

OBSERVATORY ON UNIVERSAL ACCESSIBILITY IN TOURISM IN SPAIN 2016



Via Libre



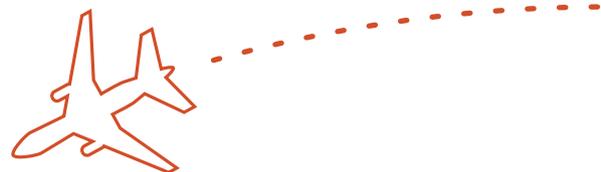
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INTRODUCTION



Tourism is the main driver of the economy in many countries and it is an important source of income in different areas.

The Spanish tourism sector is, according to the World Economic Forum, the most competitive one in the world, an honor it holds for the second consecutive year. In 2016, Spain surpassed the number of **76.6 million** tourists.

Favorably resolving the accessibility needed in tourism broadens the possibilities and opportunities for the sector. It increases the market share and contributes to the diversification of services and products in destinations in the strategies of tourism development.

Although people with disabilities and the elderly are not the only demanders and beneficiaries of accessibility in tourism, they are the groups that could be more limited or conditioned in their tourism activity when it does not comply with features suitable for the usage of all people. These two large groups represent, in figures, a high percentage of population and therefore they clearly are potential users.

The World Health Organization (WHO) in its “World Report on Disability” (2011), estimates that about **15%** of the world population has some type of disability. As of today, this represents more than one billion people.

On the other hand, by 2015 there were **901 million** people over the age of 60 worldwide. By 2050 it is estimated that **22%** of the population will be over 60 years old. Senior tourists (over 60 years old), with or without a disability, develop a tourism activity similar or superior to other population groups in tourism-emitting countries, promoted by the so-called “active aging”. Among the needs and demands that senior tourists require are aspects of accessibility such as special menus and diets, hotel rooms with showers instead of bathtubs, nearby health services, adapted transportation, among others.

Tourist destinations designed for all people is a social demand that must be promoted through the relationship of all the agents involved: public authorities and companies linked to the provision of tourism services throughout a global approach.

The study analyzes these aspects in an integrated way so as to provide a clear vision of the current situation and establish guidelines for improvement in the future.

ONCE Foundation



OVERVIEW

Through the “Observatory on Universal Accessibility in Tourism in Spain 2016”, ONCE Foundation has carried out an analysis of the supply and demand of tourism for all people, as well as a diagnosis of the state of accessibility in tourism infrastructures, products and services. The purpose is to serve as a tool when planning aspects for improvement based on the current situation.

The global and multifactorial vision is one of the most outstanding elements of this work, which allows us to identify both the strengths and weaknesses to be addressed so that accessibility becomes a reality in tourism.

The document allows to know the needs and interests of the users, the perception and vision of companies and the public administrations on accessible tourism. This cross-sectional view allows us to look beyond and realize that accessibility is not only an issue that is necessary for a group (which represents no less than 10% of the Spanish population), but also benefits a much larger group.

For many people with disabilities planning their tourism activities is an adventure; the accessible destinations offer tends to be smaller if compared with the general tourism offer. It is also important to point out the extra expense most tourists with disabilities incur when travelling which is difficult to justify when speaking in terms of equal treatment and opportunities.

This situation is also compounded by the group of elderly people, quite notorious in our peculiar silhouette of our population pyramid, as in those called “the Fourth Age”. People who are over 80 years of age who wish to keep enjoying an independent life in which travelling is an essential activity.

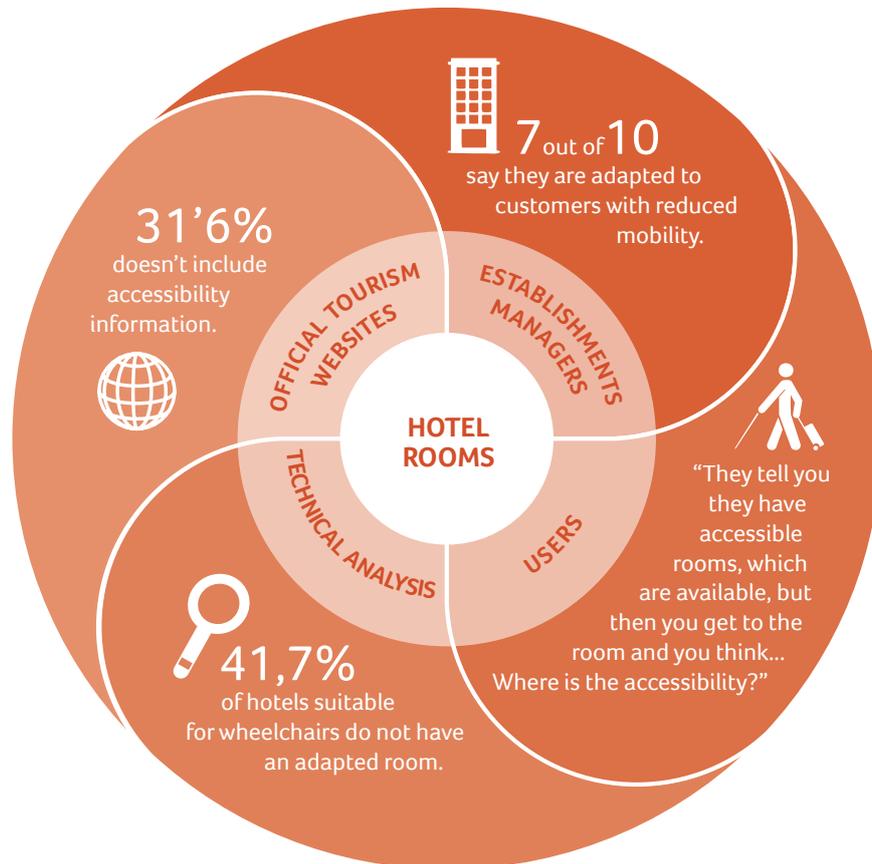
Through this report, concurrent stakeholders can manage this data to progress towards an inclusive tourism for all people.

- Public administrations find a sample of aspects that must be improved in order to fulfill two objectives: to foster the fulfillment of the human rights and the economic interests of businesses within a more social vision of tourism. The report identifies priorities and proposes strategies to improve accessibility for managers of tourist destinations.
- The tourism industry can identify business opportunities that had not been considered so far, due to lack of knowledge or the belief that accessibility may pose a burden on the income statement. The study shows which services offer accessibility, which ones don't, along with aspects that can be differential in the offer to attract a huge segment of people interested in finding destinations suited to their needs.
- With this document, organizations working with people with disabilities can reinforce the arguments they have been using for years to explain and disseminate the accessibility needs and the rights of this group

Accessibility offers an opportunity to the Spanish tourist market to continue being leaders and pioneers in the tourist markets by becoming leaders in the example by offering quality inclusive services.

360° EXAMPLE OF ACCESSIBILITY

IN INFRASTRUCTURES



THE ADVENTURE OF TRAVELLING: METHODOLOGY

The concept of Accessibility in Tourism refers to the universal design of tourist environments, products and services in a way that allows access, use and enjoyment to all users, under conditions of autonomy, security and comfort, under the principles of Universal Design.

With this concept the study presents a methodology that covers all the areas that a person uses during a trip, from trip planning to perceived quality.



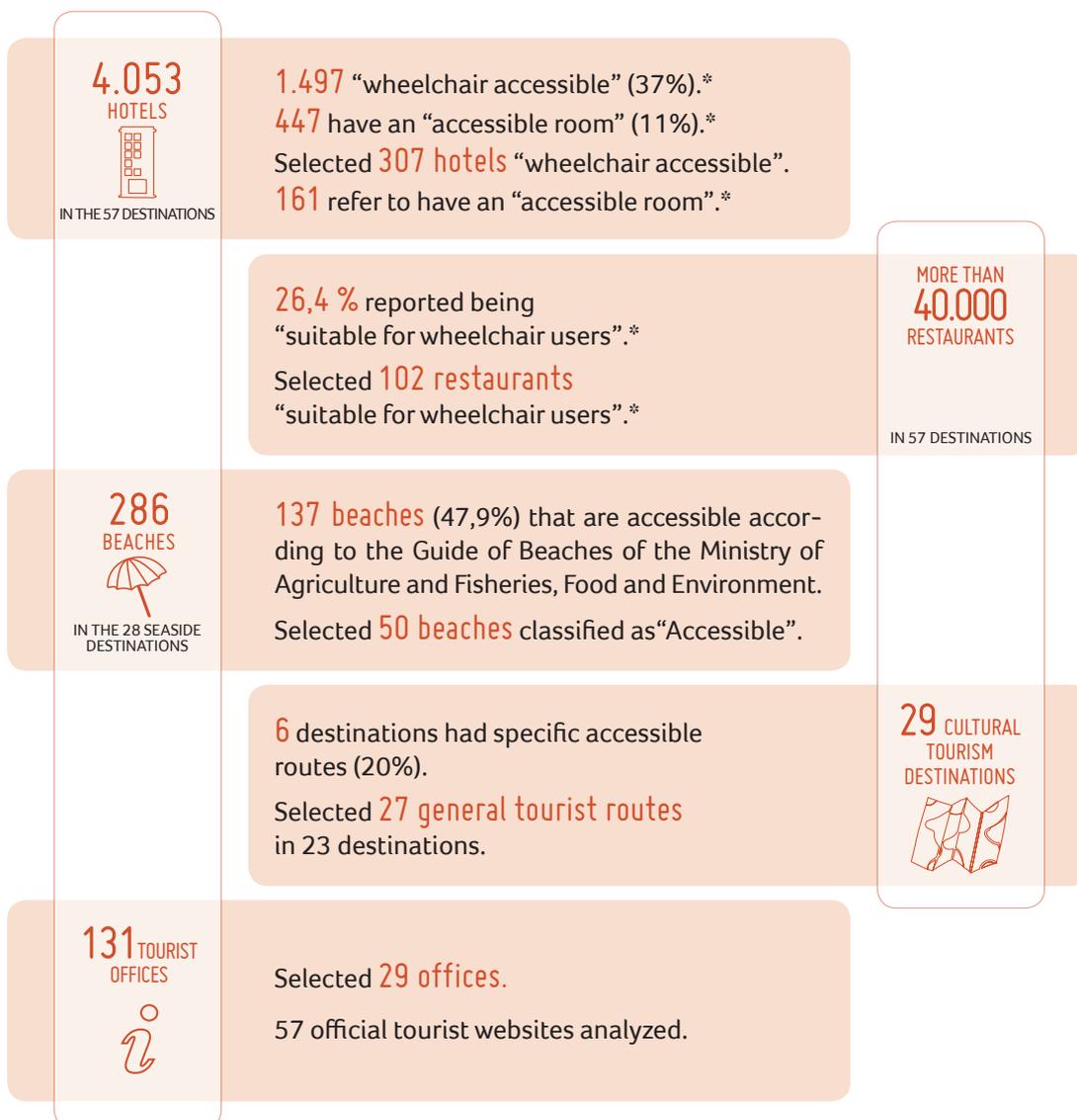
DEMAND

Tourists: 592 surveys were carried out on tourists (with or without disabilities) at national level, 194 surveys by disabled people living in the 57 selected destinations, 7 discussion groups with 39 tourists with disabilities and 8 interviews with experts.

PERCEPTION OF THE SUPPLY

Survey by 485 managers responsible for tourism companies and 24 managers of tourist destinations.

TECHNICAL ANALYSIS



DATA OBTAINED

This sample analyzed the issues that all people expected to find in a suitable way.

HOW DO YOU ARRIVE TO THE ESTABLISHMENT?	IS IT POSSIBLE TO ENTER THE ESTABLISHMENT?
CAN YOU NAVIGATE WITH IN THE ESTABLISHMENT?	ARE THE TOILETS SUITABLE FOR ALL?
IS INFORMATION ABOUT THE ESTABLISHMENT PROVIDED IN AN ADEQUATE MANNER?	CAN THE SPECIFIC SPACES AND SERVICES BE USED?

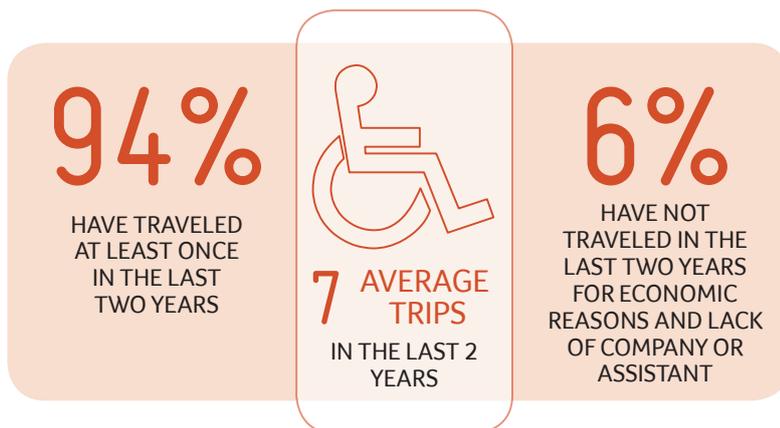
More than **250** parameters were evaluated in three categories; weaknesses, points of improvement and strengths.

The result was: **6.326** weaknesses highlighted.
6.179 points of improvement highlighted.
10.507 strengths highlighted.

* According to web search engines

1 THE PERSPECTIVE OF TOURISTS WITH SPECIAL NEEDS

WHAT ARE THEIR TRAVEL HABITS?



PEOPLE WITH DISABILITIES TRAVEL ALMOST AS OFTEN AS PEOPLE WITHOUT DISABILITIES (8 TRIPS ON AVERAGE)

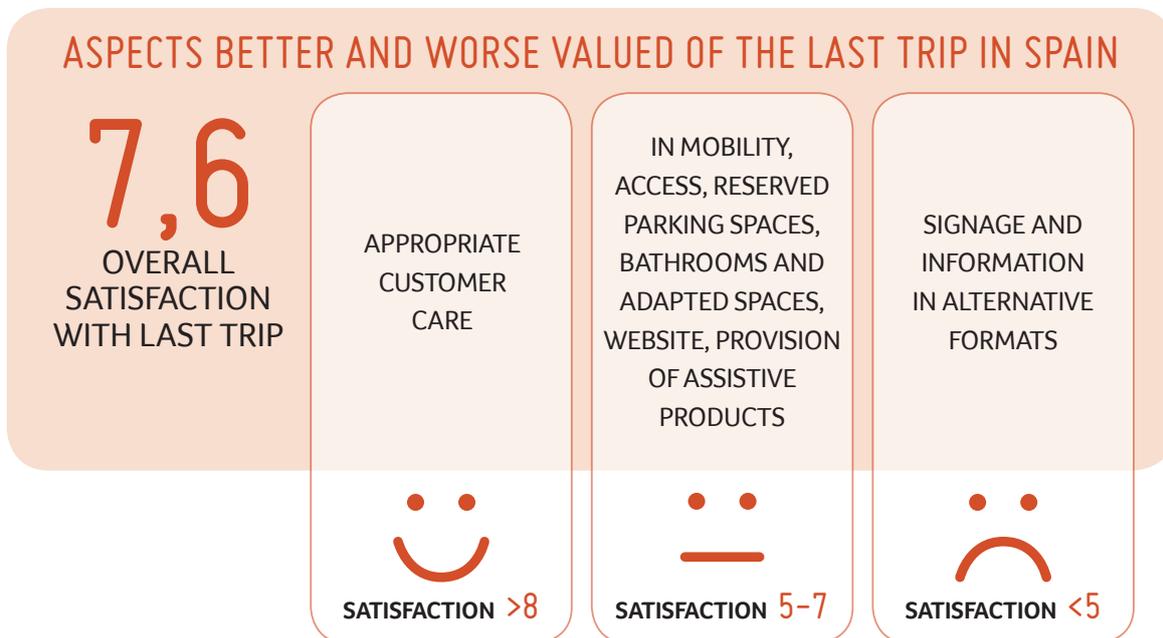


TOURISTS WITH SPECIAL NEEDS MUST MAKE FURTHER ECONOMIC DISBURSEMENT TO ACCESS ACCOMMODATIONS AND SERVICES

“Using accessible tourist accommodations or services supposes an extra cost or extra expense.”

(Tourist with physical disability).

ARE TOURISTS WITH SPECIAL NEEDS SATISFIED?



Customer care from staff, with some sensitivity towards disability, is considered as one of the levers for the satisfaction of users, because in the absence of adequate accessibility conditions, it can overcome certain barriers and solve some problems.



“Although the facilities are not accessible, you see that they help you out, they try to sort it out.”

(Tourist with visual impairment).

2 THE PERCEPTION OF THE OFFER: COMPANIES AND TOURIST MANAGERS

ARE CLIENTS WITH DISABILITIES IMPORTANT?

9 OUT OF 10

COMPANIES HAVE CUSTOMERS WITH DISABILITIES



FOR 7 OUT OF 10 THE DEMAND FOR CLIENTS WITH DISABILITIES IS OF LOW OR HAS NO IMPORTANCE

MOST ESTABLISHMENTS

CLAIM TO BE ADAPTED TO FAMILIES WITH CHILDREN, SENIORS AND FOREIGNERS

THE TECHNICAL ANALYSIS PROVES THAT THIS DOESN'T MATCH THE REALITY, THERE IS A 40% DIFFERENCE

7 OUT OF 10 SAY THEY ARE ADAPTED FOR CUSTOMERS WITH REDUCED MOBILITY AND OTHER PHYSICAL DISABILITIES

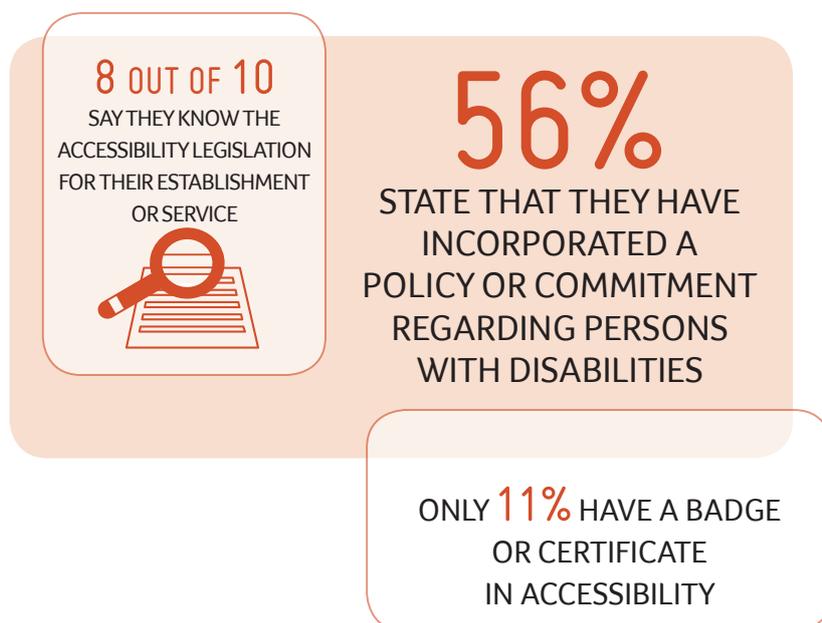
This contradiction responds to a very limited and biased perception of clients with disabilities, associated exclusively with very specific and visible profiles (wheelchair users), when the range of tourists with disabilities who actually go to their businesses and establishments is wider than what they spontaneously recognize.

The high perception that they have of themselves as an adequate offer for tourists in a wheelchair, allows a glimpse of a biased view of accessibility according to the experience of the users.

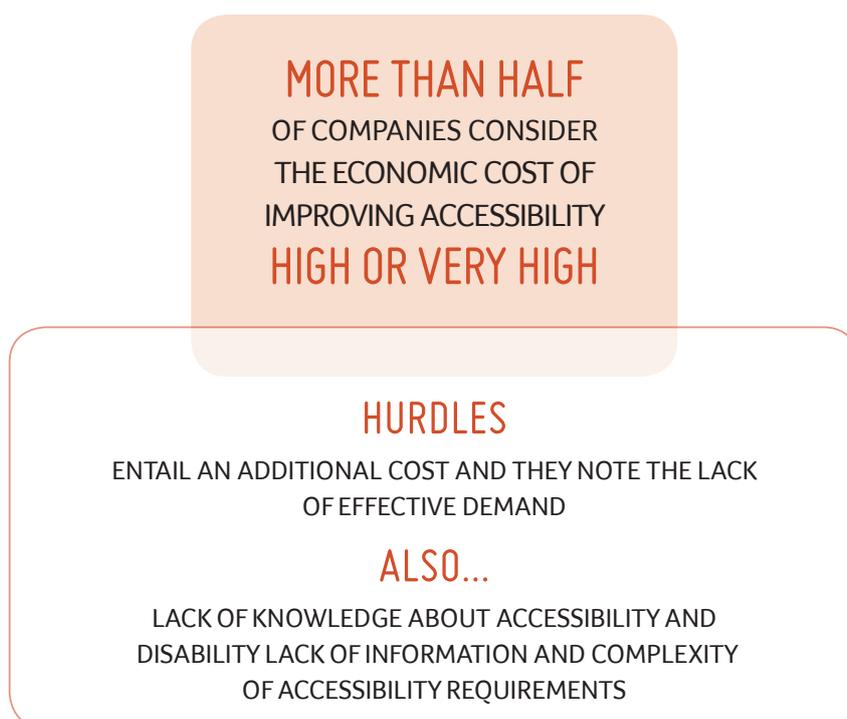
“It is never 100% safe, I never book online without having called before and they make sure that it is accessible.”

(Tourists with physical disabilities).

HOW DO THEY MANAGE UNIVERSAL ACCESSIBILITY IN THEIR ESTABLISHMENTS?



COSTS OF THE IMPLEMENTATION OF THE ACCESSIBILITY FOR THE TOURIST BUSINESSES



HOW DO THEY PERCEIVE THE ACCESSIBILITY CONDITIONS OF THEIR OWN ESTABLISHMENTS AND SERVICES?

45%

of companies and suppliers ensure that in their establishments they have their own parking spaces reserved for people with reduced mobility.

83%

state that they have access to the establishment without unevenness, and 71% ensure indoor mobility between plants.

67%

have adapted toilets, and 72% of those providing accommodation have adapted en suite rooms.

14%

claim to offer information in alternative formats and only 3% have induction loops available.

52%

have accessible signage in their facilities, although 11% do not know if their signage is accessible.

53%

say their website is accessible, but 18% do not know if it is accessible.

3 out of 10

claim to have employees with specific training in serving clients with special needs.

2 out of 10

says they have special support products for customers: especially wheelchairs.

Managers of companies and suppliers of tourist services have a significant ignorance of many aspects related to the accessibility of their establishments and services. Aspects such as accessible signage, existence of induction hearing loops, web accessibility, specific training for clients with disabilities or emergency plans adapted to clients with special needs, are unknown in a striking way by many of the companies that have participated in the study.

HOW IS ACCESSIBILITY MANAGED IN DESTINATIONS?

“Accessibility is not a priority in tourist destinations.”

There is a high awareness within the tourism sector regarding accessibility issues, which contrasts with the high rate of lack of evidence on the activities carried out.



LESS THAN HALF
OF THE DESTINATIONS ANALYZED
WERE ABLE TO COMPLETE THE
DESTINATION ACCESSIBILITY
ANALYSIS SURVEY

OF THE **42%** OF MANAGERS
WHO RESPONDED TO THE SURVEY
70,8% ARE MANAGERS OF
DESTINATIONS CLASSIFIED AS
“SUN AND BEACH”

93%

identify accessibility with urbanism.

79%

provide information on accessibility in the destination.

75%

knows the accessible transport available at their destination.

66,7%

did not know about labor integration measures for people with disabilities in tourism.

77%

do not know about the development of an accessibility plan in tourism at their destination.

79,2%

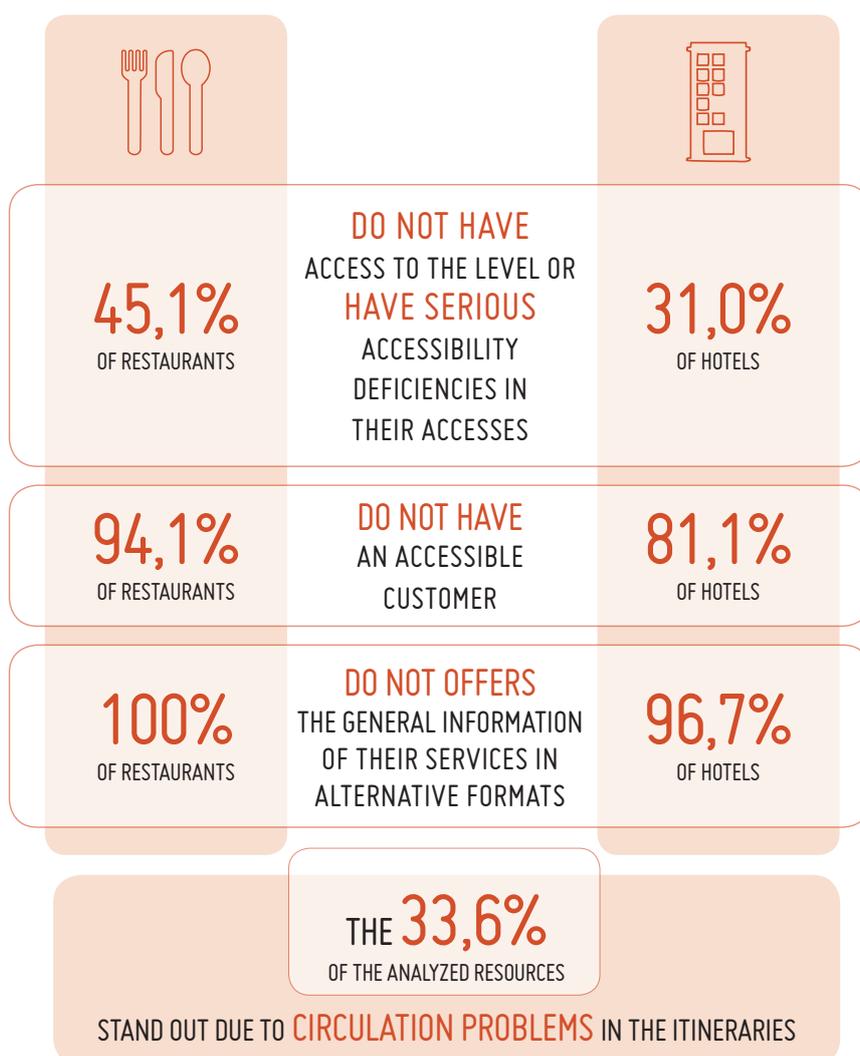
do not identify training or awareness actions to the private sector.

3 TECHNICAL ANALYSIS

The technical part of the observatory tries to reveal the veracity of the information behind the advertisements of the web search engines and the self-assessment of the tourist entrepreneurs. To this end, a selection process was carried out on tourist resources announcing that their resources were suitable for persons in wheelchairs or accessible.

GENERAL FINDINGS

Analysis conducted on hotels and restaurants that appear as "accessible" or "suitable" for people in wheelchairs in web search engines..



SPECIFIC FINDINGS

WEBSITES



84,2% not accessible web pages for use with assistive products.

HOTELS SUITABLE FOR WHEELCHAIRS



57% problems with reserved parking.
81,1% reception not accessible.
92,8% staff without disability awareness training.
85,7% no documented information on accessibility.
85,4% do not offer assistive products for their guests.
41,7% do not have an adapted room.

RESTAURANTS WHEELCHAIR ACCESSIBLE



100% do not have menu in alternative formats.
100% do not have trained staff in disability awareness.
45,1% inadequate dimensions of indoor spaces.
49% do not have an adapted toilet.

TOURISM OFFICES



65,5% have a customer desk with accessibility deficiencies.
44,8% inadequate access signaling.
24,1% unevenness in access without accessible alternative (ramps).
69% without trained staff in accessibility or disability aware.
69% do not offer information in alternative formats.
75,9% do not offer accessibility information at the tourist office.

BEACHES WITH ACCESS FOR THE DISABLED



76% of the walkways mats do not have adequate color contrast.
48% do not have adequate shade spaces
36% no loanable material available.
34% do not have floating buoys
42% have adapted showers.
74,2% of toilets present deficiencies in the maneuvering and transfer space.

TOURIST ROUTES



90% without adapted public toilets.
70% do not have reserved parking spaces nearby.
60% have deficiencies in the pavement.
59,3% nonexistent or deficient signaling on attractions of interest .
40% significant obstacles in the itinerary

TO TRAVEL IS TO LIVE. CONCLUSIONS

The desire to travel is an element that is part of the way of life of our current society, especially in developed countries, and makes no distinction of social class, gender, age or other factors. **People with disabilities or special needs travel almost with the same frequency as any other person.**

Tourists with disabilities or special needs spent more than half on their last trip (approximately 813,65 €) compared to those without any limiting circumstance (637,60 €). This confirms the perception, among those who have special needs, of **having to make a greater disbursement to ensure a greater degree of accessibility** in tourist accommodation and services.

On the other hand, more than half of the companies consider the economic cost of improving accessibility in their establishments or services to be high or very high, due to the additional disbursement and the low profitability. This tendency of companies and suppliers to associate accessibility investment with solutions dedicated exclusively to people with disabilities, while benefiting the entire population, makes them not perceive the real existing demand. In this situation, **the price implied by the "non-accessibility" of tourist environments and services has a direct impact on the economic expenditure of tourists.**

Although some work has been done on the subject, it is clear that one of the main reasons why the cost of accessibility is perceived as high it is because accessibility tends to be understood as something physical or as a set of specific solutions. The universal design is seldom considered. Much of the extra expenses people with disabilities incur to be able to get access to tourism services would be eliminated if the concept of Universal Design were included in the initial planning of services.

Despite the legislative requirements, including the deadline for compliance on December 4th, 2017, and the increasing awareness of the advantages of standardizing the use of design for all people in the tourism field, destinations and the sector in general, **are still in an incipient state of implantation.**

Among the **most important criteria for choosing a destination** are customer care, the information available on accessibility and mobility within facilities and establishments.

The information thus becomes a decisive factor for choosing a destination. However, a relevant lack of reliability was observed in the information provided by the tourist industry, businessmen, tour operators, search engines and others, mainly caused by a general unfamiliarity of the meaning of accessibility.

Accessibility is not understood globally or from the user's point of view. It is perceived as partial solutions deemed adequate and accessible.

There are few examples of comprehensive solutions that comply with legislation and can be considered "good practices". We more likely find examples of non-comprehensive situations like the consideration of a website as accessible when it is not or the accessible offer that includes resources with adapted toilet that does not meet the minimum accessibility requirements. In this way, the perception of the suppliers about their degree of accessibility tends to be more positive than the valuation that the users make.

This fact implies that the information provided by destinations, web search engines and other establishments does not coincide with reality in more than half of the cases.

In the tourism sector, architectural issues predominate over other accessibility criteria such as information, adaptations and training. Therefore tourists claim that more attention is given to some needs and disabilities than to others, Study findings shows that the work of accessibility has started in the first place by addressing physical barriers, leaving in the background adaptations needed by people with visual and hearing disabilities, and with intellectual disabilities.

Accessibility in a tourist destination depends, to a large extent, on the involvement of the managers and the relationship they have with the private sector in this regard.

Given the differentiation between the public and private sectors, the public sector is the one that stands out for showing more universal solutions for all people.

In order to maintain the leadership of competitiveness in the tourism sector and be a quality model for other countries, accessibility must be integrated into the management strategy of each and every one of the destinations.



Download the full document to

“Observatory of Universal Accessibility of Tourism in Spain”.

http://biblioteca.fundaciononce.es/sites/default/files/publicaciones/documentos/observatorio_de_turismo_110917_4_0.pdf

