

ALL IN ONE



This project received funds from the EU's COSME programme (2014-2024)

Hotels in Italy and in the Marche region



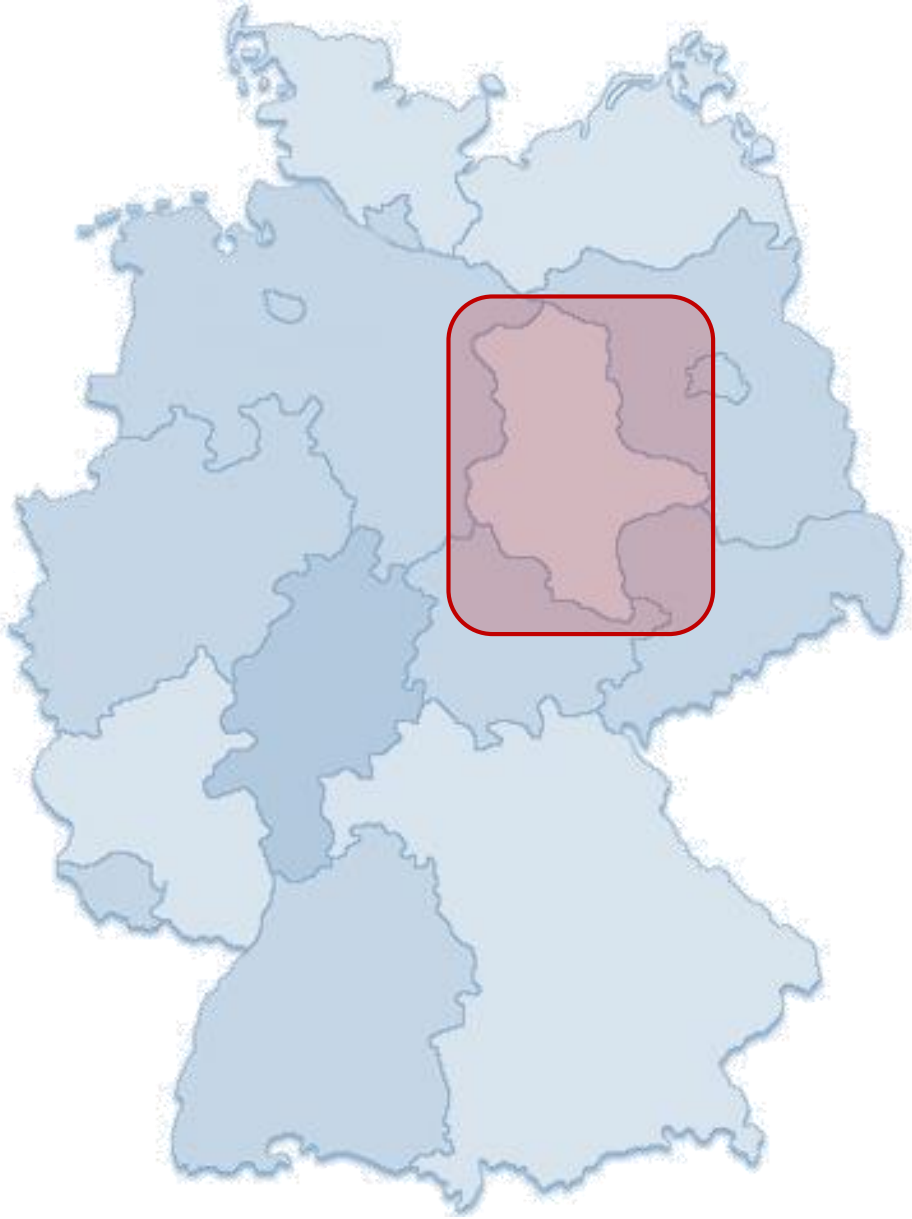
	Italy			Marche			Marche in % on Total	
	Number of establishments	Number of bedrooms	Average size	Number of establishments	Number of bedrooms	Average size	Number of establishments	Number of bedrooms
5 stars	460	33.900	74	3	94	31	0,7	0,3
4 stars	5.726	368.172	64	113	6.149	54	2,0	1,7
3 stars	15.355	473.348	31	492	16.131	33	3,2	3,4
2 stars	5.911	98.956	17	154	3.288	21	2,6	3,3
1 star	2.861	36.006	13	58	854	15	2,0	2,4
RTA	2.853	80.679	28	53	1.640	31	1,9	2,0
Total	33.166	1.091.061	33	873	28.156	32	2,6	2,6

- In 2016 there were about 33.2 thousand hotels in Italy for more than one million of rooms. The average size of an hotel was 33 rooms and the largest category was the 3 star hotels (46.3% of the total)
- Hotels in the Marche region represented 2.6% of the total number of hotels in Italy (873 hotels for more than 28 thousand of rooms).

Average size is smaller than the Italian ones (32 rooms against 33)
 Even for Marche hotels, the largest hotel category is 3 star hotels which represented 56,4% of the total of the Region)

Hotels in Germany and in Saxon-Anhalt region

- According to Eurostat statistics, in Germany in 2016 the total number of hotels was 33,061 and the number of bedrooms 952,458 .
- In Germany the classification of the hotels by stars is voluntary; according to the data of hotelstars.eu, only 8,500 German hotels are classified (25,7% of the total number)



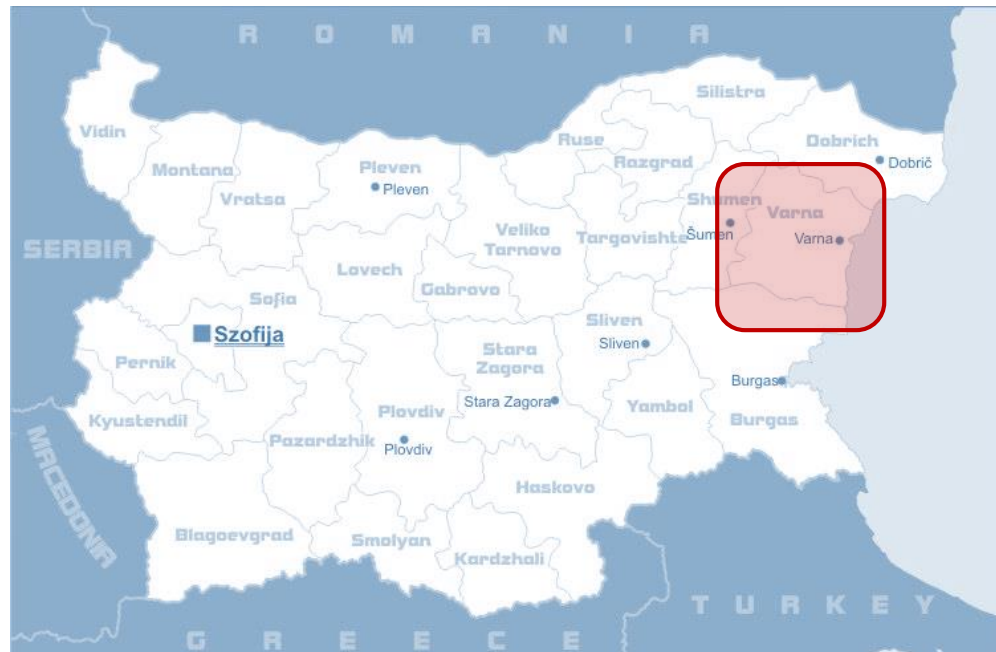
RESULTS BY FEDERAL STATES

Country	★	★★	★★★	★★★★	★★★★★	July 2017	Share in percent
Baden-Wuerttemb.	6	59	921	374	16	1.376	16,2
Bavaria	14	97	1.025	546	22	1.704	20,1
Berlin	4	20	129	114	9	276	3,2
Brandenburg	2	5	90	60	0	157	1,8
Bremen	1	12	30	25	1	69	0,8
Hamburg	4	20	55	54	10	143	1,7
Hesse	6	45	312	193	14	570	6,7
Mecklenburg-W. P.	2	4	146	142	7	301	3,5
Lower Saxony	4	49	478	254	11	796	9,4
North Rhine-Westf.	16	96	722	416	9	1.259	14,8
Rhinel.-Palatinate	4	77	438	130	3	652	7,7
Saarland	1	14	47	19	2	83	1,0
Saxony	5	6	181	130	6	328	3,9
Saxony-Anhalt	3	1	141	67	1	213	2,5
Schleswig-Holstein	5	15	180	99	14	314	3,7
Thuringia	3	10	162	78	2	255	3,0
Sum	80	531	5.057	2.701	127	8.496	100,0
Relative frequency	0,9%	6,3%	59,5%	31,8%	1,5%	100%	

Hotels in Bulgaria and in Varna region

	Bulgaria			Varna			Varna in % on Total	
	Number of establishments	Number of bedrooms	Average size	Number of establishments	Number of bedrooms	Average size	Number of establishments	Number of bedrooms
5 & 4 stars	410	66900	163	80	17900	224	19,5	26,8
3 stars	1022	46350	45	113	7.390	65	11,1	15,9
2 & 1 star	1899	50800	27	222	8.520	38	11,7	16,8
Total	3331	164050	49	415	33.810	81	12,5	20,6

- In 2016 there were more than 3 thousand hotels in Bulgaria for more than 164 thousands of rooms. The average size of an hotel was 49 rooms and the largest category was the 2 star hotels (57% of the total)
- Hotels in the Varna region represented 12.6% of the total number of hotels in Bulgaria (415 hotels for more than 33 thousand of rooms).
Average size is bigger than the bulgarian ones (81 rooms against 49). Even for Varna hotels, the largest hotel category is 2 star hotels which represented 53,5% of the total of the Region)





Accommodation accessibility in Italy, Germany and Bulgaria

- To measure SME's compliance to accessible tourism, a **specific survey** has been carried out in Bulgaria, Germany and Italy **during the period may - july 2017**
- An **on-line survey** system (Survey Monkey) has been used to facilitate the compilation of the questionnaire by the Accommodation
- Web link to the questionnaire: <https://it.surveymonkey.com/r/YCBY25N>
- To increasing the number of respondents, for Germany and Bulgaria in addition to the online questionnaire - with the aim of collecting the best of results in terms of numerosity of the sample - a direct collection activity has been activated



21 questions

4 questions to know **WHO** was answering

- Question n. 1 - 4 (location, type of accommodation, stars, capacity)

5 questions to know **WHAT** the accommodation offers to satisfy people with special needs

- Question n. 5 – 7, 12, 13 (structural elements, services, equipment, room facilities)

3 questions to know **HOW MUCH** the staff is trained to satisfy people with special needs

- Question n. 14 – 16 (staff training, specific competences achieved)

4 questions to know the **LEVEL OF SENSITIVITY** of the accommodation on “*Accessible Tourism*”

- Question n. 8 – 11 (the importance of adapting services and the tourism offer to satisfy people with special needs)

5 questions to know the **TREND** of the demand of people of special needs

- Questions n. 17 – 21 (share, trend in the recent years, monitoring the trend for type of disability)



152 questionnaires collected in Italy



46 questionnaires collected in Germany

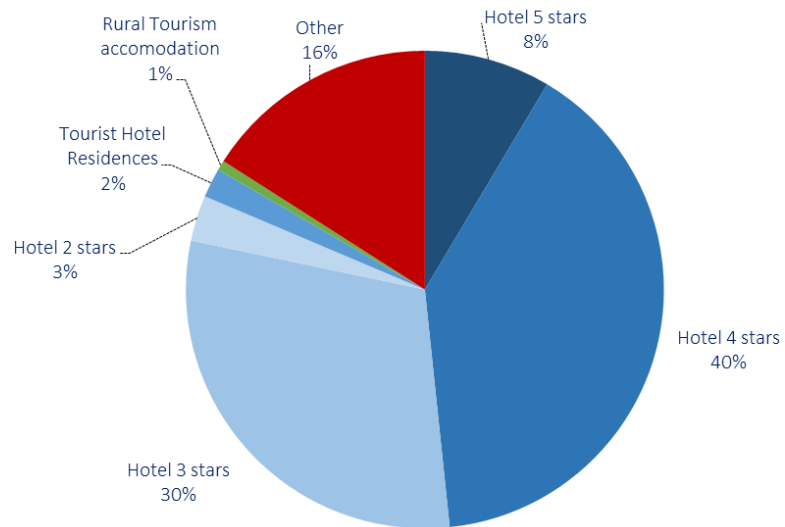


29 questionnaires collected in Bulgaria



TOURISM ACCESSIBILITY: ITALIAN SME'S COMPLIANCE

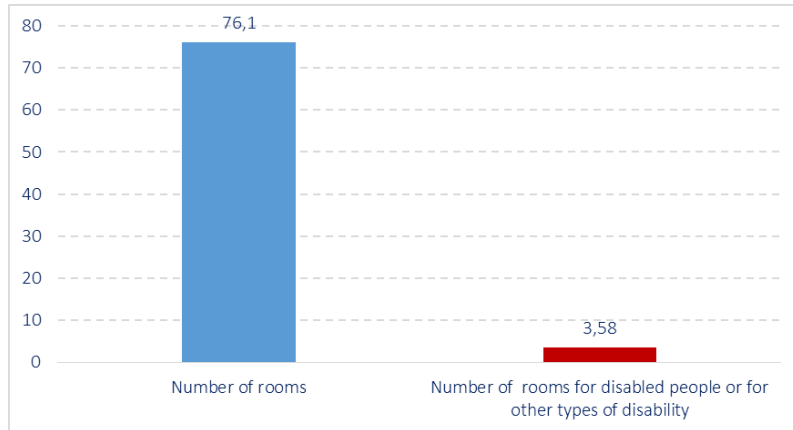
The sample



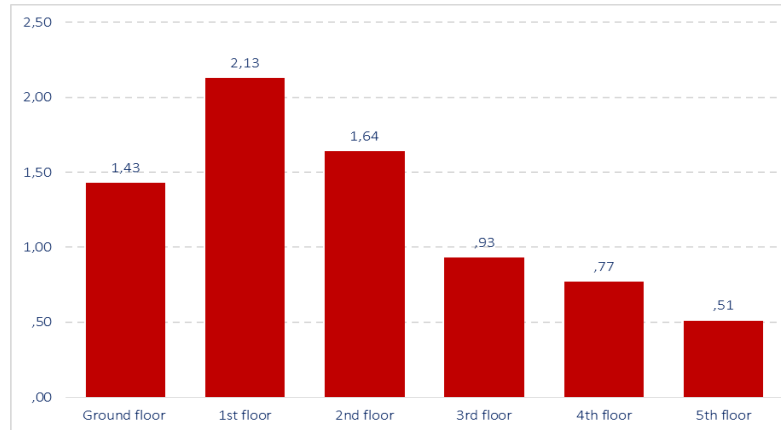
- The sample is composed by 83,4% hotels and 16,3% other accommodation
- About the hotels:
 - 10,2% 5 stars hotels
 - 47,7% 4 stars hotels
 - 35,9% 3 stars hotels
 - 3,7% 2 stars hotels
 - 2,4% tourist hotel residence

Rooms for people with special needs

Total rooms and rooms equipped for people with disabilities

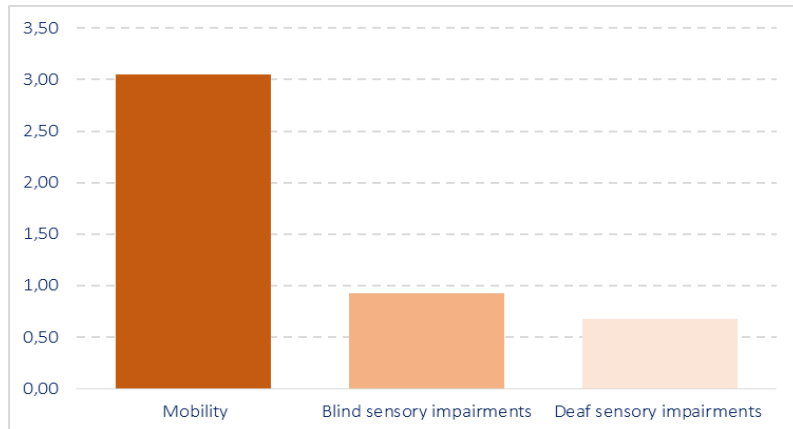


Floor location of accessible rooms

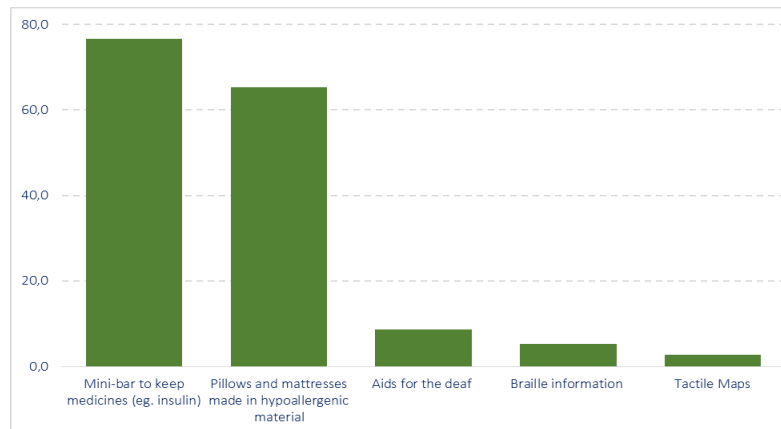


- Average size of the sample: 76.1 bedrooms; less than 4 rooms are equipped for people with special needs
- Accessible rooms are located above all on the 1° and 2° floor
- In most of cases the rooms are equipped for people with motor disabilities while the equipment for blind and deaf people are still limited (0.94 for blinds and 0.8 for deaf)
- Room services include mini-bar to keep medicines (76,7%); hypoallergenic pillows and mattresses (65,3%) and aids for deaf (8,7%). Furthermore, in few cases, rooms provide braille information (5,3%) and tactile Maps (2,7%)

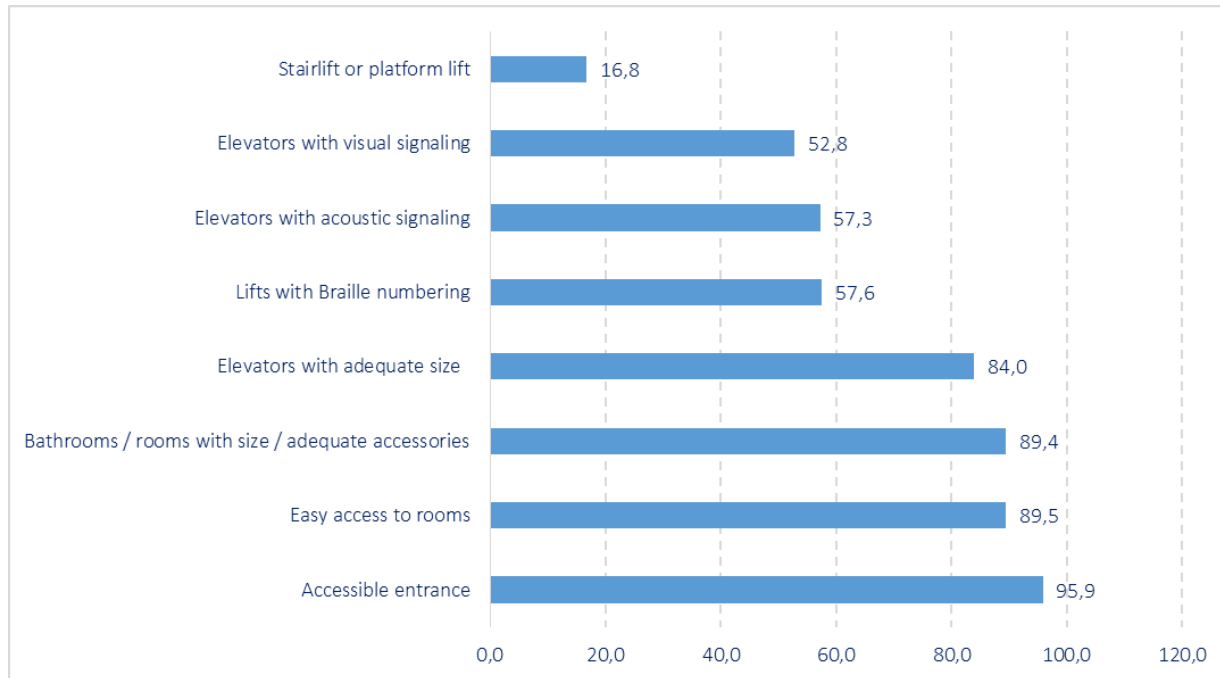
Rooms equipment for people with disabilities



Rooms services for people with disabilities



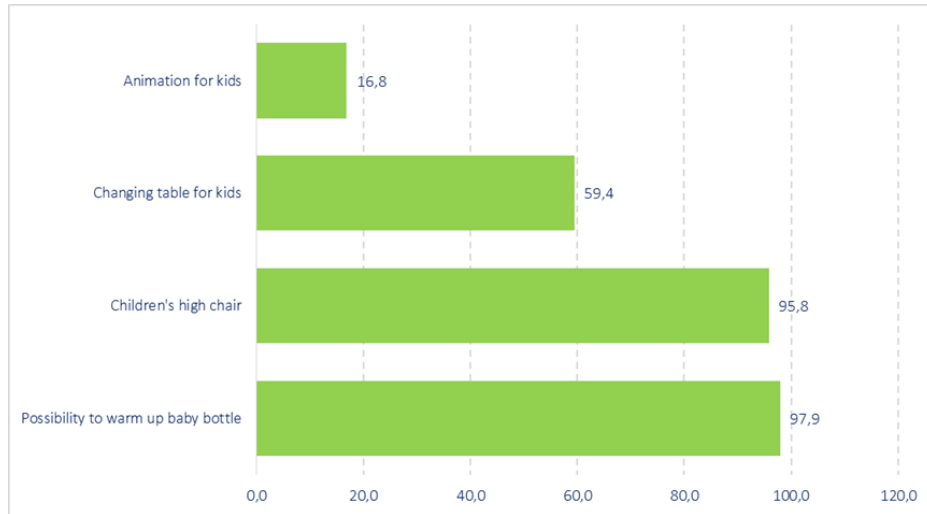
Structural elements: accommodation



- 95.9% of the sample has an accessible entrance and 89.5% an easy access to rooms
- Lifts have adequate measurements for 84% of respondents, braille keys for 57.6% of respondents, acoustic signals for 57.3% and visual signals for 52.8%

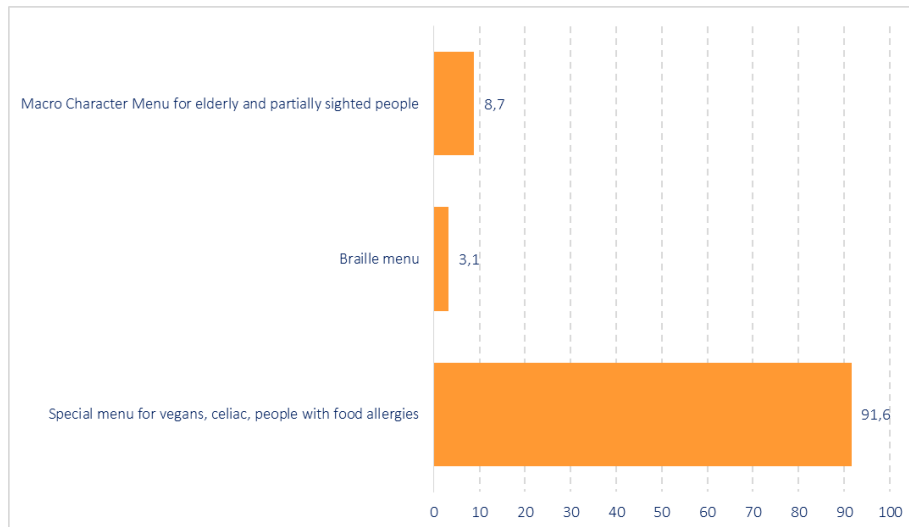
Services for people with special needs

Kids Area



The Italian accommodation sample is “kids friendly”, with a lot of services for them: 97,9% of the sample are equipped for warming up baby bottle, with children’s high chair (95,8%) anche changing table (59,4%)

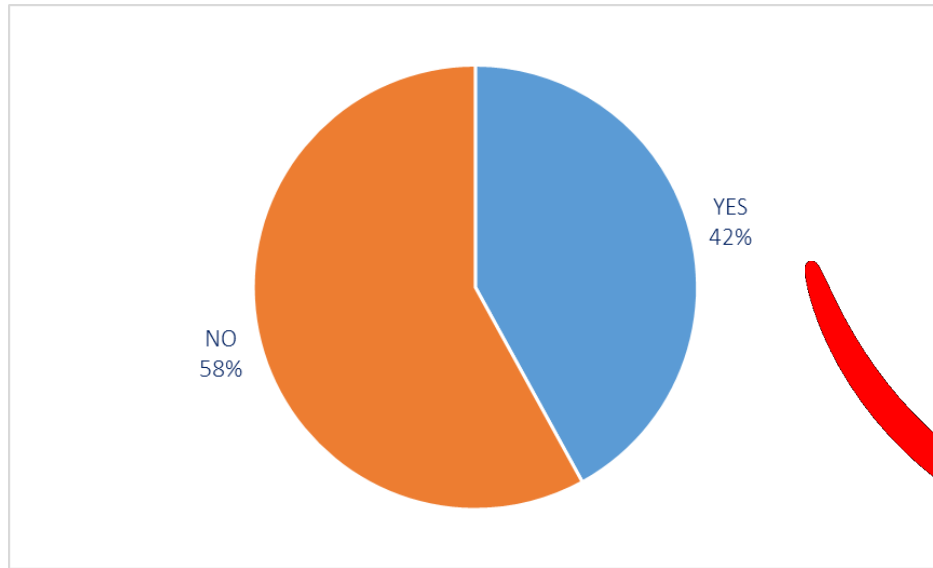
Food Area



Strongly attention for dietary habits

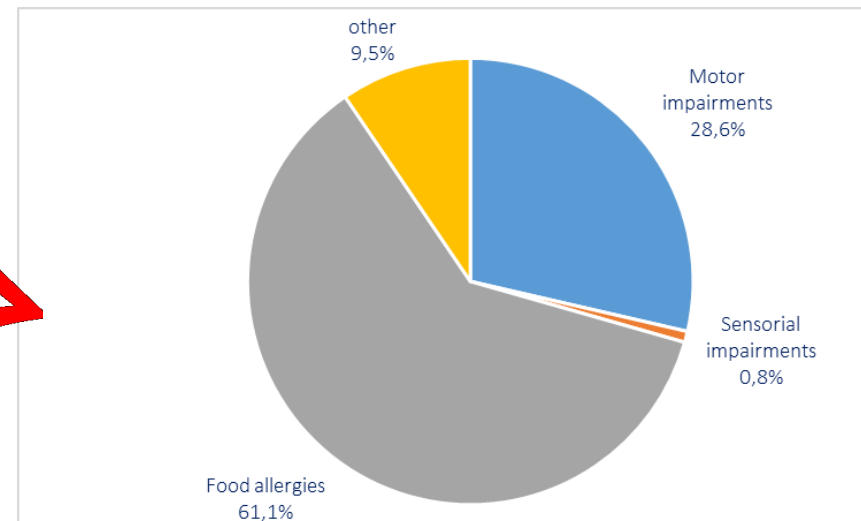
Staff training

Is the staff trained on accessibility?

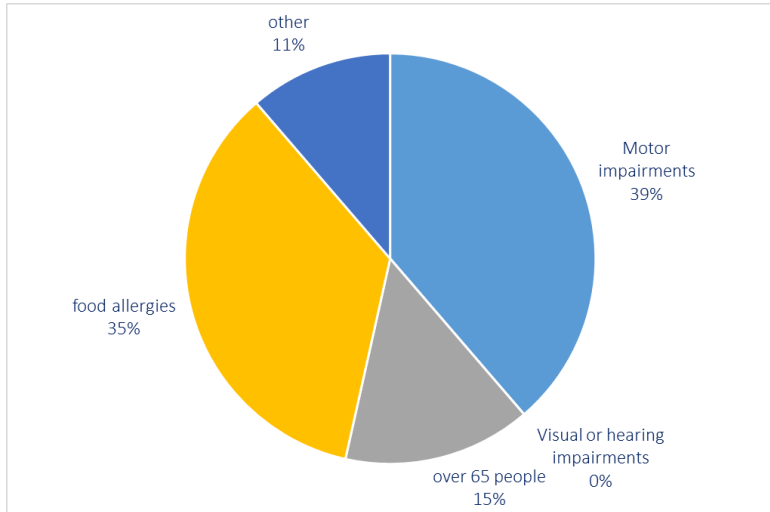


Human resources play a very important role in tourism accessibility and 42% of Italian sample of accommodations declares that its staff is trained specifically on accessibility, especially for food allergies (61,1%) and motor impairments (28,6%).

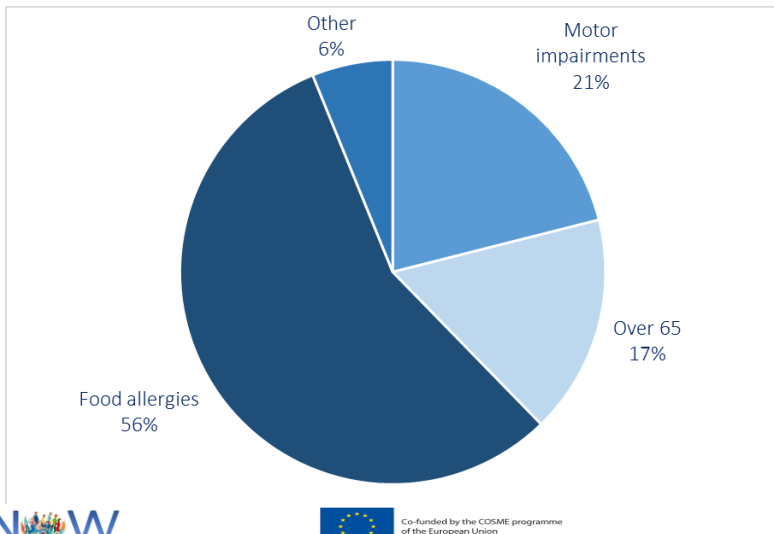
Personnel is specialty achieved in...



Clients with special needs: a snapshot of the reality

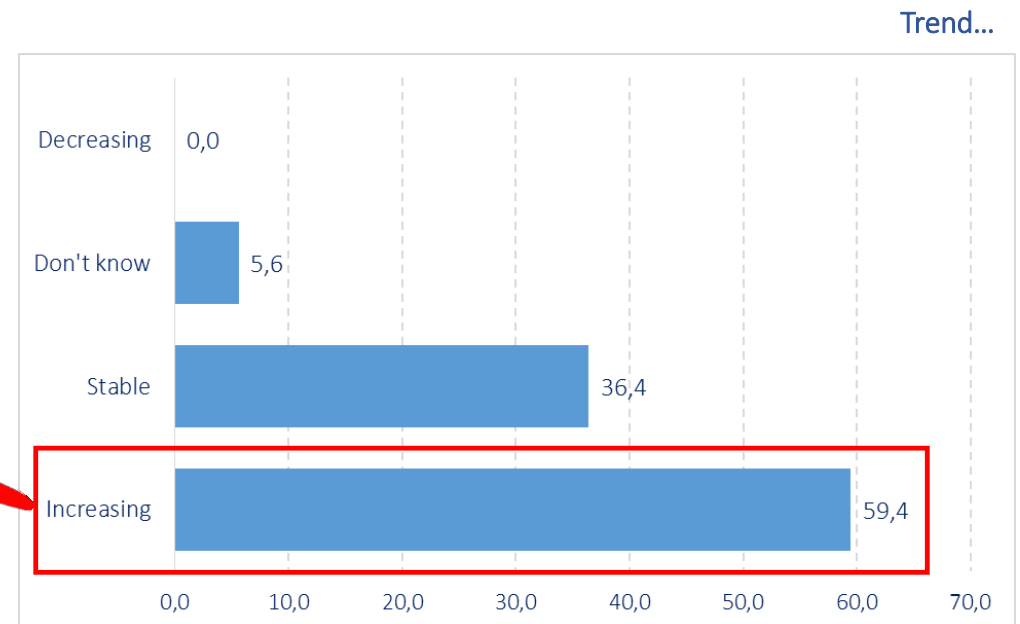


- Trends of tourism demand with special needs indicated by accommodation **are increasing** (58,6%) or at least in stability phase (35,9%).



Trends: increasing demand

- About clients with special needs, 67,1% are from Italy and 32,9% are from abroad.
- 38,7% of clients have motor disability; 35,2% food allergies, 14,8% are aged over 65.

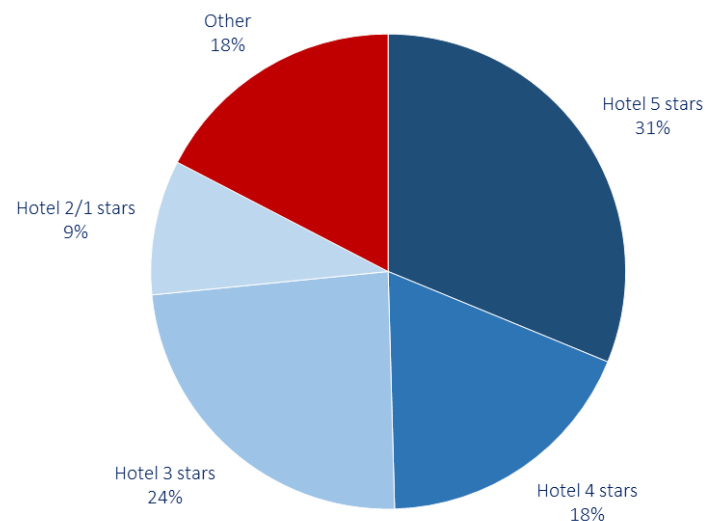




TOURISM ACCESSIBILITY: GERMAN SME'S COMPLIANCE



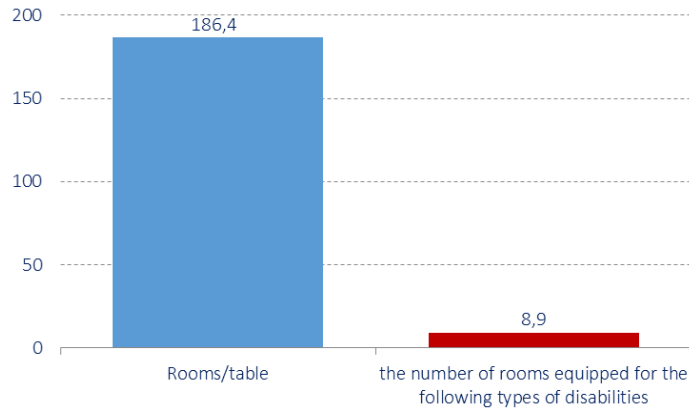
The sample



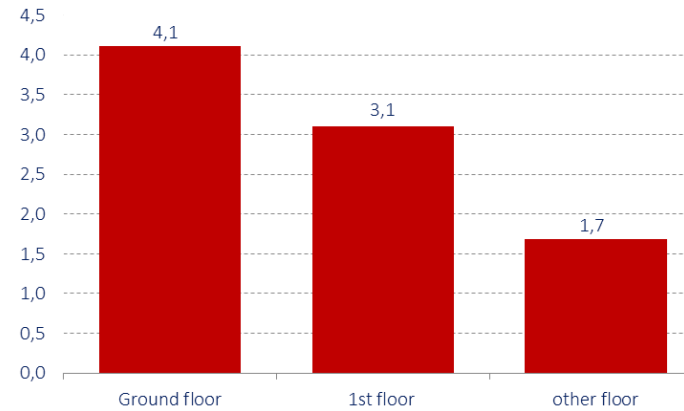
- The sample is composed by 82,6% hotels and 17,4% other accommodation
- About the hotels:
 - 37,8% 5 stars hotels
 - 22,2% 4 stars hotels
 - 28,9% 3 stars hotels
 - 11,1% 2 & 1 stars hotels

Rooms for people with special needs

Total rooms and rooms equipped for people with disabilities

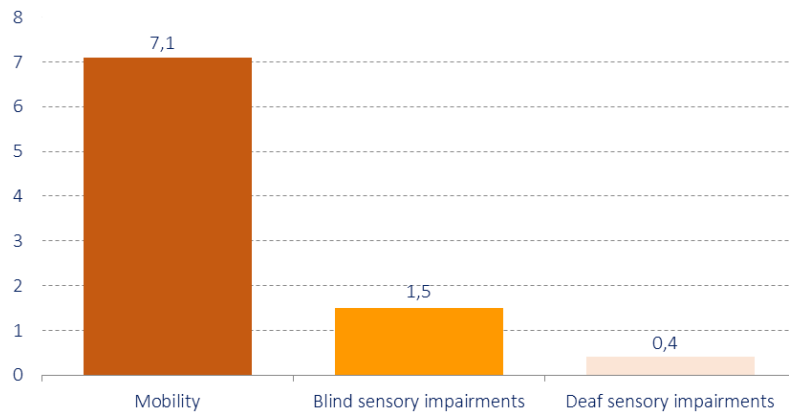


Floor location of accessible rooms

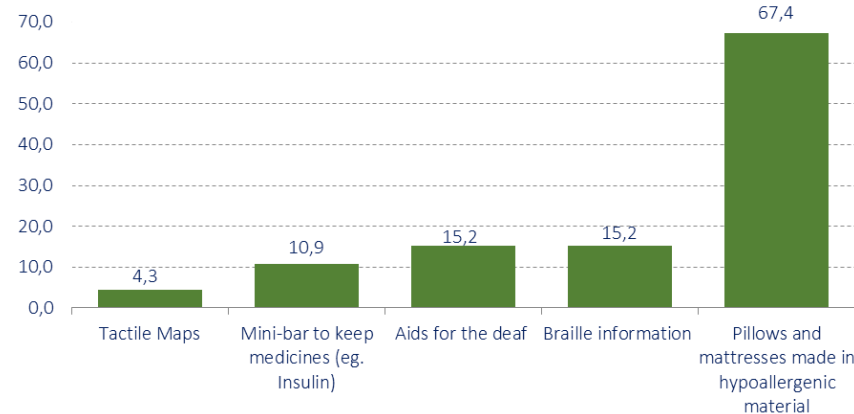


- Average size of the sample: 186.4 bedrooms; almost 9 rooms are equipped for people with special needs
- Accessible rooms are located above all on the ground and 1^o floor
- In most of cases the rooms are equipped for people with motor disabilities while the equipment for blind and deaf people are still limited (1.5 for blinds and 0.4 for deaf)

Rooms equipment for people with disabilities

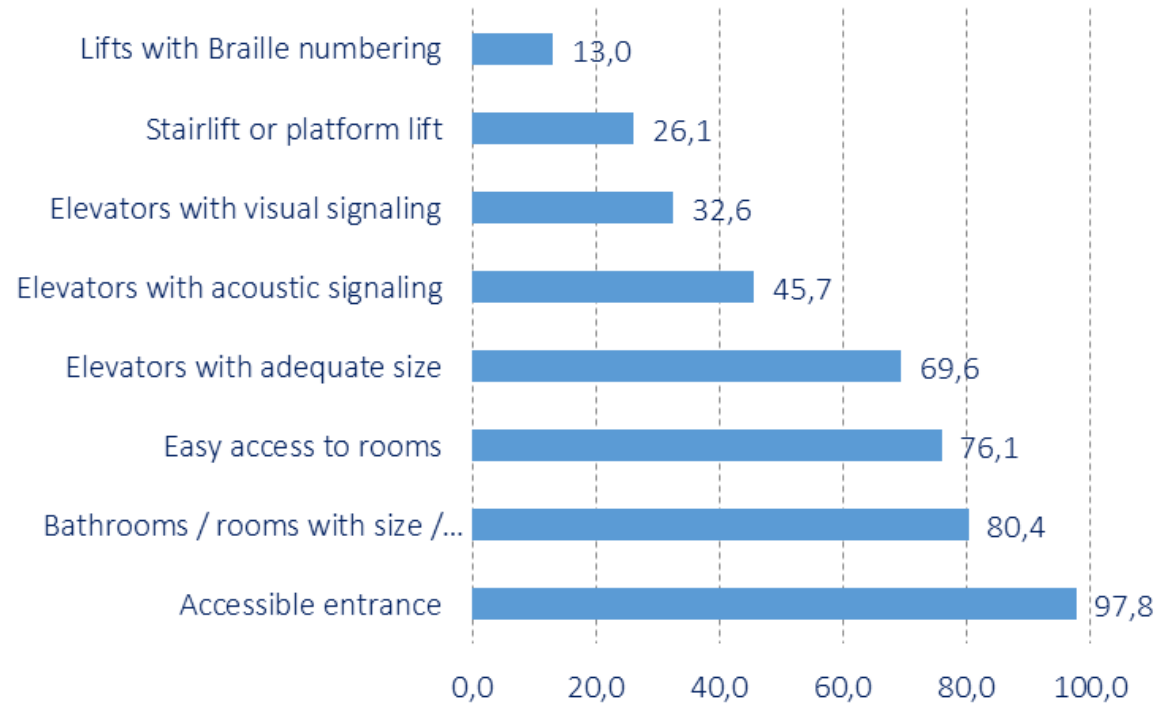


Rooms services for people with disabilities



- Room services include hypoallergenic pillows and mattresses (67.4%); aids for deaf (15.2%). Furthermore, in few cases, rooms provide braille information (15.2%); mini-bar to keep medicines (10.9%) and tactile Maps (4.3%)

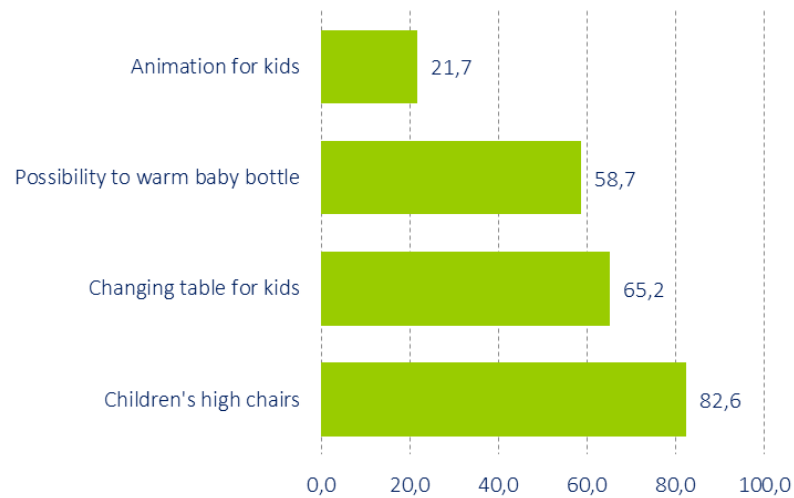
Structural elements: accommodation



- 97.8% of the sample has an accessible entrance and 76.1% an easy access to rooms
- Bathrooms, rooms with size have adequate measurements for 80.4% of respondents, elevators with adequate size for 69.6% of respondents, elevators with acoustic signals for 45.7% and visual signals for 32.6%

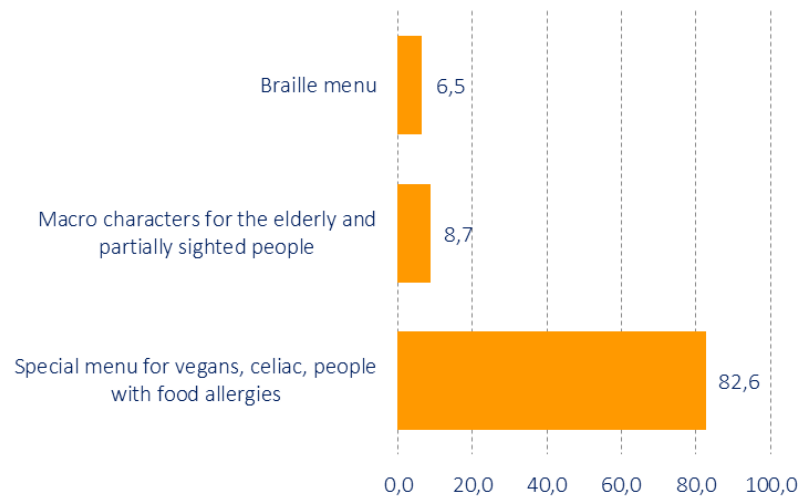
Services for people with special needs

Kids Area



The German accommodation sample is quite “kids friendly”: only the children’s high chairs is common among the accommodation. There is animation for kids in 21,7% of cases

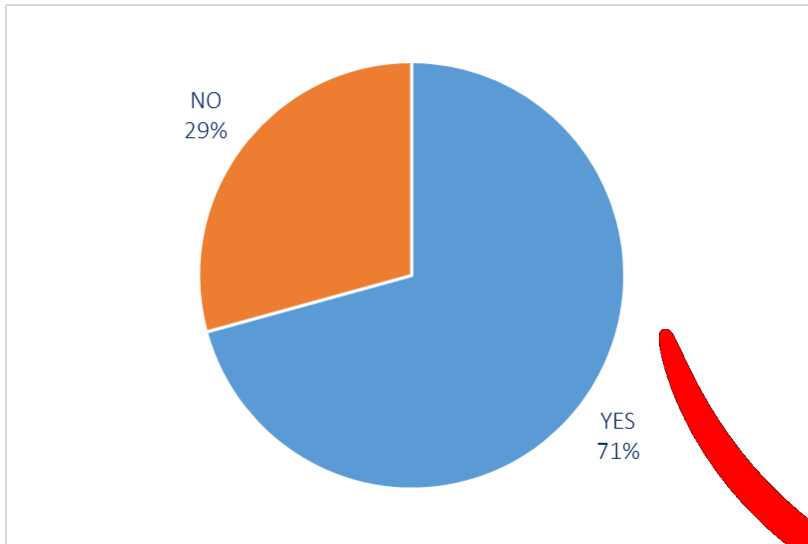
Food Area



Strongly attention for dietary habits. In Germany, menu in braille and manu with macro character are most popular than in the other countries

Staff training

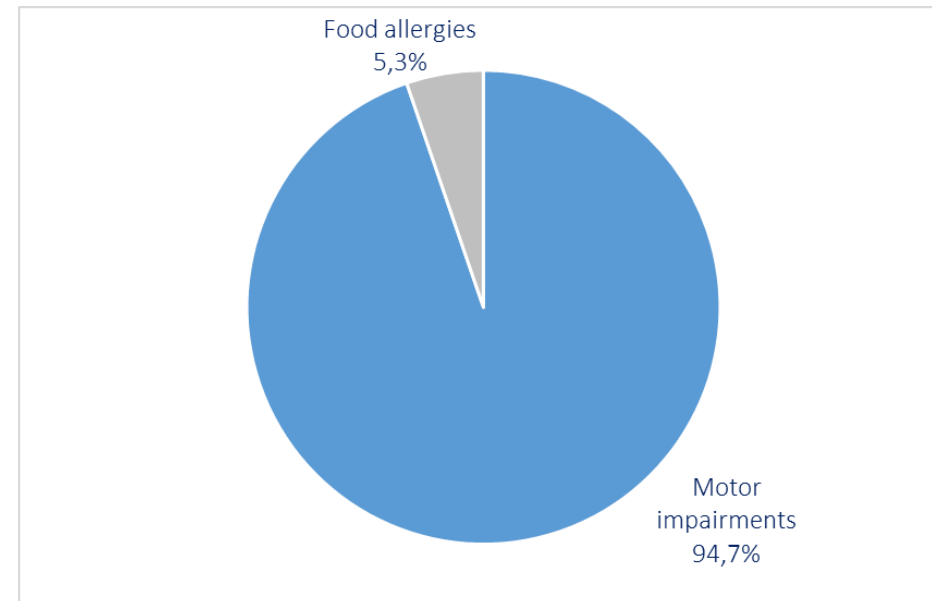
Is the staff trained on accessibility?



Personnel in German accommodations is specifically trained on accessibility (70,7%), particularly referring to motor impairments.

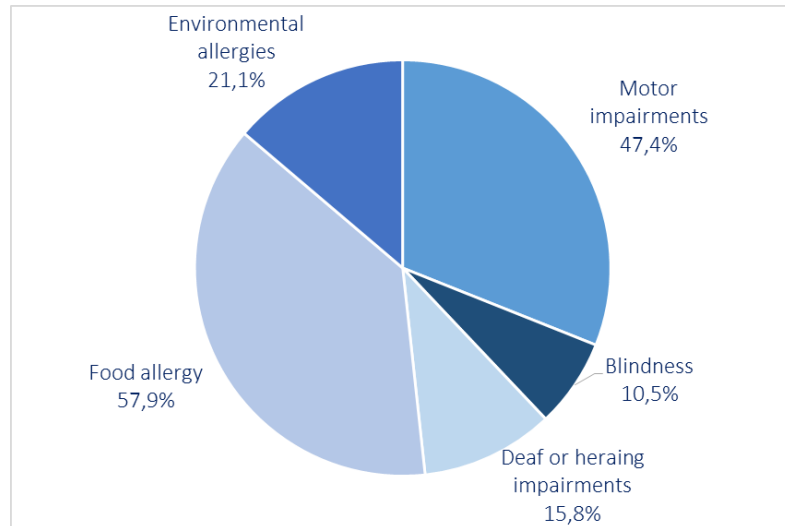
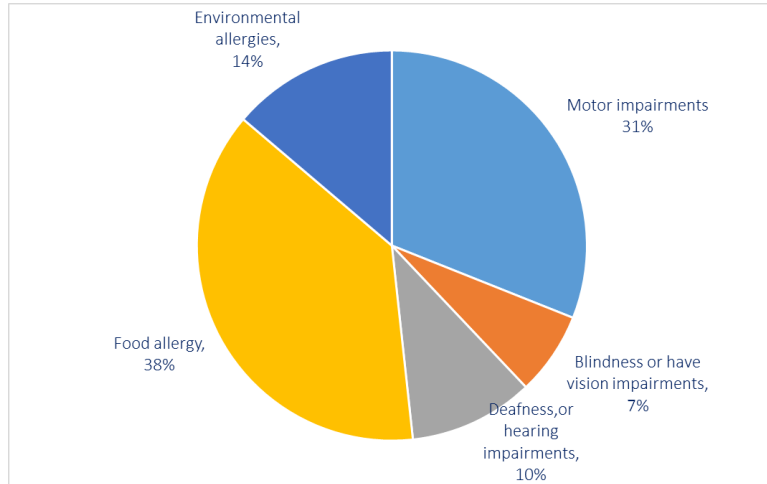


Personnel is specialty achieved in...

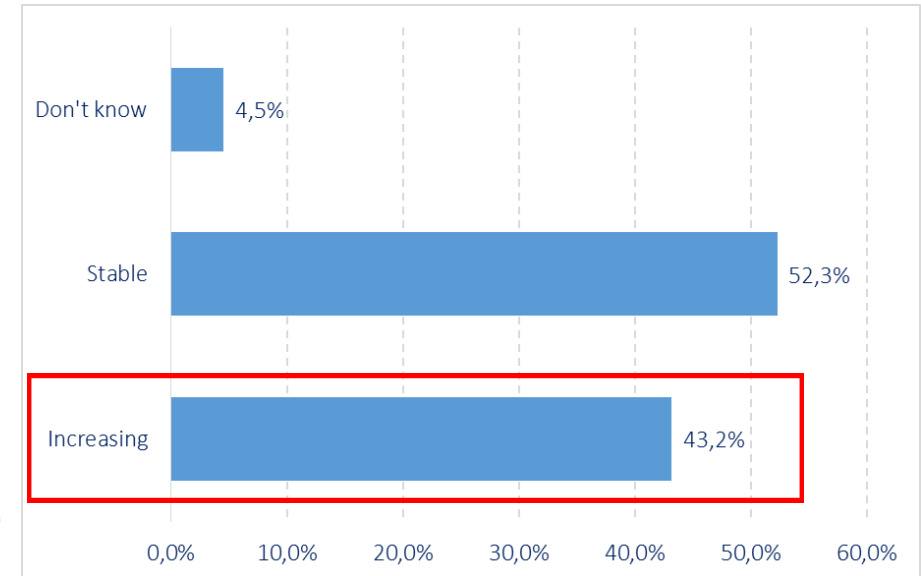


Trends: stable demands

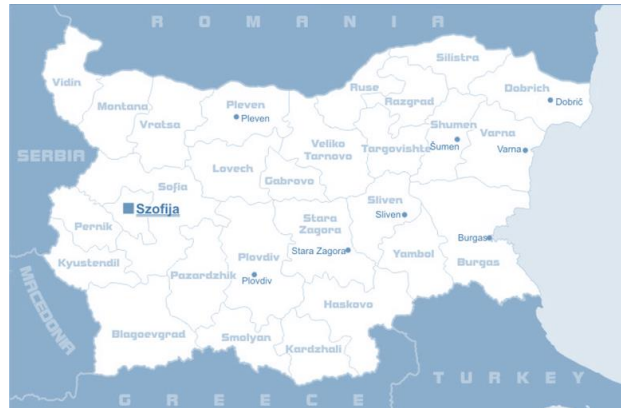
Clients with special needs: a snapshot of the reality



The trend of the presence of clients with special needs in German accommodation is stable (52,3%). However is increasing for 43,2% of businesses.

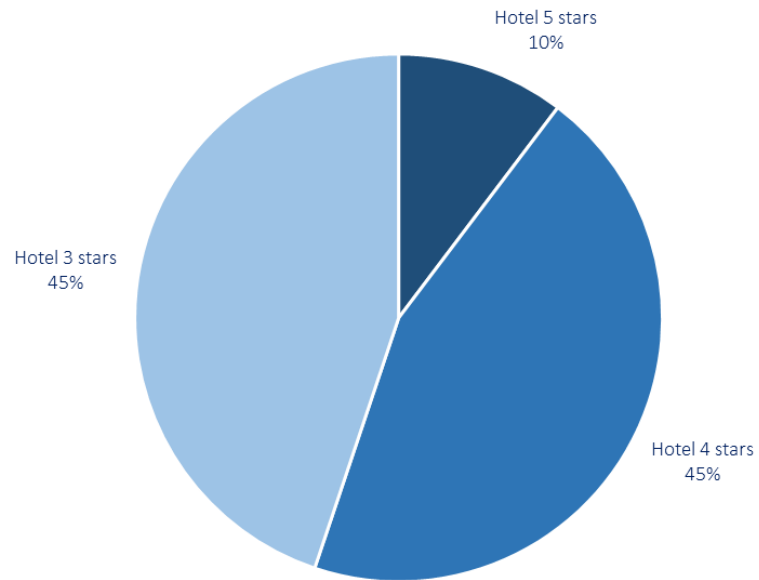


The more diffused increasing typologies of special needs of clients in German accommodations are food allergies (57,9%) and motor impairments (57,9%), followed at distance by environmental allergies (21,1%).



TOURISM ACCESSIBILITY: BULGARIAN SME'S COMPLIANCE

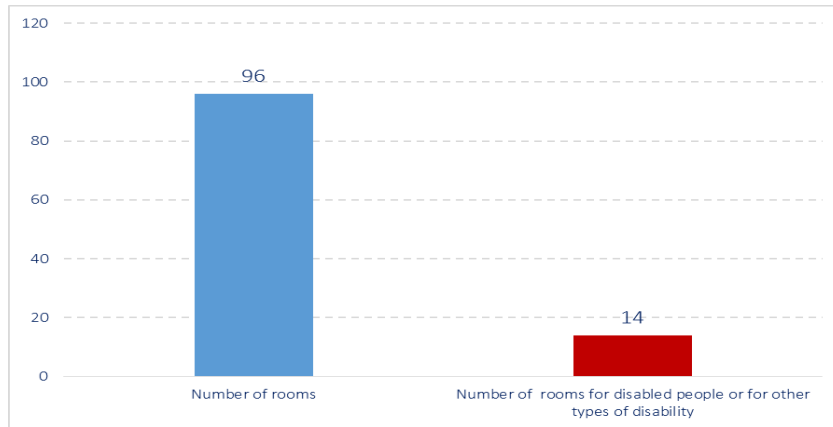
The sample



- For Bulgaria, the sample is totally composed by hotels
 - 10,3% 5 stars hotels
 - 44,8% 4 stars hotels
 - 44,9% 3 stars hotels

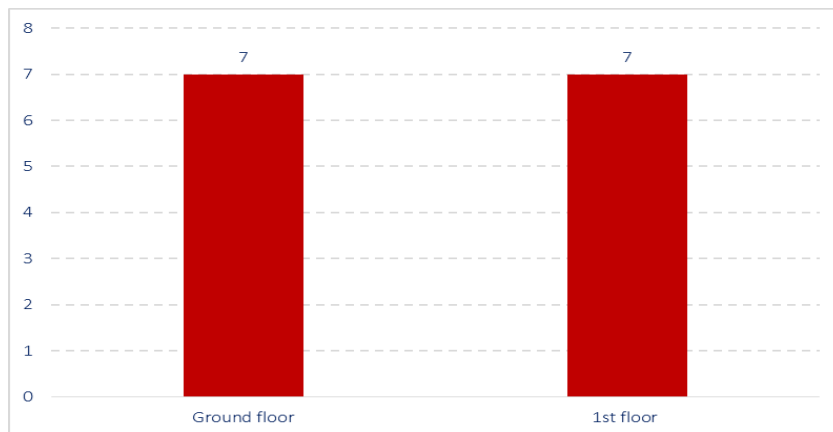
Rooms for people with special needs

Average size and rooms equipped for people with disabilities



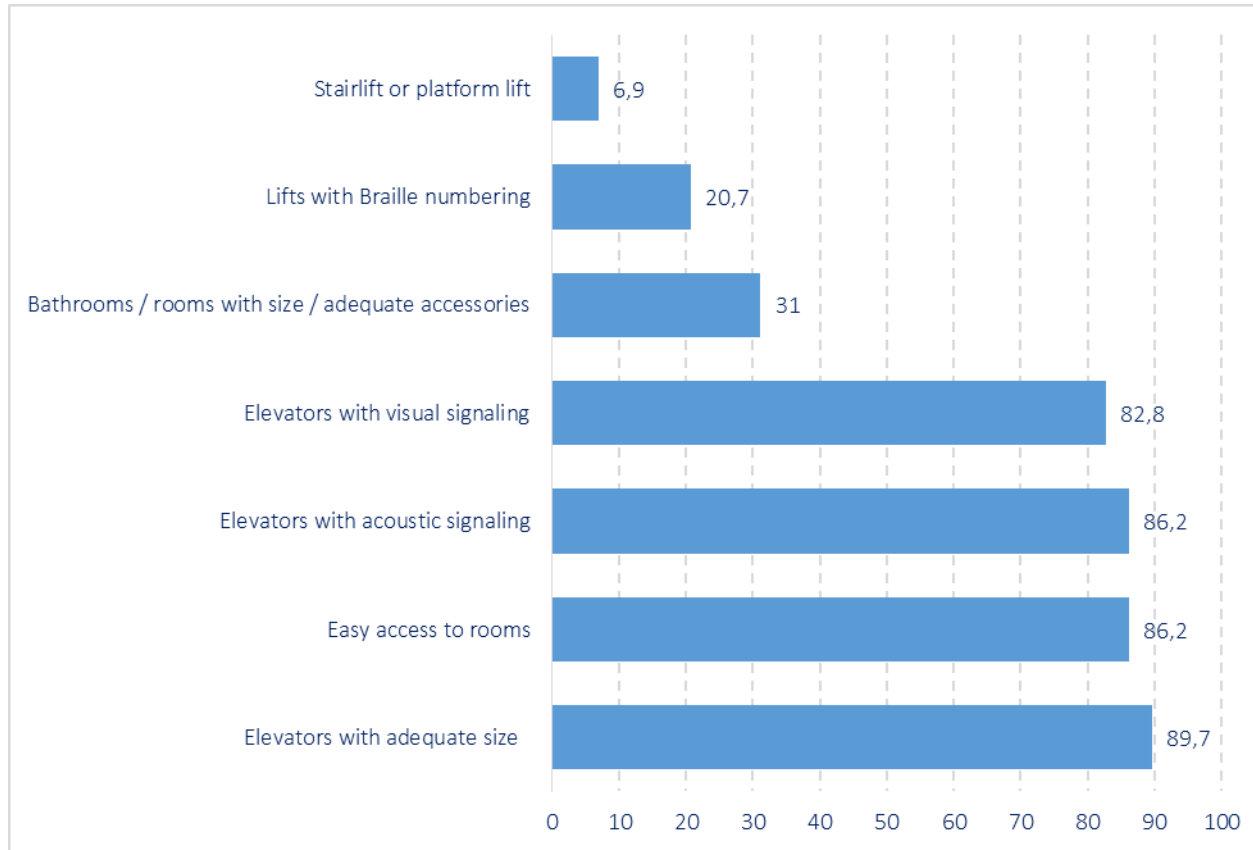
- Average size of the Bulgarian sample: 96 bedrooms; 14 rooms are equipped for people with special needs

Floor location of accessible rooms



- Accessible rooms are located above all on the 1° and 2° floor

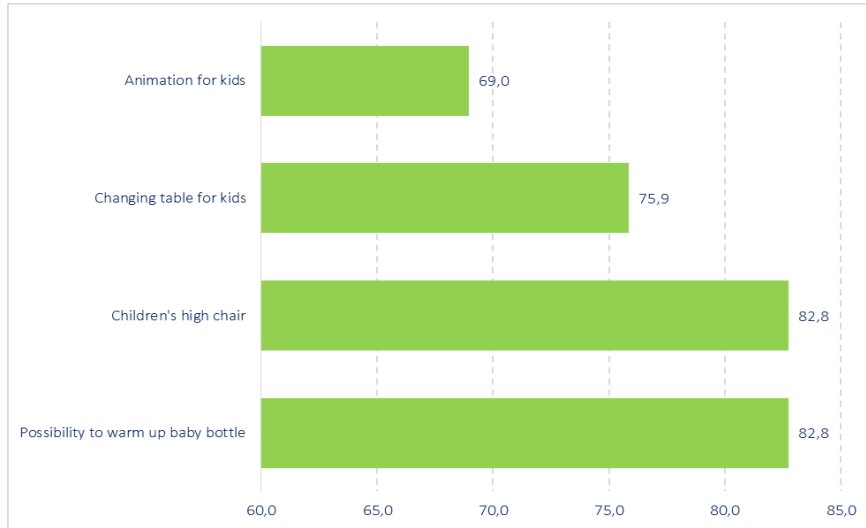
Structural elements: accommodation



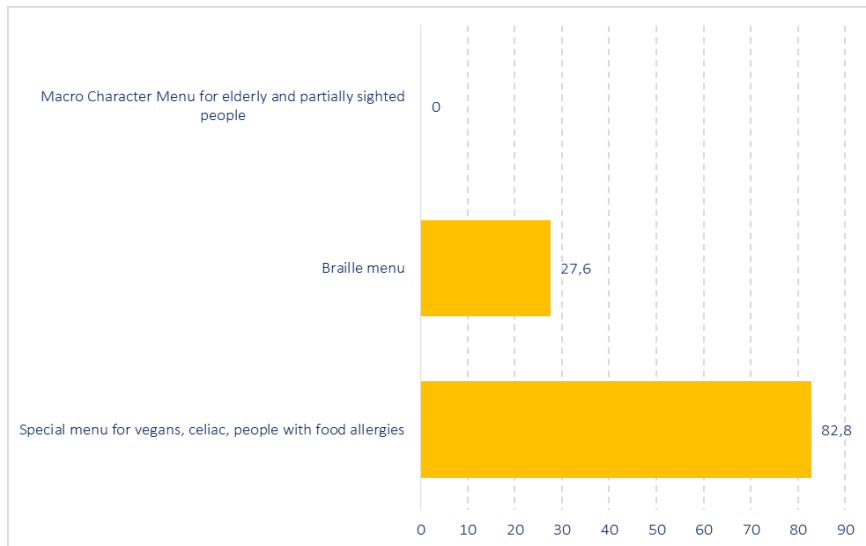
- Lifts have adequate measurements for 89.7% of the Bulgarian sample, with acoustical (86,2%) and visual (82,8) signals.
- Easy access to rooms are declared by 86,2% of the sample
- Presence of starlifts/platform lift is very limited

Services for people with special needs

KidsArea



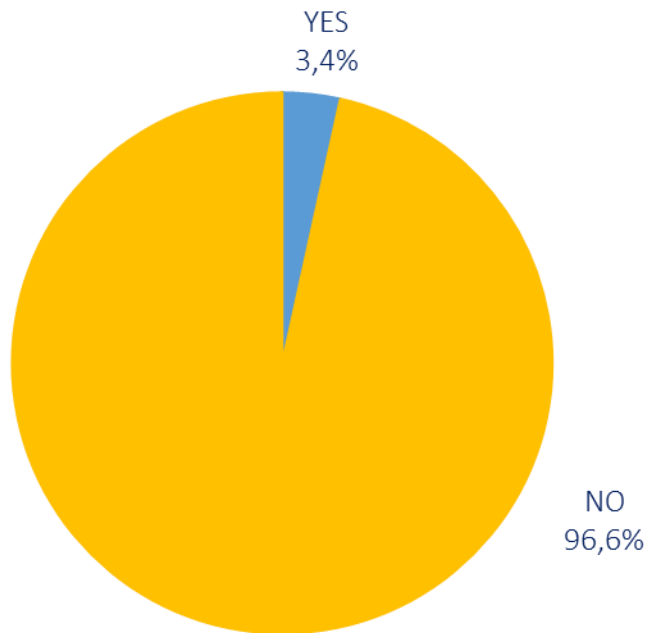
- The Bulgarian sample of accommodations show a particular attention to families with young children: 82.8% declares to have equipment to warm up the bottle and high chair; there is specific animation for children in 69% of cases



- In 83% of the case, Bulgarian hotels have special menu for people with specific food requirements
- Only 27,6% of the sample has a menu in braille and nobody has a macro character menu

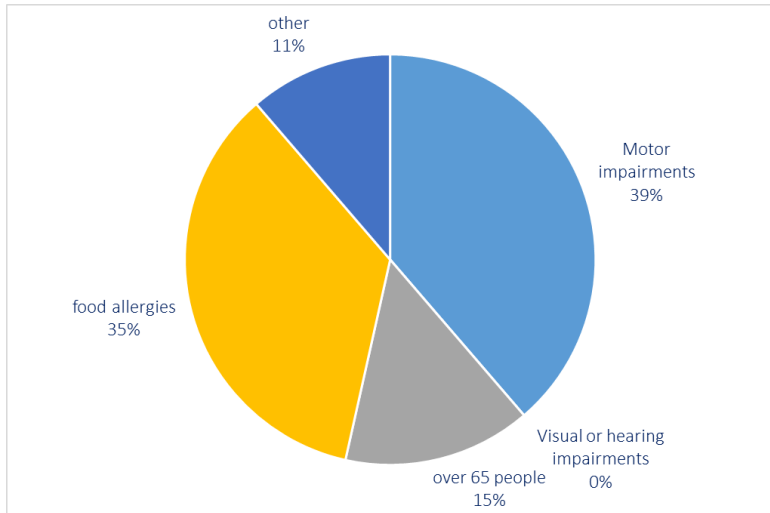
Staff training

Is the staff trained on accessibility?



Unfortunately, less than 4% of the Bulgarian sample claims to have staff trained on accessibility issues

Clients with special needs: a snapshot of the reality

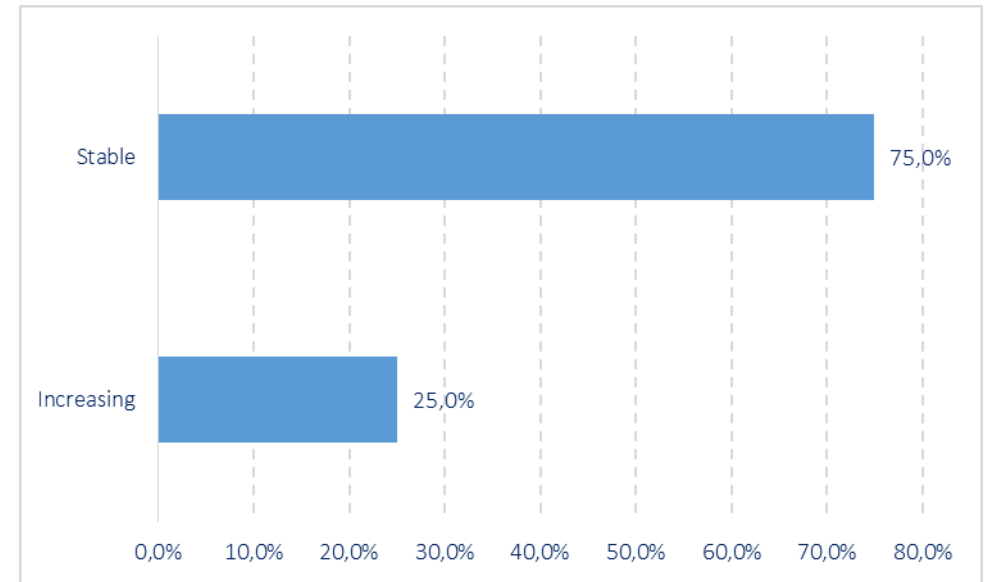


- 75% of the Bulgarian sample declare a stable demand for people with special needs

Trends: increasing demand

- The specific needs more diffused by Bulgarian accommodations' clients are motor impairments (38,7%); food allergies (35,2%), and aged people (14,8%).

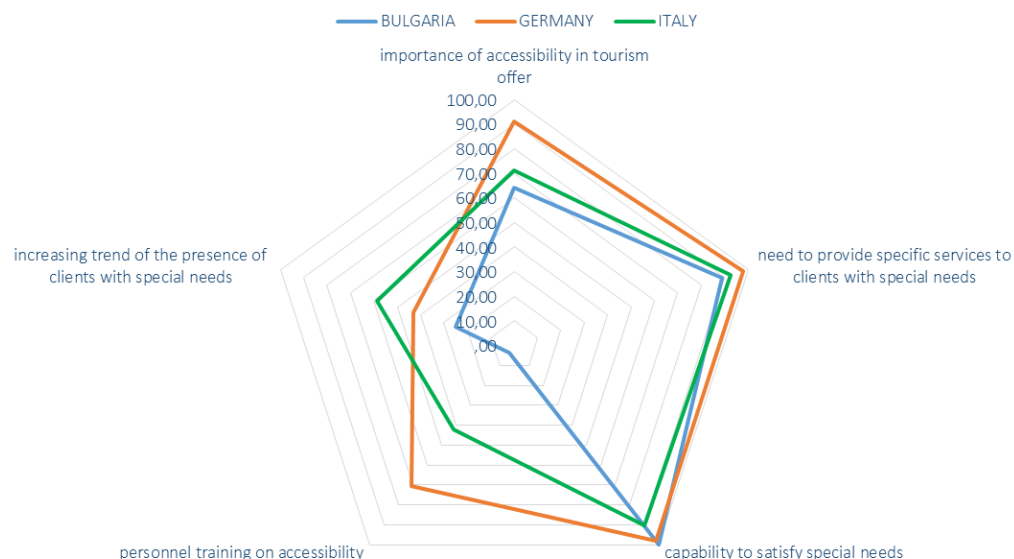
Trend...



Conclusions



Accessible tourism in Bulgaria, Germany and Italy



Analyzing results in comparing partners' countries, it is evident how

- in **all the countries**: more attention to disability impairments than sensory one

- **all the countries** have to work more for an adequate supply for the ter kind of disability ;

- in **Germany** and **Italy** staff is quite trained on accessible tourism, while in **Bulgaria** the room equipped for disability are much more numerous than in the other two countries (14%)

Conclusions

In terms of specific services and aids acoustic signals and Braille are characteristics difficultly found in tourism services.

More diffused are equipment and spaces for motor impairments (sometimes they are in accordance with the law, few times they are really comfortable).

Moreover, some services seem to be provided regardless of accessibility: frigo-bar, highchairs, baby bottles, etc.

The research shows an increased awareness (in Varna where the accommodation are newer than in the other region, the number of equipped rooms is much higher), in Italy there are some difficulties in adapting old structures, but a staff more trained is the key to offer an adequate offer to clients with special needs

All this means that - from the results of this survey - the road on accessibility on tourism is yet long and various at different levels, as individuals are the special needs of clients.

The results of the survey underlining again the need to strengthen common European policy to enhance accessibility in tourism businesses in order to support them in opening new market opportunities (more employment, more turn over, economic growth and development for SMEs)