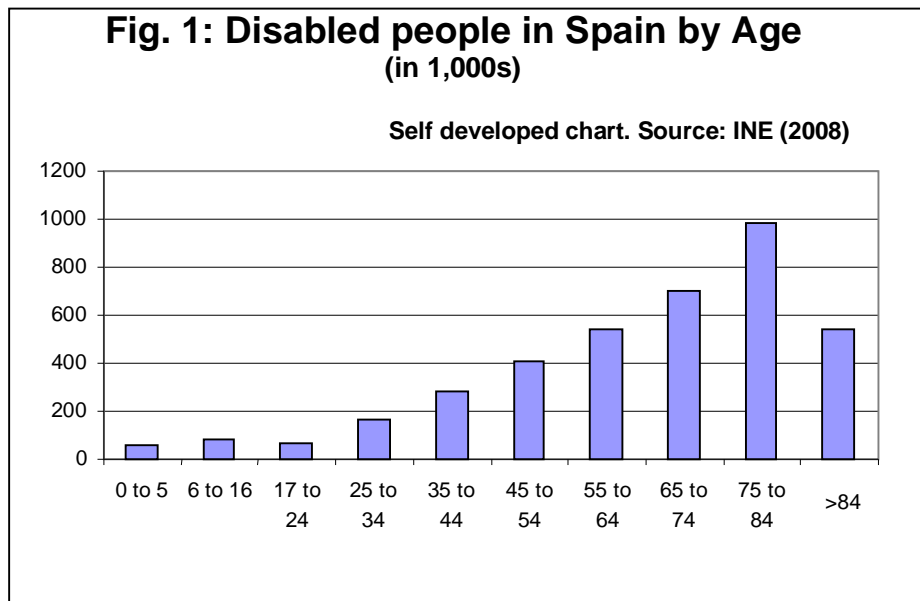
Not only disabled tourists benefit from accessible tourism. Since locals and tourists share transport, public urban spaces and buildings, making them accessible has the potential to benefit a large amount of people. In particular, removing physical obstacles, such stairs, seems to benefit many, including PwLM and people who temporarily struggle with the already mentioned barriers.

Another valuable attempt to establish a concrete number of beneficiaries comes from Australia. Dickson (2007) established that 31% of the (Australian) population would benefit from a more accessible society. This is excluding temporary disability, those who may enjoy a safer work environment, and any other vehicles like bikes or prams , which may use the same ramps as wheelchairs (see Fig. 2). This is a very similar figure to that calculated by Buhalis and others (Buhalis, et al. 2005). According to it, more than 27% of the European population would be part of the easy access market.

Travel companions of disabled people are also not considered in this figure. Assuming Australia's society is not dissimilar to that in other developed countries, as the mentioned European study suggests, figure 2 gives a reasonable estimate of potential beneficiaries of accessible tourism.

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[6] There is unfortunately no aggregated data of Europe or the world. Spain's National Institute of Statistics offers complete and reliable data.

Fig. 2. Beneficiaries of accessible urban design: 31% of population(Darcy 2006) Based on data for Australia (Darcy & Dickson 2009:2)			
People who benefit from the absence of physical barriers	**3%**	**Unknown %**	
People with limited mobility (PwLM)	Permanent disability	Age-related considerations	Temporal mobility limitation
	20%	**8%**	**Unknown %**

5. RATIONALE: THE CASE FOR ACCESSIBLE TOURISM

This section intends to clarify why is it important to contribute to the knowledge base concerning accessible tourism, from a social and economic perspective, as well as the implications for Responsible Tourism.

THE PROBLEM: NO ACCESS

Accessible means not only that a location is physically accessible (lift, no stairs…) but that is accessible in a more general meaning, that is, that everybody, regardless of disability (sensorial, communicative, cognitive) can make use of the product or service.

Disabled people wish to travel as much as any other person (Kwai-sang et al. 2004). However, tourism products and services are, in general, ill prepared to accommodate the needs of this group (Daniel et al. 2002:1). Disabled people often have to make use of the same –accessible– routes and are denied the range of choices non-PwLM have (Kitchin 1998). This means many have no access to tourism.

THE HUMAN RIGHTS CASE: A QUESTION OF RESPONSIBILITY

Historically, disabled people have been barred from many mainstream activities, travel among them (Kitchin 1998:1). Moreover, most disabled people, even in developed countries, live on below-average incomes, and rely on public financial aid. For example in Britain, 30% of working-age disabled people live in poverty (Palmer et al. 2005:75). But even if disabled people have the means to travel, they may not be able to do so because of the lack of accessibility, which restricts the possibility of travel for a significant portion of the population. The limitations placed upon disabled people have even been described as a "human rights tragedy of huge proportions" (Charlton 2000:ix).

Depriving disabled people of their vacations may contribute to their marginalisation (R. Hall D. 2006:36). If a society wants to be ensure the same opportunities for all its members, it should share the costs of accessibility among all, rather than only among those who need it. Accessibility is a question of justice that, as a society, we should face and resolve.

The accessibility principle is often thought of as being a concern only of disabled people. This is not logical, since the implementation of most accessibility measures benefits all, not only one particular group of persons with special needs. An accessible urban environment is an essential requirement for around 10%, a need for 30-40%, comfortable for all, and problematic for no one (German Ministry of Economics 2004:13). Everybody could potentially benefit from accessibility at some point in life.

Developing AT is not merely the "right thing to do". There is a social demand for it: 97% of Europeans agree that action should be taken to ensure a better

integration of disabled people, and 93% agree that the states should dedicate financial resources to solving the problem (Eurobarometer 2001).

A tourism product can be very responsible towards the environment and the local community, but if access barriers remain in place, a big proportion of the population –local and tourist– will be excluded from it.

It has been considered that "research into sustainable tourism has so far largely ignored social arguments with respect to ageing and disability" (Darcy et al. 2010:2). Indeed, efforts to make tourism a more responsible sector have focused on the environment and the local community, often finding conflicts of interests between locals, environment and businesses. However, applying the principles of the Universal Design (Preiser & Ostroff 2001) in the tourism industry may experience some resistance by the industry but it does not pose any structural conflict of interests among stakeholders in the long run. On the opposite, an accessible destination means accessibility for tourists *and* locals, who all will benefit of improvements in transport, urban environment, products and services. This way, the Responsible Tourism motto "better places for people to live in and for people to visit" (Cape Town 2002) is rarely more fulfilled that with the aims and philosophy behind accessible tourism.

THE BUSINESS CASE: ECONOMIC OPPORTUNITIES

> "American adults with disabilities or reduced mobility currently spend an average of $13.6 billion a year on travel. Creating accessible cruise ships, accessible ship terminals, accessible ground transportation, and accessible tourism destinations is not charity. It is just good business."
>
> Scott Rains (STCRC 2008)

Needless to say, the transition towards a fully accessible tourism would require resources. But there is a benefit to it, not only in a more just, inclusive society, but also in plain economic terms for tourism businesses and destinations.

PwLM would travel more if there were more accessible facilities. A German survey of PwLM carried out for the German Ministry of Economics answered asserts that:

> "37.0% of interviewees indicate that they have previously decided against travelling due to the lack of accessible facilities. 17.3% of travellers to foreign destinations go there above all because of the accessible infrastructure. 48.4% of them would travel more frequently if more accessible facilities were available"
>
> German Ministry of Economics, (2004:33)

Today, there are 127 million of Europeans who require accessibility, 70% of which "have both the financial as well as the physical capabilities to travel" (Buhalis (Buhalis, et al. 2005).

It is apparent that accessible tourism is not like a typical product in a contemporary supply-saturated economy, that is, a product that needs advertising to push it into the market. The focus of this report assumes, based on existing research and the author's experience, that there is a demand for accessible tourism that is not met by the tourism sector and that truly accessible facilities, products and services are the exception rather than the rule. Unlike most products, the effort needs to be put into the product itself, rather than stimulating the demand. A clear symptom of this is that the few fully disabled-friendly destinations or transports are at risk of becoming "wheelchair ghettos" given the lack of accessible facilities (R. Hall D. 2006:36).

By attracting the PwLM, relatives and friends will follow. Low season is one of the most important challenges the tourism industry has to deal with. Accessible tourism can help: according to Lilian Müller, who is the president of ENAT and has been working in accessible tourism since 1995, the easy access market is attractive because "it spends more money in the low-season and it is more loyal to the destinations" than the average tourist (Design for all Foundation 2008).

Another study, this time in the UK, describes the "disabled market" UK market as follows:

> "There are around 10 million disabled people in the UK
> with a combined spending power of £50 billion, and one
> in six – about 10 million – Britons are aged 65 or over.
> The over-65s traditionally take an additional ten
> overnight holiday trips annually, potentially spending six
> weeks or more of the year travelling."
>
> Tourism For All UK scheme (2009)

The demand for a more accessible tourism is not only unfulfilled, it is also growing fast: European societies are undergoing the already mentioned process of ageing, which will only continue in the future (Jack M. Guralnik 1999). According to Eurostat (2009), the proportion of the total population in the EU above the age of 65 is expected to increase from 17.1% (84.6 million) to 30.0% (151.5 million) in 2060, with the ageing being more pronounced in Southern Europe (IIASA 2002). Logically, the so-called seniors market is an increasingly important market segment. Southern European countries receive millions of seniors every year, Spain being this group's most important destination worldwide (Tourism Ethical Review 2009). Closely linked to this phenomenon is the growing number of PwLM (although not all PwLM are old, nor are all seniors PwLM).

To apply the Universal Design principles to new buildings represents an added-value for many, as it could elevate the value of accessible facilities up to 12.5 per cent (Alonso López 2002), because it means an added-value for many.

Despise the abundant evidence for the business case; the tourism authorities and businesses have failed to recognise the real value of this market. Therefore there is a severe need to build a stronger business case. One way to do it, would be to calculate the marginal cost of accessibility adaptation against the marginal income for specific business as hotels, transport, etc.

RESPONSIBLE TOURISM   **ACCESSIBLE TOURISM**   **BUSINESS OPPORTUNITY**
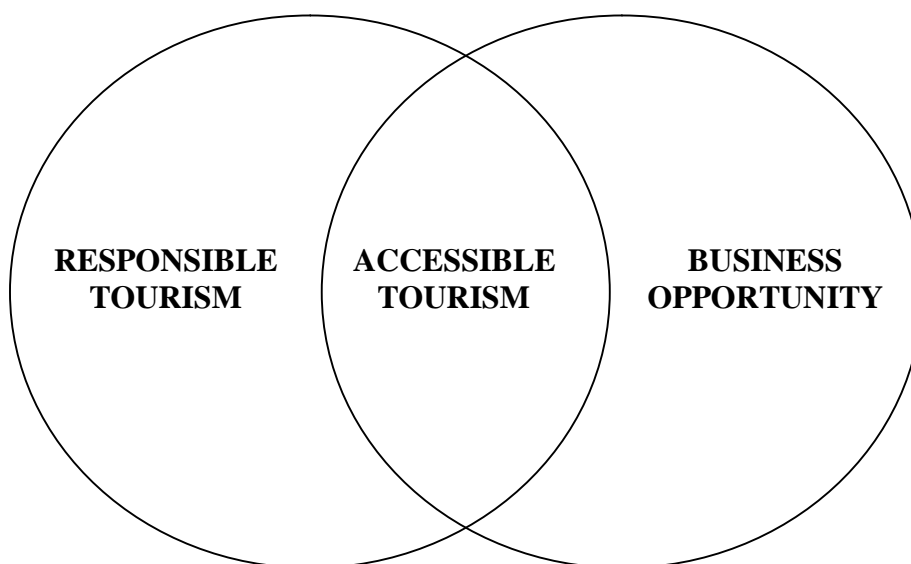
6. LITERATURE REVIEW

This chapter presents some background on the relevant literature related to the present topic. The major works on Universal Design are introduced, a key concept for accessible tourism. A review on the most important, updated research on accessible tourism is offered. Initiatives and publications regarding social or inclusive tourism, an essential concept to understand the connection with accessible tourism, are also commented. Academic works have often pointed out the need to build the business case for accessible tourism, a subject that is analysed towards the end, presenting both academic work and compilations of more practical information, addressed to the business sector. Finally, legislation from different countries, relating to the previous topics, is reviewed.

6.1 CONCEPT OF UNIVERSAL DESIGN

Universal Design is relevant to tourism because its implementation would facilitate the access of PwLM to tourism by developing a philosophy of a design that is good for everybody. The idea is to ensure that special groups have to special facilities.

The concept of accessibility has evolved from "eliminating barriers" in buildings, urban environments and transportation, to the principles of "Universal Design" (UD) or accessibility for all. The Universal Design has earned a lot of attention within the academic research field, as the approach went from eliminating barriers to designing everything so it can be made use of by all. The "Universal Design Handbook" (Preiser & Ostroff 2001) is likely the most comprehensive reference work on Universal Design to date, as it gathers the work of major researchers. Universal Design can be encapsulated in its seven principles (Preiser & Ostroff 2001):

- · Equitable use
- · Flexibility in use
- · Simple and intuitive
- · Perceptible information
- · Tolerance for error
- · Low physical effort
- · Size and space for approach and use

Iwarsson and Stahl's work (2003) has rightfully earned credit among the research community. They propose that accessibility comprises a personal and environmental factor and therefore "accessibility must be analysed by an integration of both".

Alonso López (2010) suggests, from a Spanish perspective, that accessibility improvement is shifting from being a legal requirement to becoming an essential part of the quality of tourism. In his article he focuses on how to apply the concept of UD to all cultural tourist attractions.

Universal Design is normally understood as improving the accessibility of the urban space. However, there is a whole field on how to make information systems accessible for all, particularly focused on people with sensorial disabilities, who may additionally have a limited mobility. Efforts to make the World Wide Web an accessible channel for all have taken place in the last few years. In this respect, a particular book has gained recognition and has become a reference: "Web accessibility for people with disabilities" (Paciello 2000). Needless to say, both locals and tourists can benefit from improvements in the public space and the information systems.

At the European level, the Committee of Ministers' resolution (COUNCIL OF EUROPE 2001) introduces "the principles of Universal Design into the curricula of all occupations working on the built environment", which has helped introduce the principles of Universal Design in the national laws of the EU member states.

6.2 ACCESSIBLE TOURISM RESEARCH

Academic attention to the relationship between disabled people and travel has been very recent, and it represents the shift from a health approach to disability to a more global, vital approach. The topic of travelling with disability, as part of a wider academic field on disabilities, has emerged next to GLBT, women, and black studies from the social struggle of disabled people for their rights.

Accessible tourism research can focus on the demand: disabled people, ageing and travel, or PwLM; on the supply: case studies of best practices, guidelines and the business case for accessible tourism, or both. As the importance of meeting the needs of the easy access market is increasingly recognised, the focus is moving from the demand to the supply, producing work that will help facilitate the necessary transformation of the tourism sector towards accessibility for all.

One of the first serious attempts to examine domestic and international tourism patterns (as well as demographic profiles and constraints to travel) was "Anxiety to access" (Darcy 1998). It provided detailed information on travel patterns and experiences of people with a physical disability, based in New South Wales, Australia, during the years running up the Sydney Paralympics. Later this report was used to produce estimates of the size of the easy access market, which were used to create recommendations for the public and private sector to focus on Paralympics of 2000.

The article "Travelling with a disability: More than an Access Issue" (Yau et al. 2004) determined very convincingly that disabled people experience different stages in the process of travelling. According to this paper, travelling is only possible for a disabled person once he or she has come to terms with the disability. These findings, which are highly relevant to determining the travel needs of disabled people, have been cited numerous times.

Darcy's PhD thesis (2004) made a very significant contribution to the understanding of the topic. This piece of work explores – from an Australian

perspective – the rights of disabled people, and their travel experience. He includes an extensive literature review and explains that tourism authorities and the industry limit the tourism experiences of disabled people and create the so called "disabling journeys".

"Setting a research agenda for accessible tourism" (Darcy 2006) is a very important document for accessible tourism research, produced after the Sustainable Tourism Cooperative Research Centre workshop in Australia. It compiles existing research on the topic from both supply and demand perspectives looks at the state of the field addressing the supply, demand and regulation of industry practice.

From a European perspective, "Accessibility Market and Stakeholder Analysis" (Buhalis, et al. 2005) analyses disability terminology, accessibility and tourism. The report suggests an estimation of easy access market size in Europe and worldwide, identifies key stakeholders, and acknowledges the accessible tourism supply. The report exemplifies access needs through the design and transformation of facilities. Interestingly, the report gives a great deal of importance to the information on accessibility, emphasising the importance of accurate online information. The report was produced in the frame of OSSATE[7], a project which, according to their website, "aims to implement a prototype multi-platform, multi-lingual digital information service providing national and regional content on accessible tourist venues, sites and accommodation".

Sustainable Tourism Cooperative Research Centre's "Accessible tourism: challenges and opportunities" (STCRC 2008) is a good introduction to accessible tourism research, structuring priorities and acknowledging past findings.

Darcy and Dickson (2009) have carried out efforts to determine the number of beneficiaries of accessible tourism, establishing the already mentioned figure: 30% of the Australian population will have access requirements at any given time, and most people will have limited mobility at some stage in their lives. Although based on findings in a specific country, the conclusions are highly relevant to other similar societies.

In "Inherent complexity: Disability, accessible tourism and accommodation information preferences" Darcy (2009) explores the criteria disabled people use to evaluate accommodation, and therefore provides guidance to those needing to present information on accommodation accessibility.

A recent and complete analysis of the easy access market has been provided by the publication "Accessibility Analysis UK Tourism Survey" (Visit England 2010). The report makes a useful distinction between those travelling with "any disability" or with "any mobility impairment". Although its scope is restricted to the UK, the results may be considered meaningful for other similar markets where such data is not available.

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[7] One-Stop-Shop for Accessible Tourism in Europe

6.3 SOCIAL AND INCLUSIVE TOURISM

Inclusive or social tourism are concepts that incorporate the rights of underprivileged people, often including disabled people, to enjoy their holidays.

The European Commission recently launched the Calypso programme, which aims to "improve the lives of underprivileged citizens across Europe who cannot usually […] travel to Europe's holiday spots, while at the same time helping local economies beat the off season blues" (European Commission 2010).

Another European initiative is the book "Achieving full participation through Universal Design" (Soren Ginnerup 2009), representing an attempt to promote complete participation in life by guaranteeing everyone, including persons with disabilities, access to all spheres of society, regardless of age or cultural background. It suggests Universal Design as a strategy to achieve this.

The government of Brazil has released a number of interesting publications aimed to set the basis for what it is called "a more inclusive tourism". Although the series of publications mentions that accessible tourism will attract tourists with disabilities, it does not focus on the economic potential of accessible tourism but rather emphasises the social benefits for the locals. Accordingly, it claims that accessible tourism should become "an important mechanism of social inclusion". The titles include "Introduction to a journey of inclusion" (Ministério do Turismo 2009a), "How to provide a good service in accessible tourism" (Ministério do Turismo 2009b), "Accessibility mapping and planning of tourist destinations" (Ministério do Turismo 2009d) and "How to provide a good service in adapted adventure tourism" (Ministério do Turismo 2009c).

6.4 BUILDING THE BUSINESS CASE

One of the biggest obstacles for PwLM wanting to enjoy tourism why PwLM cannot enjoy tourism as much as they would like is the lack of specially adapted, accessible, facilities. Strengthen the the business case for accessible tourism is key to improving accessibility, offering tourism businesses an effective incentive (economic gain) to engage in the quest for fully accessible tourism. However, there is still an acute lack of material supporting the business case for accessible tourism. Few works offer a good range of arguments with supporting data.

An important work related to the issue of disability and travel is "'Ebilities' tourism: an exploratory discussion of the travel needs and motivations of the mobility-disabled" (Ray, N.M 2003). This paper identifies what it calls "mobility-challenged travellers" as an important overlooked tourist niche deserving of attention.

The report "Economic Impulses of Accessible Tourism for All" (German Ministry of Economics 2004), authored by different universities and consultancy firms, very strongly supports the business case for accessible tourism. This report

emphasises that the accessibility principle should be applied not only to persons with disabilities, since "accessibility is in the interest of everyone". This report provides very concrete support for improving accessibility in society through three models, in which it correlates the investment in accessibility to the economic benefit.

The article "Leisure and tourism for the young disabled. From the place of the disabled to the place of the disabled tourist in France" (Celestin Lomo Myazhiom 2006) confirms the potential for the market group of disabled people, and poses important questions relating to the obstacles to the flourishing of accessible tourism from a French perspective.

In Spain, a recent article (Molina Hoyo & Cánoves Valiente 2010) reclaims attention to the case for accessible tourism, focusing in particular on the region of Catalonia. The article takes France as a model for labelling, suggesting to follow its steps in terms of certification as well as underlining the opportunities that accessible tourism can bring to tackle seasonality. The mentioned French label, called "Tourisme et Handicap", was presented in a paper presented at the ENAT Tourism for All International Congress in 2007 (Tulliez 2007)

Domínguez Vila (Domínguez Vila 2009) has developed an excellent business case for accessible tourism and —most importantly— she has presented different travel patterns, depending on the degree of disability, be that sensorial, physical, mental or communicative.

The report "Developing a business case for accessible tourism" (Darcy et al. 2008) provides case study examples "of high standard accessible tourism product, facility or experience". As important is the reflection on the methodology used to build accessible tourism case studies. The report concludes by suggesting the most meaningful indicators for assessing business cases.

As in Australia, the upcoming Paralympics in the United Kingdom has prompted the administration to improve the conditions for disabled people. This effort is synthesised in the document "London 2012: a legacy for disabled people" (DfCMS 2010).

In terms of contributions to the business case for accessible tourism, it is essential to mention the recent British publication "2012 Legacy for Disabled People: Inclusive and Accessible Business" (Office for Disability Issues 2010), which aims to present disabled people as an attractive customer base, for SMEs in particular. It attempts to do so by providing a convincing case for all kind of SMEs "to focus on disabled people as customers". The report provides an estimation of the market size and growth, the buying patterns of disabled people and a cost/benefit analysis. Additionally, it provides examples of SMEs that have successfully benefited from meeting the needs of accessible people, some of them related to the tourism sector. It concludes with a number of recommendations addressed to the SMEs on how to improve the way they deal with disability, and how to build a stronger relationship with organisations for disabled people.

6.5 LEGISLATION

There are no international standards for legislation on disability issues. This has led some countries to develop their own legislation, depending on the level of awareness in their legislative bodies. In any case, how effective a piece of legislation becomes, however ambitious, is influenced by the resources devoted to its implementation.

In this section, relevant resolutions and directives of the European Union regarding disability issues, as well as segments of national legislation[8] in the US, UK, Spain and Australia, are commented.)

The most important piece of legislation regarding disabilities has been the American with Disabilities Act (ADA 1990), which was born in 1987. This piece of legislation has addressed architectural, transportation, and communication accessibility and "has changed the face of American society in numerous concrete ways"(Burgdorf 2008:252). The US is considered to have facilitated the entry of disabled people into mainstream life although much remains to be done (Goodwin 1995).

In the UK the Disability Discrimination Act (2005) makes it unlawful to discriminate against people based their disabilities. This act uses the concept of "reasonable adjustment", an approach that requires taking active steps to remove barriers that are obstacles to disabled people. This piece of legislation has brought attention from the tourism industry to the situation of disabled people, as well as having motivated an extensive response from the public and private sector (Shaw & Coles 2004)

The EU released a resolution for "Achieving full participation through Universal Design" (Council of Europe 2007) but has failed to engage the member states into a single, comprehensive legislation regarding disabilities, and each country or region has its own legislation. However, a number of EU directives separately address disability in different ways. The one most relevant to tourism is the directive concerning disabled people and PwML travelling by air, providing the following guarantee:

> The Regulation on rights of disabled persons and persons with reduced mobility when travelling by air provides for compulsory, free-of-charge assistance and information at airports and by air carriers. No reservation can be refused on the grounds of disability except for safety reasons or insufficient size of aircraft. Air carriers and airport managers must ensure that their staff has received appropriate training to assist disabled people. Establishment of enforcement bodies and complaint procedures are obligatory. Passengers with reduced mobility and disabilities of rail transport are guaranteed assistance, information on accessibility and non discrimination. The responsibility for mobility equipment falls on carriers. Legislative work on maritime and coach transport is on-going.
>
> (EC 2006)

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[8] The EU countries, China, Pakistan, India and most Latin American countries have specific legislation.

In Spain, Article 49 of the Spanish Constitution (1978) demands that the public sector implements a policy to integrate disabled people and provide them with personalised attention. This was further developed in specific laws (LISMI 1982; Liondau 2003) that grant special protection to disabled people, as well as introducing a number of measures to improve their situation. Additionally, each of the 17 Autonomous communities have passed further independent legislation. Nevertheless, as is often the case with legislative bodies, the application of the law has been poor, according to the main associations for disabled people in Spain (Pérez y Diego & González Velasco 2003:19).

Australia's Disability Discrimination Act (Parliament of Australia 1992) provides protection against discrimination based on disability but also "encourages everyone to be involved in implementing the Act and to share in the overall benefits to the community and the economy that flow from participation by the widest range of people".

6.6 CONCLUSION

The findings of this report will complement the works regarding PwLM travel patterns, (Darcy 1998; Darcy 2009; Visit England 2010). The mentioned documents will serve to put the findings into context.

On the other hand, the efforts to establish the business case for accessible tourism (Celestin Lomo Myazhiom 2006; German Ministry of Economics 2004; Molina Hoyo & Cánoves Valiente 2010; Darcy et al. 2008; Office for Disability Issues 2010) will contribute to the discussion section together with the findings of this report. In particular, market dynamics regarding accessible tourism will be studied taking into account the previous work and relating the findings to the existing ones.

7. RESEARCH METHODS

7.1 METHODOLOGY

This report aims to contribute to the understanding of the dynamics and key elements of accessible tourism. More concretely, it aims to shed light on accessible tourism as an economic sub-sector –the supply– as well as on the needs and habits of accessible tourism core beneficiaries –the demand.

A mixed methodology –both quantitative and qualitative- was deployed in this research. The methods undertaken comprise literature review, case studies, interviews and questionnaire survey.

A review of relevant, existing academic research as well as statistics, legislation, manuals and reports was undertaken to inform the methodological development of the study, providing a wider overview of the matter under study and identifying the need for further research.

To collect data on the travel opinions, habits and dynamics of PwLM a multilingual, self-completed, web-based questionnaire survey was released. This was considered the best method for the primary research as its practical and advantages would leave more resources for other parts of the research. Moreover, an offline alternative may have been impossible to carry out. The limits of online survey have been acknowledged but it was considered that such a method could produce results, valid data. It was envisaged these would provide an overview on the way PwLM travel, what are their most acute needs in the elements associated with travel (transport, accommodation, activities) and their views on the topic.

This research intends to observe the growing accessible tourism niche market and to pay singular attention to companies that are able to provide tourism products or services to PwLM in one way or another. A case study approach with real examples has been considered appropriate to help understand the specific features and dynamic of this kind of tourism businesses in relation with the data previously collected on PwLM travel needs.

Finally, a number of interviews with accessible tourism experts has been carried out to capture the most important priorities and ongoing processes related to accessible tourism.

7.2 METHODS
7.2.1. LITERATURE REVIEW

An assessment of the existing academic literature with precise central questions is expected in a literature review. However, given the human dimension of the present topic, it was considered useful (and inspiring) to acknowledge the historical struggle of disabled people for their rights as well as the social model of disability. Some pieces of classical and recognised work (Nussbaum 2006; Oliver 1990) have been singled out for their influence as milestone in both academic research and social struggles. To help assess the size of the accessible tourism beneficiaries a review of different reports and way of dealing with this question was carried out. This helped to shed light on such a complex concept as accessibility in tourism and is reflected in the introduction to this report.

Review of literature directly related to the research question helped construct a good overview of the achievements towards a more accessible tourism from different perspectives. To evaluate the quality of the literature certain criteria have been used. Papers related to ongoing, relevant lines of research related have been mentioned in the literature review section as long as they were up-to-date and showed a good academic quality. Special attention was given to review the most important works about Universal Design and the pieces of legislation, which have aimed to provide accessibility also in tourism.

7.2.2. ONLINE QUESTIONNAIRE

7.2.2.1 JUSTIFICATION

Exploring the travel needs and habits of PwLM is one objective of this report, as it is impossible to successfully meet their needs if we are not aware of them nor their travel needs habits and motivations: lack of information on travel behaviour constitutes one of the major obstacles for accessible tourism (German Ministry of Economics 2004:41).

To do so, an online questionnaire was deemed the best option available, especially because the target population is not easy to reach. This method offers a number of advantages: it allows an easier way to contact the mentioned target group and simultaneously access it in different countries as well as it provides the convenience and speed of automated data collection, minimising the required resources (Heiervang & Goodman 2009; Wright 2005; Schmidt 1997; Jansen et al. 2007; Fleming & Bowden 2009).

A study showed that there are no difference in how people respond to a survey depending on the technology used, be that print or web (Huang 2004; Fleming & Bowden 2009). Moreover, web surveys have been found to produce a clearer and higher-quality answers to open-ended questions (Schaik & Ling 2003). Darcy (2009) has recently carried out a questionnaire using a similar technique on accessibility information, validating the method in as much as it provides comparative data.

7.2.2.2 DESIGN

The questionnaire [9] has been developed taking careful consideration of conceptual and methodological issues that web-based questionnaire rise as suggested by Jensen and others (2007).

It was released on the Internet using Google Docs[10], a known, secure, free, web-based application that allows data collection through tailor-made questionnaires with different types of questions. To try to overcome the geopgraphical limitations, versions in English, German, Spanish and French have been -almost simultaneously- released to intend to cover as many Western European countries as possible with just a few languages[11]. The different versions have been translated using the help of one or more native speakers and key concepts as accessibility and accessible tourism have been discussed with them to ensure all versions are equally understood.

The questionnaire consists of:

- · A Brief introduction of the questionnaire and the present research with contact details of the author and supervisor
- · An agreement of informed consent[12]

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[9] The English version of the questionnaire can be read in the Annex 1 and also can still be visited online at http://ow.ly/2mlc6

[10] http://docs.google.com

[11] Many have answered in English although it may not be their native language.

[12] In keeping with Leeds Met guidelines, informed consent has been required of all participants who contributed data. The information given to the participants before consent can be checked in the questionnaire.

- · A question on how the questionnaire was found
- · 51 pre-coded questions (with one or more than one possible answer) divided in the following groups:
  - o Profile (age, nationality, gender, job)
  - o Disability (percentage of wheelchair use, type of disability, requirement of assistant).
  - o Travel (habits, needs, preferences and accessibility information in accommodation)
- · Four open questions
  - o Source
  - o Disability
  - o Clarification on information on accessibility
  - o Opportunity to add/clarify something
- · The option to leave the email to receive a copy of the report and/or further be contacted by email to expand the answers on a voluntary basis.
- · Follow-up questions

The rationale is to relate the results of the pre-coded groups of questions to each other to establish patterns of associations. Open questions will be useful to determine patterns of feelings and experiences that are not visible in the pre-coded questions.

All questions are mandatory except the four. The system requires all mandatory questions to be answered before submitting the survey. Nevertheless, the option "I prefer not to say" has been offered in sensible questions as "amount spent per day in travel" or "type of disability". However, the use of this option was exceptional, which is not surprising as the questionnaire is anonymous.

It has been attempted to find a balanced number of questions to include all relevant pieces of information and limit the length of the questionnaire to prevent participants to loose motivation before the end.

It has been suggested that making use of the web multimedia capabilities and include, pictures, animations and other design features may make the questionnaire less dry more attractive for the respondents (Fleming & Bowden 2009:4). Unfortunately, due to the constraints of the web-based software (Google Docs) used for this questionnaire, this has not been possible. The only incentive of the present survey is the option of receiving a copy of this report once finished.

Follow-up questions were sent by email to the respondents who agreed to further co-operate. The answers contributed to the findings, relating to PwLM travel habits.

7.2.2.3 SAMPLE

At the beginning, the questionnaire has focused solely on the mobility limitation produced by physical barriers. Other accessibility issues related to sensorial,

cognitive and communication disabilities (even if combined with a physical mobility limitation) have been consciously excluded, since they would require a differentiated, specific questionnaire each of them.

Accordingly, the questionnaire was open to anyone with a physical mobility limitation and usual travel companions (meant to answer on their behalf), which makes possible to collect data of people who do not use the Internet. There was no restriction in terms of nationality. Travel experience was not an obstacle to participate either. Underage potential respondents were excluded following the indications of Trish Coll from Leeds Met.

7.2.2.4 DISSEMINATION

The dissemination took place during July and August 2010 with different methods.

Emails asking to disseminate the questionnaire were sent to Disabled people associations in UK, France, Germany and Spain as well as to any individuals known by the author who are either eligible to answer or may know someone who is.

The initial dissemination strategy was to earn support of disability associations to distribute the survey on the author's behalf to their members. A direct request to the contact email of disability associations was sent to the following:

- · 54 Disability associations in Germany
- · 76 Disability associations in Spain
- · 25 Disability associations in France
- · 19 Disability associations in the UK

The response rate was close to zero (just one response). Some direct calls made clear that most of these organizations need to go through certain bureaucratic steps before co-operating. Moreover, some of them did not have the emails of the members. Summer season did not help.

Next step was to request people of the author's social circle to disseminate the request to their eligible contacts. This tactic was not much more successful. It was clear that a new strategy was necessary to attain a sample with a decent size.

Online communities of disabled people seemed attractive as they had a diversity of members and those were active Internet users. However, it is not possible to send a message to all members without the cooperation of the administrator. Cooperation was found from the administrator of *Accessible Travel* community[13], who had disabled members all over the world interested in travel as well as *Tour Watch*[14]. Additionally, a request was published in the travellers' community Couchsurfing's disabled group.

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[13] http://accessiblecities.ning.com/ now closing
[14] http://tournet.ning.com/

The popular social network Facebook proved another very useful as there are plenty of loose groups related to disabilities and accessible tourism. The members are diverse in terms of age, original country or even disability dimension. The only common element of members is to share the group language and interest.

It was possible to instantly become a member and post a request to the group wall[15]. Only members who visit the group will see any message on the group's wall. This was done with a number of groups that related with disability or accessible tourism in one way or another using and combination of the terms "disabled", "disability", "travel" and "accessibility"[16]. Groups were selected considering the number of members and the likelihood to include disabled members among their members. A request was posted on around 20-25 groups for each language. This helped the number of responses to rise.

However, to be more effective the cooperation of the administrators was looked for to be allowed to send a personal message to all members of the group at once. Most refused to send a message on the author's behalf but others did (See Fig. 3) and at least one group in each language agreed to cooperate so their members would receive a personal request in their Facebook mailbox.

Fig 3. Facebook groups co-operating	Members
Ein Herz für Menschen mit Behinderung (A heart for disabled people)	2,970
I support the right for disabled people to travel around Iceland!	2,178
Pour une vraie loi en faveur des personnes en situation de handicap (For a real law for disabled people)	932
Création d'un parti politique des personnes handicapées de France (for the creation of a political party for disabled people)	512
Turismo accesible en España (Accessible tourism in Spain)	393

These actions prompted the responses. The response rate could not be determined with accuracy but it is roughly estimated to be around 1-2% according to the new data collected after the emails to the members were sent.

Twitter, the social network of short messages was useful too. Tweets requesting to fill the questionnaire were sent from the author's twitter account

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15 This is an example of requests: Dear EDforum,
Please help me with my research survey about travel needs of people with reduced movility: http://ow.ly/2gfc7
This questionnaire is completely anonymous and the findings will be used for my academic research only. More details at the link.
If completed the report will be shared with those who responded.

Thanks!!

[16] Check an example of the results "disability + accessibility" of groups:
http://www.facebook.com/home.php?#!/search/?init=srp&sfxp=&q=%20disability%20accessibility

@buenviajero in the four languages with *hashtags* on #accessibility so make it easy for people with that interested to find it.

Key twitter users identified that focus on any accessibility, disability or travel who had many followers (around 1,000 each), some were known to the author personally and others only online. This way @masquenoticias @Pepeday, @asaltodemata, @gnomada, @craiggrimes and others retweeted the requests to their followers.

In all the above methods to disseminate the survey resend to eligible contacts was not prohibited and occasionally explicitly encouraged. This created a snowball effect to certain extent, as people resent the questionnaire link to those acquaintances, who knew were eligible to answer it. From twitter, facebook, emails and questionnaires feedback it is known that certain snowball effect has occurred: 23.8% of the respondents answered because they received a direct email or message from a friend about it.

The response rate presents serious difficulties to be established in this kind of survey (Fleming & Bowden 2009:7): we cannot set how many people received the requests to fill the survey not how many of them did not fill the survey because they were not eligible. Visitors to the actual web questionnaire could not be technically measured and therefore no ratio between answers and responses could be obtained.

Finally, the website of ENAT, the European Network for Accessible Tourism, agreed to publish a piece of news[17], asking to their readers to participate. Additionally a request was published in the ICRT English and Spanish blogs[18], an accessibility blog in Spanish[19] and the author's own blog on Responsible Tourism[20] .

7.2.2.4 LIMITS AND CONSIDERATIONS

Despite the mentioned advantages, there are limits to this questionnaire, which need to be acknowledged.

Fake response

Since surfing the Internet is perceived to be an anonymous activity (Kling et al. 1999), web users might provide incorrect information for fun or use fraud data for any specific purpose. However, given the length of the survey and relative specificity of the questions, it would seem unlikely that someone would follow that path. Even in that case, illogical answers may help identify the fake respondent.

Non-response bias

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[17] http://www.accessibletourism.org/?i=enat.en.news.984
[18] http://blog.icrtourism.org and http://blog.icrtourism.org/Spanish/
[19] http://www.blog.regojo-quinta.com/
[20] http://turismo-sostenible.net/2010/08/21/el-turismo-responsable-debe-ser-tambien-accesible/

Non-response bias (produced when respondents within the sample have very different attitudes or demographic characteristics to those who do not respond) is expected but not feared. As answering was voluntary it is expected that those who are most aware of the accessibility problems in travel (because a close person or themselves directly suffer) are over represented. Those more concerned about accessibility in travel could be assumed to travel more than average. However, this bias should not represent a problem, since the survey does not pretend to answer to what extent PwLM travel but rather how they do it and what problems they encounter.

Inaccurate response

The possibility to respond on the behalf of a PwLM was given to those who "normally travel with him or her as assistants, friends or relatives". Some questions require knowing quite well the PwLM. Therefore, inaccuracies may affect questionnaires answered on the behalf of PwLM. To prevent this, 11 responses have been deleted when found hints of misrepresentation, including non coherent responses, or references to more than one PwLM.

Snowball sampling

The dissemination could produce bias if a particular group of people with a particular profile is overrepresented within the sample. To prevent this, a question was included to ask for the way people found about the survey. If many would answer "through the rugby association of amputees" the bias could be identified. However, no bias was identified.

According to the questionnaire's question on the source that led the respondent to it, snowballing ignited from various different seeds and very diverse sources preventing that the sample is biased inasmuch belongs to the circle of just one seed. This variety of sources guarantees that no group is pre-eminent (see Fig. 4).

| Fig. 4. Source of respondents	
Respondents	Sources
79	Facebook (from different groups)
28	Snowball email from different seeds[21]
27	Unknown (did not shared the source)
25	Carlos direct email
23	Twitter (from different twitters)
14	Blogs that published it
11	Tourwatch online community
11	Couchsurfing forum
4	Accessible Travel
222	Total

Exclusion of non-Internet users

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[21] It is impossible to track from which sources the request was taken before resending it.

An open, web-based questionnaire like this carries two main limitations: potential bias and lack of control over sample (Jansen et al. 2007:4). Both phenomenon are true for this survey.

Disability has more prevalence among older people: in developed countries up to 40% of persons over 65 suffer from a chronic illness or disability that limits their daily activities (Hutton 2008:5).

A negative correlation between Internet usage and age exists. For example, in the USA, 85% of people in their 20s use the Internet compared to just 27% for those over 75 (Pew Internet 2009a; Pew Internet 2009b). In the UK, the use of the Internet among younger generations is similar to the American and just 23% of those over 75 (Ofcom 2010). See Fig 5.

Fig. 5. Internet access in the UK as for 2010

Home internet access (%)

Source: **(Ofcom 2010)**
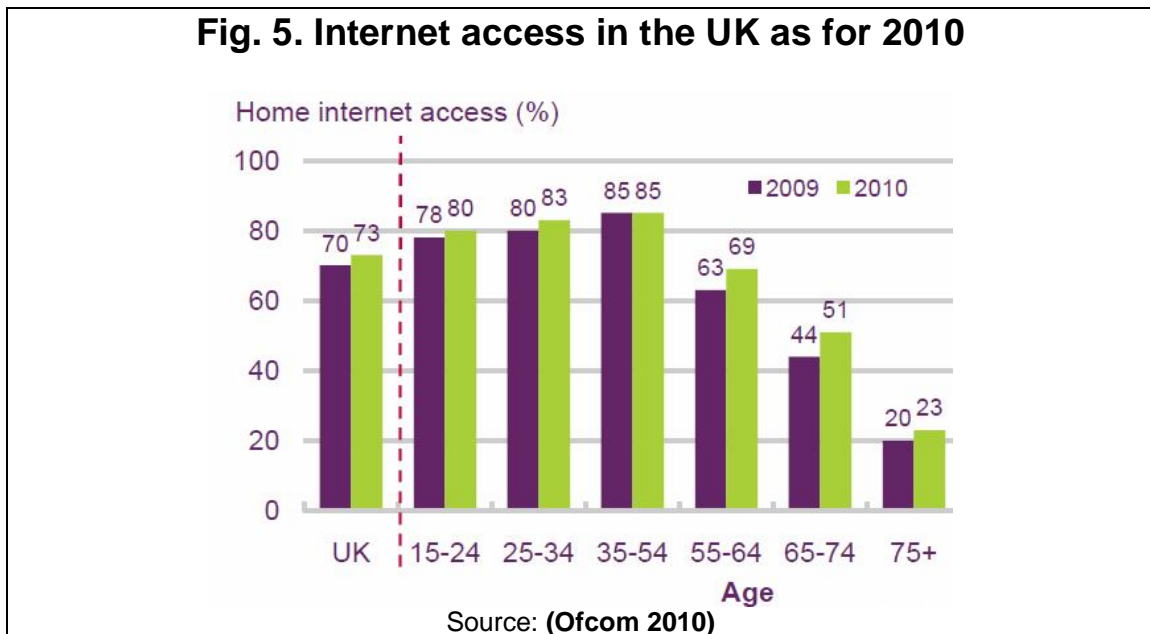
However, age is not the only factor that affects Internet penetration: education and wealth can too: a recent study (Akamai 2009) on the US online population shows that 94% of those with education beyond college use the Internet while only 39% of those who did not complete high school do. The same study shows that 83% those earning over 75.000 USD a year use while only 42% of those earning less than 30.000 USD go online. Similar patterns have been found in Portugal (Marta-Pedroso et al. 2007:392), the UK (Gardner & Oswald 2006:3), Spain (Fundación Orange 2010:143 & 163) and the whole world (Fleming & Bowden 2009).

Considering that the questionnaire is published online, the mentioned digital divide will inevitably affect the results, excluding the population who does not use the Internet, whatever their age, from the results.

Those interested in demographic data of PwLM (particularly disabled people) can access it relatively easy from the national statistic institutions and international organisations (Dority 2009; EFD 2008; Eurobarometer 2001; INE 1999; Newdisability.com 2008; Turismo Valencia 2010; UN 2007).

Data analysis

Data analysis will be carried out with SPSS software and MS Excel as well as analysis of qualitative data collected through follow up emails, for the cases in which this has been explicitly allowed.

Considerations

Given the described biases, the data collected is not expected to be a valid representative sample that would describe what the average demographic characteristics of PwLM who travel. However, the validity of patterns of associations can be valid (Heiervang & Goodman 2009) and useful to establish patterns on the travel habits and needs of PwLM.

It may be suggested that this survey is reasonably representative of the portion of PwLM who travel the most as the limitations we described to answer this survey may coincide with those who limit travelling.

7.2.3. CASE STUDIES

7.2.3.1 JUSTIFICATION

The introduction of accessibility requires the business co-operation. To attain it, it is indispensable to strengthen the business and show some successful approaches and good practices, offering the industry good reasons to "go accessible" beyond meeting the legal requirements.

So far attempts to construct and promote the business case have focused on the mainstream tourism industry (Celestin Lomo Myazhiom 2006; German Ministry of Economics 2004; Molina Hoyo & Cánoves Valiente 2010; Darcy et al. 2008; Office for Disability Issues 2010). Instead, this report will focus on tourism companies, which have a special focus on accessibility, independently of their size or business model. The smaller companies in particular, whose core-business is based in accessible tourism, has not been explored academically.

With this method it is intended to explore the overlooked accessible tourism, with a special attention to specialist companies, providing enough relevant elements of analysis in terms of different approaches and patterns. This is important to better understand accessibility issues in the complex, real-life tourism industry context.

7.2.3.2 SAMPLE

Since the size of the total amount of specialist enterprises in accessible tourism was impossible to determine, the sample size is not likely to be proportional or representative to it. However, the companies were found using the term "accessible tourism" and equivalent terms in main Boolean search engines (e.g. Google) as well as online directories of companies that deal with this market. ENAT's member directory[22] was also used as a reference.

Additionally, respondents of the questionnaire (who agreed to further co-operate) where asked to mention any accessible tourism specialist company and suggested a few.

The criteria used for the selection of the sample required the existence of at least one of the following elements: originality, meaning, success and best practices. The sample was restricted to companies that offered online information in English or Spanish.

7.2.3.3 DATA COLLECTION

In order to collect data of the companies, a review of information available on their websites and third-party references was carried out. Occasionally the web review was complemented with email and phone interviews or emails to the managers.

7.2.3.4 DESIGN

The case studies include key information on the company, including range of services, years of activity, and other elements and a short text of around 100 words meant to sum up the most relevant aspects of each company. The deliberately brief format has be chosen to allow a larger number of companies to be included, offering a richer diversity of practices and approaches.

7.2.3.5 LIMITS

The small number of cases and the unavoidable bias in the selection can offer no guarantee for establishing a good representation of the whole in the findings. A pre-established marking system would be necessary to assess the accessibility good practices of the tourism businesses.

7.2.4. INTERVIEWS[23]

Interviews with experts carried out, so gain familiarity with the concepts, current issues and priorities, regarding accessibility in the tourism sector and in the society as a whole.

The interviewed experts are the following.

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[22] http://www.accessibletourism.org/?i=enat.en.member-search
[23] The whole transcript of the interviews can be read in the annex 2 (in English and Spanish)

- Javier García González, accessibility architect
- Miguel Nonay, activist and consultant
- Diego González, manager at Accesturismo and president of RedEstable[24]
- Juan A. Regojo Zapata, manager of the consultancy R&Q

8. ANALYSIS OF RESULTS

This section analyses resulting data of the questionnaire and the case studies.

8.1 QUESTIONNAIRE[25]

Who responded?

A total of 222 respondents were taken into consideration. As expected given the 'online bias', the sample was much younger the real PwLM collective (Fig 6). The 'peak' on the age-range 50-59 may be explained as a combination of disability incidence and relative high Internet penetration.

Fig 6. Sample by age range

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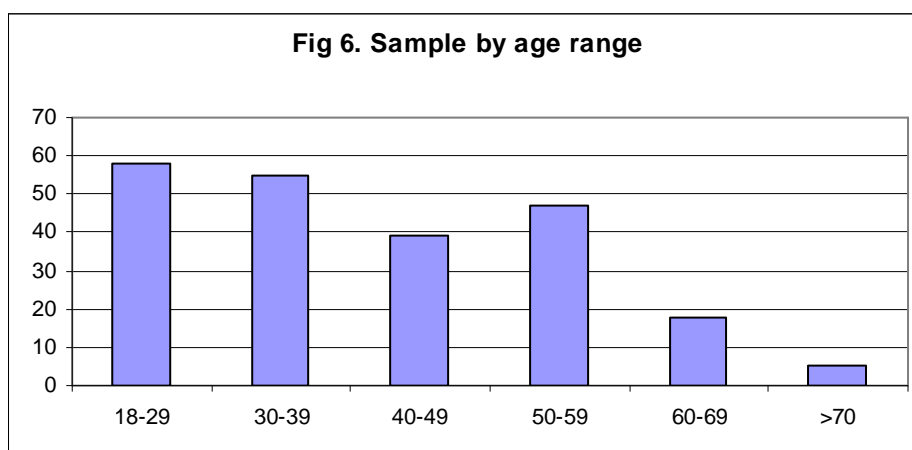
[24] Association of Accessible Tourism Companies

[25] The data informing the data mentioned in this section can be consulted in the annex 1, where relevant chart and tables have been placed.

The questionnaire accepted respondents from everywhere around the world. However, most of the respondents come from a rich country. In fact, only 5.5%[26] of them do not belong to an OECD country. This supports the wealth and educational bias associated with the use of the Internet mentioned in the limits of the questionnaire.

The choice of an online questionnaire has resulted in a lack of data from lower-income PwLM with less education. In particular, very little data has been collected from developing countries. It seems very clear that being affluent and living in a wealthy country contributes significantly to the possibility of travelling.

The language barrier introduced by the choice of languages for this questionnaire alone has excluded important parts of the world's population. As a result, countries such as Japan and China have unfortunately not been examined at all in this report. Therefore, we can only assume that their citizens also have the desire to travel, but that they confront greater financial constraints and more physical barriers, as it is possible that the awareness of the need for accessibility has not penetrated to as great an extent as in wealthier countries.

Most respondents have a nationality from either the European Union or North America[27]. As the sample is spread among 21 countries (Fig 7.), possible correlations between country original and other variables have not taken into account.

Fig 7. Respondents by country of origin			
Spain	44	Netherlands	2
Germany	40	Bolivia	1
France	36	Brazil	1
USA	21	Israel	1
UK	19	Italy	1
Iceland	18	Norwegian	1
Switzerland	15	Philipines	1
Austria	6	Serbia	1
Canada	4	Sri Lanka	1
India	4	Uruguay	1
Australia	2		
Mexico	2	Total	222

People who use a wheelchair or other mobility aid were the ones that were most active in responding, rather than those who just had mobility considerations like seniors. As mentioned before, there was the possibility to respond all the questions on behalf of other, as long as that person was a travel companion. 33% of the respondents took advantage of this possibility and responded on behalf of their travel companion with limited mobility. Most of those were relative or friends and only (23%) in comparison with their usual assistants

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[26] 5,5% of the non-OECD countries correspond to 8 respondents from Mexico, Bolivia, Israel, Sri Lanka and India

[27] A complete list of the respondents by country can be found in the Annex 1

(10%). More women (59%) responded than men, a proportion very close to a comparable questionnaire of Darcy (Darcy 2009).

The sample showed a high rate of employment: only 30% were unemployed. For a comparison, in the UK, 70% of disabled people are out of work (Berthoud 2006:41). This reinforces again the hypothesis that the sample given the online bias and interest for travel, the sample is more educated and enjoys a better economic situation that the average PwLM.

Not unsurprisingly, a few respondents commented that the reason of their mobility limitation was caused not by a disability or age-related movement limitation but by overweight.

> "As a fat person, I don't get taken seriously and I have it much more difficult!"
>
> Respondent DE-32

In terms of gender bias, males seem take more decisions by themselves and slightly less dependent on others. It could be that males are more reluctant to admit they need assistance. This could explain that more chose "sometimes" instead of "mostly". See tables 8 and 9:

Fig 8. Who makes most of your decisions related to travel?			
	Myself	Others	Total
Female	68,91%	31,09%	100%
Male	77,33%	22,67%	100%

Fig 9. Do you need any assistance?			
	Yes or mostly	Sometimes	No	Total
Female	61,83%	23,66%	14,50%	100%
Male	55,56%	28,89%	15,56%	100%

Travel habits of PwLM

The results show that travel habits of PwLM are conditioned by their needs of accessibility.

Most choose 3 to 5 stars hotels (Fig 10), since these ones which generally offer adapted rooms. Hotels of 1 or 2 stars only make the 10,62% of the market. Comments from respondents suggest that the preference for more expensive hotels is rather conditioned by the lack of accessibility of cheaper hotels, than by the buying-power:

> "I don't travel more often abroad for the lack of accessibility, the lack of information and a 50% over cost, which I don't want to pay"

Respondent ES-19

"Accessible budget hotels are difficult to find"

Respondent EN-20

Fig 10. Preferred accommodation

8,38%   2,23%

9,50%

10,61%

31,84%

10,61%

26,82%

- Hotel 3 stars
- Hotel 4-5 stars
- Hotel 1-2 stars
- Private apartment
- Friends/Family
- Hostel / Cottage
- Camping
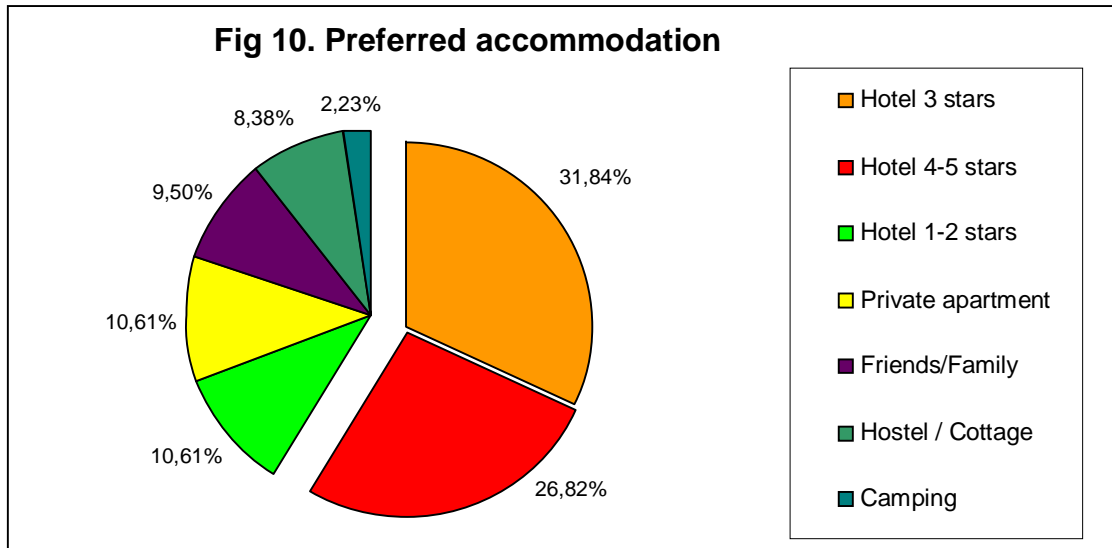
It has been claimed that PwLM are more likely to travel in low-season than average (Design for all Foundation 2008), a statement that seems to be confirmed by the present data: only 15% of the respondents affirmed that they could not travel during the low-season (Fig 11). The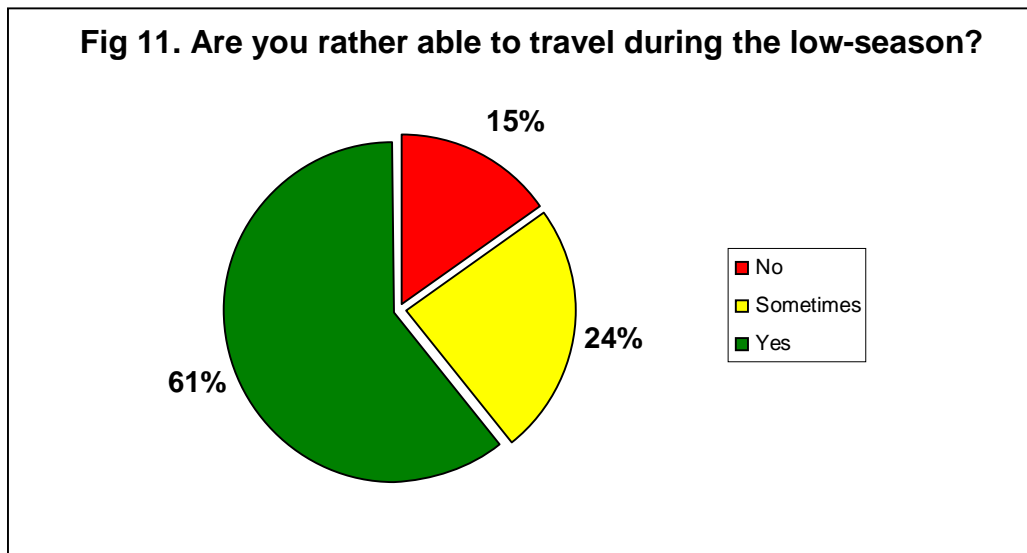 availability of PwLM in low-season may be explained for the simple reason that many of PwLM do not work full-time but still enjoy social benefits or are retired.

Fig 11. Are you rather able to travel during the low-season?

15%

24%

61%

- No
- Sometimes
- Yes

As expected, the main reason for travel was vacations. However, as much as 24% declared that business was a reason to travel, which is again in line with the assertion of a relative good socioeconomic position of the sample.

Some respondents declared in the open questions that they travel in a more courageous ways, even to places where accessibility is very poor. The

challenge is overcome by a positive attitude and the pro-active search for solutions to accessibility problems. Even adventure sports (riding a horse, diving, ultralight flight, paragliding, rafting…) seem not to be out of reach to some PwLM.

Open and follow-up questions, suggested that at least some cruise companies are capable of offering a complete accessible tourism product.

> "The best travel experience I've had whilst disabled was this year on a cruise liner. Everywhere was accessible; they seemed to look after all their guest's."

> Respondent EN-84

> "…The best travel for us has been cruising. Most ships and ports in the Caribbean and Europe are accessible and have easy rental of cars or cabs to get around"

> Respondent EN-15

Special Requirements

Here we will attempt to analyse the requirements of PwLM from the travel industry.

When asked what the most relevant accessibility element is, the main entrance ranks highest and with a very little deviation compared with other elements analysed (Fig 12). The bathroom seems to be regarded a high importance: photos and diagram rate high. Comments reinforce the bathroom to be a key element of accessibility in accommodation.

The high variance of the responses indicates that PwLM constitute a very diverse collective with very different access needs. The high variance indicates that many elements have been often rated the maximum or minimum score, depending on the individual needs of the PwLM.

Fig 12. Importance given to accessibility elements in accommodation (5 is the highest score)			
Element	Mean	Std. Deviation	Variance
Type of access to main entrance	3,88	1,341	1,798
Lift information	3,84	1,464	2,143
Accessible parking place	3,77	1,406	1,976
Largest free space at side of bed	3,61	1,447	2,093
Bathroom photos	3,56	1,434	2,056
Bathroom diagram	3,52	1,53	2,342
Type of door	3,48	1,515	2,296
Shower seat	3,47	1,588	2,523
Room photos	3,3	1,459	2,128
Height of bed	3,22	1,477	2,18
Room diagram	3,02	1,513	2,289
Alarm system in room	2,81	1,486	2,209
Light switch next to bed	2,79	1,521	2,312
Height of the rail in the wardrobe	2,75	1,46	2,131
Clear space underneath the desk	2,7	1,446	2,09

In terms of perceived obstacles to travel, the inaccuracy of the information on accessibility rated highest (see fig. 13). According to the respondents' very recurring comments, the accuracy of the accessibility information is key:

> "I have to say that often I have come across unpleasant surprises: I was sold an adapted room and once there it is was not."

> Respondent ES-33

> "After stressing [I use a] wheelchair and [that I] need an accessible room to arrive at the hotel to be confronted by wide sweep of stairs and [there was] no elevator. Receptionist issued our now favourite phrase, 'You didn't say he couldn't walk!' "

> Respondent EN-32

"I love to travel but information is hard to find online […] I have found that bathroom setups are the most important to know. Even if a hotel says there is a roll-in shower, this could mean very different things".

Respondent EN-40

Fig. 13. Average rating of factors perceived as an obstacle to travel (5 is the highest score)			
Obstacle	Mean	Std. Deviation	Variance
Inaccurate information on accessibility	3,91	1,278	1,633
No accessible transportation to get to the destination	3,93	1,256	1,577
No accessible transportation at the destination	3,94	1,218	1,483
No accessible accomodation	3,99	1,238	1,532
Economic constraints	3,18	1,376	1,894
Health problems	2,69	1,501	2,252
Lack of confidence	2,62	1,379	1,901
Lack of assistant	2,58	1,495	2,236
Lack of interest in travelling	1,79	1,269	1,611

The lack of accessibility itself (be that transport or accommodation) ranks second and lack of interest in travelling ranks the last one. Despite improvements in air transport regulations, respondents tend to agree that their wheelchairs are at risk when using a plane, often to be broken or lost. Lack of sensibility of security was also mentioned:

"The security in some European airports is so stupid that they don't get that the wheelchair is basic need […] and they don't let it through the toll…"

Respondent ES-32

Another factor that was not included in the pre-coded questions, but arose in the open questions, is the lack of adequate training of tourism professionals. Respondents not only complain about their lack of their technical knowledge about accessibility but their unhelpful attitude.

"One of the biggest obstacles to travel is the ignorance of the [tourism] professionals. [They should understand that] we can take our own decisions, travel with anyone we want and that not accessible facilities can become so with good-will"

Respondent ES-31

I have just returned from China where I did a number of internal flights. The formal service offered was years behind that of the UK but the on-board staff of the various airlines made everything possible in a way that would now be unthinkable in this country.

A question has been included in the questionnaire to identify the most demanded services at the destination. The three most demanded services at the destination are airport transfer, accessible hotel bookings and accessible tours. Other services are also demanded; especially wheelchairs of different types (see Fig 14).
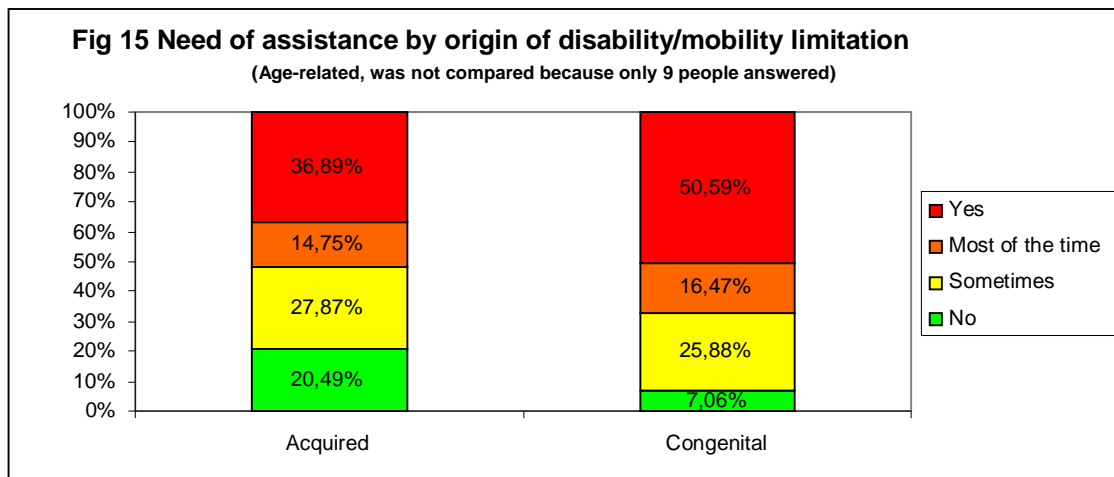
"Hotel and plane are can be done but tours are really difficult to get"

ES-29

Fig 14. Most demanded services at destination

By percentage of all mentions

42
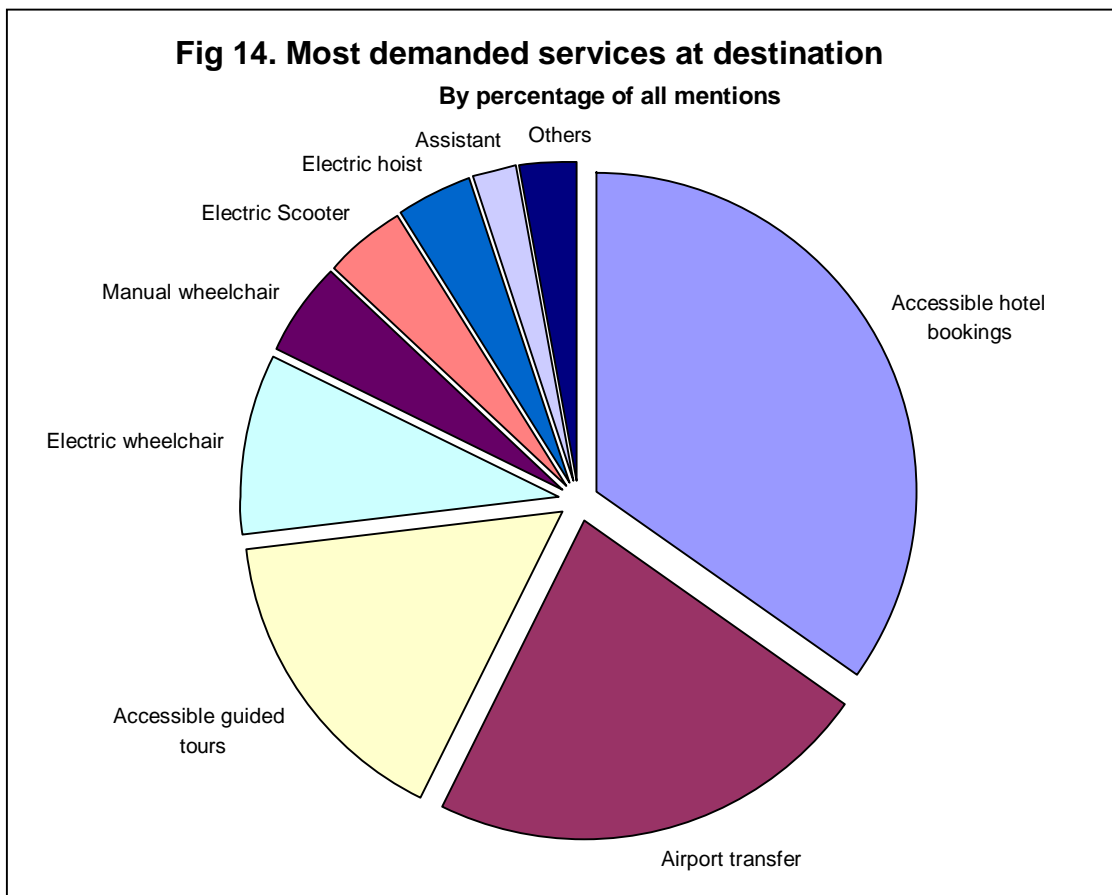
Sociological differences by origin of disability

Some differences arose between those with an acquired disability or were born with one. Age-related mobility limitation was not considered as a subgroup due to insufficient sample (only 9). Those who acquired their disability due to a disease, accident or other seem more likely to take their own decisions (10% more), need less assistance by others (Fig 15) and represent a higher proportion among those with fully-employed (58% vs. 48%).

Fig 15 Need of assistance by origin of disability/mobility limitation
(Age-related, was not compared because only 9 people answered)

	Acquired	Congenital
Yes	36,89%	50,59%
Most of the time	14,75%	16,47%
Sometimes	27,87%	25,88%
No	20,49%	7,06%

8.2 CASE STUDIES

In this section 11 companies with a diversity of size, experience, approaches will be presented.

COMPANIES ADDRESSING THE ACCESSIBLE TOURISM

accessible portugal	Lisbon	DMC[28]	Founded in 2004

This Lisbon based travel agency specialises in accessible tourism. It has a multilingual website, showing a strong international focus.

It offers a comprehensive set of services that may be bought individually or in a package. Its core product is a tour based on the use of vans, fully accessible and with elevator, providing the tourist with accessibility and flexibility at the same time, two things that seldom come together. The also offer a wide range of other services such as hotel booking, equipment rental and sale, airport transfer. Even some "adventure sports" like paragliding or aerial sightseeing.

Accessible Portugal edits a magazine in English language covering topics related to accessibility and travel

The prices are expensive as products are aimed at the high-end market, which may indicate absence of competition.

www.accessiblebarcelona.com	Barcelona	Online booker	Founded in 2003

Accessible Barcelona is the entrepreneur initiative of Craig Grimes, who is a wheelchair user. It offers airport transfer, equipment rental and, most importantly, hotel bookings.

The company offers very complete and detailed information relevant to independent travel in Barcelona, such as accessible attractions, accessible transport and general tourism tips.

The strength of AB is the review on accommodation, offering for free extremely detailed information on accessibility on every item, such as lift, doors, bathroom, bed etc.

Craig uses the social networks to build a reputation as a knowledgeable person, who is disabled himself and therefore reliable.

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[28] Destination Management Company

	Valencia	Integral access company	Founded in 2005

Adaptamos is a company specialising in accessibility in general and tourism in particular, addressing the Spanish market.

Initially, they started by organising accessible tours to attractions in the city of Valencia or nearby and offer qualified assistants and transfers around the city. Hotel bookings are offered but no information is displayed online.

They later expanded to take advantage of their expert knowledge on accessibility. Now other three other business lines are active: consultancy, training and assistive technology. The selection on assistive technology is really comprehensive.

Adaptamos is benefiting from the gained knowledge about accessibility and disabled people and it is well integrated in the local fabric, with many agreements with local authorities and attractions.

	UK	Tour Operator	Founded in 2004[29]

Coop Travel is the travel division of the Co-op group, a conglomerate of significant size based in the UK, which claims to be ethic-oriented.

The offer mainstream tourism products but as a side line called "disability travel", which includes equipment rental, insurance and of course package booking. 16 destinations (4 in the UK and 12 others in Spain, Portugal, Greece, Turkey and Egipt) offer equipment rental.

A support request form is offered, where very detailed questions on information on mobility limitation are formulated to adapt to the tourist needs.

To offer vacation packages, Coop Travel works in partnership with some specialist operators based in the UK: CanBeDone, Red Point, Traveleyes and Hearing Concern.

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[29] After merge of the two biggest co-operative consumer groups in the UK.

Scandic	Stockholm	Hotel Chain	Founded in 1962

Scandic is a Swedish-based chain company mainly focused on the Scandinavian country. This group has an orientation on sustainability and claims that its hotels are environmentally friendly.

Under "special needs", Scandic states that its hotels are for everyone, where specific arrangements in case the guest is disabled, has an impaired hearing, is allegic or has an impaired sight, in almost all hotels. Specific information on accessibility is displayed for each hotel online.

Scadic declares having created the position of "disability coordinator" to coordinate the checklist that all hotels must comply with.

Sol Melià HOTELS & RESORTS	Mallorca	Hotel Chain	Founded in 1956

Sol Melià is one of the largest hotel chains in the world with hotels in most Europea and American countries. Melià has included accessibility as part of its CSR[30] but does refer to it outside the annual report on CSR[31].

There it claims that to have invested over 60.000 euros in 2009 to adapt rooms to handicapped people[32], accessibility ramps, lifts and mechanic systems for swimming-pools.

The company does not state the minimum accessibility of its hotels and it does not provide any way to book an adapted room online.

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[30] Corporate Social Responsibility
[31] Available here: http://es.solmelia.com/html/dsostenible/es/pdf/memoria2009.pdf
[32] In spanish it used the term minúsvalido, which does does not have as bad connotations as handicapped but it is worse than "discapacitado", the equivalent of disabled.

The Hytte	Hexham, Northumberland	Cottage	Founded in 2008

The Hytte is a self-catering cottage with four bedrooms. Its design was inspired in the traditional Norwegian farms, meaning timber, turf roof and spacious gardens. Additionally, some elements like spacious gardens, patio areas, sauna and outdoor hot-tub spa contribute to make it a luxurious accommodation.

This lodge is both environmentally-friendly and fully accessible by PwLM. It won several awards for both sustainability and accessibility. In its second year it reached 97% of occupancy.

In terms of accessibility, its website provides a complete diagram of the house and pictures of all rooms, including bathrooms and detailed access information.

IntercambioDeCasaSinBarreras			
Intercambio de casa sin barreras	Vitoria (Spain)	House exchange	Founded in 2009

The name of this innovative company literally translates to "barrier-free house exchange" and its purpose is exactly that.

Adapted apartments are not easy to find. One can exchange his or her adapted room for an equivalent somewhere else in the world.

This is not only a cheaper alternative to a hotel, but it has the advantage that one is guaranteed a properly adapted house that the house is properly adapted.

Su Taxi Adaptado	Barcelona	Adapted transport	Founded in 2010

This company translates to "your adapted taxi" and provides a wide range of accessible transport especially for the surroundings of Barcelona, where these kind of services was almost non existent before this company was created.

The company provides accessible vehicles, all of which are bigger than a normal adapted car, able to pick up several wheelchairs at the same time.

The demand has been unexpectedly high, making impossible to attend all the orders. However, the main difficulty is to normalise the business legally. The authorities do not consider it a taxi, as it does not comply with the licence requirements. At the same time, the vans are too small to be considered buses. This makes impossible for the company to work at bus areas in the airports or in hospitals.

accessible sweden — independent holidays for the mobility conscious	UK	Tour operator	Founded in 2008

This British tour operator specialises in Swedish holidays available for everyone, "regardless of reduced physical abilities".

AS sells packages from a range of possibilities, including city tours, cruising, bird watching, moose safari etc.

The information accessibility is provided "with a detailed accessibility pack, tailored to the chosen locations and activities".

To make a booking AS requires filling a very detailed question with details about the mobility limitation and the services the tourist may be interested in related to disability.

CAN be DONE	London	Travel Agency	Founded in 1985

Can Be Done arranges holidays and travel for people who have mobility limitation of some kind since 1985. It sales packages with hotel nights and airport transfer, but does not include flights nor any service at the destination. The promotion is based on their experience and reliability.

Destinations include Europe, USA and Canada both in cities and the countryside. It also offers the possibility to arrange tailor-made holidays, including adapted self drive vehicles.

Accommodation is personally inspected or suggested by a wheelchair user. One important point is that it attempts to offer the very same thing them as to those who are able-bodied.

9. DISCUSSION

9.1 PwLM TRAVEL

A complex and heterogeneous niche

Claims saying that PwLM share a common desire to travel (Darcy 1998:65) are confirmed by the questionnaire eliminating the common myth that says that "disable people do not travel". From the respondents' comments, it is possible to say that PwLM blame their limited opportunity to travel on the lack of a truly accessible tourism.

If the desire for travel is clear, the behaviour and needs of PwLM is not so much so. The size of the collective formed by PwLM is too complex – and probably also too sizeable – to be considered a homogenous market segment.

Disabilities are complex and multifaceted, defying generalisations. The repercussions of each disability are very unique, meaning that accessibility needs are different for each and every disabled person. For example, blind people for example have very particular needs that other disabled people do not share. Even, two wheelchair users can have very different needs according to their particular health situation and age, despite what common perception may tell. Although some generalisations could apply to certain disability dimensions (e.g. deaf people prefer to travel together) this should not halt further research to discover differentiated patterns within a given group.

The results showing clear differences between congenital and acquired disabilities could serve as an example for further segmentation. This kind of knowledge can be useful for better addressing their particular needs, or simply adapting the tourism product to each particular subgroup of PwLM. However, in order to generate this kind of information, a vast amount of information needs to be collected and statistically analysed.

Travel planning and accessibility information

Accessibility information is at the core of the tourism accessibility puzzle. One of the biggest differences – with regards to the travel experience – between travellers without any mobility concern and PwLM is the greater need of planning the journey, to ensure accessible vacations free of negative surprises. Reliable accessibility information is difficult or, in some cases, even impossible to find. This requires a considerable amount of work in terms of individual research, often including direct telephone contact with hotel managers, or seeking out references left by others.

But even when reliable accessibility information exists, this may not be enough, as many PwLM require specific details that are very seldom provided. Just to name a few examples, the door width is essential for knowing if the wheelchair will be able to enter the room, the diagram of the bathroom indicates how easy it will be to move from the wheelchair onto the toilet or shower chair, the height

of the bed suggests if it will be possible to go to bed without assistance… All these little pieces of information can be essential in determining how accessible a facility is.

It is not surprising that PwLM tend to be loyal to products and services they have found satisfying (Design for all Foundation 2008), given it is not particularly easy to find others. In the same way, it is understandable that cruises, in which accessibility throughout the vacations might be guaranteed, are very much appreciated as a travel solution.

For the traveller with limited mobility, research does not end with the obtaining of this precious information. First-hand references may be required to confirm the claims, since so called "accessibility" often turns out to be exaggerated (Ray 2003).

Personal experiences, which are a very good source of accessibility information, may be shared with friends and acquaintances, or shared with a wider audience through the Internet. In particular, as revealed in responses to the questionnaire, social networks provide new sources of first hand information from users who have already been to the destinations in question. In fact, it has been suggested that people with disabilities may be the "single segment of society with the most to gain from the new technologies " (Kažemikaitienė & Bilevičienė 2008) as with these they "are capable of handling a wider range of activities independently" (Burgstahler 2009). This suggests that the potential of the Internet as a channel for communication of accessibility information has not been fully exploited.

As the use of the Internet among all age ranges and the use of smart phones keep generalising, the Internet will be reinforced as a channel to transmit accessibility information. The ease of use, quality of information and the possibility of directly knowing about previous experiences, make this channel very appropriate to disseminate this essential information. Direct contact between PwLM to share information only seems to have a very high potential to succeed. Tripbod.com, a website that sells pre-travel knowledge from locals to travellers, seems to offer a good example on how this information exchange could be carried out.

Tradition paper guidebooks can also be useful, especially among non-users of the Internet. Good examples of complete and reliable guides to accessible tourism do not abound. Without a doubt, the accessibility guide of the town of Arona (Arona Turismo 2009) is an outstanding example. Arona is a village in Tenerife (the Canary Islands) which is know for having developed a number of good practices in accessible tourism, such as accessible promenades, accessible accommodation etc. (Domínguez Vila & Fraiz Brea 2009:12).

Ideally and following Universal Design's principles, all guidebooks should include information on accessibility, so special guides are not necessary. Realistically, specific guides are necessary until the awareness on the problem of access has become generalised.

Both online and offline guides would need to stick to certain common symbols, which are internationally recognisable. Currently, there is no common international iconography, preventing by different nationalities at the same time. Symbols are required to represent an accessible shower, accessible toilets, accessible beach and so on. The number of symbols can be quite big as the guide of Arona proves (Arona Turismo 2009). This is very important to facilitate the decision-making process of tourists. Given that tourism is a economic sector that very often deals with people of varied nationalities, achieving an international common symbology should be a priority.

But it is impossible to agree on a common symbol if previously there is not a common measurement of accessibility, as it is the case at the moment. In some countries different law regarding accessibility in buildings and facilities co-exist. In Spain for example, there is a different law for each of its 17 regions. National harmonisation is necessary but not enough. Doing so at the international level will be even more beneficial. The European Union in particular is well positioned to start this process. Other fields like commerce and the labour market have already undergone a process of standardisation.

These accessibility measurements should take into consideration the differences in disability *and* mobility, as they are currently failing to do so (Church & Marston 2003:1). There are still no common standards of accessibility based on common criteria. Although what is accessible to one PwLM may not necessarily be so for another, certain minimum standards and codification would simplify the search for accessible options.

9.2 OPPORTUNITIES FOR DESTINATIONS

The economic argument should be considered especially in mature destinations, where accessibility can become a powerful competitive advantage against emerging markets, which may still lie behind in accessibility. However, this will not be possible without a participative and global approach to the construction of accessible destinations.

Access along the tourism chain

Results suggest that for tourism to be possible, accessibility is required in not only one of its components, but all. In other words, all the elements of tourism process need to be accessible. This includes transport to and around the destination, as well as accommodation. A perfectly accessible hotel cannot be accessed without an accessible transportation and vice versa, a perfectly accessible bus could drop tourists in hotels they cannot access. But transportation plus accommodation may not be enough for many, especially in a holiday context: tourist want to visit attractions. Not surprisingly, a high demand for accessible tours has become apparent in the questionnaire results. This may not necessarily be because organised tours are preferred over independent travel, but most likely because – again – the lack of information on local transport and attractions produces uncertainty when researching the destination.

Achieving accessibility is everybody's business… and duty

A global approach and commitment is required to provide the same travel opportunities for PwLM in every single element – from the decision to travel, to returning home. Tourism is a multi-stakeholder phenomenon; therefore the transition to a more accessible tourism requires the involvement of all stakeholders, including tourism businesses and different levels of administration. The public sector has an essential role to play. Issues such as public financial support, certification, destination marketing and public infrastructure all require the involvement of every administrative level of political power (local, regional and national authorities as well as supranational).

Lack of involvement of the core beneficiaries of accessibility in the decision-making process and policy design can affect the effectiveness of any action regarding accessibility. Often, compliance with legal requirements is not enough to ensure accessibility is achieved, because law-makers and those who design facilities have frequently not been directly exposed to problems relating to accessibility. Comments from respondents illustrate this well, when they repeatedly comment design flaws that affect their ability to use a supposedly accessible facility. The flaws are often not due to a lack of resources, but rather a lack of clear perception of the needs of PwLM.

Another point people without mobility limitations seem to miss when designing accessible spaces is the need to be integrated

Universal Design spirit prevents the formation of "wheelchair ghettos", where everything is fully accessible but most users are PwLM.

Although it may be difficult to avoid such dynamics in certain situations where fulfilment of the requirements of PwLM would limit the experience of other able tourists, they may prevent the normalisation and integration of PwLM into society". Furthermore, a high concentration of PwLM may have a noticeable effect on either able people nor the PwLM themselves.

The most remarkable effort to provide standardised accessibility information is the French label "Tourisme et Handicap" (Tulliez 2007), which certifies full accessibility – understood not only in the physical dimension – for four types of disability: motor, sight, hearing and mental, for various categories of tourist establishments, such as accommodation, dining, tourist sites and leisure facilities, through a recognisable icons and symbols. (Fig 16)

Fig 16 Label "Tourisme et Handicap"

9.3 ENGAGING BUSINESSES

Different approaches to accessibility

The case studies show very different approaches to accessibility. The most common one, however, was not included: compliance. It appears that for most business – not only in tourism –, accessibility is a legal requirement that one must comply with. Accordingly, costs of accessibility compliance are regarded as expenses rather than as an investment. This being the case, businesses try to minimise it the same way they would any expense.

Even when money has put into reforms to comply with minimum accessibility as established by the law, it does not necessarily mean that the facility will automatically become truly accessible. This is not only because the legal requirements can be lacking: PwLM are not always obvious.

If there is neither understanding of accessibility nor any empathy with the PwLM it is highly probable that flaws will arise. These can be as simple as not making sure there is an accessible path to adapted rooms, or promoting a hotel as accessible where there is neither adapted parking nor accessible public transport.

In the last years, some smaller businesses have succeeded in addressing the easy access market, focusing on it as their main market (*Accessible Barcelona, Accessible Portugal, Adaptamos, CanBeDone, Accessible Sweden, The Hytte*), suggesting a certain momentum within accessible tourism entrepreneurship. These companies, unlike those mentioned in the last paragraphs, have a pro-active attitude: they understand accessibility as being the core of their business, and for doing so obtain the trust of their clients. They understand the needs of PwLM and they act accordingly, offering quality information on accessibility. Their employees are used to dealing with the typical concerns and problems that PwLM face, as they do so in a daily basis.

Some entrepreneurs have addressed very specific needs that have been ignored altogether by the mainstream tourism sector (*Su Taxi Adaptado and Intercambio de casas sin barreras*) with innovative business models.

Other bigger companies like *Scandic and Coop Travel* have understood that there is certainly a market to be addressed, and act accordingly. Scandic in particular has decided to centralise all issues regarding accessibility under the supervision of a single person, making it possible to coordinate strategies among all the hotels in the chain.

Sol Meliá, on the other hand, seems to see accessibility as a matter of charity – a good deed, but not a source of revenue. Accessibility is presented as part of its CSR policy, but it is not integrated in the daily business: it offers no general information to PwLM, and there is other way to obtain the accessibility information of each hotel besides directly contacting each one.

There seems to be a correlation between the size of an organisation and the potential pro-activeness towards accessibility. The bigger the company, the more difficult is to become accessible. This could be because of practical reasons, as it is harder for bigger organisations to adopt larger changes.

Possible solutions

Legislation may seem to be the simplest way to make businesses "go accessible". The most prominent example of this coercive tactic is the Americans with Disabilities Act, which has been successful in buildings and facilities improving in the USA (Goodwin 1995).

> "Best access was definitely in Florida - they had ramps almost everywhere and if they didn't they were so embarrassed and terrified of prosecution."
>
> EN-67

However, as it may also happen with other issues (e.g. sustainability), it is very voluntary change is more likely to succeed than the requirements demanded by law alone. In Spain for example, legal requirements are not working particularly well. According to Diego González[33], one of the experts interviewed for this report, only 8 to 10 per cent of Spanish hotels fully comply with legal requirements). He demands harder enforcement of the law, following the example set by the US, where a coercive way of obliging businesses to comply with legal accessibility requirements seems to be successful.

According to available data there is a significant easy access market, but even when companies know about it, they have few successful examples to look at and emulate. Businesses which are not accessible do not see PwLM, and therefore they are not exposed to the problem of lack of access, reinforcing the invisibility of the market and therefore their lack of interest.

The business case needs an emphasis on the overwhelming size of the easy access market, and more good examples on how good practices produce concrete results, so that they can easily imitate these. The results are not only monetary: An accessible business means quality as well as a sensible management.

Design also has a role to play, which should be taken into account. "Orthopaedic-looking" facilities have the ability to scare able-bodied users – and business managers know it. According to Diego González, some able-bodied clients may even refuse being booked in an adapted room because "they are not sick or disabled!". This is a paradox, as accessible facilities may be required for PwLM but, being more spacious, are also beneficial for able-bodied users.

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[33] See the complete interview in annex 2

9.4 SUMMARY

The arguments for accelerating the transition towards accessibility are strong. There is clear evidence that it possesses the potential to significantly benefit locals, tourists and tourism businesses.

However, there are three main obstacles. Firstly, lack of common standards and regulations regarding accessibility. The second one, very related is the poor and unreliable information on accessibility, which places a serious limitation on the potential travel experiences of PwLM. Thirdly, a holistic approach is lacking: separate and uncoordinated efforts alone will not make accessible tourism flourish. A holistic approach that covers transport, accommodation and attractions is indispensable to producing accessible destinations.

To overcome these obstacles, tourism businesses need to be part of the solution. To do so, they need to understand what accessibility means and to what extent it can benefit them. The public sector should stimulate this process whilst simultaneously coordinating efforts to shape a tourism industry which is truly accessible for all.

None of the already mentioned processes have any chance of being successful if they do invite associations for PwLM to actively participate. Consultation with PwLM is essential, not only because they are the key stakeholders in accessible tourism, but because their needs and problems are nowhere near as obvious at they may seem to those who do not have any mobility limitation.

10. RECOMMENDATIONS

Once discussed the implications of the findings of this report the following recommendations are made.

For tourism businesses

- Comply with the current legislation on accessibility.
- Do not overstate levels of accessibility. Reliable and complete information is better even if the accessibility is poor.
- Understand accessibility beyond law compliance, recognising it as moral duty but also as a very promising business opportunity
- Rise awareness and provide specific training on accessibility issues for professionals involved in tourism.

For all administrations

- Legally penalise tourism businesses overstating their accessibility to prevent this bad and common bad practice.
- Recognise that accessibility benefits both tourists and locals.
- Standardise legal requirements for buildings with as many levels of administration as possible
- Raise awareness about limited mobility issues among general population and tourism sector professionals
- Persuade business to recognise the business case that lies behind accessible tourism, providing informative materials.
- Make use of the Internet to communicate accessibility information of destinations on the tourism board websites (making sure it is accessible)
- Elaborate accessibility holistic plans for destinations, devoting the necessary resources to accelerate the transition towards full accessibility
- Recognise accessibility as a competitive advantage among destinations
- Coordinate accessibility policies among administrations and avoid overlapping competences.
-

For national level administrations

- Legally penalise tourism businesses overstating their accessibility to prevent this bad and common bad practice
- Set an certification system, with the purpose of bringing reliable and consistent accessibility information, regarding

For supra national level administrations

- Set an internationally-agreed certification system with as many countries onboard as possible
- Create an international ranking of accessibility with the best destinations in terms of accessibility

For both public and private sectors

- Include PwLM in the decision-making process regarding accessibility, since they are the main stakeholder within accessible tourism
- Create destination guides with accessibility information and channels to provide this information in an accessible way
- Recognise the increasing importance of PwLM under the light of ageing

For PwLM

- Campaign for accessibility, providing electoral incentives for governments and prestige concerns for businesses
- Demand participation in the decision-making processes that affect accessibility
- Give feedback to the business on accessibility and direct them to sources where they can learn more
- Suggest accessibility rules and norms, according to their needs.

For future researchers

- Further analyse the sub groups within PwLM, providing useful data to understand their specific needs and travel patterns
- Contribute to provide further evidence to support the potential economic and social benefit of more accessibility
- Research the situation of PwLM mobility, regarding to travel in the developing countries
- Contribute to the understanding of the psychological and sociological aspects of PwLM travel
- Assess the success of different policies on accessibility; especially assess the relation of specific regulations (like ADA) to tourism.

11. CONCLUSION

As society increasingly becomes aware of the needs of those who experience mobility limitations, and destinations discover the potential for financial gain in being accessible, the process towards an inclusive tourism will continue. At some point, however remote this may seem at present, our society will be accessible for all to the fullest extent.

Meanwhile, there are good reasons to accelerate this process. Whilst it is the responsibility of all, the public sector should lead this process, engaging businesses and raising awareness in society as a whole.

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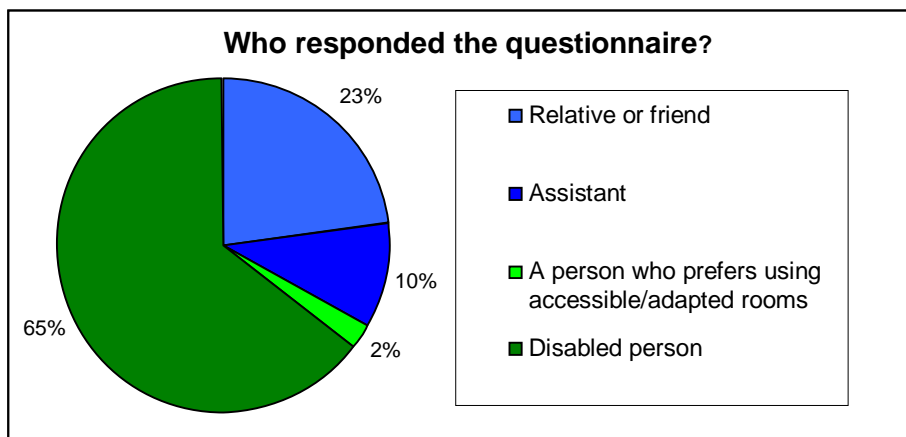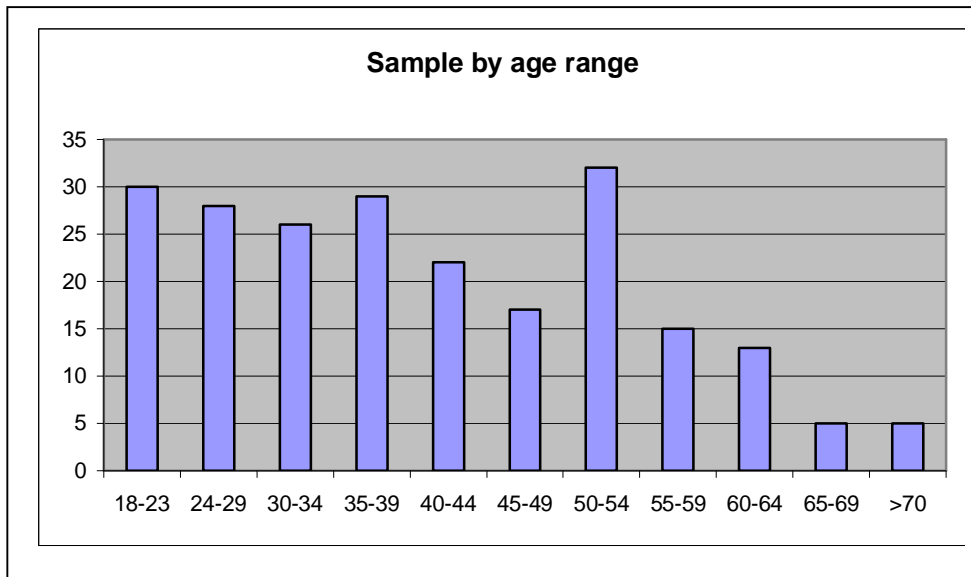Shaw & Coles, 2004. Disability, holiday making and the tourism industry in the

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ANNEX 1 – TABLES AND CHARTS OF QUESTIONNAIRE RESULTS

Sample by age range

Who responded the questionnaire?

Chart 3. Employment status

5,34%
3,40%
10,19%
32,52%

- Full time job
- Unemployed
- Part-time job
- Retired
- Full time studies
- Part-time studies

18,45%

30,10%

Profile of respondents

Chart 6. Main reason to travel is...

23%

- Both
- Business
- Pleasure

1%

76%
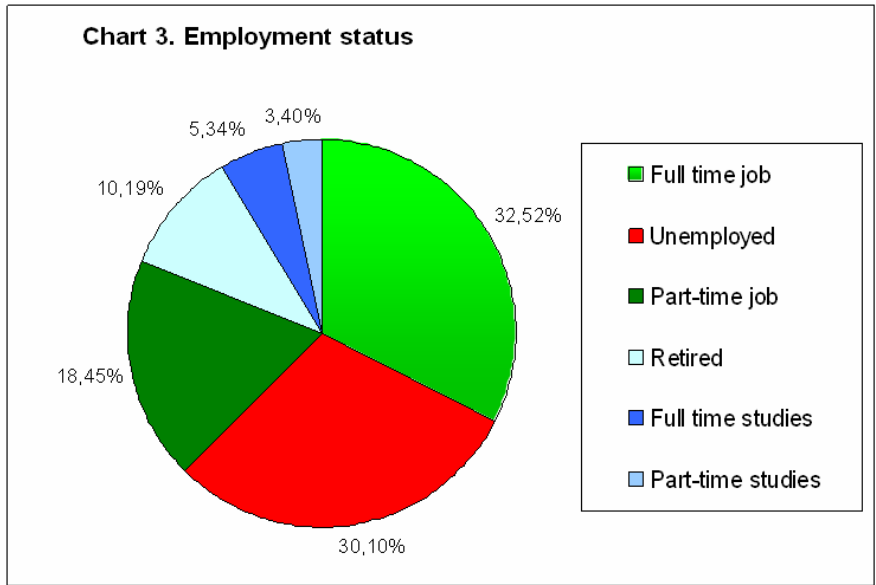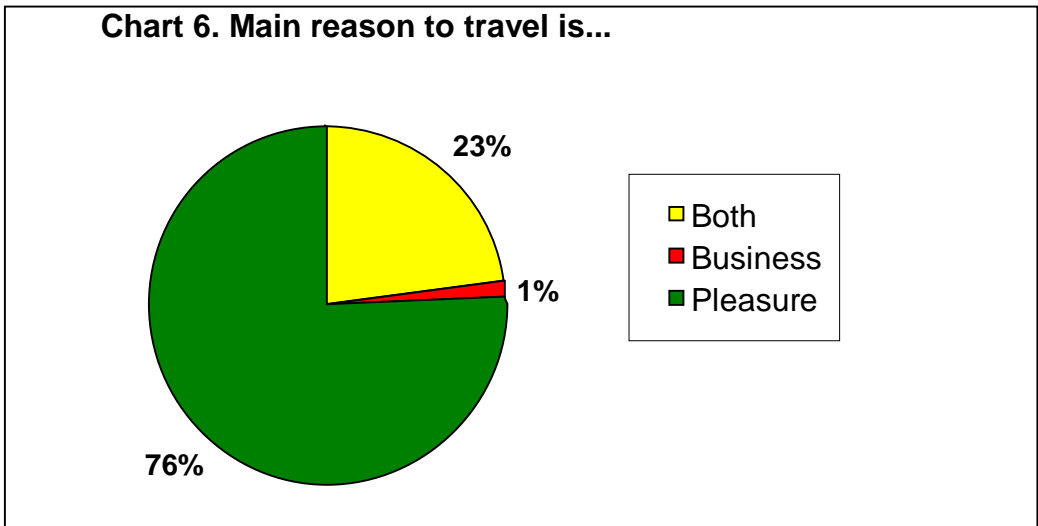
Acquired vs congenital disability

Chart 3 Who makes most of your decisions related to travel?

	Acquired	Congenital
Others	23,58%	33,78%
Myself	76,42%	66,22%

Chart 5. Percentage of full-time employed by disability origin

Age-related disabilities not considered

Acquired	58%
Congenital	42%
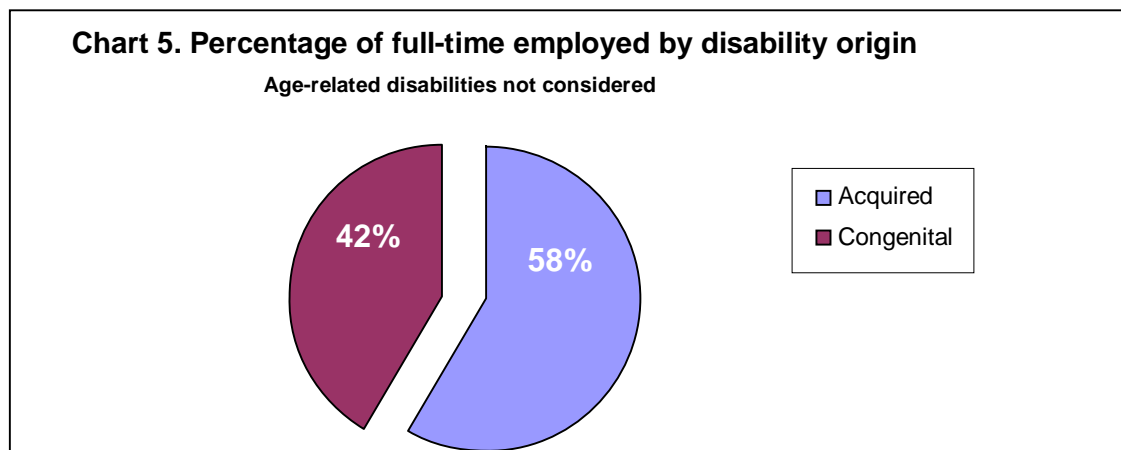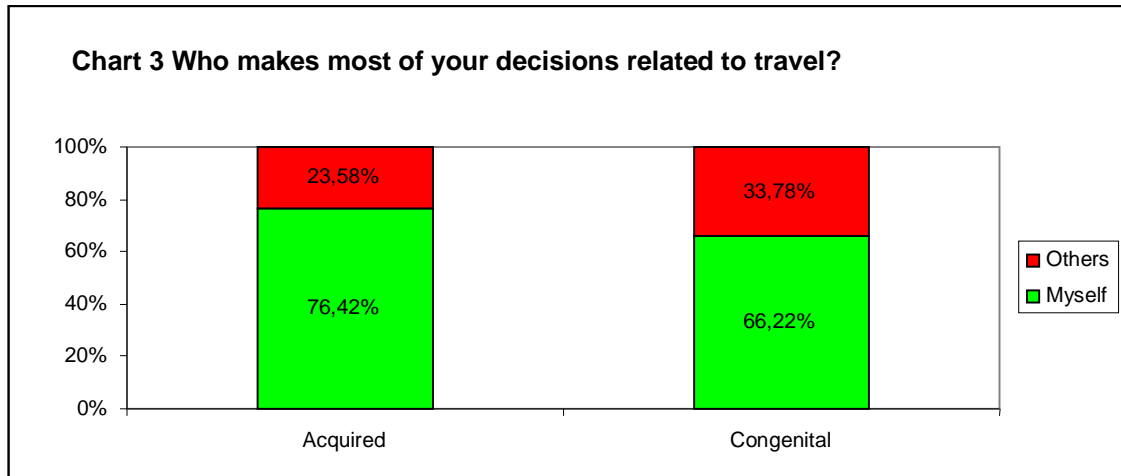
ANNEX 2 – INTERVIEWS WITH EXPERTS

Interview with Juan A. Regojo Zapata (email interview)

¿Cómo ha evolucionado la idea de accesibilidad universal en el tiempo? ¿Cómo es la situación de la accesibilidad en España?

En mi opinión el avance que se produce en el campo de la accesibilidad es de progresión muy lenta ya que exige una sensibilización que va calando con dificultad en los actores que tienen que ponerla en marcha.
En primer lugar se requiere la sensibilización parte de los propios interesados. El asociacionismo en España tiene una historia corta en comparación con otros países. Inglaterra tiene una historia centenaria en este campo. Son las asociaciones las que actúan como grupos de presión para hacer valer sus derechos ante políticos y legisladores.

Aunque el fundamento de ese derecho (el derecho a la igualdad) esté claramente definido en la carta magna de todos los paises occidentales (la igualdad de derechos), las ramificaciones en relación a la accesibilidad no han llegado al rango de ley hasta que personas concretas se han convertido en activistas de sus intereses. Esas leyes han aparecido de forma tímida en un principio y han llegado a su máximo apogeo en España con la promulgación de la DB-SUA, que no es definitiva pero su carácter eminentemente práctico la hace útil.
Al mismo tiempo, en el ámbito normativo, ha habido una acción poco favorecedora con la aparición de las normativas autonómicas, que no han hecho desconcertar a aquellos que tenemos que aplicar estas leyes. La multiplicidad de normativas siempre es desaconsejare.

También es necesario decir que la norma nunca llegará a cubrir todas las necesidades que pudieran darse en este campo. Por ello es necesario que los que determinan o diseñan los espacios tengan conocimiento de causa y sentido común.
Los arquitectos somos los que nos corresponde interpretar y aplicar estas norma a realidad física en las que interaccionan las personas en su diversidad funcional. Se puede constatar que, en general, los arquitectos tiene muy como conocimientos en este campo. Los errores en este campo son errores que más tarde tienen repercusiones económicas importantes y que desprestigian a la profesión. Económicamente es menos grave tener que rectificar una instalación eléctrica, de gas, de agua o aire acondicionado que el tener que rectificar toda una estructura, para cambiar anchos de huecos de ascensor, inclinación de rampas, escalones únicos, anchos de pasillos, radios de giro, anchos de puertas, etc.
La tarea de la formación de los arquitectos es una tarea pendiente. Además de tener un conocimiento de la norma deberían tener un conocimiento cabal de las dificultadas a las que se enfrenta un discapacitado en su actividad diaria. Esto ayudaría a que la accesibilidad se integre de veras en el diseño de los edificios, y la arquitectura moderna.

A pesar de ser poca, la competencia de los arquitectos en esta materia va a más debido al hecho de que las normas obligan. A pesar de ello esto es insuficiente.

Los hoteleros son el penúltimo eslabón en esta cadena de accesilidad. A mi entender son sujetos pasivos del estado de su hotel el cual han recibido de las manos de un arquitecto o han adquirido de un tercero. Pare ellos la accesibilidad es un aspecto más, entre otros muchos, que necesitan observar dentro de su departamento de calidad. Este aspecto pasa de nivel de importancia a otro superior o inferior según la presión exterior a la que se ven sometidos. La vida de los empresarios sigue lides muy pragmáticas.

Sin duda la accesibilidad ha pasado de no tener la más mínima importancia a ser, en algunos casos, a ser un tema recurrente en la mejora de su imagen de los hoteles y cadenas hoteleras, de su "política social corporativa". Las normativas les pisan los talones y la reclamaciones tienen una repercusión negativa en su imagen. En un hotel la imagen que se da tienen mucho valor comercial, ya que la publicidad pagada tienen cada vez menos repercusión y las opiniones de los usuarios tienen más valor y están a la vista de todos en las redes sociales.

A demás de todo esto, ayuda a la toma de decisiones en relación de la accesibilidad, las ayudas que viene de la Unión Europea, y que distribuidas a través de las comunidades autónomas, incentivan a la inversión hotelera. La ayudas que existen en estos momentos llegan a devolver a la empresa hasta en 50% de la inversión.

La industria hotelera española tiene relevancia internacional debido al número de visitantes que pasan por nuestro país todos los años. Por esta razón España es un buen lugar para ser un país de referencia en materia de accesibilidad. La crisis actual es un acicate para los hoteles, que se preocupan más en mejorar la calidad de sus establecimientos.

Los usuarios están cada vez mejor informados sobre la calidad de los hoteles y antes de hacer una reserva buscan referencias. El grado de accesibilidad de un hotel no es fácil de valorar. La variedad y diversidad funcional es muy amplia. Es necesaria una medida objetiva reconocible.

Dentro del ambito de los auditores de accesibilidad hay dos tendencias. Por un lado los que se inclinan a expedir su propio certificado de accesibilidad que, sin quererlo, propician el desconcierto de los usuarios y por otro, los que buscan para sus clientes certificaciones de prestigio y de valor internacional. Esta última postura permite que los usuarios nacionales o extranjeros, preocupados por la accesibilidad tengan una percepción rápida y segura de lo que pueden esperar de ese hotel antes de hacer la reserva. Esta última postura parece la más adecuada para la imagen de los hoteles. La Norma UNE 1700001-2 desarrolla el estándar ISO-170001 y tiene visos de ser la mejor herramienta para los departamentos de calidad en los establecimientos hoteleros, de cara a inspirar confianza en el usuario final.

¿Hasta qué punto las leyes y reglamentos importantes para la accesibilidad?

Los Leyes son imprescindibles. Son un paso necesario pero no suficiente. La norma nunca regulará todos los casos y si lo intenta se convertiría en algo demasiado rígido y farragoso. La accesibilidad necesita de la formación de las personas encargadas de definir los proyectos y reformas de los establecimientos hoteleros. No se puede normativizar todo.

¿Cuáles son las mejores prácticas en cuanto a accesibilidad? (ya sea una localidad o un edificio/infraestructura)

No es fácil de determinar. Y los auditores de accesibilidad nos centramos en la normativa de nuestro ámbito y con dificultad podremos tener una perspectiva internacional para poder escoger el país con la mejor práctica. La mejor práctica biene por la formación, por el sentido común y las ganas de hacer las cosas bien que tengan los actores que intervienen.

¿Existe una lista que un hotel pudiera usar para comprobar la accesibilidad de su establecimiento?

El autochequeo de la accesibilidad con la ayuda de una lista puede tener un valor. Cada auditor tiene la suya.

Una lista de autochequeo en manos de un director de hotel puede ser un primer paso, pero solo lleva a la precariedad de la accesibilidad y a que los hosteleros acometan de una forma simplista, algo que tienen que integrarse en los sistemas de calidad de la empresa y en la formación de sus empleados. Con mucho esfuerzo y tiempo, el director de un hotel aprendería a valorar como sus empleados deben atender a una persona con discapacidad auditiva o visual. Quizá deba dejar este aspecto de la formación de sus empleados en manos de especialistas.

Interview with Javier García González from Inizia (transcription from thephone interview)

Inizia is a small company based in Huesca, Spain. Among its services we can find technical assistance on accessibility and accessible signalisation. Javier, cofounder of the firm:

Accessible tourism's capacity to attract large sums of people has been overestimated.

We don't understand accessible tourism as a tourism product as others. For us, it is maily a social issue.

It seems that the central government has prioritised accessibility in the last years. Whereas this is main because of electoral reasons or because they believe that will attract lots of visitors, we can't say.

Deaf, blind and mentally disabled people travel in groups more often than physically disabled people.

We often find that in new buildings the architects have no idea about accessibility and the design is so poor that needs to be modified to be really accessible. Sometimes we can intervene before the construction takes place but others walls must be torn down. No surprise that the client is irritated that he has to pay an over cost. Accessibility is often seen as a source of spending rather than an investment that will pay off.

We find that many people don't know how to deal with disabled people and need to be educated on it. In fact, many people who have not been personally touched by disability consider people in wheelchairs as objects rather than people.

The law is not detailed enough. Besides, in Spain there are 17 different regional laws. It is perfectly possible to comply to the law and not be accessible.

Information on accessibility is very poor. It is very difficult for disabled people to rely on the claims of what establishments say. In Huesca Province, we analysed 58 cases of rural houses that claimed to be accessible. We found out that only 8 were really accessible.

We see a need for co-ordination and communication between different stakeholders. Disabled people associations, businesses associations and different levels of administration authorities should have a periodic meeting to discuss accessibility issues in a given area. Otherwise efforts are duplicated.

Parking lots and bathrooms are often the most inaccessible elements of any given place.

Banque region attempted to introduce "easy way", a accessible certification but today it has been removed because of the difficulties that encountered.

Big projects normally enjoy better accessibility.

France's certification is undergoing problems.

Interview With Miguel Nonay (Transcript From Live Conversation)

Miguel Nonay, 48, is a Zaragoza-based consultant on accessible tourism, barrier elimination and accessible routes as well as an activist and expert in social networks. His biggest success was to make the Spanish rail company (RENFE) to accept scooters in the trains after a short but very intense online campaign.

"Disabled people have been mistreated in history and many of them are burnout because they have suffered a lot the lack of sensibility of the society. That's why we find certain hostile attitude in some of them. I think we need to be assertive in defending our rights, speak up when there is an unfair situation against us, but always with reasoned arguments".

"Barcelona is the most accessible city in Spain. Valencia, Zaragoza, Sevilla, Madrid and Oviedo are also good examples"

"Sincerity is appreciated from hotels. Even if there it is rather not accessible, by saying so, the most agile disabled people would go there while without information no one would dare to go."

"Heritage buildings should make an effort to become accessible. The argument that the building should not be modified is not acceptable"

"Online social networks have changed my life. Now I know I am not alone, we can exchange information and organise campaigns"

Interview With Diego J. González Velasco (Transcript From Live Conversation)

¿Cómo ha evolucionado la idea de accesibilidad universal en el tiempo?

Es evidente que las condiciones de accesibilidad han mejorado mucho en estos últimos años. Las barreras arquitectónicas han dejado de ser invisibles y se ha trabajado intensamente en su supresión, hecho propiciado por alcanzar el objetivo de una mejora en la calidad de vida no solo de aquellas personas con algún tipo de discapacidad, sino de todas aquellas con una movilidad reducida como las personas mayores, las familias con cochecitos de bebe o la mujeres embarazadas en avanzado estado de gestación entre otras.

La consabida inversión de la pirámide de población ha favorecido que la supresión o eliminación de las barreras físicas no solo se asocie a una reivindicación histórica del colectivo de personas con discapacidad física, son muchos los colectivos de población que también necesitan de la accesibilidad física para relacionarse con su entorno y poder desarrollar su vida con normalidad.

Existen otro tipo de barreras que aún no se han abordado del mismo modo y con la misma intensidad, hablamos de las barreras de la comunicación, su eliminación favorecería la plena integración del colectivo de personas con discapacidad sensorial: sordos y ciegos. Entre otras paradojas, la Lengua de Signos Española y (LSE) y la Lengua de Signos Catalana (LSC) han sido reconocidas como lenguas oficiales del Estado Español, a pesar de este hecho estamos todavía muy lejos de que todos los contenidos audiovisuales se encuentren signados, por el momento se avanza en la subtitulación y se sigue luchando por que todos los servicios de información públicos y los medios audiovisuales este signados.

Por todo ello, hablar de accesibilidad universal o diseño para todos es seguir hablando de una meta o un objetivo por alcanzar, los arquitectos, diseñadores u otros profesionales dedicados al diseño de nuestro entorno, en su gran mayoría, siguen trabajando al margen de las necesidades de un gran número de potenciales usuarios que intentarán hacer uso de los espacios diseñados o concebidos por ellos.

El turismo no es una actividad que permanece al margen de este hecho. Hablamos de turismo y desafortunadamente se asocia a masa, "turismo de masas", los destinos turísticos ponen toda su maquinaria al servicio de captar el mayor número de turistas, las cifras son el objetivo. A pesar de que las tendencias del turismo indican que el turista busca cada vez más la personalización, la realidad es que el precio en un entorno de crisis económica sigue mandando a la hora de la toma de decisiones. En este contexto al sector turístico los arboles no le dejan ver el bosque, la mayoría de ellos no ven el turismo accesible como una oportunidad de negocio, que es un 10% de la población española, que son 50 millones de personas en Europa comparado

con las cifras de las que se suele hablar en este sector. Por otro lado surge la afirmación categórica: los discapacitados no viajan.

¿Cuáles son los elementos claves a la hora de comercializar un producto o destino turístico como accesible con éxito?

El elemento fundamental a la hora de promocionar o comercializar equipamientos, recursos, servicios o destinos turísticos como accesibles es la objetividad y veracidad de la información que facilitemos.

Las dos grandes cuestiones que el sector se plantea a la hora de facilitar la información en cuanto a la accesibilidad son: cuanto y como.

La cantidad de información que facilitemos es muy importante, pero el objetivo último es llegar a incorporar esta información en cuanto a la accesibilidad con el resto de datos y dar un paso adelante en el objetivo de la plena normalización e integración del turismo accesible. Hasta el momento la tendencia es la de publicar guías especificas para facilitar información a turistas con discapacidad o movilidad reducida, responden a una necesidad pero no responden a la realidad de que la discapacidad no es un destino o un servicio, sino una situación personal que requiere a la hora de viajar de unas condiciones determinadas que le faciliten disfrutar de su viaje como cualquier turista. La realidad en estos momentos pasa por que las personas con discapacidad, movilidad reducida o necesidades especiales tengan que disponer de dos guías, la suya y la del resto.

En la mayoría de las ocasiones estas guías especificas contienen excesiva información, por lo que finalmente y por lo general se editan en un solo idioma, lo que supone una limitación a la hora de seleccionar nuestro público objetivo.

En mi opinión se debe tender a sintetizar al máximo la información, facilitando la esencial y procurando que los responsables de los equipamientos, recursos y destinos turísticos depongan de información que amplié la que se facilita a través de las guías generalistas. Otra opción es ampliar esta información a través de la Web.

Como facilitar la información es otro elemento clave. El turismo es una de las actividades económicas más globalizadas, lo que supone que la información que facilitemos deba ser comprensible por todos más allá de las diferencias culturales.

Sin ir más lejos en España, existe una clara falta de homogenización a la hora de proporcionar información sobre la accesibilidad, los criterios y pictografía suelen ser diferentes entre todas las guías de turismo accesible que se han publicado hasta la fecha. Desafortunadamente, la dispersión normativa que existe en nuestro país en materia de accesibilidad tiene su reflejo en la realización de estas guías. Cada administración pública ha decidido o se ha decantado por un modelo, lo que ha dado como resultado que para el manejo de cada una de ellas se tenga primero que realizar un proceso de aprendizaje.

Seguimos de espaldas a las buenas prácticas que se están llevando a cabo en países como Francia o Reino Unido, donde la administración central es la responsable de la accesibilidad turística y por lo tanto la encargada de establecer los criterios a la hora de facilitar la información, las administraciones en materia de turismo de los departamentos o regiones se encargan de que esta se aplique y de participar en su desarrollo, por otro lado las organizaciones de discapacitados participan activamente en el proceso para que este se desarrollo de acuerdo a sus necesidades. Como ejemplo la pictografía utilizada es la internacional por lo que existe la seguridad de que más allá de nacionalidades o culturas la información está llegando correctamente.

¿Crees que se ha inflado la expectativa respecto al turismo accesible? ¿Como cuantificáis los beneficiarios del turismo accesible?

Te adjunto un estudio de mercado que realizamos para el Ministerio de Turismo, te será muy útil.

¿Crees que la accesibilidad puede ser un elemento para añadir competitividad a un destino?

El sector turístico desarrolla su actividad en un entorno económico globalizado, de gran incertidumbre y profundamente cambiante, en el que se vislumbran nuevas tendencias y retos, como así se recoge en el Plan del Turismo Español Horizonte 2020.

La industria turística debe buscar estrategias específicas que le permitan crecer diversificando e incrementando su competitividad a través de valores añadidos que influyan positivamente en la experiencia turística y en la captación de nuevos segmentos de mercado, susceptibles de consumir aquellos destinos turísticos diferenciados del resto.

Es en este sentido, donde el turismo accesible, adquiere un papel predominante en la industria turística, no sólo por la aportación de valores añadidos en la experiencia turística, sino también por la diferenciación y especialización absoluta en un amplio segmento de mercado no abordado actualmente lo suficiente por el sector turístico español.

El Turismo accesible surge como una reivindicación, más de autonomía e integración, del colectivo de las personas con discapacidad o movilidad reducida pero conduce a un objetivo generalizable de calidad en el turismo para toda la población. El turismo de calidad debe ser accesible a todos y nadie podrá quedar al margen de éste por ninguna razón o circunstancia.

En estos últimos años la accesibilidad a los equipamientos, recursos y servicios turísticos ha comenzado a ser abordada por el sector turístico de nuestro país. Hecho que evidencia la aceleración de los cambios a los que se está viendo abocado el sector turístico, especialmente en aquellos destinos denominados "maduros", donde la competitividad y la calidad se erigen como principios fundamentales y rectores de sus políticas turísticas.