



TOURISM4ALL

DEVELOPMENT OF A CROSSBORDER NETWORK FOR THE PROMOTION OF THE ACCESSIBLE TOURISM DESTINATIONS

Priority Axis: ENVIRONMENT AND CULTURAL HERITAGE

Objective 3.1 - MAKE NATURAL AND CULTURAL HERITAGE A LEVERAGE FOR SUSTAINABLE AND MORE BALANCED TERRITORIAL DEVELOPMENT

Deliverable: RECOMMENDATIONS FOR POLICY MAKERS AND / OR SECTOR OPERATORS

Work Package: WP4 IMPLEMENTATION OF PILOT ACTIONS IMPROVING THE TOURISM DESTINATION ACCESSIBILITY

Activity: 4.4 REPORTING ON PILOT ACTION RESULTS

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1. Introduction

The TOURISM4ALL project aims to develop and promote a wide cross-border network of accessible tourist destinations, including natural and cultural sites and urban spaces and beaches, in order to reduce tourist seasonality and promote social inclusion through the exchange of good practice, evaluation methods and joint services to promote tourism for the benefit of people with reduced mobility and people with special needs, such as people with disabilities and the elderly.

The aim is to encourage other entities to replicate good examples and adopt policies that support and promote the development of affordable tourism. This will further valorise natural and cultural heritage, improve local management of tourism strategies and ensure the sustainability of implemented activities and more effectively promote tourism products and services in the area covered by cross-border cooperation (in cooperation with tourism service providers), with the goal of increasing tourist traffic.

It goes without saying that tourism is the main source of income for millions of people in Europe and the world. It is, however, much more than one of the economic branches because it connects people, 'erases' borders by strengthening understanding between people and cultures, and thus contributes to their unity. When talking about the sustainability of tourism, it means preserving and enriching cultural and natural heritage of our world community, strengthening the contribution of this dynamic industry to

economic development and job creation, improving local development by investing in infrastructure for tourism development. For all these and many other reasons, tourism deserves care and attention, as well as political support. As can be seen in practice, tourism has taken a leading role in the sustainable economic development of entire regions.

Currently, the prospects and needs of tourism in Europe and around the world are huge and challenging with increasing competition from outside, increasing consumer needs for more specialized tourism and the need for more successful practices that respect environmental issues.

Accessible tourism refers to the provision of a tourism experience which does not put customers in a 'disability' situation regardless of the activity limitation(s) or impairment(s) they may present. Further, the European Network for Accessible Tourism (ENAT) refers to Accessible Tourism as the set of 'services and facilities (such as physical environment, transportation, information, communication) which enable persons with special access needs, either permanent or temporary, to enjoy a holiday and leisure time with no particular barrier or problem.'

Accessible Tourism is inclusive of all people with access needs, that is people with disabilities but also all other people who may benefit from accessible infrastructures, such as elderly people, people carrying heavy luggage or parents with small children.¹

¹ Source: ECONOMIC IMPACT AND TRAVEL PATTERNS OF ACCESSIBLE TOURISM IN EUROPE, pg. 32, last accessed on October 15th 2021

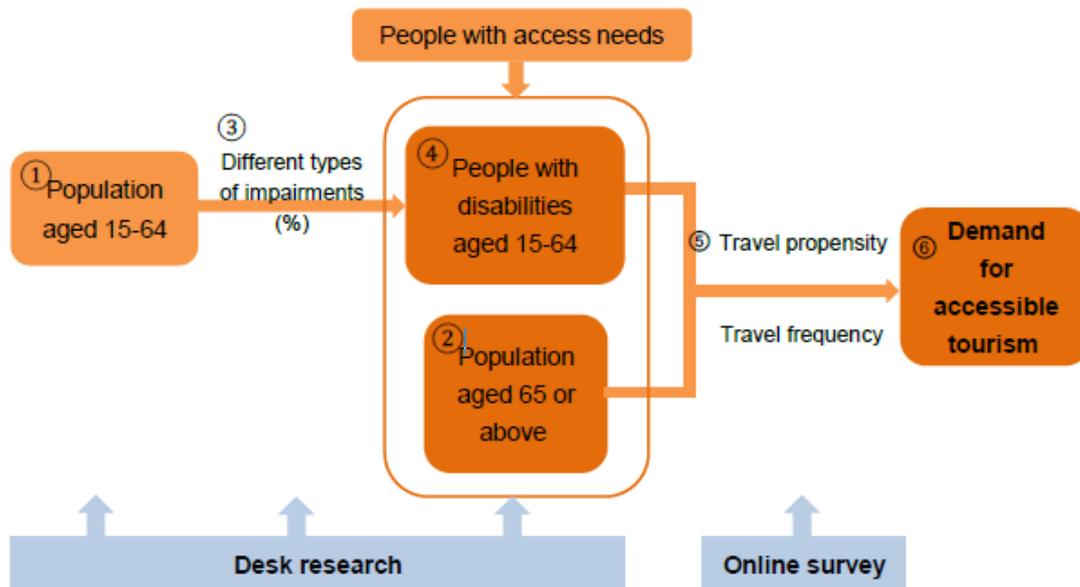


Figure 1 - Estimation of Demand for Accessible Tourism²

Tourism in Croatia is one of the most important economic branches. During the season of tourism, tourism sector employs most of the working-age population, which affects the living standard of the population. Tourism of Croatia in the long-term contributes to economic growth by attracting foreign investment and short-term by balancing the balance of payments and encouraging additional employment in closely related tourism activities. The role of tourism in the economy system is derived from its economic functions, so this work presents the tourism functions and their roles in the

² Source: ECONOMIC IMPACT AND TRAVEL PATTERNS OF ACCESSIBLE TOURISM IN EUROPE, pg. 40, last accessed on October 15th 2021

economic system of the Republic of Croatia. This work presents the importance of tourism in the economic system and analyses Croatia's tourism development strategy by 2020.

Croatia has the strongest economy in Southeast Europe. Tourism directly affects the economy of the country and is one of the most important activities of the Croatian economy and is very important for the development of other economic activities. The importance of tourism is observed through the effects on the balance of payments that are also maintained on several economic functions of tourism. In addition to influencing the balance of payments, tourism also contributes to the stabilization of the economy and economic growth. Croatian tourism is a great source of income for the country. According to the data published by the Croatian National Bank on its website, it can be seen that revenues from tourism increased by 10% in 2017 compared to 2016, which is the result of a good tourist season. According to data published by the Croatian Chamber of Commerce, revenues of 16.5 million euros were generated by foreign tourists as well as 90 million overnight stays in 2017, which is an increase of 14% and 12% compared to 2016.

In Italy, just like in Croatia, tourism represents one of the foundations of the economy. Tourism continues to make an important contribution including indirect effects; in 2017 it accounted for 13.0% of GDP and employed 14.7% of the workforce. Tourism industries directly employed 2.0 million people in 2018, accounting for 8.3% of employment. An estimated 216 100

businesses were operating in the accommodation sector in 2018. Travel exports represented 39.9% of total service exports in 2018.

In line with global trends, arrivals data for 2018 shows steady and positive growth. According to accommodation statistics, the number of inbound visitors totalled 63.2 million up from 60.5 million, (growth of 4.4%). International overnight stays rose by 33.2% between 2011 and 2018. Almost 60% of international arrivals head to just four regions: Veneto, Lombardy, Lazio and Tuscany. A total of 62.9 million domestic overnight trips were made in 2018.³

All of these numbers have been severely affected and lowered by the impact created by the COVID-19 Pandemic, and thus created a significantly negative consequences to the country's economy.

Tourism for all is a widespread social imperative, which should be made possible by the public authorities and by enterprises that are in some way involved in providing tourist services. Persons with disabilities or with special needs are full-fledged citizens in States, an increasingly important segment of tourism demand for the industry's business, and a factor for diversifying destinations and products in tourism development strategies. The worldwide growth rate of persons with disabilities or with special needs is higher than

³ Source: <https://www.oecd-ilibrary.org/sites/3d4192c2-en/index.html?itemId=/content/component/3d4192c2-en> (last accessed on September 29th 2021)

population growth. This is due to population ageing and to the global increase in chronic health conditions linked to disability.⁴

Structural differences in tourism models across countries are typically reflected in a different sensitivity of demand for tourism services to income and prices. The international demand for both Italian and Croatian tourism is more income elastic than for other Mediterranean destinations. The tourism demand can be extremely sensitive to prices.

The policy makers and authorities are aware of challenges and opportunities, but differentiating away from the traditional offer has proven difficult so far. This calls for renewed and coordinated efforts by policymakers at all government levels to address the existing shortcomings and support the development of the tourism sector in terms of scope and quality of the offer.

2. Tourism policies and programmes for Italy and Croatia

Accessible tourism is about making it easy for everyone to enjoy tourism experiences. Making tourism more accessible is not only a social responsibility – there is also a compelling business case for improving accessibility as it can boost the competitiveness of tourism businesses.

⁴ Source: Manual on Accessible tourism for All - Public Private Partnerships and Good Practices, UNWTO Publications, pg. 19, <https://www.e-unwto.org/doi/book/10.18111/9789284416585> (last accessed on May 10th 2021)

Evidence shows that making basic adjustments to a facility, providing accurate information, and understanding the needs of disabled people can result in increased visitor numbers.

There are various types of accessibility

- **physical accessibility** – improving spaces and infrastructure to create an environment where citizens can move around freely
- **food accessibility – providing assistance to person with food allergies and/or food intolerances in finding adequate dining places**
- **communication accessibility** – helping people with communication difficulties to get their message across via tools and trained staff
- **web accessibility** – making booking services and related websites easier to access⁵

Accessible services have the potential to attract more potential customers, increase service quality and strengthen the image. Accessibility is often narrowed down to the construction or adaptation of facilities but types of barriers and difficulties involved in tourism have a much wider scope and are present in all tourism and travel-related services. Accessible destinations have to ensure the accessibility of the complete value chain including hotels, transport, attractions, free-time facilities, tourism information offices, information and booking systems, marketing and an inclusive attitude

⁵ Source: https://ec.europa.eu/growth/sectors/tourism/business-portal/accessibility_en (last accessed on October 26th 2021)

among all relevant actors. Accessibility measures in tourism have to be accompanied by adequate accessibility of public spaces and involvement of public bodies. Only coordinated efforts combining each phase of the visitor's experience may lead to visitor satisfaction.⁶

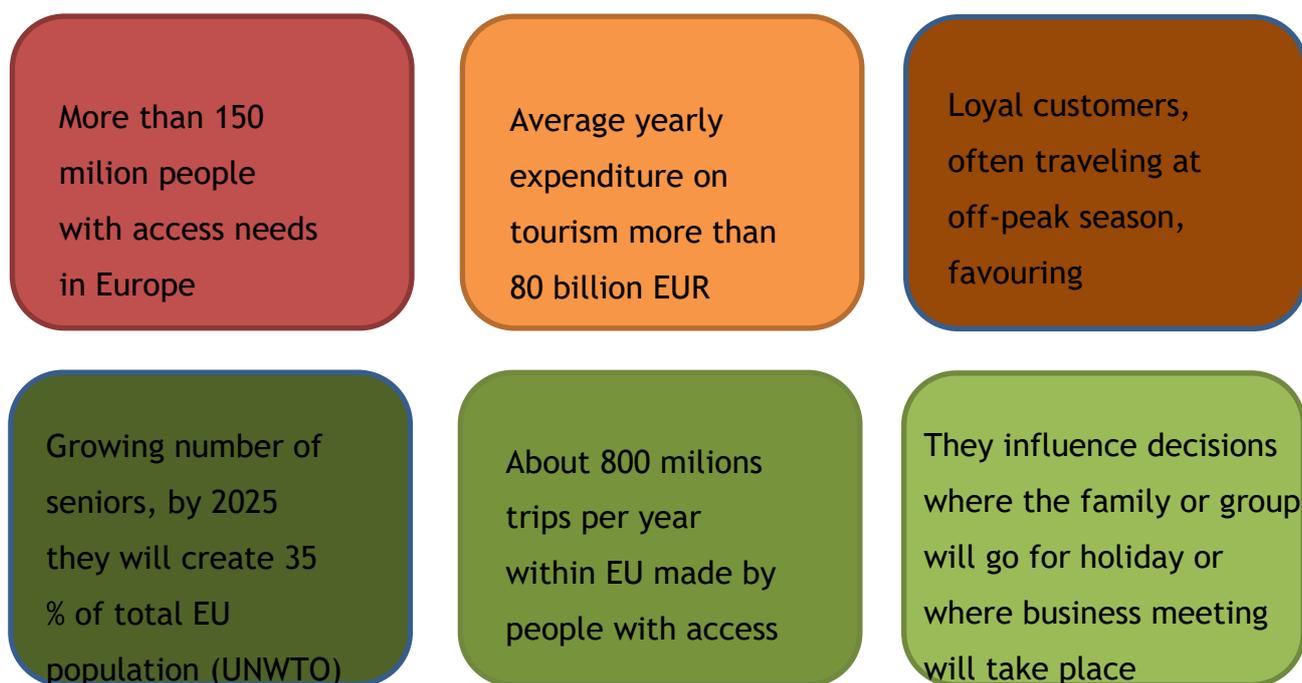


Figure 2 - Basic facts about the accessible tourism market in EU⁷

⁶ Source: https://www.accessibletourism.org/resources/io3_1_visitors-en-final.pdf (last accessed on October 26th 2021)

⁷ Source: European Commission (2014), Economic Impact and Travel Patterns of Accessible Travel in Europe - Final Report, <http://ec.europa.eu/DocsRoom/documents/5566/attachments/1/translations/en/renditions/native>, last accessed on October 15th 2021

2.1. Italy ⁸

The current policy framework is the National Strategic Plan for Tourism 2017-2022, which is based around four themes:

- Culture and heritage: cultural and natural heritage should be enhanced through sustainable management practices and the innovative use of assets.
- Competitiveness and employment: tourism competitiveness should be boosted to generate added value and increase the quantity and quality of employment.
- Putting the tourist at the centre: the Italian tourism experience should respond to the demands and expectations of the market.
- Integration and interoperability: the system of tourism associations and operators should be fully integrated, encouraging interoperability and partnership working.

Three strategic principles cut across all of the Plan's targets and measures:

- Sustainability: a key element of competitiveness in tourism, which must conserve natural resources and landscapes and attract investment for their protection. A sustainable vision for tourism is geared towards sharing opportunities throughout the country and

⁸ Source: <https://www.oecd-ilibrary.org/sites/3d4192c2-en/index.html?itemId=/content/component/3d4192c2-en> (last accessed on October 6th 2021)

throughout the year, and bringing employment to new as well as established destinations.

- Innovation: in relation to tourist destinations, business models, professional profiles, marketing, and the quality of services and products. Digitalisation is at the forefront of innovation, relating to the distribution of information, decision making by travellers and the expansion of information tools,
- Accessibility: includes widening access to less-visited areas and giving all types of visitor the chance to benefit from tourism and fully appreciate the uniqueness of the destinations visited.

In 2016, the Ministry signed protocols with the Ministry of Economic Development and AGID, the Government's digital agency, for the creation of new digital services for tourism, including Wi-Fi and large bandwidth networks. In a new commitment to tourism mobility, the Ministry has agreed a Special Plan for Tourist Mobility with the Ministry of Infrastructure and Transport, with EUR 372 million available over the period 2016-2024, including EUR 90 million for investment in a 'soft mobility' network (e.g. cycle tracks, tourist rail services) and EUR 60 million for touring routes (Cammini), such as the Via Francigena and the Via Appia. This further develops the work begun during the 2016 Year of the Italian Routes, which had the objective to enhance the value of cultural routes.

The Tax Credit system for the tourism sector, namely the 'Art Bonus Decree', approved in 2014 and refinanced with EUR 460 million until 2020

aims to refurbish and modernise tourism establishments, is due to expire in 2020. It is hoped that this will continue into the future. A new hotel classification system with a special focus on sustainability and accessibility is in the process of being approved.

Greater emphasis has recently been placed from a promotional perspective on extending the national offer away from major attractions towards lesser known destinations. The objective is to diversify away from the popular iconic destinations and spread the economic benefits of tourism in both time and space by drawing on the inherent resources, history and uniqueness of places right across Italy. This strategy will develop products to meet niche interests, such as wine, sport, adventure and well-being, with new experiences offering local communities the opportunity to develop smaller scale tourism offers rooted in the place. This reflects market trends that see many visitors motivated to travel for a more personal experience centred on personal growth and self-actualisation as well as contributing positively to the places they visit.

ENIT's 2020 marketing plan, therefore, draws on sustainable tourism principles to show the breadth of the offer. Some product strategies have been particularly successful such as cultural tourism linked to small Italian centres and smaller cities of art.

The future vision for Italian tourism development for the next few years focuses on value growth. This aims to generate sustainability in economic, social and cultural terms by drawing on the value of the wider tourism offer underpinned by local businesses. The vision sees the following as important:

- An underpinning requirement for environmental sustainability.
- Well-coordinated promotion (national / regional / local level) based on common objectives,
- Enhancement of local products and brands through “brand positioning” to fit the national system.
- Respect for local communities and social responsibility.
- Increasing the use of local airports and other transport hubs.
- Building economic value by attracting events.
- Supporting the competitiveness of the tourism offer with investment and product development.
- Improving the quality of the service and product and the identification of segments / countries with the greatest potential.

This vision sees a broader definition of cultural tourism to be of potential value. In Italy, there are 5 568 municipalities with a population of less than 5 000, the so-called Borghi villages. These places offer 51 000 accommodation businesses with 1.4 million bed spaces and attract over 21 million arrivals staying 90 million nights. Moreover, 64% of the 55 UNESCO sites in Italy are represented in these locations and the seasonality of cultural tourism does not coincide with times of peak demand but rather encourages shoulder and off-season demand.

The Committee “**for the promotion and the encouragement of Accessible Tourism**” was established in Italy in response to the demand of focusing the whole tourism system on each person and his needs. Accessible

tourism is the highest expression of such a civilized goal, as well as being an undeniable - modern and fashionable - attractive to revamp the image of Italian tourism in the world. For this reason Italy has established a Charter of Rights for Tourists.



Figure 3 - Accessible Tourism⁹

⁹ Source: ECONOMIC IMPACT AND TRAVEL PATTERNS OF ACCESSIBLE TOURISM IN EUROPE, pg. 40, last accessed on October 15th 2021

Accessibility, i.e. the absence of all architectural, cultural and sensory barriers, is the essential requirement to allow everyone to enjoy Italian heritage. The principle promoted by the Committee's action is simple and very clear: individuals in their entirety and with their needs are citizens and customers having the right to experience tourist offers completely and autonomously, receiving suitable services according to the price they pay.¹⁰

All tourism businesses and institutions should aim to be universally accessible and create barrier-free tourism. This means ensuring **tourist** destinations, products and services are **accessible** to all people, regardless of their physical limitations, disabilities or age. Accessible tourism aims to allow tourism destinations to be enjoyed equally by everyone.

2.2. Croatia¹¹

Over the last two years, many tourism and hospitality related legislation have been modified either to improve the management of tourism or, to align legislation to EU directives. The new laws establish two funds, for tourist boards in less developed areas and to create clusters of tourist boards. Another major change is the devolution of tourism taxation to

¹⁰ Source: <http://www.italia.it/en/useful-info/accessible-tourism.html> (last accessed on October 15th 2021)

¹¹ Source: <https://www.oecd-ilibrary.org/sites/e1fa2868-en/index.html?itemId=/content/component/e1fa2868-en> (last accessed on October 6th 2021)

regional level, giving County Assemblies the responsibility to set tax rates in their respective areas.

New structures relating to the management of the tourist board system will come into force in 2020, enabling financial incentives for clusters of tourist boards and changes in the roles of local and regional boards. Local bodies will have more operational control over product development, information and distribution, while regional boards will be responsible for strategic planning and development, research and marketing. The national Tourist Board will focus on international marketing.

Regarding cross-government policy development, the Ministry of Tourism has played an important role in the development of the new Croatian Development Strategy 2030, where tourism is an integral component. Empowerment of the Tourism Sector is one of the strategic goals of the 2030 Strategy. The aim is to achieve a multiplier effect on the Croatian economy via linkages throughout the tourism value chain.

The current Tourism Development Strategy 2020 has the following aims:

- To improve the tourism product and raise quality through investment, innovation, smart specialisation and sustainability.
- To position the Croatia brand strongly in international markets, increase shoulder and off-season turnover, increase average spend and support the private sector.

Preparations are underway for the development of a new tourism strategy. Action plans stemming from existing work have helped create a network of stakeholders focused on the development of new products and destinations. Besides three sessions of the Working Group on Tourism, the session of the Leadership group on Tourism has also been held. The Working group includes representatives from professional business associations, while the Leadership group directly includes representatives of the business sector. These groups provided inputs and constructive proposals to better prepare implementation mechanisms, strategic reforms and strategic projects, in order to achieve the defined strategic goal on tourism. The Ministry of Tourism is currently developing the overall strategic project to achieve this and expects the Strategy to be adopted by the Government at the beginning of 2020. The drafting process will start after the adoption of the National Development Strategy 2030, as it will be in line with the 2030 Strategy's strategic tourism goals.

Croatian Tourism faces a number of challenges:

- Lack of workers - 64% of employers report difficulties in finding suitable staff.
- Building overdevelopment – Newly built accommodation in some areas along the coast is causing environmental degradation, with impacts on water consumption and traffic.
- Congestion and waste management - Cruise ships have created potential social concerns as tourism in Croatia is rooted in destinations where local populations share resources.

- Seasonality and unbalanced geographic spread – The season is concentrated between June and September, with coastal resorts accounting for 89% of all tourist arrivals and 95% of all overnight stays. Croatian tourism is directly connected to the sun and sea product and has insufficient innovative and high quality products elsewhere, despite a rich abundance of natural and cultural resources that could support diversification.

These issues are being addressed in a number of ways by the Ministry of Tourism:

- HRK 65 million is being allocated to 42 projects to encourage adult education institutions (and other) to attract vulnerable groups into the labour market. A network of regional centres of competence in tourism is also being established as hubs of learning involving industry, academia and other institutions. In addition to providing formal vocational education, the centres will train trainers, encourage flexible and continuous learning and target disadvantaged groups. The government has also exempted companies from VAT on food and accommodation costs for seasonal workers, enabling an increase in salaries for these workers and further incentive to work in the sector.
- To encourage diversification, the Tourism Development Fund facilitates the development of public infrastructure and public visitor attractions to improve the quality of tourism products. A range of projects have been funded over the last three years for the improvement of beaches

and lakesides, cycling infrastructure, interpretation and visitor centres. Cycle tourism has been a national priority with a network of cycle routes for tourists being developed around the country, also contributing to the health of the local population. The Ministry is also revising regulations to enable mandatory classification to cover new trends for different types of accommodation to boost the quality and visibility of accommodation in less visited places.

- Impacts of intensive tourism development are being addressed with a multifaceted approach involving research and collaboration with partners from the Croatian Sustainable Tourism Observatory. The European Tourism Indicator System is being applied to monitor levels of sustainability at regional and local levels using 15 baseline indicators focused on social, economic, environmental and spatial sustainability. Additionally, the Ministry is collaborating with seven other Mediterranean countries on SMARTMED projects to address key challenges of seasonality and over-development.

Croatia has also taken a comprehensive approach to redefining its tourism administration system, and it is digitalising the national information infrastructure through the e-Tourism project (Box 1.15). This is focused on the development of eight linked public sector e-services in tourism, providing information for civil servants and linking the processing of several public bodies into an integrated system.

3. Understanding the market

In order to make the tourist offer of a country accessible to persons with disabilities, the possibility of obtaining information for all persons should be balanced at national level and measures to ensure availability and access to the tourist offer should be taken. So, in museums and galleries it is necessary to achieve the effects that every person, regardless of his disability, can experience some performance. Full accessibility is reflected in different segments.

There is huge demand for accessible travel. A great amount of money is spent by people with health conditions and impairments, and their travelling companions. Another growing market with access requirements is the extended family group or multi-generational travel – a market which has doubled in 2014. Step-free access can be a requirement at both ends of the age range, especially for those using prams!

The viability of tourism destinations depends on an ability to identify markets that will continue to deliver business in the long term. In order to fully understand what potential clients are looking for, in this case how to adapt the touristic locations to the persons with disabilities and to adjust to the trends and changes in market offers and requests.

In terms of numbers of tourists, around 1 billion people globally suffer from some form of disability, as per the WHO's World Report on Disability. This translates into roughly 15% of the world's population. According to the type of disability, people with damage to the locomotor system are the most represented, followed by persons with mental disorders, while the third place is occupied by persons with impaired organs (most often organs for movement).

And it is important to mention only around 6% of travellers are wheelchair users (approximately 8% of all disabled people). Disabled people are more likely to have a long term illness or hearing loss than have mobility impairment. The destination should be regarded as becoming 'accessible' and 'inclusive' rather than 'disability friendly'. In this way, the destination being open to those of all ages who have access needs, rather than only those who recognise themselves as being 'disabled'.

Generally, in Italy accessible tourism is being facilitated by a good legislation. Accessible tourism is a topic which has received increasing attention, above all since the late 1990s. Focusing the analysis on the most recent period, some important steps are to be noted:

- In 2009 Italy ratified the Convention on the Rights of Persons with Disabilities
- (CRPD) and its Optional Protocol, adopted by the UN General Assembly on December 13th 2006.
- To guarantee the implementation of the UN CRPD, a national law (article 3 of Law of 2009, no. 18) established the National Observatory

on the Condition of Persons with Disabilities. The Observatory is a consulting body that provides technical and scientific support for the elaboration of National policies in the field of disability.

- In October 2009 the Minister for Tourism created the “Accessible Tourism” ministerial Committee. This Committee drafted the “Manifesto for the Promotion of Accessible Tourism”. The Manifesto contains ten fundamental principles, as illustrated by Figure 1. In March 2011 European Network for Accessible Tourism (ENAT) undersigned the Manifesto, committing to promote its contents in all 27 EU Nations.

Moreover, on September 27th 2012, Italy signed the adoption of the Global Code of Ethics for Tourism (Angeloni, 2012). Also in 2012 a Ministerial Decree established a Committee for the Promotion and Development of Accessible Tourism. In 2013 the Prime Minister’s Office & Mission Office for Enhancing Italy’s Image (PMO et al.) elaborated and published the first “White Paper on Tourism for All in Italy”, entitled “Make it accessible”.

The White Paper is a novelty to Italy and contains 360 best practices and projects related to accessible tourism, which show that Italy has been promoted among the destinations available worldwide. Below a summary of this White Paper is provided. To quantify Italian people with disabilities, the White Paper uses the main source of data, represented by the study “Social inclusion of people suffering from limitations to personal independence”, published by the Italian National Institute of Statistics in December 2012. According to this study, in 2011 the number of persons aged 11-87 years

with functional limitations is 3,947 thousands: more precisely, 1,867 thousands are persons with “slight” functional limitations while the number of persons with “serious” functional limitations is 2,080 thousands. According to the same survey, over one and a half million Italian people (45% of the total of those aged between 15 and 87 with functional limitations) find it difficult to go on holiday due to health-related problems.

Foreign tour operators also report that Italy falls short in providing training for establishing relations with clients suffering from mental illnesses, or with blind or deaf clients. Operators believe that personnel in Italy are not adequately trained to provide information to travellers suffering from renal insufficiency (who need to know where haemodialysis centres are located locally), diabetes or oncological diseases (who might benefit from the positive effects, including psychological effects, of the holiday in order to carry on with their treatment).¹²

Croatia can take advantage of the potential of accessible tourism in order to improve the tourist offer. For example, hotels with certain orthopaedic aids could be considered accessible or at least partially accessible. The problem is transportation too. There are a very small number of low floor buses or trains or taxis for people with disabilities, which usually makes an offer of a tourist destination in the world.

As regards the offer of customized tourism in the Republic of Croatia, national regulations require that persons with reduced mobility should

¹² Source: Accesible tourism in the Italian destination
(https://www.researchgate.net/publication/276274636_Accessible_tourism_in_the_Italian_destination) Last accessed on October 13th 2021.

ensure smooth access and movement, but most facilities still contain obstacles in the facilities themselves and in their immediate near. Thus, people with disabilities often encounter a non-adapted height of the thresholds in accommodation units, non-customized beds, bathrooms, and often the problem is serving food served through the so-called "Buffet", which Often people with disabilities are unable to approach.

It is necessary to systematically invest in market research in order to obtain a picture of the needs of potential tourists. It is also necessary to market research in order to obtain information for the adoption of quality and necessary business decisions. It is a systematic investment in tourist infrastructure so that people with disabilities can be equally able to enjoy all the activities that the destination offers.

As for excursions and vacations, unfortunately, one-day excursions are prevalent, while several days of excursions and vacations for persons with disabilities are rare, and they take place mostly in the organization of associations of persons with disabilities who want to provide their members with adequate rest because State does not yet have a solution to this problem. Often people with disabilities have the only type of vacation and excursions they experience through departures on health rehabilitation, which can be traced through the prism of social and health tourism. Facilities designed to accommodate people with disabilities are often the only hostels and resorts, such as the Red Cross Resort, city-owned children's resorts and trade unions whose primary goal is to accommodate children and families.

3.1. Mapping and assessment of competence needs of tourism operators

In the frame of the project, some partners organized a survey which targeted tour operators, SMEs and associations on the Italian and Croatian coasts, with the aim of:

- Mapping the knowledge and perception of the accessible tourism market in general (definition, advantages, barriers, ...)
- Assessing the perception of the accessible tourism market on the pilot site (experiences, advantages, barriers, ...)
- Mapping the training needs in the field of accessible tourism for tourist operators of pilot application sites
- Mapping the interest in participating in training activities on accessible tourism

Project collected *n.*131 surveys (66 IT, 65 HR), from public (*n.* 43) and private (*n.* 88) organizations of the pilot project sites.

More specifically:

- Authorities (Municipality, Local Authorities, Local Development Agencies, Chamber of Commerce, Authorities that are responsible of the destination management involved in Tourism4all project investment)
- Business associations

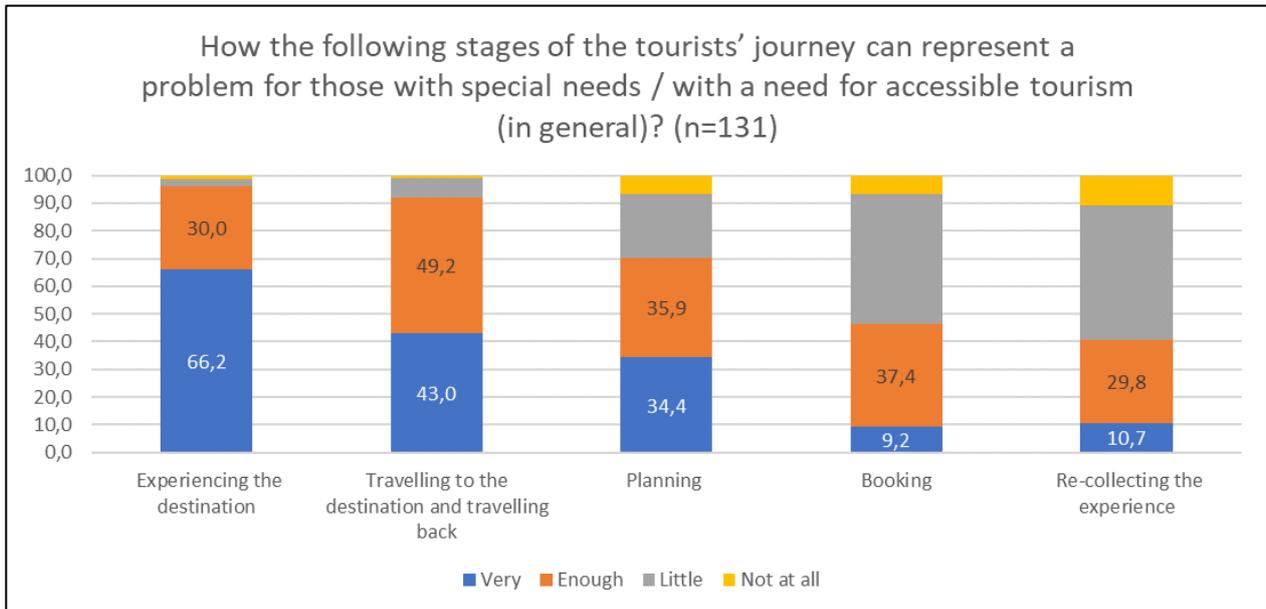
- Organizations representing People with Disabilities (PwD) or Elderly People
- Tourism organizations & operators (Regional Tourism Agency, Local Tourism Office, Tourism Consortium, Tourism operators / Travel Agencies (incoming agencies, Hotels / Camping associations / Tourism Business association, etc.)
- Educational Institutions and Cultural institutions

Timing

Collection period: June 2019 – November 2019.

Main Findings

- Accessible tourism is still perceived as a cost instead an opportunity
- There is no complete and homogeneous view of all of the potential targets of accessible tourism: the idea of accessible tourism is still mostly linked to “physical disability”
- Referring to the tourist journey, main perceived problems are:
 - Experiencing the destination
 - Travelling to the destination and travelling back



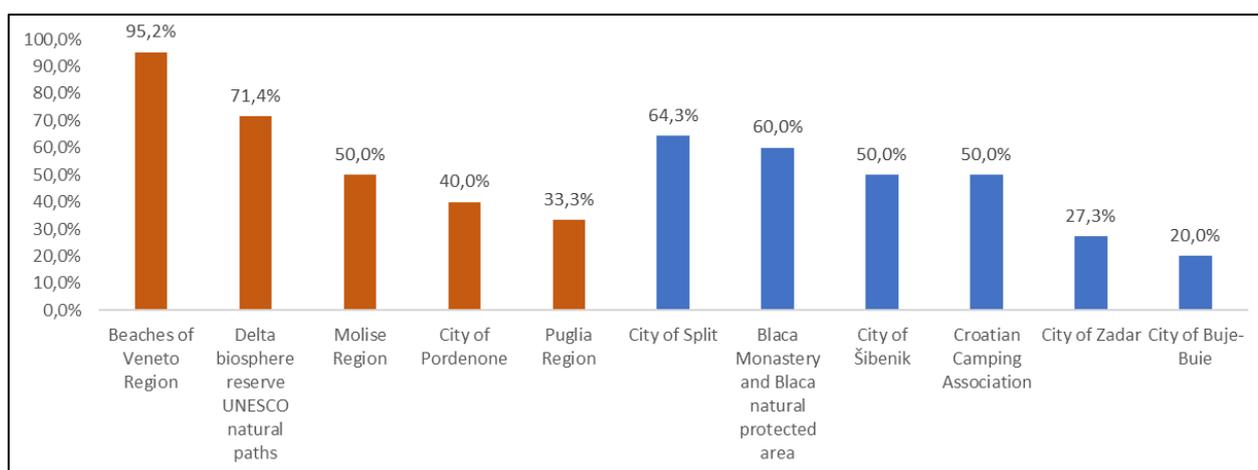
Perceived as most critical by Croatian stakeholders (Croatia= 57,8 %, Italy=28,1 %)

- General sharing of the opportunity that accessible tourism can represent for organizations and tour operators even if the judgments are more critical than the possibility of increasing earnings
- Presence of many obstacles (mainly architectural barriers but not only) in the attempt to adopt "accessible" tourist solutions from tourism organizations and operators: an integrated and organic approach is needed
- The opinions of Italian stakeholders are generally more positive (perhaps due to greater experience on the topic)

With reference to the pilot site:

- Percentage of stakeholders declaring to have made experiences on the theme of accessible tourism over the last 5 years is higher in the Italian context

Percentages of stakeholders declaring to have made experiences on the theme of accessible tourism over the last 5 years (n=120)

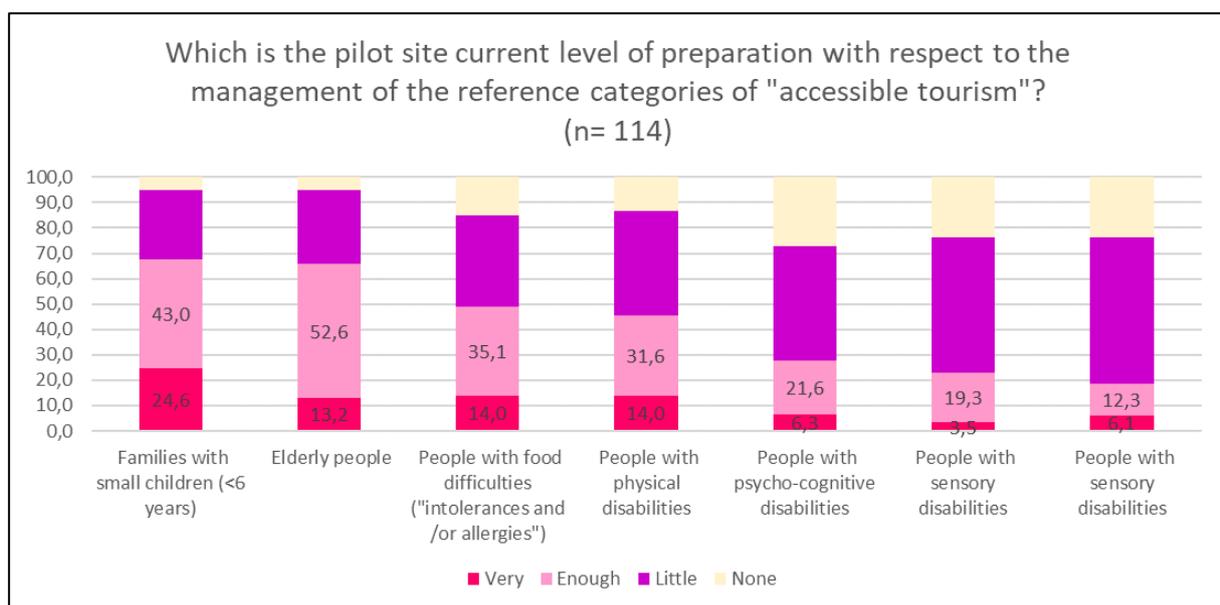


Italy 67,9 %

Croatia 45,3 %

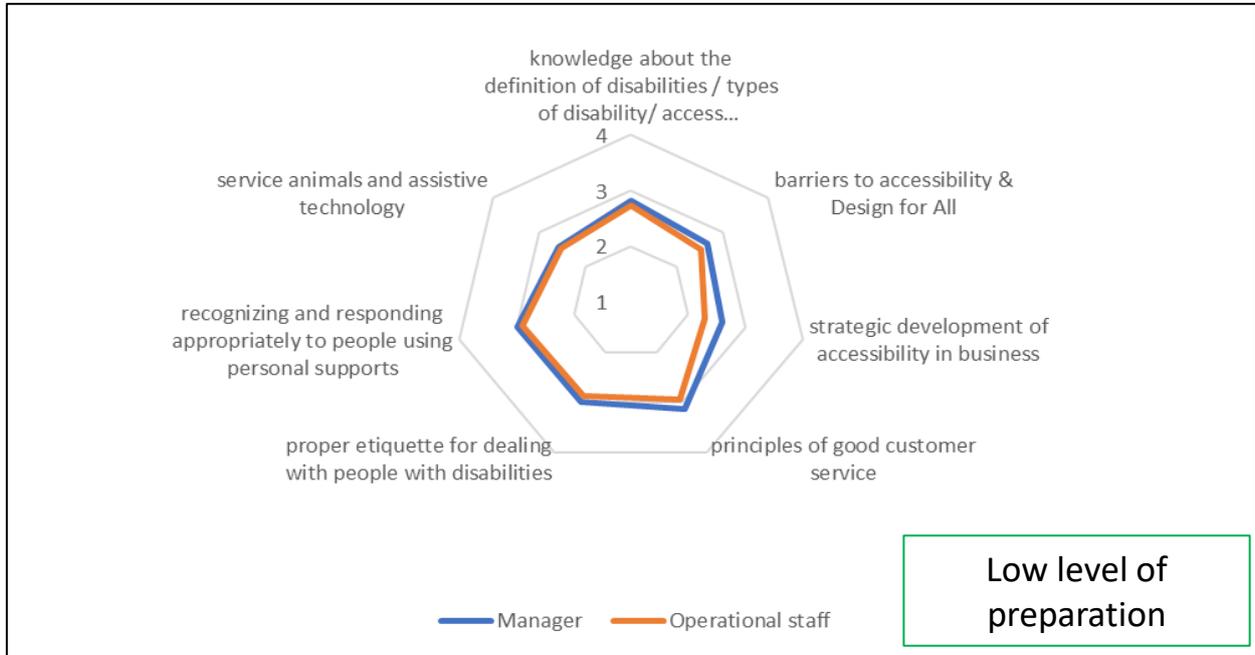
- Experiences are related to mostly people with physical disability and elderly people
- Less than 10% of respondents believe that the pilot site is properly prepared to manage accessible tourism targets

- The pilot site current level of preparation with respect to the management of the reference categories of “accessible tourism” is lower for:
 - People with sensory disabilities: Blind /Visually Impaired
 - People with sensory disabilities: Deaf / Hearing impaired
 - People with psycho-cognitive disabilities

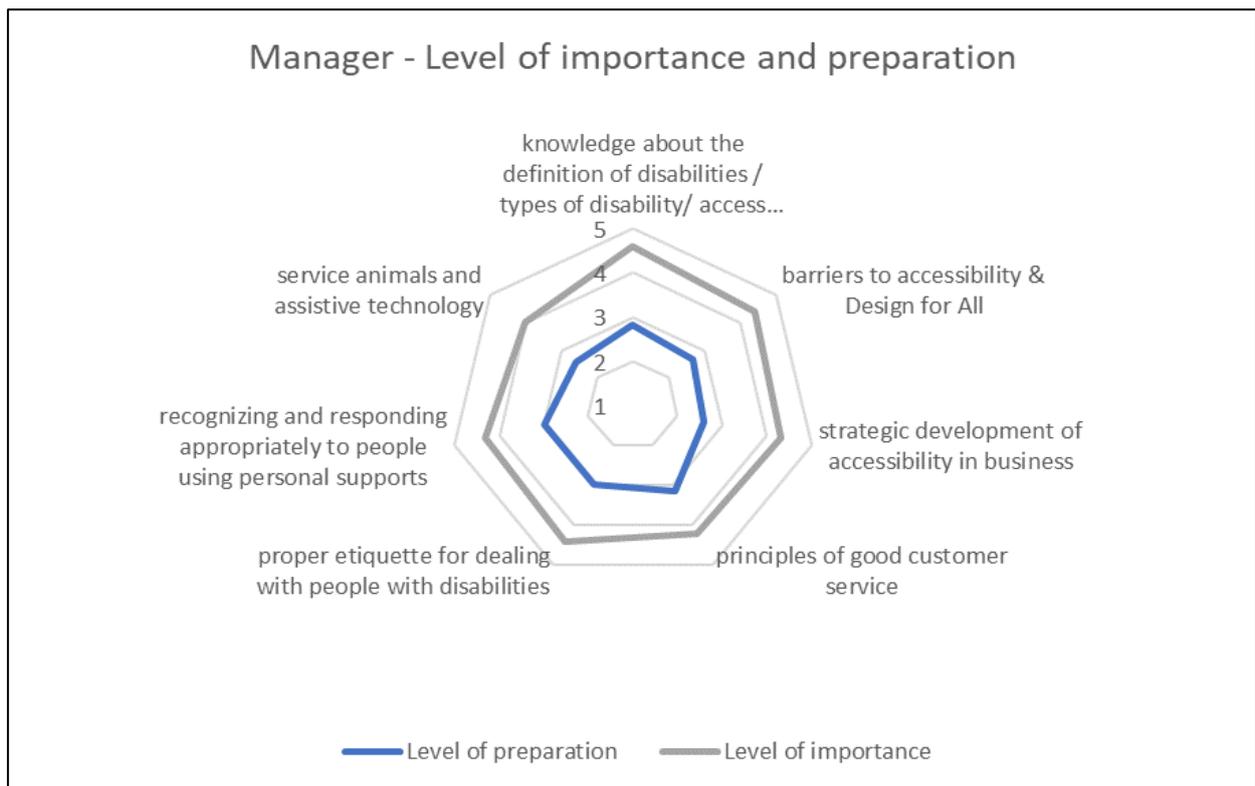


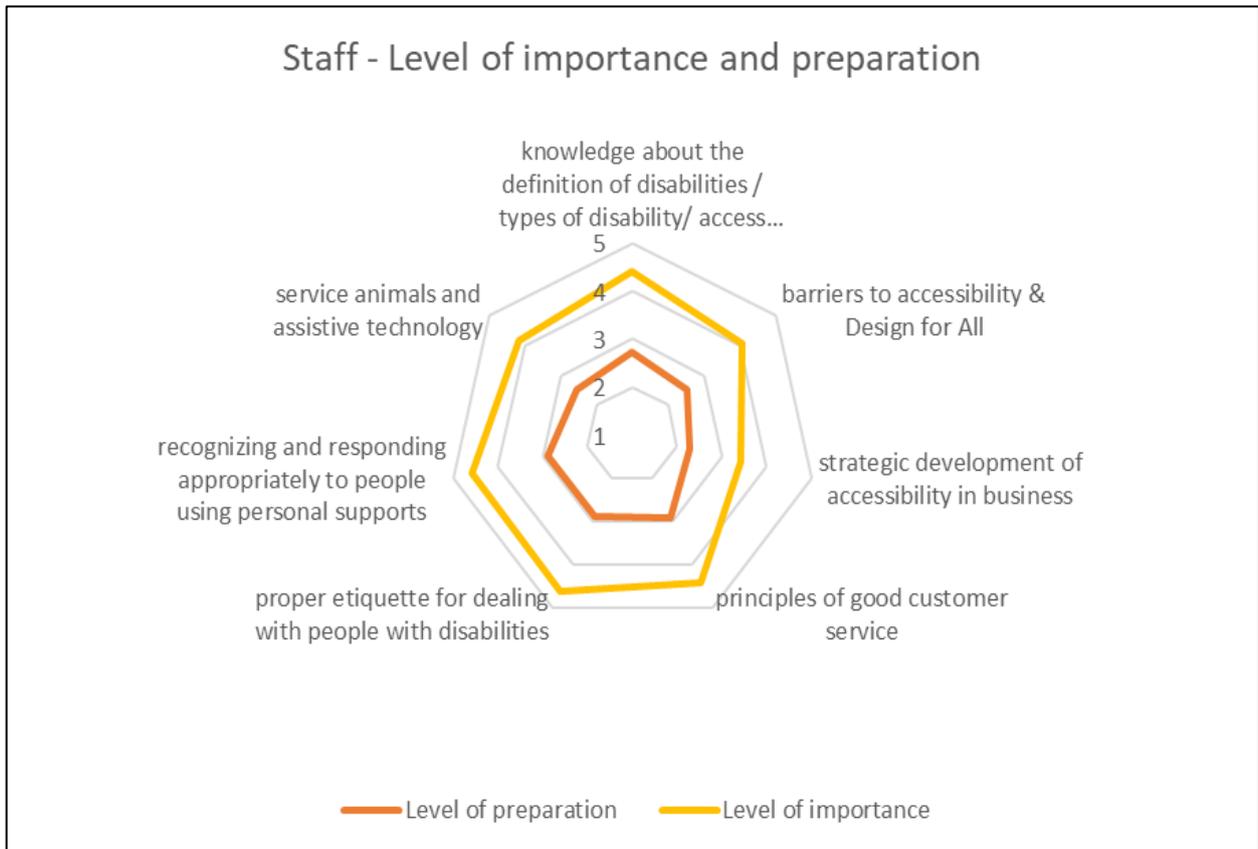
- All training topics are important both for managers and local tourism operators and for operational staff of local tourism operators (with, obviously, the only exception of “Strategic development of accessibility in business”)
- The current level of training of tourism operators regarding "accessible tourism" is low, especially for Croatian stakeholders
- There are no significant differences between managers and staff in the level of preparation on accessible tourism subject

Level of preparation of managers and operational staff (1=absent; 5=high)



- Big gap between the current level of preparation and the importance given to the various training topics related to accessible tourism for both managers and staff





- Italian stakeholders declare more previous training experiences on the accessible tourism subject

4. Recommendations for policy makers

It is very important to work on the actualisation of the issues of accessible tourism. These issues are also closely related to development of tourism in general, and the development of sustainable tourism, and should be considered in this context.

Accessibility to certain localities is not only necessary for people with disabilities, but also for the elderly, families with small children, people with temporary or chronic diseases. This accessibility is strongly associated with universal design which is the process of creating products that can be used by people of different abilities and those who operate in the widest range of possible situations.

Local Authorities will want to make sure that the services and facilities they provide are economic prosperity and ensure that the region thrives socially and economically. In addition, Local Authorities, also have responsibilities under the Equality Act 2010 to comply with the public sector Equality Duty. This means they must “have due regard to the need to:

- Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Act.
- Advance equality of opportunity between people who share a protected characteristic and those who do not.
- Foster good relations between people who share a protected characteristic and those who do not.

Therefore, it is important that throughout their work they consider the different demographic groups that make up their population, and make sure that they meet the needs of people with “protected characteristics”. The protected characteristics are: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion and belief, sex and sexual orientation. By undertaking a destination audit Local Authorities will be better placed to meet the needs of their population.

It is highly recommended to involve disabled people and to make sure that their views, ideas and insights are incorporated, which will mean that destinations and related services (e.g. transport) will be able to tailor their delivery and environments, to ensure that the needs of disabled customers of all ages are catered for.

The four key indicators of a well-planned and effective process to involve disabled people should be taken into consideration by the policy makers, in order to create the best possible environment and involvement of the mentioned. These are:

- Involving local disability groups and disabled representatives;
- Valuing the involvement of disabled people and demonstrating this through example and best practice;
- Ensuring that all those disabled people involved are able to contribute fully to the process without experiencing communication barriers;
- Demonstrating that once provided, the views of disabled people will be acted upon;

These elements combined with use of a practical checklist to identify the individual stages for involvement should ensure better provision of information and greater value to disabled visitors and their families/friends.

It should be ensured to persons with disabilities access, on an equal basis with others, to the physical environment, to transportation, to information and communications, including information and communications technologies and systems, and to other facilities and services open or provided to the public, both in urban and in rural areas. Liberty of movement is also recognized, expressed as the right to leave any country, including their own, which is a key factor in tourism.

All appropriate measures should be taken to ensure that persons with disabilities enjoy access to places for cultural performances and services, such as theatres, museums, cinemas, libraries and tourism services, and, as far as possible, enjoy access to monuments and sites of national cultural importance. All these measures will enable persons with disabilities to participate on an equal basis with others in recreational, leisure and sporting activities and that they have access to services from those involved in the organization of recreational, tourism, leisure and sporting activities.

"The right to travel and access to tourist activities and facilities should be a key social right of people with disabilities and their families. Recreation and tourism, as part of civil rights, are considered an area of expression of expression, self-realization and improvement. Travel and tourism are an important factor in the quality of life for all people. People with disabilities, like everyone else, want and are willing to travel, but in general it can be

said that tourism products and services are not tailored to their needs.” (Mahmoudzadeh, Kourdi Sarjaz, 2018)

Accessible tourism is a sector that represents millions of people with needs and is one of the most promising *niche* forms of tourism in the world. The main targets of social tourism are young people, families, retired people and people with disabilities. "The current offer of tourist products and services in the field of social tourism, both at the level of the European Union, and especially at the level of Croatia, can be assessed as relatively modest. We cannot limit the offer in social tourism only to the offer of accommodation, but also to the offer of services, and primarily programs encouraged by the state and various organizations with the aim of strengthening social tourism. Only by acting through programs that provide various actions for the purpose of strengthening social tourism can we count on the reaction of the tourism sector. By strengthening social tourism, some problems of tourism service providers themselves can be partially solved, such as the high seasonality of tourist demand.”¹³

4.1. Proposed recommendations for the Public sector

The public bodies/sector has a crucial role to play in the development and management of tourism and in making it more sustainable. The level of government engagement in tourism varies considerably across the world.

¹³ Source: https://mint.gov.hr/UserDocsImages//archive//151014_akcijski_socijalni.pdf (last accessed August 20th 2021)

Contacts with governments on sustainability nevertheless reveal that most are, at least nominally, seeking to pursue sustainable tourism. This applies equally to developed and developing countries, though the emphasis may be different.

4.1.1. Public sector as the initiators for sector improvement

The public sector as the major decision maker in the country should serve as an example for all by providing concrete solutions for all of the existing and potential problems. Over the past period, the public sector has been very active and has achieved significant results in terms of promoting and supporting the concept of accessible tourism legislation.

A specific strategy to enhance rehabilitation and equalisation of opportunities, which will lead to full participation of persons with disabilities in social life and development, should be considered and adopted. Therefore, the basic assumptions for the systemic improvement of the mentioned sector could be created.

All of the sustainability agenda is about areas of the public sector rather than the private. Although the private sector is beginning to recognize its responsibility, it cannot, on its own, be expected to take a lead on these issues. Governments are responsible for many functions that are fundamentally important to the sustainable development of tourism, such as

land use planning, labour and environmental regulations, and the provision of infrastructure and social and environmental services.

Many governments are already actively engaged in supporting tourism through marketing, information services, education and in other ways, often through joint public-private frameworks. These functions need to continue and to be more closely aligned with social tourism objectives and sustainability goals.

In this connection, it is desirable that initiatives by public institutions are to be taken in the future to work more intensively on the adoption of by-laws and the missing operational plans. It is desirable for the public sector as a state pillar to start implementing the mentioned measures, as it will affect the overall awareness of the society. On this issue, the public sector has a decisive role and will certainly affect the overall change of consciousness and will bring significant improvements.

4.1.2. Delivering visitor satisfaction

Long-term viability needs satisfied visitors who return and who recommend others to visit. This means delivering an experience that meets or exceeds expectations.

It requires the following:

- An emphasis on the quality of every component of the visitor experience, including mechanisms for checking, identifying and improving it.

- Attention to value for money and the overall competitiveness of the destination.
- Obtaining regular feedback from visitors, with special emphasis on incorporating the obtained information in the forming

Visitor experience is extremely important and highly depends on how engaged your employees are. The connection between the visitor and the tourist operator can easily be lost by avoidable mistakes and inappropriate behaviour. Sector operators have lots of work to do to ensure the visitor (client) is entirely satisfied with the quality of offered services and products. Strong relationships have to be built from both ends with mutual respect and consideration. The 4 main points that need to be respected in order to ensure client/visitor/customer satisfaction with the offered services are:

1) Provision of adequate information

One of the most important things that catch a visitor's attention is adequate information. Visitors should be given access to real and true information at any time, and providing them with this will naturally work wonders for the visitor's satisfaction. By providing the requested information their experience and confident in the service provided will enhance which will set fertile grounds to their repetitive visits.

2) Transparency

This point is also crucial to visitor satisfaction. Customers/clients/visitors should have clear access to information relating to prices, brand, products

and more. These must be clearly stated, so they can be compared with other services and make informed decisions.

3) Professional and friendly staff

To provide exceptional visitor service, professional and friendly staff is a necessity. The staff is the one that needs to represent the ingenuity and reliability of the services that they are offering. This will help to make sure customers' demands and complaints are addressed. Providing support across a variety of different platforms can also go a long way in ensuring customer satisfaction. Customer care tools would ideally be available via phone, email and online live chat, helping to cater for any technological limitations or lack of comfort your customers might have.

4) High-Quality Services

Above all, the sector operators' goals and underlying aim of satisfying customers should be to offer outstanding and qualitative service at all times. If the standards and services do not match customer's expectation, or desires, they will not be back for another visit. One-time customers soon become loyal ones when their fears are allayed, and their expectations are met, and the end result is a heightened level of customer satisfaction from the existing and new clients.

4.1.3. Maintaining and projecting an attractive destination

A comprehensive understanding of which tourism products and services exist at a destination represents a critical early step in tourism development. An attractive destination represents a destination with outstanding geological features, significant cultural monuments, important historical events, famous sites, all serving the purpose of motivating people to become tourists. Without attractions, visitors have no reason to visit, at least touristically. Therefore, it is vital to assess a destination's attractions in order to identify potential markets (if any) and understand the comparative position in the marketplace.

A vision is an exciting picture of a destination's desired future intended to motivate stakeholders to work together to achieve this future. Visioning is most successful when it is participatory and creates an image that integrates all the separate visions of stakeholders. A strong vision can motivate stakeholders to work together to achieve what otherwise might be unachievable. Unfortunately all too common, many efforts simply write too short, bland, under motivating admixtures of key words contributed by different stakeholders. Tourism visions, in particular, involve the elaboration of the style of tourism the destination would like to host (ecotourism, culinary, cruise port, allowable ship size, volunteerism, etc.), and who the target market is for the destination.

The vision may also include elements of a shared strategy although the how rather than the often falls to the mission, objectives, and strategies elements of a process. Since a vision is only as strong as those who share it, the assessment team will want the broadest possible participation from a diverse set of community representatives.

Inventorizing tourism data is an initial step toward further tourism development. A destination vision shapes the purpose and paints a future of tourism development that should mobilize resources. A vision that fails to mobilize resources does not fulfil the function of a vision.

It is important to maintain the existing destinations and project an attractive destination:

- A positive and consistent image through effective destination branding, making it accessible to the persons with disabilities according to the concept 'Tourism for All'
- Safety and security. Viable destinations need to be safe and secure, and to be perceived as such. This requires attention to matters such as levels of policing, health care available to visitors, quality of information available and support services for visitors in need of assistance. Travel advice relating to safety, issued by governments in source countries, can have a considerable impact on the performance of the tourism economy in recipient countries.
- A highest priority should be given to maintaining an attractive environment as the economic sustainability of the tourism industry is a particular feature of tourism.

- Many cities in Croatia are making access improvements for the travellers that come to visit them, and the most accessible ones so far are the City of Varaždin, Istra, Pula, Umag, Split and Dubrovnik. Other major cities are still working on making improvements in their accessibility, but still lack a lot of access. For example, the city of Zagreb, is not very accessible at this time. The City of Istra has developed a guide for the disabled traveller where they list the customer services, shops, cafes, cultural sites, public health services, pharmacies and many others. Also, a guide for the blind which also does translation has been developed and is widely promoted and used. Regarding transportation, it is important to note that the city of Zagreb and its transportation system is very friendly for those needing accessibility. Besides having low-floor buses, most of the trams in Zagreb are also low-floored and easily accessible.

Italy is one of the most visited countries in the world and a desirable destination for tourists with so much to do and experience. Italy is not an easy country for travellers with disabilities. Cobblestone streets and pavements blocked by parked cars and scooters make getting around difficult for wheelchair users. And while many buildings have lifts, they are not always wide enough for wheelchairs. Not a lot has been done to make life easier for hearing- or vision-impaired travellers either. However, awareness of accessibility issues and a culture of inclusion are steadily growing.

Being an ancient and rich country, full of history and masterpieces of art, it has gone further to make its attractions accessible to all tourist demands. A

large number of routes have been freed of barriers to allow everyone enjoy the sites. Italy offers a great selection of hotels, apartments suitable for all visitors.

From an accessible beach on Italian Riviera, up to a romantic Gondola ride in Venice, through Wine and Food tastings in Tuscany, many of other different touristic sites have adapted their programmes to provide a better experience for all of their users.

4.1.4. Affirmation of cooperation of the public and private sector

The public and private sectors are interrelated in all activities and operations. The activities of one party to a large extent influence the realization of the tasks of others, and therefore good business cooperation between the two sectors is necessary.

Cooperation exists, however, a lot of work and effort is needed to keep the cooperation maintained and to a certain extent improved. Exchange of experience and information is necessary in order to improve the cooperation between the public and the public sector by reducing costs and improving the overall state of cooperation.

It is necessary to examine the challenges and opportunities provided by both sectors and their connections, because this is the best key to improving the general situation in the economy, and thus the state. It is also necessary to continue working on further improving the competitiveness and efficiency of

both the private and public sectors. It is desirable that representatives of public institutions try to improve their decision-making policies and working procedures by working on the formal adoption of best practices.

4.2. Proposed recommendations for sector operators

Sector operators have a very important role to play in the development of tourism, them being the first line on users. They are encouraged to listen to the tourist's needs, especially the categories that make the largest per cent of the service users.

The sector operators should take into account the demographic factors, and consider the problems of aging of population. In the Republic of Croatia this represents one of the major problems. A significant per cent of the aged population has some kind of disability and requires specialised programs. That is why it is of great importance for tourism that the sector operators adjust their programs to their needs.

The sector operators have to consider accessibility of tourism and leisure spaces as a basic quality factor – but it should also be seen as an opportunity for differentiation and as a way to attract new customers/clients. While designing, executing, operating, maintaining and communicating about the tourism business, it must be ensured that it will be accessible and available to everyone.

However, there are also positive examples of quality offer for people with disabilities, such as the facility of the Croatian Association of the Blind in Premantura, with a capacity of 70 people, near which there is a adapted beach for people with disabilities. The facility is mainly used for education, rehabilitation and recreation of blind people, their companions and family members from all over the country and abroad throughout the year. Apart from Premantura, adapted beaches exist in other parts, and these positive examples should serve as the examples of good practices.

Some of additional recommendations for sector operators are categorized in the following categories and subcategories:

- **Provide courtesy accessible accommodation:** The assistance should observe specific access needs of stranded travellers and be extended to “essential staff” or accompanying persons. These measures require planning since some services entail costs that need to be borne by governments, companies or individuals. Accessibility after all is about “equality” and not about “privileges”.
- **Engage in DMO/DPO peer support:** Tourism ministries, destinations, regional and local administrations should work with disabled peoples’ organizations (DPOs) in understanding different obstacles for clients with disabilities and the ways to bridge them. DPOs may assist DMOs, not only in emergencies but also by playing an active role in co-designing accessible experiences.
- **Inclusive policies in post-COVID-19 tourism**

- **Gather data on accessible tourism:** Decision-making on future developments in the sphere of accessible tourism should be based on specific and comparable data. Data needs to reveal the profile, the behaviour and the expenditure patterns of travellers with access needs, their families and the essential staff. Quality data collected globally would make the business case of Tourism for All much more evident.¹
- **Adjust accessibility policies and strategies:** Administrations should keep their role in mainstreaming accessibility in marketing and training programmes, and in inspiring their industry partners to do the same. Customers with disabilities should be targeted by mainstream marketing channels and not considered as a niche market.
- **Inclusion of accessibility in business planning**
 - **Treat accessibility as a competitive advantage:** Companies will reap the benefits of putting accessibility in place once they realize its competitive advantages. Designing inclusive experiences produces personalized services and accommodates the widest range of potential visitors, their needs and their preferences.
 - **Improve customer service:** Tourism service personnel usually lack training on catering for customers with disabilities and therefore lack confidence. Staff can expect that travellers with disabilities have varied aspirations and, with careful planning,

many activities that might not be considered as “accessible” can be adapted for those with access needs (e.g., adventure tourism, visits to archaeological sites, etc.). The pandemic opens opportunities for destinations and companies to embrace a more inclusive tourism.

- **Encourage feedback from end-users:** Visitor feedback and reviews should be harnessed for further improvements. Potential clients should have access to accurate and timely information which needs to be objective and reliable so travellers can make travel decisions with confidence. Statements such as, “We are 100% accessible” are misleading and strongly discouraged.
 - **Apply international standards:** Tourists need the same accessibility conditions, wherever they travel. Applying standards can ensure the same level of accessibility for tourism products and services worldwide. The standards also help to resolve doubts for service providers and clients by supporting a common understanding of accessibility, while ensuring service quality.
- **Training and labour inclusion for all**
 - **Extend professional training by including safety:** Employees require capacity building on health, safety and sanitary measures in order to reassure customers of the smooth functioning of services and facilities. An appropriate attitude also helps the guests feel comfortable and safe, regardless of their abilities.

- **Ensure labour inclusion:** Employment in the tourism sector should adhere to principles of equal opportunity. Workplace adaptations, job design and skill matching can enable everyone to access the labour market. Teleworking, as an option for employees with access requirements, can facilitate independence, reduce costs and lead to better customer service.
- **New technologies and social innovation improve accessibility**
 - **Use innovative technology:** Technologies should be a lever in making travel easier for all. Alternative formats. e.g. large print, easy reading, simple language, subtitles, audio descriptions and Braille, should be incorporated in information provision, facilities and services. Translations into widely spoken languages and sign languages are extremely helpful.
 - **“Build back better” tourism:** Now is the time to finally adopt an inclusive approach to tourism by developing sustainable and accessible solutions. Tourism for all brings many benefits to visitors and local communities and a better quality of life for all.¹⁴

¹⁴ Source: UNWTO Inclusive Recovery Guide - Sociocultural Impacts of Covid-19, Issue I: Persons with Disabilities, <https://www.e-unwto.org/doi/book/10.18111/9789284422296> (last accessed October 26th 2021)

4.2.1. Strengthening mutual cooperation of public sector and tourism sector operators

It is necessary to ensure cooperation between all levels of government. This cooperation should be based on mutual contact and joint activities that will result in the full implementation of all the measures that will lead to the improvement of energy efficiency. Given that there are different levels of government, the public sector obligations are different in this respect due to their jurisdiction. Taking into consideration all the mentioned, the cooperation between public administration institutions is of great importance for the economic and social development and progress in the process of improving accessible sustainable tourism.

5. Concluding remarks

People with disabilities often face a limited offer of tourist destinations, poorer service and insufficient acceptance of the environment. While the tendency to develop health tourism is recognized as one of the priorities for the development of the tourist offer, the question arises whether the needs of guests with disabilities will also be recognized. In order to work on raising the quality of services for people with reduced mobility, it is necessary to educate employees in the hospitality and tourism industry about the specifics of disability and the possibilities of implementing specialized tourism programs. Those are the basic steps that need to be realized if the tourism should address the needs and requirements of people with any kind of disability. Tourism, as well as other sectors of the economy, must follow world trends in supply and demand for services to meet the needs of every tourist, regardless of his health. Adapting to the needs of individual users will become a fundamental policy of all economic entities of our economy, whether they are directly involved in tourism or not.

People with disabilities may and want to participate equally in social activities and remove the attitudes of others towards them. People with disabilities are often faced with limited selections of tourist destinations. In countries where the importance of accessible tourism is recognized, workforce training for people with disabilities is being worked out. In order to ensure long-term changes, appropriate plans and knowledge to manage tourist destinations

are needed. The tourism development perspective tailored to the needs of each individual depends on the ability of the public sector to manage tourism in the best possible way, by taking the methods that will enable them greater economic benefits and profits while at the same time adapting to the requirements of market competition. The tourism development perspective customized to the needs of each individual depends on the ability of the public.

Regardless of the specific needs you will have in a group, there are some general, useful tips to make a tour more accessible that are appropriate for all type of customers:

- Choose accessible routes.
- Inform about barriers in advance.
- Respect tempo of the group.
- Participants with disabilities usually don't travel alone; they are often accompanied by a carer (often a family member). Don't be afraid to ask carers in the group to help you.
- Always ask a disabled person how you can help – do not assume that you know best.
- Don't be afraid to ask customers with access needs for additional information about their abilities.
- Provide clear and comprehensible information in accessible and usable formats appropriate to different kinds of impairments - sign language, simple language, audio format, different font sizes, Braille code, Easy

to read format etc. You will learn more about accessible communication in the next chapter.

- If the barriers are not big and can be overcome with some assistance, offer your help, but only if the person wants you to help him/her e.g. take a wheelchair up/down a single step. Respect if they reject help.
- If the barriers are too big or frequent and there is no other solution (e.g. alternative route) then agree an alternative solution with the participant.
- Identify evacuation procedures and paths in advance

There is huge demand for accessible travel and it is of vital importance to work on the development of accessible tourism. So, to conclude the destinations have to be improved and developed so that they can:

- Help meet the demands of an ageing tourist population in Europe and the older, wealthier incoming tourists from the major world regions
- Help re-build economies in countries that depend on tourism, through new investment
- Promote European cultural heritage to all our visitors
- Extend the active lives of older citizens through travel
- Extend the tourist season: supporting businesses & jobs
- Support the objectives of cross-border social tourism
- Maintain and develop employment opportunities for young job seekers in Europe, with new specialised jobs
- Make the most of new opportunities with tourism and the care sector

- Support sustainability and high quality tourism development.
- Let disabled people know if there are recommendations which cannot be followed up at the time and the reasons for these
- Discuss the recommendations with disability groups and enable disabled people to tell you which better suit their needs.