



THE FUTURE CHALLENGE OF ACCESSIBLE TOURISM IN THE EUROPEAN UNION

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Abstract

The tourism industry is going through continuous change and development. Novel impacts, trends and innovative solutions all play significant role in the development of the industry, but the general growth within the sector is affected by other external factors, too. One of these external factors is the re-definition of new or even older tourism trends. The change of trends and fashions is just as cyclical in the tourism industry as everywhere else. The sector of European accessible tourism is among the newly re-defined areas, with and increasing attention towards the field. As of today, the terminology of accessible tourism had widened significantly; the terms used in the sector were re-defined in order to be able to contribute to the mental accessibility of the whole society. The importance of this re-defined segment is foreseen to increase in the near future, as - due to various reasons and at different levels -, one out of every 5 people in the EU belongs to the demographic group of people with special needs. Furthermore, the classification latency of the tourism sector can be even greater. The total number of people in the group of tourists with special needs is far bigger and more sophisticated than indicated by the statistical data. For tourism stakeholders, the issue of hereditary or acquired disabilities is a key factor, as well as the question of non-visible impairments – an important difference that the current databases keep no track of.

The current research – based on the results of a previous research – focuses on a special segment within accessible tourism: namely the characteristics of para-athletes and their tourism-related habits and preferences. Due to the currently ongoing transformation processes, European accessibility represents a dynamically widening market segment, including tourism as well. The employment of specially skilled workforce has become of key importance for accessible tourism in the EU; and not only because the professionally trained staff increases the quality of services but also because the availability of special supplementary services are the basis of the further development of the whole tourism industry.

KEY WORDS: accessibility, European accessibility, accessible tourism, European Union

Introduction

The tourism industry is transforming through continuous innovation. New types and forms of tourism, new trends and destinations emerge, resulting in the overall growth of the industry. As of today, within the global processes of tourism, the European Union represents one of the most important tourism destinations in the world. When looking into the details, we can see that novel technologies and special innovations are developed in close connection with some special destination or consumer groups. (Zsarnoczky, 2016a).

Tourism processes had become extremely versatile in the European Union. One of the emerging types of tourism is accessible tourism, including a very complex service area (Buhalis et al, 2011). Accessible tourism is a niche segment, where all participants have high expectations. Tourism designers, developers and investors need to answer the needs of a proactive consumer segment, both in the already existing and future destinations. According to Németh et al. (2018), innovative solutions, local economy and social co-operation are the key drivers of development today.

To establish successful new tourism destinations, in-depth knowledge of the specific tourism field is required from the experts involved. The complex demand side of accessible tourism today consist not only of disabled people, but different groups of senior people, single parent families, para-athletes and people who prefer safe

tourism; all of whom are in demand for sustainable and high quality services (Zsarnoczky, 2017).

According to UNTWO, the world's population is far more affected by disabilities than it had been thought before. At least 15% of the global population is involved somehow, which accounts for at least 1 billion people (UNWTO, 2013). As this ratio is a newly introduced number, it is important to understand it properly. Disability is the umbrella term for impairments, activity limitations and participation restrictions, referring to the negative aspects of the interaction between an individual (with a health condition) and that individual's contextual factors (environmental and personal factors).

Disabilities have many forms; and in some cases, the term is not clearly defined. Based on the above mentioned definition, we can say that accessible tourism as a market is extremely versatile, and its demand side is also many-sided. The term disability not only refers to reduced mobility, visual impairment, hearing impairment, developmental disabilities, mental disabilities, learning disabilities or long-term health related disabilities: people with prostheses, allergies or other sensitivities, invisible disabilities and even the elderly all belong to this group. It is also important to note that among elderly people, the possibility of developing some form of disability is increasing with age; an additional factor to be considered by all stakeholders within the market (Zsarnoczky, 2016b).

People living with disabilities consume within the same economic segments as other demographic groups; moreover, they tend to spend excessively in some areas with special significance. Based on the analysis of the available European statistical databases (EUSTAT, 2017), within the member states, there is no significant difference in the spatial distribution and main characteristics of disabilities. However, the data also suggest that with regards to the level of development, there are significant differences in the level of available accessible services: although the compulsory European directives are met in the member countries, the theories are put into practice with different effectiveness.

Despite the fact that the mandatory elements of accessibility are available at most of the tourism destinations, there is still room for development when it comes to demand-optimised service packages that include accommodation, hotel services, conference- and wellness offers and special complimentary programmes.

Research method

The current research in this study focuses on accessible tourism, a relatively less-researched area in the European Union. The secondary research revealed that the whole research field had gone through a significant change during the last 3-5 years. Previously, accessibility was a term mostly related to people living with disabilities and their special needs; whilst lately, in the more recent literature, the terminology has been re-defined as a collective term, resulting in a much wider target group, described in the introduction of our study. Within the frameworks of the research, the examination focused on the tourism-related significance of accessibility, and the relation between people living with disabilities and tourism processes. The primary research consisted of interviews with experts and para-athletes who were participating in a summer training camp, and their accompanying relatives. The results of the research offer a novel perspective on the topic of accessibility, revealing new research fields and ideas for accessibility experts, and can contribute to more targeted development and investment possibilities for accessible tourism experts and stakeholders.

General environment of accessible tourism

Accessible tourism is still in a beginning phase in the European Union. The EU introduced the definition of accessible tourism only in 2015 and started setting up the related terminology at the same time. The experts of the EU are still working on the introduction of the field, as accessible tourism not only represents a new segment in tourism, but also requires a whole new approach from the stakeholders.

As of today, accessible tourism services are mainly available only in some specially designed segments of mass tourism. There are still few service providers that would be able to welcome a larger cohort of tourist with special needs at the same time. There is a vast difference between partially and fully accessible tourism spaces. In order to provide full accessibility for every guest with special needs, tourism spaces should be developed with

the idea of universal design in mind from the very beginning, and it is also essential that the special demands of future guest should be prioritized during the whole implementation process. Just as 'conventional' tourism spaces are designed for the masses, accessible tourism facilities should be created bearing in mind the diversity of unique needs.

For the long term sustainability of tourism locations, the good relationship between local people, local businesses and tourist is essential, and it can also guarantee the quality of services. With an open attitude towards discussion, service providers can benefit a lot from the direct feedback coming from their guests. As accessible tourism is in many ways different from other forms of hospitality, special attention needs to be taken to the demands of the visitors. Guest with special needs demand a lot more attention and information. This type of tourism especially requires specially trained staff, with the right kind of know-how and experience. Should a destination specialize in accessible tourism, it is also important to inform other prospective visitors about this priority.

In accessible tourism, it is essential that the special needs of tourists are answered appropriately. The basic demands of tourist with special needs are basically the same as the requirements of average guests; however, they usually need special attention in some aspects. For example, they often need more detailed information, through the right communication channels. Another difference is that tourist with special needs usually travel with companion, and the length of their stay is generally longer than the average.

According to group theory, the primary challenges of accessible tourism are no different from any other kinds of tourism. Tourism as an industry need to cut back on harmful emissions, increase the use of renewable energy resources and try to optimize its exploitation of resources. Based on a different approach, accessible tourism is nothing more than an additional segment of the demand side that will require further resources. At this point, the future and sustainability of accessible tourism raises an important question: whether we should develop the whole tourism industry with the special needs of each individual tourist in mind, or should we rather continue the current trends, where a calculation-based ratio of services are developed and available for guests with special needs. In case of the latter scenario, not all of the tourism spaces would fit the needs of accessibility, but some of the already existing places would be turned into accessible destinations. With the latter, the need for further resources would be eliminated, and the utilization level of the existing places could be optimized.

Results

Accessible tourism is a complex activity, where accessibility ensure the availability of services for the whole society. The general objective of accessible tourism is that all people – regardless of their situation and possibilities – can have access to all tourism services in all tourism destinations.

To reach the concept of full accessibility, the easiest solution is the implementation of a universal design

planning concept (Darcy et al., 2009, Buhalis et al, 2012). The demographic group of disabled people is not homogenous, but includes several smaller groups with different characteristics. To understand these differences, it is important to clarify that disabilities are defined either as congenital impairments, caused by genetics, or different circumstances during birth; or acquired disabilities that result from external impacts or diseases after birth. These two groups can have significantly different consumer demands, based on their special needs. In the case of customers with acquired disabilities, with a positive attitude, a well-trained tourism staff can create a flexible two-way communication, where the parties can fully understand each other, and the demands of the customers are fully met. However, in the case of people with congenital impairments, the staff working in accessible tourism need to have special skills and competences in order to be able to provide unique and tailor-made solutions when needed.

From the viewpoint of the service provider side of accessible tourism, further challenge is posed by the fact that not all types of impairments are recognisable visually. Tourism employees primarily recognise visible impairments of vision, mobility, hearing, speech, or developmental or mental disabilities. Non-visible impairments like surgical removals or prostheses are only recognisable for expert of professionals. According to accessible tourism professionals, the number of people with hidden and visible disabilities are around the same, and therefore, the whole group of disabled people accounts for a lot more than the size of the group of people living with visible impairments.

In Europe, several accessible tourism central coordination organisations are actively helping the disabled people, and their work represents very important added values in the accessible tourism industry as well. The most important organisations that operate in coordination with the aim to support accessible tourism are the European Network for Accessible Tourism (ENAT), the One-Stop-Shop for Accessible Tourism in Europe (OSSATE) and the Spanish ONCE Foundation (Once Foundation for the Social Inclusion of Persons with Disabilities). Of course, several other useful organisations are active in the European accessible tourism sector, but they mainly work together with local professional or tourism organisations. Furthermore, numerous specialised tourism websites and information databases on local programmes are also available for tourists with disabilities.

One of the most successful websites is the Europe for All¹ portal that offers practical guidelines, descriptions and personal reviews. Another popular site is Pantou², an initiative by the European Commission, which collects the offers of travel services and destinations with accessibility services in the whole area of the EU. The European Union takes particular care to provide a wide availability of accessible information systems (AIS) at accessible destinations (EC, 2014). During the

development and implementation of AIS tourism systems, great emphasis is put on the uniform standardisation of signs and pictograms, and as for digital and ICT platforms, the harmonisation of mobile applications, visual signs, fonts and colours is also in line with global communication standards.

Unique and one-time global events are of great importance for the tourism industry, because they generate significant income for the whole sector. In accessible tourism, the most important global events are Paralympic Games, its preparation events and training camps. Besides the competing athletes, trainers, other staff members and fans also participate at these events. In many cases, the competitors are accompanied by their whole families, who support the efforts of para-athletes, generating even more income for the tourism service providers. Every destination should aim for becoming a brand and ensure that the visitors are left with positive experiences that will motivate them to re-visit the safe environment. According to the demands of travellers, safety has become one of the top priorities in the decision making process about travel destinations (Péter et al., 2018; Ernszt et al., 2018).

Prior to our recent study, a previous research had been carried out on health tourism and accessible tourism possibilities in the Mátra Mountains. The main findings were that regardless of their generation characteristics, tourist are attracted by the peaceful rural environment, and the vicinity of nature (Zsarnoczky, 2018). The attractiveness of the Mátra region is given by not only its natural surroundings, but the available health tourism, wellness and rehabilitation services. The Mátra region is a dynamically developing health tourism region (Zsarnoczky, 2015); however, the overall availability of accessible tourism services are still very low.

The location of data collection and research for our study was the Matra Resort³ complex, located in the Northern-Mátra mountains in Hungary. The Matra Resort complex is a Hungarian best practice for accessible tourism: the professional development and preparation of the project began in 2011. The success of Mátra Resort is also indicated by the fact that it is the first Hungarian tourism service provider that is full member of ENAT, Pantue and Europe for All.

The Matra Resort initiative is implemented together by the Municipality of Parádsasvár and local tourism service providers. The project not only focuses on accessible tourism facilities, but also participates in the organisation and implementation of local programmes and international professional conferences. The available statistics of the Matra Resort – Au Naturel guesthouses clearly show that since the opening of the facilities in 2015, the number of tourist with special needs are increasing (Fig. 1.). Whilst the number of tourists is increasing in the destinations, the number of tourist with special needs duplicate by the year, clearly indicating the financial return of investments.

¹ <http://www.europeforall.com>

² <https://pantou.org>

³ Matra Resort <http://matraresort.com>

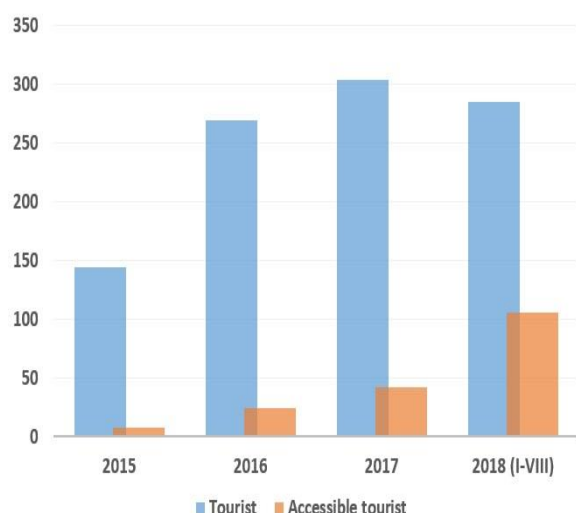


Fig. 1. Dynamics of tourist/accessible tourist arrivals
Source: Matra Resort – Au Naturel
Guesthouses database

Within the frameworks of the questionnaire survey, the results of the previous questionnaires and interviews – taken with tourist with special needs – were compared to the surveys conducted among para-athletes.

The comparison indicated that the opinion of tourists with special needs is quite similar (Zsarnoczky, 2017):

- the availability of door-to-door transportation is a priority for them,
- accessibility is just as important for them as the quality of the accommodation,
- they demand accessible attractions at the accommodation facility,
- they are in demand for easily understandable information while at the destination,
- they demand equal treatment and component staff,
- they tend to travel regardless of the seasons, but the cost-value rate is important for them,
- they prefer the vicinity of nature and safe environment,
- they rely on the experience of others when arranging their travel,
- they usually travel with friends, relatives or other accompanying persons,
- they like shopping local products.

In general, the para-athletes agreed with the above mentioned statements, and added some new data and information to the previously collected findings. The total number of respondents were 46, out of which 20 were registered para-athletes; the other 26 persons were trainers, accompanying persons, family members or other helpers. This ratio clearly shows that para-athletes travel with at least plus 1 person. One of the most important finding of the research was that para-athletes and their accompanying persons define themselves as tourists with special needs, regardless of the fact whether they have any impairments or not.

The additional statements of para-athletes are:

- they like group tourism activities;
- they do not necessarily expect unique or exceptional treatment;
- they seek active forms of relaxation;
- they are willing to try out local medical and/or health products;
- they are open to participate in programmes not specially designed for tourist with special needs;
- the length of their stay is usually 1-2 days longer than the average (note: as found out later, when answering this question, para-athletes meant the length of the training camps and not their individual travels);
- they definitely like to re-visit places where they had good experiences.

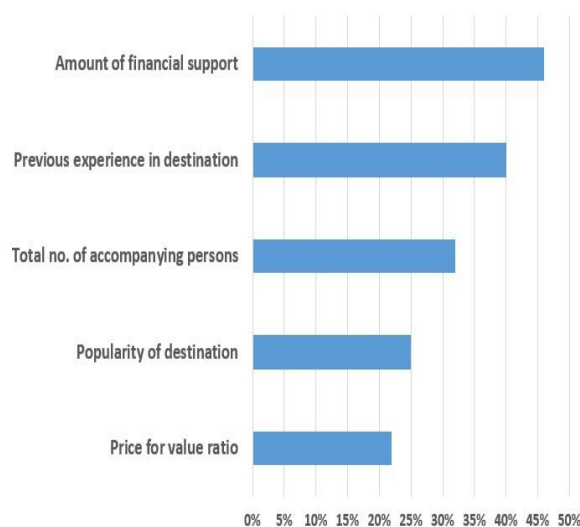


Fig. 2. Key factors in choice of destination of para-athletes (N=20)

Source: Own source at Matra Resort

During the processing of the surveys, one of the main findings was about the choice of destination. When analysing the results, we need to take into account the travel possibilities of para-athletes (note: in the previous study, we did not examine whether the travels of the respondents travelled at their own expenses or had other external financial funding). Para-athletes usually finance the costs of their travels from supporting funds, tenders or other resources. It is also important to note that during their decision-making process, they take into account other available services and co-financing (sponsoring) options or discounts offered by the destination. This factor clearly indicates that in the field of accessible tourism, there are some special elements of decision making, based on external reasons. However, these co-financing options are not determining when para-athletes arrange their other (private) travels.

Conclusions

The high quality of the tourism industry is a priority in the European Union, and within the sector, accessible tourism represents an area of key importance. Although

related to the whole tourism industry, the intensity of accessible tourism is relatively low at the moment, the statistical data show an increasing tendency in the sector both in terms of accessible destinations and services.

People with disabilities represent a significant demographic group in the EU and together with the disabled people outside the EU, they account for an important target market in tourism. They have the same motivations when it comes to relaxation and quality leisure time to be spent at reliable tourism service providers, hence, the complex physical and mental accessibility of tourism destinations is necessary. In accessible tourism, income is not only generated by the visitors, but also by the people accompanying them, and their travels are less dependent on the seasons and they usually spend more time at the destination than the average.

The most important challenge for tourism service providers is the sufficient training of their staff. Tourists with special needs like to return to destinations where they had good experiences and participate in 'returning guest' programmes, as a safe and friendly environment is a priority leisure time element. Investors of accessible tourism need today have to take into account multiple factors like universal design solutions or door to door transportation options. Beyond the physical accessibility of the destinations, there is also a great need for social accessibility, which basically means breaking down the mental barriers of local people towards people with special needs. The already existing and operating best practices clearly show that the professional tourism planning brings forth positive results, setting a good example for other tourism service providers as well. Accessible tourism is facing great opportunities in the European Union, and the results of the developments will be beneficial for the whole society.

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