



NEED ANALYSIS PROJECT ITTI

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Along with the main aim of the project ITTI which is to improve accessibility of tourism services through tailored training for tourism employees on working with disabled and elderly guests, and to increase the competitiveness of tourism facilities and tourism workers on the labor market, the first step of the project was to analyze the needs of the Slovenian tourism enterprises for the targeted accessibility trainings of staff.

The two Slovenian partners approached the analysis in different ways in order to receive a holistic and accurate depiction of the state of the art in terms of development and knowledge about accessible tourism and the willingness of the tourism enterprises to further adjust their offer for this rapidly growing market segment.

Firstly, the lead partner ŠENT approached the analysis by sending the interviewers, persons with special needs themselves, to gather real time, eye-contact feedback from the front of the house tourism staff of 20 notable Slovenian tourism establishments, ranging from hotels, restaurants, museums to leisure recreation facilities.

On the other hand, NTA opted for more quantitative approach and performed an extensive, web-administrated survey covering different aspects of accessibility problematic in tourism and thus gathered throughout the process 50 responses of tourism sector representatives, out of 313 contacts of tourism enterprises and individuals being NTA members to whom the survey was sent (response rate equals 16 %). Further with aprox. 75% of replies coming from hospitality sector it achieved a sample covering approx. half of the population of Slovenian hospitality enterprises, therefore the sector of hotels is especially well covered and the results of this segment should be deemed very reliable. Table 1 below indicates the respondent profiles of NTA's survey, which range from front line workers to middle and upper management positions:

Table 1 : Respondent profiles of NTA's survey

Position	Frequency
Upper management (director, owner, director of marketing, director of finance, etc)	6
Sales and marketing	15
Reception	9
Housekeeping (& maintenance)	4
HR	7
Health & Spa (instructor, masseur, gym trainer, nurse)	6
Guest relations & animation	3
Total	50

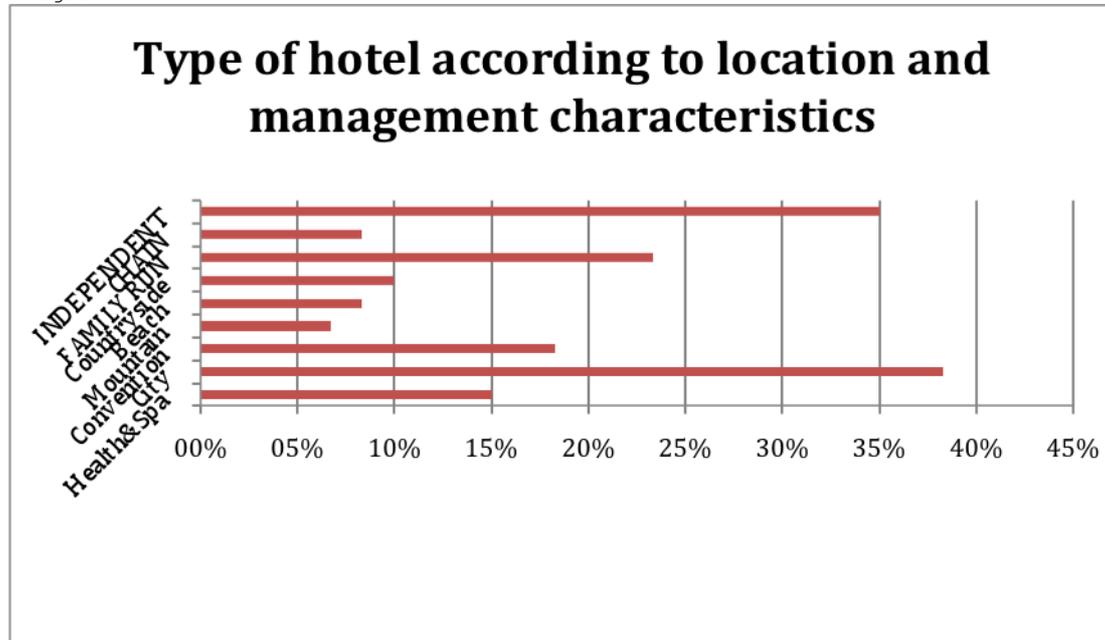
Naturally both approaches show their limitations, yet once the results were combined, it showed that basically the foundations were very similar regardless the approach. Therefore we can claim the analysis provides a solid overview of state of affairs in Slovenian accessible tourism offer and certainly confirms the need for better awareness and further tailored accessibility trainings. The main findings of both researches are briefly reviewed in the following section.

It is clear that the tourism upper and middle management is aware of the trend and term itself of accessible tourism as almost 80% of the respondents heard about it before. Yet being informed about the term does not mean they also understand the term. Šent's "door-to-door" survey spotlighted the problem that the employees often really do not understand what stands behind the term accessible tourism. Even more surprisingly, NTA's survey shows that only 54 % of respondents understand the immense economic potential of such type of tourism. However it is encouraging that both surveys reveal that approx. 80% of establishments already considered adopting their offer to tourists with special needs and have already done some minor modification towards this direction. About half respondents are worried that the costs connected with better accessibility are going to out weight the potential increased revenues. When asked about the competences within their staff only about 30 % believe they possess competent and expertly trained staff capable of adopting and further developing the tourism offer in way that they could make it more accessible, which when interpreted in this way might also indicate that they indirectly acknowledge the need for accessibility trainings.

In interesting issue that both surveys revealed is that the majority still associates the wheelchair user as the best representative of group of persons with special needs. Similarly, more than 85 % of respondents already adopted, or are in the process of considering tailoring their offer and infrastructure according to the needs of wheelchair users, while only about 35 to 40 % would consider implementing modifications for the visually impaired, aurally impaired and persons with problems in mental health. However, Slovene tourism workers seem to have already discovered the potential that lies in the senior population, as almost 80% would not mind taking care of modifications and service that would make their facilities more "senior friendly".

While the majority of the respondents of NTA's survey were hoteliers, it is also very interesting to observe their profiles as they clearly indicate which types of hotels are more interested into pursuing accessible tourism. As the Diagram 1 below indicates the most commonly interested are independent and family run hotels located in the city, Health & Spa locations as well as hotels with orientation towards convention guests. Thus it is those types of hotels towards which the trainings should be focused.

Diagram 1

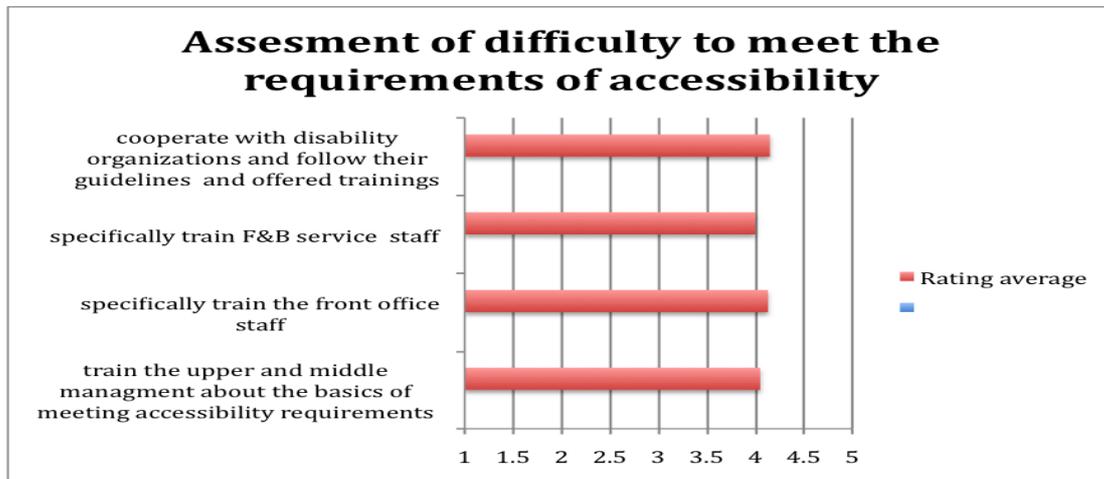


When asked about the difficulties that the tourism enterprises are facing, when trying to meet the requirements of accessible market the answer options (total of 17) for which average values exceeded the mark three on a classical 5 point Likert scale (1-the easiest; 5-the most difficult) which means they are considered problematic by the hoteliers were the following 7:

- assure functionality of rooms
- assure additional technical equipment of the rooms
- assure functionality of restaurant service
- assure functionality of recreational facilities
- train the staff in order to know how to handle clients with special needs
- offer additional, specialized services for clients with special needs
- assure equal/suitable participation of disabled in recreation and animation

The average values of these answers are also represented in the Diagram 2 below.

Diagram 2



As can be seen from the Diagram 2 above, even though the technical infrastructure modifications seem to be the most problematic and costly, the four out of seven areas which are deemed as problematic by the tourism establishments/workers when trying to make their offer accessible are related to services. As such it is clear that they can be overcome by provision of suitable staff trainings.

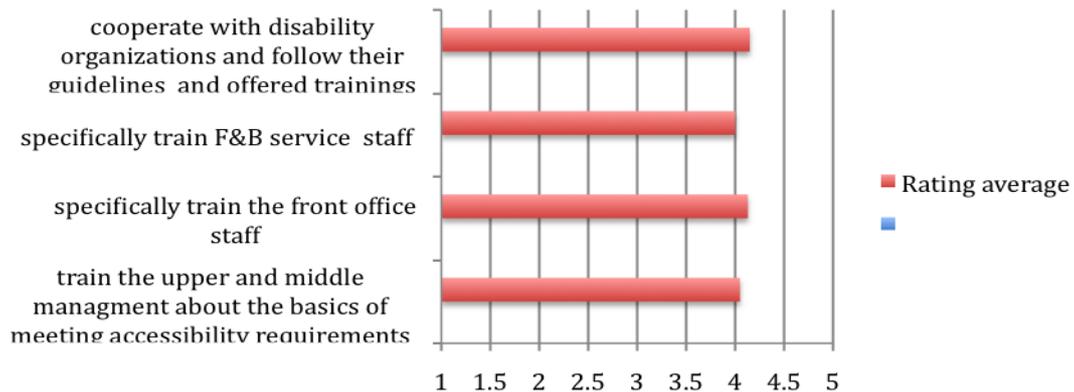
In a way similar was the conclusion of ŠENT's on-site surveyors who noticed that often the staff did not know how to react, treat them and even if willing to help seemed to be in unease.

Further the tourism enterprises were asked to assess which provisions would they need to take in order to make them more competitive in terms of accessibility. The 4 choices (out of 10 in total) for which the average values exceeded the value 4 on 5 point Likert scale and are thus deemed as the most necessary provisions to be taken by the hoteliers are represented in the Diagram 3 below.

As the results in the Diagram 3 show it is obvious that the tourism (and especially hotel enterprises, who were the dominant respondents) see the need to accordingly (in depth) train the staff that comes in direct contact with clients, namely the front office and bar and restaurant staff. Similarly they realize that the provisions are only going to work in cases when also upper management has some basic skills and understands what accessibility is about. Further and perhaps most surprisingly, tourism enterprises are aware of the importance of collaboration with disabled associations and non-governmental organizations that can offer them guidelines and recommendations and occasionally also provide them specialized trainings that their staff is lacking.

Diagram 3

Assessment of most necessary provisions in order to become a competitive accessible hotel

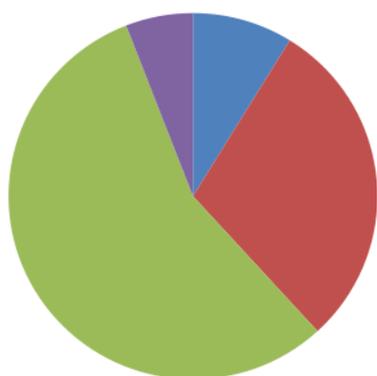


The ultimate part of NTA's need analysis tackled the trainings directly and tested the willingness of tourism enterprises to invest into the accessibility education. As expected, the majority of enterprises were reluctant to disclose the investments they had made into accessibility provisions, however some that answered the question indicated that they would on average be willing to invest about 7000 Euros into accessibility improvements and about a half of that sum into trainings.

Additionally, when asked about the reason behind the willingness to invest into accessibility improvements almost all enterprises stated that creating a competitive advantage was their main reason, closely followed by diplomatic and ethical response of ensuring the opportunity for a holiday to all. Even though only a bit more than half of the enterprises stated they were aware of economic impacts of accessible tourism, 78 % recognized the growth of the segment being their main motivator to invest into accessibility provisions. On a similar note, almost 90% of the enterprises would be willing to cooperate with specialized travel agency that would represent and market them on accessibility market.

Last but not least, when asked about the type of trainings and educational modules on accessibility that they would be willing to participate in the by far the preferred type was a combined theoretically-applied approach (seminars & workshops) with presentations of best practice examples and on site visits as can be seen from Diagram 4 below. It is also clear that training modules should avoid the e-learning since this type is clearly not popular among the Slovenian upper hotel management.

Preferred type of trainings



- Theoretical
- Theoretically-applied approach (seminars & workshops)
- Theoretically-applied approach with presentation and visits of best practice example
- Internet based distance learning