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Case study

Tourism and disability in Italy. Limits and opportunities ☆

Massimiliano Agovino ^a✉, Mariaconcetta Casaccia ^b, Antonio Garofalo ^a✉, Katia Marchesano ^a✉

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Highlights

- We investigate the status of implementation of accessible tourism in Italy.
- We identify the factors that hinder the tourism demand of disabled people.
- We outline tourism supply focusing on its strengths and weaknesses.
- Tourism is considered for disabled people as an opportunity of full social integration.

Abstract

As society develops, the status of tourism changes from being socially desirable to being a necessity. No less so is this for those who have various physical and other disabilities. This paper examines secondary data derived from Italian sources to illustrate both the demand for tourism from those with disabilities, and the factors that both inhibit and enhance the opportunities they have for participation in tourism. It provides a geographical assessment of tourism provision within Italy and identifies areas of good and poor provision for this market segment. Implications for tourist providers are discussed.

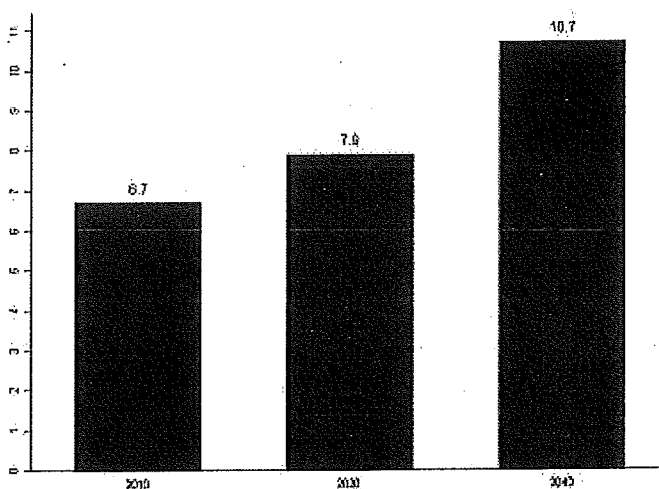
Keywords

Accessible tourism; Disability; Qualitative research; Tourism demand; Tourism supply; Italy

1. Introduction

Tourism, as well as being an important economic factor for economic growth and job creation, has increasingly become a primary social need. Empirical studies show that tourism has a positive effect on people that take advantage of it (Daniels et al., 2005, Eichorn et al., 2013, Minnaert et al., 2009, Ozturk et al., 2008). Moreover, the UNWTO Global Code of Ethics for Tourism, the global framework for the responsible and sustainable development of the sector, underlines in its Article 7 that all persons should be able to exercise their right to enjoy tourism without hindrance. As for its position on top of the social hierarchy needs, it requires the possibility that everyone can access it to equal advantage, independent of physical, social and economic conditions.

People with disabilities represent a largely underestimated niche of the tourism market both in numerical and economic terms. About 15% of the world population has at least one disability (World Bank, 2016). In Europe there are 80 million people with at least one disability (1 person in 6) and in Italy, the phenomenon extends to 6.7% of the population (WHO, 2016). These figures are expected to increase over the years due to the demographic ageing because of its correlation with age (WHO, 2011). In the case of Italy, according to the FCS-Censis (2012) estimates, the percentage of this group will increase from 6.7% in 2010 to 10.7% in 2040 (Fig. 1).



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Fig. 1. Disability progression, years 2010, 2020, 2040.

Source: Our elaboration on estimates FCS-Censis (2012).

As highlighted in several international studies this target group is not favoured to benefit from tourism due to the existence of physical, environmental, economic and social and/or other barriers

2008, G. A. V. and McIntosh, 2015, Small and Harris, 2011). Accessible Tourism is referred to as a modus operandi for the removal of such barriers, through a set of facilities and services directly adapted. Accessibility is, therefore, a lever towards full social inclusion of people with disabilities or other special needs, as well as a source of significant economic benefits. Accessibility is also one of the 8 areas for joint action between the EU and EU countries under the European Disability Strategy 2010–2020.

The development of universal accessibility measures to tourists tracks its origins in the Seventies in Britain, where a working group of the English Tourist Board sought to identify tools for the creation of an open-to-all tourism offer. The study results gave way to a series of national services to tackle the problems and critical issues. In 1989, an English working group was created: The Tourism for All, which had a wide spread throughout the world. The Tourism for All indicated the set of organizations and institutions engaged in the development of an accessible tourism for these people. Over the last years, many initiatives were taken by the European Union for the development of barrier-free tourism products and services in travel destination. Among them there was the establishment of an operational centre, with the aim of identifying and certifying tourism accessibility conditions of various structures. In 2006 the European Network For Accessible Tourism was launched (ENAT).

The first important steps in the creation of accessible environments were taken in Italy via the law 13/89 and the Ministerial Decree 236/86, whose objective was the removal or overcoming of the architectural barriers of the buildings. A greater awareness towards the topic, indeed, found concrete expressions in conferences including "Tourism for All Networking" organized in 1994 by C.O.I.N. (non-profit integrated cooperatives) and "A.A.A. 30 milioni di turisti europei offresi - problemi e prospettive per il turismo dei disabili". The national commitment to accessible tourism then consisted primarily in a number of institutional projects (National, Regional, Local) aimed at creating and/or strengthening an accessible tourism supply in Italy.

In reality, despite numerous initiatives, both public and private, empirical studies show that this group of people continue to have a lower probability of participation in tourism activities than non-disabled ones. On the contrary this probability decreases with the increasing of the degree of disability (see Pagán, 2012). Several studies on the implementation of accessible tourism have been conducted at international level which showed the profitability of accessibility but little has been done in Italy on that data. Therefore, the aim of this paper is to fill this gap by highlighting good practices in the implementation of concrete measures to make accessible tourism a reality. In particular, implications for tourist providers are discussed.

The paper is structured as follows. Section 2 presents the existing literature on tourism and disability. Section 3 outlines the socio-economic potential of this group of people (Section 3.1) and identifies the factors that hinder their tourism demand (Section 3.2). Section 4 presents the existing accessible tourism offer in Italy, focusing on its strengths (Section 4.1) and weaknesses (Section 4.2). Section 5 presents the discussions and policy implications. Section 6 concludes.

2. Tourism and disability: literature background

The empirical literature has shown that tourism has positive effects on well-being and life quality. These effects are particularly felt by people with different disabilities (Garcés Ferre et al., 2015,

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accompanied by non-self-sufficient people (friends, family). If it is also implemented through making small changes, significant improvements can lead to increased market share and favouring the formation of social capital (Daniels et al., 2005, Eichorn et al., 2013, Minnaert et al., 2009, Ozturk et al., 2008).

These people when decide to travel face many cultural obstacles (e.g., the discrimination related to their disability by non-disabled people (Bizjak et al., 2011, Gillovic and McIntosh, 2015, Small and Harris, 2011), environmental (e.g., the presence of architectural structures not equipped with the necessary support services for the different types of disability) and economic¹ (see Eichhorn et al., 2008). Furthermore, as noted by Smith (1987) they also meet barrier exclusively related to the type of disability defined as intrinsic barriers (Hunter-Jones, 2004, Smith, 1987).

The various barriers faced were extensively discussed in the literature with the clear purpose of avoiding the creation of "accessibility islands" (World Health Organization, 2016) that compromise the security and integrity of the tourism experience.

In the case of cultural and environmental barriers, several sensitization campaigns promoted by governments of the various countries, and legal parameters established in accessibility policies that provide information of how to apply the requirements in different environments, products and services have achieved some positive results (Shaw & Coles, 2004). Economic barriers, as main sources of social exclusion among these people, have been extensively studied in terms of social tourism as key factors in the process of achieving social and economic equality (McCabe, 2009, McCabe et al., 2010, Michopoulou et al., 2015, Minnaert et al., 2007, Minnaert et al., 2009).

In fact, despite numerous initiatives, both public and private, empirical studies show that the group still has low probability to take part in tourism activities. Moreover, this probability decreases with each increased level of disability and the different functional limitations (see Pagán, 2012). Serious allegations have been made directly to the public operator that with an inefficient manner and a lack of public awareness has effectively addressed problems related to the different life spheres of a person with disabilities (health, education, employment, leisure). More generally, looking at the revision of the existing regulatory framework in the major EU countries (Italy, Spain, France, Germany and the UK), the feeling is that in Italy disability is detecting also social barriers, both at media and political level failing as a matter of welfare, inclusion, integration and promotion of civil rights (Fondazione Censis, 2012). Naniopoulos, Tsalis, and Nalmantis (2016) highlight the need to have political representatives with disabilities among policy makers to legislate on disabilities programs. According to these scholars, the issues that concern them often ignored and with limited power to influence change and decision-making, as experienced first-hand, would ensure a more effective action of the public machine with an important part of the empowerment process and the realization of services actually needed by this group.

In the case of tourism, the major obstacle that these people face is the lack of information defined in the literature as information barrier (see Eichhorn et al., 2008) or interactive barrier (Smith, 1987). It is essential to provide reliable and timely data on the accessibility conditions at the destination (Darcy, 1998, Shi et al., 2012).

They not only need basic information (number of stars of the hotel, type of service, breakfast and dinner included in the price) but also additional information reassuring him get all the services he

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Information combined with the lack of competence by the majority of travel agencies (the main stakeholders that generates the match between demand and supply of tourism) brings accessibility problems to the detriment of the tourists with disabilities. Bizjak et al. (2011) in a pilot study conducted on a sample of students show that a short period of training has the effect of changing the attitude towards this group. The lack of knowledge generates hostility and false stereotypes towards people with disabilities. This result is confirmed by a study on the capacity of the travel agencies of the city of Hong Kong to meet the demands of this branch of tourists. The results show that disabled face harsh travelling reality. Travel agencies do not have the right skills and the approach to disability issues is characterized by a closed mind (see McKercher, Packer, Yau, & Lam, 2003). The tourism segment of this need group has high potential growth. It is a major economic opportunity for sector operator and stakeholders as far as there is public infrastructure facilities and tourism industry adaptation for their best care. Or even better, when universal design cater for all levels of disability (see Özogul & Baran, 2016). A general lack of information generates a friction between tourism demand and supply of this need group. The education of the main stakeholders (economic agents) in the match process between tourism demand and supply is necessary to satisfy this part of tourism demand.

The advent of internet and then the control of information of the tourism offer actors (hotels, B & Bs, camping, etc.) enriched the set of information that tourists need in addition to those already made available by travel agents. In reality, as many authors point out (Ray and Ryder, 2003, Shaw and Coles, 2004) the information provided by the net even if enriched by services to these persons, addresses the problem of disability without taking into account the different forms of disabilities. People have different accessibility needs. There are different types and different degrees of impairments. Consequently, However, in practice, the information that must be implemented for enabling different categories of disabled persons to access and use tourism facilities will vary greatly depending not only on the type of disability but also the way these provisions are designed and managed (Ray and Ryder, 2003, Williams et al., 2006, World Health Organization, 2016).

On the basis there is a problem of disinformation on the supply side than the potential demand. As noted by Israeli (2002) the decision making process of different categories of disabled persons is very different from that of a non-disabled tourist. When a tourist with disability chooses his/her travel option and the place to visit, he does not address to the classic trade-off characterized by an increase in the amount of an asset in view of reducing another. Thus to remain on the same indifference curve. In the case of disability, accessibility cannot be compensated with an amount of another asset. For this reason, the need of competent operators with the matter of disability related to the different disabilities underpins the functioning of this tourism market segment (Burns et al., 2009, Figueiredo et al., 2012). Every disability needs special attention and different services (Daniels et al., 2005, Darcy, 2010). What is necessary in the context of tourism and travel is to focus on measures that ensure, as far as possible, a fully independent use of the facilities and services by all customers. The empirical analysis shows that the strong inclination of a person with disability to travel increases when the services available are adapted to a specific disability (Figueiredo et al., 2012).

3. The potential demand of the tourists with disabilities in Italy

(Section 1). In addition, we will identify the factors that hinder the tourism demand of these need people (Section 3.2).

3.1. The socio-economic characteristics of people with disabilities

In 2011, about 4 million people, aged 11–87 years, have some impairment or disability (i.e., difficulties in motor or sensory functions or in the essential activities of daily living). When segmented by different degree of disability, 52.7% have severe disabilities, while 47.3% have mild disabilities. Table 1 shows that women with disabilities are twice the number of males (about 62% against 38%).

Table 1. People with functional limitations per degree of severity of disability and demographic characteristics, year 2011.

Demographic characteristics	Severe functional limitations	Mild functional limitations	Total
Sex			
Man	34.4	41.7	37.9
Woman	65.6	58.3	62.1
Age group:			
11–34	6.5	3.2	4.9
35–59	12.5	12.0	15.0
60–74	23.9	19.1	28.6
75–87	57.1	68.9	51.5
Qualification:			
Primary school/no certificate	68.9	55.4	62.5
Secondary school	19.1	28.5	23.6
University degree, PhD or other	12.0	16.1	13.9
Marital status:			
Single	18.7	9.9	14.6
Married	45.2	59.3	51.8
Divorced or dissolved partnership	1.0	3.7	2.3
Widow/er	35.1	27.1	31.3
Income sources:			
Good/adequate	49.4	57.4	53.2
Poor/insufficient	50.6	42.6	46.8
Total	52.7	47.3	100.0

The likelihood of having a disability is higher among older people (51.5% of people aged 75 + compared to 5% of people in the 11–34 age group). The 62.5% has no qualification or has at the most a primary school certificate and 46.8% have insufficient economic resources. This fact strengthens the evidence that such public seems not be viewed as a market segment (World Health Organization, 2016).

Age and gender disparities are mainly due to demographic with a marked population ageing. This phenomenon is accompanied by an increase in life expectancy at birth combined with a low fertility rate (WHO, 2011). According to WHO (2013) estimates, in fact, between 2000 and 2050 years, people with 60 + age will double: the world population will rise from 11% to 27%. Thus, disability is a high correlation to age (WHO, 2011).

Low levels of education among this group are due both to the prevalence of older people with a lower level of education and women with disabilities typically with lower qualifications than men (Addabbo, Krishnakumar, & Sarti, 2014). However, the low labour market participation explains the lack of economic resources observed for most of these people (see Sickles & Taubman, 1986). Furthermore, the low employment rate among them depends not only on the degree of disability but also on the type of disability (see Agovino et al., 2014, Gannon, 2005, Gannon and Nolan, 2004, Hale et al., 1998, Hum and Simpson, 1996, Wilkins, 2004).

Fig. 2 shows that 68.9% of people are inactive and only 16% have a job. In particular, inactive people with disabilities, have a share almost double than one observed in the whole population (81.2% vs. 45.4%) (Istat, 2012). In this case we must highlight that the 68/99 law, which governs the inclusion of this need group in the labour market, has had a partial effect on their participation in the labour market (see Agovino, Garofalo, & Marchesano, 2016).



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Fig. 2. People with functional limitations per employment status and by age group, year 2011.

Source: Istat, 2012.

effects are most severely felt by people with disabilities (Small et al., 2012). However, research carried out in a destination shows the impact of tourists with disabilities is very low, especially for international ones (Darcy, 2010).

Moreover, the group of people with disabilities is very diverse and their probability to go on a holiday face the biggest barriers regarding accessibility and is reduced with the increasing of the degree of disability (see Darcy, 2010, Pagán, 2012). Literature mainly identifies three types: environmental, economic and informational barriers. The culmination of these barriers is a loss of enjoyment of the tourism experience (ENAT, 2007).

3.2.1. Environmental barriers

The existence of environmental barriers is one of biggest deterrents to participation of this need group in tourism (Marston & Golledge, 2003). People with disabilities do not participate to travel programs because facilities are not physically accessible and barrier-free. As the demand for accessible tourism is growing, it is now seen as a prerequisite and an opportunity rather than an obligation the absence of barriers to mobility and physical accessibility.

However, the data still show how strong the presence of these barriers is. The highest percentages, 38.4% of people with disabilities in the age group 15–87, have problems to the access to buildings. In this case, higher percentages are observed for those with severe disabilities (56.4%) and for older women (44.1%). Consequently, the presence of architectural barriers and the lack of accessibility components is still considerable.

This is followed by the difficulty with housing. The 25.3% declares that they cannot leave their own home both for health problems and the lack of support and/or assistance. Also in this case, a higher percentage is observed for those with severe disabilities (39.1%), for older people 65 + years (27.9%) and women 65 + years (35.6%) (Istat, 2012).

Furthermore, as expected, the type of disability affects accessibility. In particular, people with sensory and motor disabilities have a high difficulty of access to buildings (40% and 48%) (Istat, 2012).

3.2.2. Economic barriers

Many people with disabilities want to travel but are constrained not only by their health status and/or the presence of environmental barriers, but also by financial barriers (Shaw & Coles, 2004). In Italy 53.3% of people with disabilities seek more difficulty in travelling than people without disabilities and have greater unmet needs (Istat, 2012).

Several studies have dealt with overcoming economic barriers faced by people with disabilities. Specifically, these studies have focused on the concept of social tourism that brings a moral dimension to the broader concept of accessible tourism. Its primary aim is to include socio-economically disadvantaged people in tourism who would otherwise be excluded from it (see Haulot, 1981, Minnaert et al., 2009, Pagán, 2012, Shaw and Coles, 2004). Social tourism is view as a potential measure in the fight against social exclusion, as recently supported by the European Economic and Social Committee. It is linked to a set of benefits that include improvement of well-being, personal development of the beneficiaries, recognition of the right to holiday and the expression of the need of enlarged accessibility (physical, economic and social accessibility). It is

It is not by coincidence that these people, more than non-disabled ones, look for cheaper accommodation facilities away from tourism flows such as residences, holiday homes or religious institutes. Policies for mainstreaming tourism for all require an equal distribution of accessible accommodation in all price-categories (ENAT, 2007). However, this is not always easy and these people face a higher cost. Relevant 'accessibility components' sometimes are not considered in all the services dedicated and are the costliest.

3.2.3. Information barriers

The difficulties for people with disabilities in undertaking tourism activities are not only found in the enjoyment of the holiday, but also in the organization of the trip or the retrieving of information concerning the location.

In fact, on the one hand the existence of accessible facilities constitutes one of the fundamental prerequisites for the participation of the disabled in tourism, on the other, the dissemination of information on accessibility is an equally significant variable (see Cavinato and Cuckovich, 1992, Fodness and Murray, 1997, McKercher et al., 2003; Shaw et al., 2005; Stumbo and Pegg, 2005, Eichhorn et al., 2008). Often, in fact, most of these people do not travel or choose the desired destination as for the lack of reliable information. Therefore, information is the main barrier in the phase of planning and organization of the trip (Fodness & Murray, 1997). It is essential to provide reliable and timely data on the accessibility conditions at the destination. Information should be: detailed, auditable and affordable (see Yau, McKercher, & Packer, 2004).

As well as highlighted by Williams, Rattray, and Grimes (2007) for the accessibility of Web sites of some Australian, UK and US Hotels, even in Italy we can observe that the Internet is not living up to its enormous potential to enhance and broaden the lives of persons with disabilities in planning their activities or holidays. In particular, the data show that, despite Internet is the most popular system used to disseminate information, only a user with disabilities on three relies on it. This is partly explained by the fact that 24% of them have difficulty in surfing the net because internet is inherently unfriendly to many different kinds of disabilities (Istat, 2012), and partly by the fact that information, in 37% of cases, are not considered reliable (C.A.R.E., 2005). In this sense, the Stanca Law n.4 of 9 January 2004 is the only legislative measure that enacted policies to address accessibility issues for people with disabilities to better access information technology. This law protects the right of every person to have access to all sources of information and related services. It is worth noting that it do not directly address cognitive disorders and is more focused on disabilities such as visual, motor, or hearing impairments. However, this right of access is governed solely in favour of media and IT services of the public administration and for public utility services. For corporate and private sites, no legislation was designed to govern the accessibility. The above highlight the social and business value of accessibility and it would be desirable, therefore, to intervene in this sense.

Probably this is a circular argument: the lack of reliable information in mainstream tourism may push tourists with disabilities (79%) to specialized tourism or organize their own trip (see ENEA-ITER, 1999). The agencies have very often difficulties to meet request for information on tourism

4. Accessible tourism supply in Italy. Strengths and weaknesses

In this section we will outline tourism supply focusing on its strengths (Section 4.1) and weaknesses (Section 4.2).

4.1. Strengths of accessible tourism supply

In recent years, the Italian tourism sector for 2010 featured a modest growth both in absolute terms and compared to other countries. The added values of the activities tourism-related amounted to 6.0% of the total economy. However, over the years, the weight of tourism in GDP declined from 5.3% in 1998 to 4.9% in 2008 (Alivernini, Breda, Cannari, & Franco, 2013). In addition, between 1997 and 2010, the tourism market shares in the Italian regions fell by 2%, from 6.8% to 4%. The sharpest downturn was recorded in the North East and Central Italy (Alivernini, Gallo, Mattevi, & Quintiliani, 2012).

The causes are mainly due to: low quality of services offered; lack of infrastructure; low security; poor accessibility; lack of sectoral policies; and lack of innovation in tourism offer. These aspects are crucial for the development of accessible tourism supply.

In 2009, 52% of Italian tourism enterprises have made considerable efforts to accommodate guests with disabilities. The differences per macro-geographical areas have been recently accentuated, with a peak of 57% in Central Italy (Unioncamere-Insart, 2009). In addition, the data show a strong unequal distribution of accessible accommodation in all price-categories. In fact, 57% of the hotel companies are attentive to customer with disabilities needs, with a maximum of 79% for 5-star hotels. Another type of accommodation enterprise, in which this group find the necessary flexibility to address its needs, is represented by Camping (83%). At the other extreme we can find alpine and mountain lodges and B&Bs, with 25% attention thresholds (Table 2).

Table 2. Accommodation enterprises sensitivity to the needs of disabled people per accommodation type.

Accommodation facilities	Yes	Not
Hotel	57.0	43.0
1 star	28.5	71.5
2 star	42.1	57.9
3 star	66.2	33.8
4 star	76.6	23.4
5 star	78.6	21.4
Holiday village (HV)	77.2	22.8
Farm Holiday	58.3	41.7
Camping	83.0	17.0
B&Bs	25.5	74.5

Download	Share	Export	100	100
Holiday house			57.2	42.8
Youth Hostel			80.1	19.9
Lodge			24.5	75.5
Others accommodation facilities			43.6	56.4

Source: Osservatorio Nazionale del Turismo – Dati Unioncamere-Insart, 2009.

At national level, 53.9% of the sector operators had a favourable opinion in providing a general framework (adequacy of the services) to the industry. The greatest reactions come from enterprises of the Centre (58.7%), the Northeast (58.1%) the South and Islands (52%) (Unioncamere-Insart, 2012). Foreign tour operators, however, judge Italy, in 77% of cases, an accessible destination.

4.2. Weaknesses of the accessible tourism supply.

In reality the accessible tourism supply presents different weaknesses. It is good for us to highlight them with the aim of facilitating the already difficult match process between the accessible tourism supply and demand.

Particularly, the data (Eurostat, 2009, Eurostat, 2011; Unioncamere-Insart, 2011) shows that in order to promote the take-off of accessible tourism supply in Italy some corrective measures must be introduced:

Railway stations with lower standard of accessibility (inaccessible approaches to the stations by ramps and lifts, inaccessible ticket counters and entry carriages with no designated spaces for wheelchair users) (for 54% of buyers) and/or lack of reliable and detailed information on accessibility (80% of respondents);

Accommodation facilities (hotels and restaurants), that in most cases are not adequately prepared to serve customers with disabilities (46% of buyers). In particular, the critical issues related to the accommodation system (25% of customer) arise by the presence of structural barriers (bathrooms not equipped and bedrooms too small) (Unioncamere-Insart, 2011). Table 3 shows the structural offers and accessible tourism services of the Italian companies, with a primary focus in the North-East and North-West of Italy. In particular, in 2012, the most popular structural offer is the one of bathrooms with adequate size and accessories (44% of Italian accommodation facilities), immediately followed by the easy access to the structure (43% of Italian accommodation facilities). Easy access to rooms is only present in 34%. In addition, we observe the existence of lifts with adequate spaces for wheelchair users (17%) and with an alarm (11%). In smaller percentages, instead, lifts equipped with other features per different types of disabilities, for example with Braille push-button panel, are present (8%).

Table 3. Accessible tourism services by geographic areas.

	Download access facility	Download access room	Share dimensions of lift recommended	Export with acoustic signal	Elevator with Braille Push Button	Elevator with equipments	Adequate size bathrooms/rooms	Engagement tours
North West	47.6	39.6	24.8	16.3	14.5	7.3	47	45.1
North East	49.2	38.2	25.4	19.1	12	7.7	49.3	28.2
Centre	37.4	30.1	10	4.7	3.4	4.5	35.7	11.5
South and Islands	39.2	30.6	10.4	4.4	3.5	4.3	43.2	16.9
Italy	43.3	34.4	17.5	11.2	8,1	5.9	43.8	24

Source: Osservatorio Nazionale del Turismo – Dati Unioncamere-Insart, 2012.

In this case, the causes can be found in the buildings that not comply with accessibility requirements. The data show, in fact, that accommodation facilities (hotels, holiday homes and other collective accommodation) have on average a smaller size than that of the European Union (Eurostat, 2009). A small company has difficulties to face the costs relating to fix special equipment and technical aids to enhance accessibility. In addition, it can hardly become a landmark of the (large) international tour operators.

Awareness and training of personnel (lack of adequate human capital). Customers with special needs do not feel adequately understood. Good personal service can make a significant difference for any tourist but only 16% of Italian accommodation enterprises have personnel with adequate specific training (Table 3). In addition, according to foreign tour operators, there is a lack of staff who has attended disability equality training and is able to interact more confidently and more effectively with people who have different disabilities. (i.e. mental retardation, deaf or blind, kidney failure, diabetes or oncological diseases). In 2011, the percentage of graduates (or with post-graduate degrees) employed in hotels and restaurants amounted to 5.1%, a value significantly lower than the average of the EU-27 (12.6%) and the corresponding levels of Spain (18.2%) and France (15.5%) (Eurostat, 2011).

4.2.1. Information

Information should itself be presented in formats that are accessible to people with disabilities, e.g. as accessible web pages or in text, audio or Braille formats. Adequate promotional material of the accessible tourism services is available only in 14% of cases (Table 3).

5. Discussions: the planning as service source of accessible tourism

5.1. Benefits of the accessible tourism

with a potential demand steadily growing (see Bowtell, 2015, Portales, 2015). This need group is a growing sector with great market potential that could be profitable. Accessible tourism may bring economic benefits and a return on investment providing also a major source of job creation. It is, therefore, useful to highlight these economic benefits. In particular, they can be found in the reduction of the seasonal nature of some destinations (Low-season supply), one of the problems of our country (Alivernini et al., 2013). The tourist with disabilities tends, in fact, to travel especially in low season (to avoid inconveniences caused by crowding in the high seasons) (ENEA-ITER, 1999).

The ability of tourism operators to diversify their offer. (see Zajadacz, 2015); The possibility of securing an income higher than that of conventional tourism, as for its "multi-client" nature. For each need people travelling one must estimate an average of 1.5 or 2 people travelling with them (Gillovic and McIntosh, 2015, Zajadacz, 2015). In fact, people with disabilities often need to be accompanied by a family or a friend and this makes this potential niche of accessible tourism even larger, extending, thus, also to their accompanying person. For these reasons, it is estimated that the number of potential users in Europe of accessible tourism services is about 268 million people, equivalent to an estimated potential annual income of about 166 billion euro (Eurostat, 2005); The improvement of the quality of supply (see Section 4.2).

In the development of the national tourism industry, as 82% of people with disabilities do not prefer to travel abroad. (ENEA-ITER, 1999).

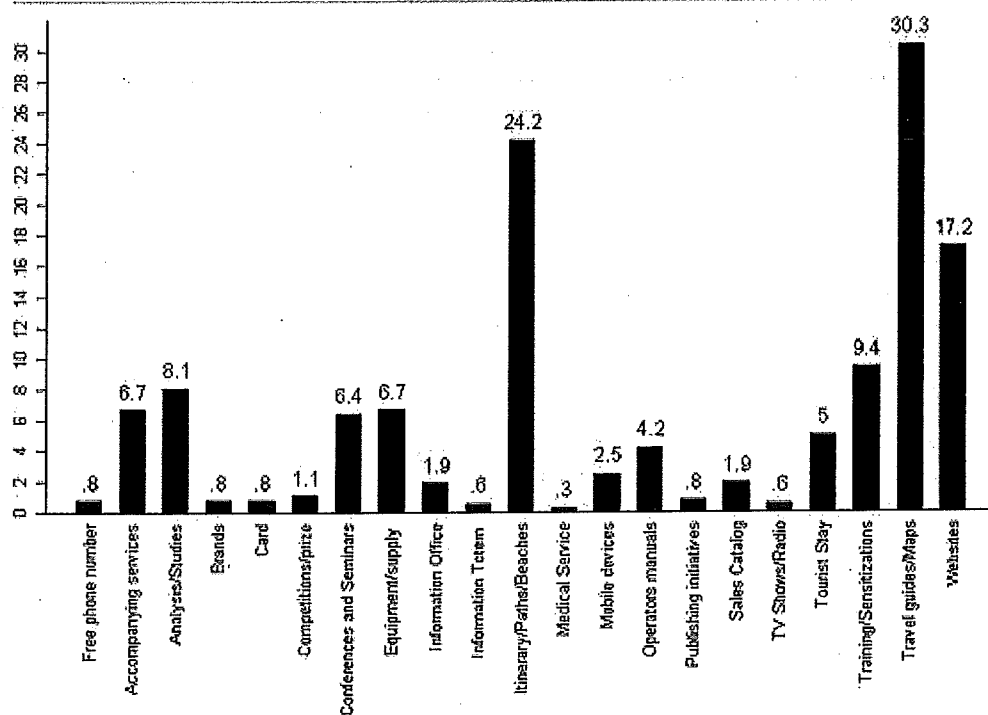
However, despite many economic benefits, there are still strong limitations to its development (see Section 4.2). The limits on the side of accessible tourism demand (Section 3.2) are a direct consequence of the limitations present on the supply side (Section 4.2). A tourism company to provide the availability of its products needs to make numerous changes to their accommodation facilities (for the removal of environmental barriers), provide adequate information and train their staff with the needs of these people. All this requires costs difficult to bear by a tourism enterprise. Public and private institutions have worked towards the improvement of accessible facilities and services with policy plan that takes a long-term view. Such a plan provide a general framework to improve accessibility and eliminate sources of friction between the supply and demand of accessible tourism.

5.2. The institutional planning in the accessible tourism sector

Before 1996 no concrete institutional systematic initiatives, aimed at supporting and realizing the right to holiday and mobility of all citizens was made. Later, as for the large number of people with disabilities, as well as the attention set at the international and European level, have generated an intense interest towards this target group. This led to the development of a wide range of projects aimed at creating and/or strengthening accessible tourism supply in Italy. Some of the objectives were, in fact, the realization of accessible services within the accommodation facilities; the provision of equipment and assistance and activities which can be enjoyed by a wide range of visitors; the provision of detailed information about the accessibility of venues and activities throughout the national territory as well as the creation of targeted offers to meet the different needs of these tourists. However, it is useful to point out that the information on these projects are limited and incomplete.²

accessibility information schemes, awareness and training actions, multi-platform, multi-lingual digital information service providing national and regional content on accessible tourist venues, sites and accommodation. In particular, the projects meant to meet the needs of these people through different actions, especially related to information. In fact, in relation to the supply side, we observe the creation of maps and tourist guides (30.3%) and tourism-related services (such as transportation, cultural venues, catering) and the realization of web sites (17.2%).

The supply of real services aimed at eliminating existing environmental barriers making accessible, beaches, hotels, museums (24%) for a range of needs (from the catwalks on the beaches to the sensory pathways). In addition, other projects have focused on appropriate supply awareness-raising and training (10%), and 8.1% on studies and analysis (Fig. 3).



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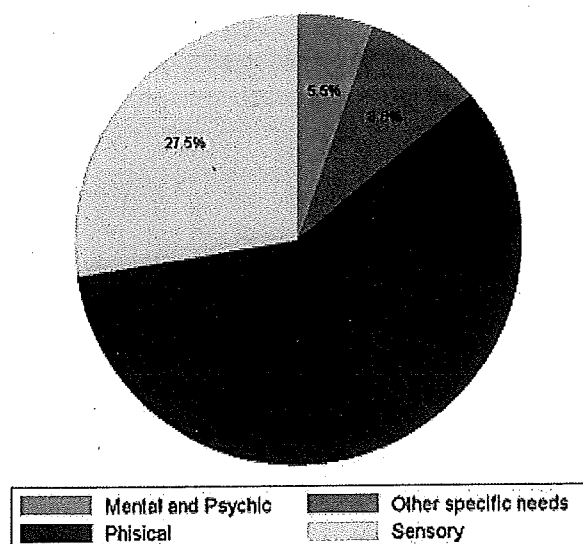
Fig. 3. The accessible tourism projects outputs.

Source: Libro Bianco, 2012.

Therefore, has been paid a greater attention on problems of information asymmetry on the demand side (maps, tourist guides, web sites) and the supply side (staff training and awareness). However, the low percentages show that efforts in this direction are still few.

Misinformation, in fact, is one of the main causes of the mismatch between the demand and supply of accessible tourism. Information and training of the main actors involved, is the sine qua non conditio for a proper operation of the accessible tourism match (elimination of barriers).

In addition, the facilities required for each subject need to be different depending on the type of disability. In this regard, the projects related to motor and cognitive disabilities are the majority (58.4%), while 27.5% is devoted to sensory disabilities. A low attention, instead, is given to mental and psychological disabilities (5.5%) as they require a greater degree of specialization (Fig. 4).



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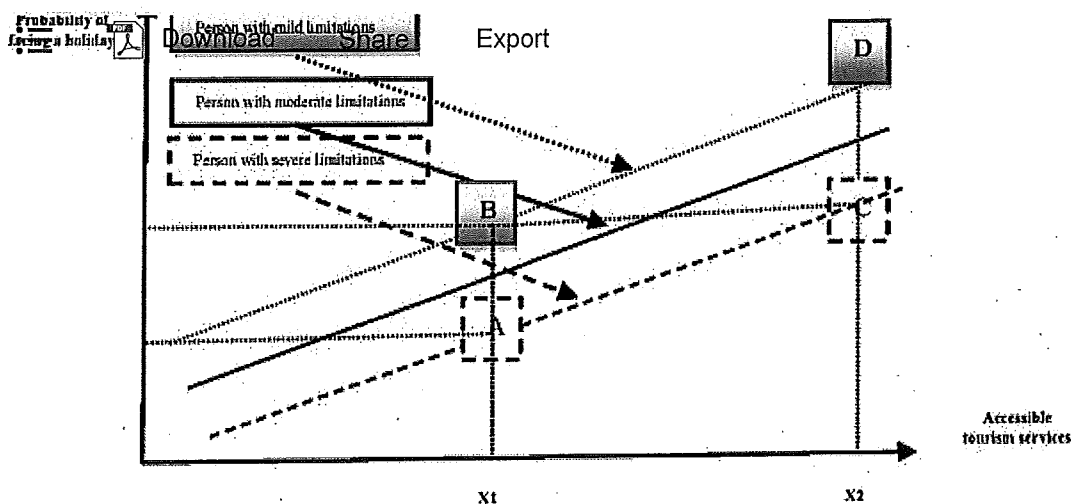
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Fig. 4. Types of disabilities related projects.

Source: Libro Bianco, 2012.

Projects undertaken over the years have made (maybe) possible to reduce the friction between the demand and supply of accessible tourism even if the responsible bodies have never put in place monitoring activities of the same.

It is therefore necessary, to invest more in training and the provision of adequate services per type of disability. Information can help public health programs to identify the prevalence of characteristics associated with different disability types and better target appropriate interventions to reduce health disparities. Fig. 5 relates to the probability of a disabled person to face a holiday and the number and/or quality of services provided. We distinguish, for example, three degrees of disability: mild, moderate and severe. It seems to be logical to assume that the probability of facing a holiday is reduced with the increase of the degree of disability. A disabled person with a severe limitation needs more care and specific services than a disabled person with minor limitations. If we want to relate a disabled person with mild limitations (DPML) and one with severe limitations (DPSL), we will observe that at a certain number and/or a quality of service equal to $\times 1$, the probability of a DPSL to face a holiday is lower (point A) despite that of a DPML (point B). In order that a DPSL has an equal probability to face a trip of a DPML, accessible tourism services need to cover a number and/or a quality of service equal to $\times 2$ (point C).



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Fig. 5. PwD probability of facing a holiday contingent upon accessible tourism services.

This example highlights the difficulty to quantify and qualify the number of services required for accessible tourism. Moreover, when we discuss disabilities the need of not generalizing is evident. In addition, the different probability of travelling associated with the different degrees of disability reveals the presence of a further segmentation of the tourism demand for disabled people. The attention given to the diversities, through specific services, would meet the full demand tourism of the disabled.

However, the data show that Italy is not particularly careful to offer services suited to those with specific travel requirements. There is, in other words, a lack of confidence in the potential of this market segment (Bizziak et al., 2011, Card et al., 2006, Darcy, 2010, Gillovic and McIntosh, 2015, Robinson et al., 2007), even though the data say otherwise (Ray and Ryder, 2003, Stumbo and Pegg, 2005).

Table 4 shows that, at national level, 58.3% of tourism entrepreneurs thinks it is important to focus on these tourists, while 38.7% do not consider accessibility a lever of competitiveness for its supply (Unioncamere-Insart, 2012). The latter sheds light, once again, the need for specific information, training and awareness measures of the Italian tourism enterprises.

Table 4. The perception of tourism operators on the accessible tourism relevance by geographical macro-area.

	Much	Enough	Little	Not at all	Can't say
North West	11.2	32.3	28.1	22.6	5.8
Nord East	15.7	40.3	21.9	15.9	6.2
Centre	10.9	57	23.2	9	0
South and Islands	12.9	48.1	25.1	13.4	0.4
Italy	13	45.3	24.1	14.6	3.1

In addition, the data for macro-areas show that the entrepreneurs considering important to focus on this type of product are placed mostly in the South and Islands (68%) and Central Italy (67.9%); then follow the North-East (56%) and North-West (43.5%). The hotel facilities management (65.9%), more than that of complementary businesses (52.5%), seems to understand more the importance to focus on accessibility and as double opportunity to improve its overall offer in favour of all guests and as real business opportunity. The sensitivity towards this type of product seems to grow, among the hotels, with the number of stars. In extra-hotel sector, however, there are more favourable operators among Hostels (63.4%), Farm holidays (67.2%) and Camping (53.7%). The huts can represent an additional strategic lever, probably because of their specific structural characteristics (Unioncamere-Insart, 2012).

6. Conclusions

The aim of this paper was to investigate the status of implementation of accessible tourism in Italy. In particular, limits and opportunities related both to the demand and supply of accessible tourism were analyzed.

The analysis showed that people with disabilities represent, in Italy, a very significant segment of tourism, with a constantly growing potential demand. Accessible tourism is configured as an opportunity of full social integration. The demand side of these people is, however, hampered by the presence, still massive, of both environmental and information barriers. In fact, despite the first steps in favour of accessible environments, there are still many problems and difficulties faced by this group, especially in access to buildings. Other critical issues concern instead informative barriers. In particular, the difficulty of access to some information channels (e.g., web sites not adequate for the different types of disabilities) and/or the absence (or inaccuracy) of reliable information on the accessibility of the places to visit.

Accessible tourism is also a great opportunity for tourism operators and could bring substantial economic benefits (both micro, and macro-economic). From a micro point of view, the benefits, highlighted by the analysis, can be mainly attributed: to the low-season supply of some tourist destinations; the possibility of diversifying the offer and the improvement of its quality; the possibility of getting higher income. From a macro point of view, the main advantages are related to the possibility of the development of the national tourism industry as well as the strengthening of the tourism sector providing a major source of job creation and revenue from abroad. However, despite the numerous potential advantages, there are still many limitations which hinder the development of accessible supply in Italy. Firstly, the structural inadequacy that still characterizes many local facilities (such as railway stations) and accommodation facilities (size of the rooms, lifts not adequate and/or bathrooms not equipped). Then, the awareness and the specific staff training of accommodation facilities, travel agencies and tour operators is still very low.

The limits related to the demand (potential) of this group are a direct consequence of those connected with the accommodation facilities supply. These limits are a source of friction of the matching process between tourism demand of people with disabilities and the national tourist supply.

Institutional projects were mainly related to interventions for the provision of accessibility services and actions in order to reduce information asymmetry both on the demand side (maps, tourist

percentage of the projects delivered and the strong presence, even today, of those limits indicate that the efforts for the full realization of accessible tourism in Italy are still few.

Future actions should, therefore, be directed, in a more massive and effective way, both on informing the actors involved in the matching process and an efficient provision of services and facilities barrier free. In addition, the facilities required for each subject will be different depending on the types of disability. Moreover, in order to allow a constant monitoring of the activities carried out and getting more robust empirical analysis on the topic of accessible tourism, it is essential to have, at national level, a synchronous and systematic detection tool of information (statistical data) both for demand and supply side.

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