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Accessible tourism in Greece: What is the current status?

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ABSTRACT

Accessible tourism is a new emerging segment of tourism in Greece, as well as worldwide, related to the tourist activity of disabled people and elderly age groups. Travelers with disabilities and elderly people have their special needs when engaging in tourism. This paper attempts to present the existing status of the accessible tourism in Greece. More particularly, our research focuses on the travel needs and barriers faced by people with disabilities in order to evaluate the current accessibility level of the Greek tourism industry, as well as the quality of infrastructure, tourist services and products offered to disabled and aged people throughout the Greek tourist chain. For this purpose, questionnaires with experts involved in the Greek tourism industry were undertaken and a quantitative analysis has been used to present our results. Whenever it was possible, our results have been compared with those of other academic studies, conducted for Greece or other similar tourism destinations. Our results show that, first the "accessible tourism" product of Greece is not entirely satisfactory; therefore, demand for accessible tourism in Greece remains low, as the Greek tourist destinations lack the appropriate infrastructure and easy access to public transport; and second the dynamics and size of the accessible tourist market is not fully understood by the Greek tourist industry. Our findings enrich the existing limited literature by providing some valid conclusions for the accessible tourism in Greece, since similar academic research has not been conducted before.

1. Introduction

Tourism is the largest and fastest growing industry in the 21st century (WTO, 2015). The rapid growth of the tourist industry has brought a lot of changes in the way tourists perceive the offered tourist product. In recent years, along with the development of mass tourism, there has been a development and utilization of various alternative forms of tourism characterized by particular dynamics and diversity. Accessible tourism is considered as one of the alternative forms of tourism, and it is characterized as a newly emerging tourist market, which has shown a growing trend in the last decades. This is due to the fact that tourists are more experienced, more demanding and more selective in the way they are doing their tourist activities.

It is widely accepted that people, with or without a disability, have the same desire to travel. Their desire and the special needs that this niche source market has, has contributed to the development of the model of accessible tourism. This tourism model is using all the elements that a tourist product needs. The concept of "Accessible Tourism" refers to the adaptation of the environmental resources, tourism services and products, in order to allow all visitors' access, use and enjoyment, based on principles and international design standards (WTO, 2016b).

Darcy (2006) mentions that it is very important to define the definitions of accessible tourism and to develop a common code of statistical data (qualitative and quantitative) so that there is a common code of communication and perception by all public and private tourist sectors related to accessible tourism.

There is a big variety of different definitions of "Accessible Tourism" (ENAT, 2017). "Accessible Tourism", also known as "Access Tourism", "Universal Tourism", "Inclusive Tourism" and "Barrier-free Tourism" in Japan, is tourism and travel that is accessible to all people, with disabilities or not, including those with mobility, hearing, sight, cognitive, or intellectual and psychosocial disabilities, older persons and those with temporary disabilities" (ESCAP, 2009).

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According to Darcy and Dickson (2009, p.7), "accessible tourism enables people with access requirements, including mobility, vision, hearing and cognitive dimensions of access, to function independently and with equality and dignity through the delivery of universally designed tourism products, services, and environments. This definition is inclusive of all people, including those traveling with children in prams, people with disabilities and seniors".

ECTSAA's (2016) definition of accessible tourism that it is "about the process of making all tourism offers suitable and easy to use for the people with disabilities and for the wider range of customers who need - and benefit from - accessible surroundings, facilities, services, and information". Accessibility benefits the whole population. It is argued that the people with impairments as well as the elderly population actually depend on accessibility information and determine if individuals go traveling or not (Buhalis et al., 2005). Accessible tourism targets any market segment that prefers easy access to a tourist experience. It is a fast-growing segment of the tourist market that includes people with some form of disability, as well as elderly people who often have diseases that can lead to disabilities (Buhalis and Michopoulou, 2011).

The aim of the paper is to examine why accessible tourism could be a new promising tourist market for growth in the Greek tourism industry. It presents a preliminary overview of the general situation within the country, giving information regarding the current situation.

Two objectives have been set through this research paper. The first one is to analyze the accessible tourism sector from the side of demand and supply. The second one is to examine the current situation of accessible tourism in Greece. Further, our research attempts to give a picture of accessible tourism from the present to the medium-term future and to investigate the level of supply of accessible infrastructure, customer service and activities provided by tourism businesses and operators.

The rest of the paper is organized as follows. Section 2 reviews the existing literature related to accessible tourism sector worldwide and in Greece. Section 3 presents the demand and supply of accessible tourism worldwide. Section 4 presents our methodology, the research's limitations and the data analysis. Section 5 presents the empirical findings of our research. The last section summarizes the main findings of this research and includes a recommendation for the development of accessible tourism in Greece.

2. Literature review

Through an extensive literature review on accessible tourism, we found that in the last two decades there has been an increase in the surveys and studies on accessible tourism. The concept of accessible tourism is a relatively new scientific field of research in the field of tourism. Most researchers and relevant literature focus on three main research areas:

- *The economic aspects* of accessible tourism and future economic forecasts from investment and the promotion of accessible tourism (Darcy, Cameron, & Pegg, 2010; University of Surrey, 2013; Bowtell, 2015; European Commission, 2015).
- *Different models of perception* of the characteristics and peculiarities of the people with disabilities, the social and political approach to accessible tourism (Darcy and Buhalis, 2011; Portales, 2015).
- The *practices and techniques for promoting accessible tourism* to types of tourist destinations, tourism (products & services) and destination management. (WTO, 2013, 2016a; Darcy, 2010; Naniopoulos et.al, 2015; Ambrose, 2016).

The common component of economic aspect and the economic forecasts for investment in accessible tourism is considered that accessible tourism is a low-profit tourism market with a stereotypical approach that wants people with disabilities and the elderly to have a significantly lower disposable income compared to the people without disabilities and younger people. All the research approves that accessible tourism has the potential to be one of the fastest growing tourism market segmentation. According to the University of Surrey (2013), the European travel market is losing more than 142 billion Euro every year, due to the lack of appropriate infrastructure, services, products and behavior towards tourists with special access needs. This driving force reduces the number of businesses who dare to invest for fear of losses (Portales, 2015).

Researching different models of perception of the characteristics and peculiarities of the people with disabilities based on the social and political approach to accessible tourism, they agree that accessible tourism is a tourism model that affects not only the people with disabilities but the whole society. The accessible tourism model reflects some positive trends in society, such as (i) increasing empathic position towards disabled people, (ii) a clear penchant for specialization in the field of accessible tourism and (iii) the value of changing the attitude toward diversity (Portales, 2015).

In the effort to apply all the practices and techniques for promoting accessible tourism to different types of tourist destinations, tourism (products & services) and destination management all the involved tourism stakeholders and the scientific community agrees that it must be a created universal design around the accessible tourism. To evaluate the tourist experience across different tourism sectors from demand and supply-side perspectives (European Commission, 2014), accessibility has to be measured as an indicator of quality.

Comparing all the above papers and conclusions of every field of research, the common affiliated is that there are two contradicting trends for accessible tourism. On one side, you have the scientific community together with the research communities (UNWTO, ENAT, W.H.O, Australian Foundation for Accessible Tourism, Accessible UK, South Africa's Universal Accessible Tourism Foundation, ONCE Foundation), who argue that there is clear evidence that accessible tourism is a new, big and rising tourist opportunity for investment and development.

On the other side, you see the lack of accessible tourist services and products and foremost a business reluctance, to take investment risks in the development of accessible facilities and in the design of tourist services and products (Buj, 2010).

Our review of the relevant literature and articles in Greece has shown that there is a significant lack of studies of the subject under investigation as far as Greek reality is concerned. There is a very small number of publications in Greek journals and academic research papers.

In 2006, Ikkos (2006), in collaboration with JBR Hellas Consultant Company, concluded that accessible tourism in Greece presents a large number of problems and weaknesses. Most of the tourist attractions, public transport and accessibility in public do not meet the requirements of the universal design.

Their research took place during 2015 and 2016. They researched the Greek tourism product from every different angle. Through their research, they investigated every tourism region in Greece, all the related tourism segments. Their aim was to investigate the travel patterns and behaviors of, and information provision for the people with access needs and compared different accessible tourism model that has been applied in Greece.

In contradiction to the saying of Ikkos (2006), Dimou and Velissariou (2016), in their research on accessible tourism in Crete, found that there are high levels of satisfaction of customer service, from the people with disabilities, since there are hotels that meet many accessibility standards, several archaeological sites, and natural landscapes with disabilities, since there are hotels that meet many accessibility standards, several archaeological sites, and natural landscapes are easily accessible.

The sectors that do not allow Crete to become an absolutely accessible tourism destination, are the sectors of public transport and the urban infrastructure related to tourism. The results of their research concluded that Crete can become an important accessible tourist destination if it invests in that direction.

Their research was conducted during the summer season (May – October) of 2015; they focused their research on the region of Crete. The aim of their research was to examine the demand side; their research focused on the satisfaction of the people with disabilities using the accessible infrastructure. The participants were asked to provide any opinion or information they believe would be useful to improve the accessibility standard, to investigate from the demand side what the problems that they are facing during their vacations are. They used a questionnaire with a structure of twenty-five open and close-ended questions.

3. The demand and supply for accessible tourism

Accessible tourism analysis has two main components. A demand-side analysis of the niche market segment of accessible tourism; and a supply-side analysis which determines how the tourism-related business sectors support accessible tourism and what the level of accessibility is, including supply-chain effects.

3. 1. Accessible tourism: overall demand-side

Over the last decade, the connection between people with disabilities/impairments and the tourism sector have been increased due to the attention that is given to it by academic studies and governments (Darcy and Dickson, 2009).

The accessible tourist market is the largest tourist group of consumers when you consider the number of disabled people with a chronic or temporary disability, the rapid increase in the elderly population and the accompanying people when they are on holidays (families, friends, escorts etc.).

According to the World Tourism Organization, the tourism market which benefits from the infrastructure and the universal design of accessible tourism exceeds one billion international tourists traveling each year (WTO, 2016b).

As presented in Table 1, the European Commission (2014) estimated that the market segment for accessible tourism was approximately 138 million people in 2011 in EU27. This is basically in line with the findings of the OSSATE research by Buhalis et al. (2005) who suggested that there were 46.6 million people with disabilities (aged 16-64) and 80.9 million elderly populations (aged 65 or above), or equivalently 127.5 million people with access needs in 2005. The narrow gap between the two estimates can be explained by the fact that the population of the with access needs experienced mild growth over the past few years (European Commission, 2014). Furthermore, details about the future forecast of accessible tourism will be presented in Table 2.

In Greece in 2011, the population (aged 65 or above) were approximately 2 million people and the 776 thousand people with disabilities.

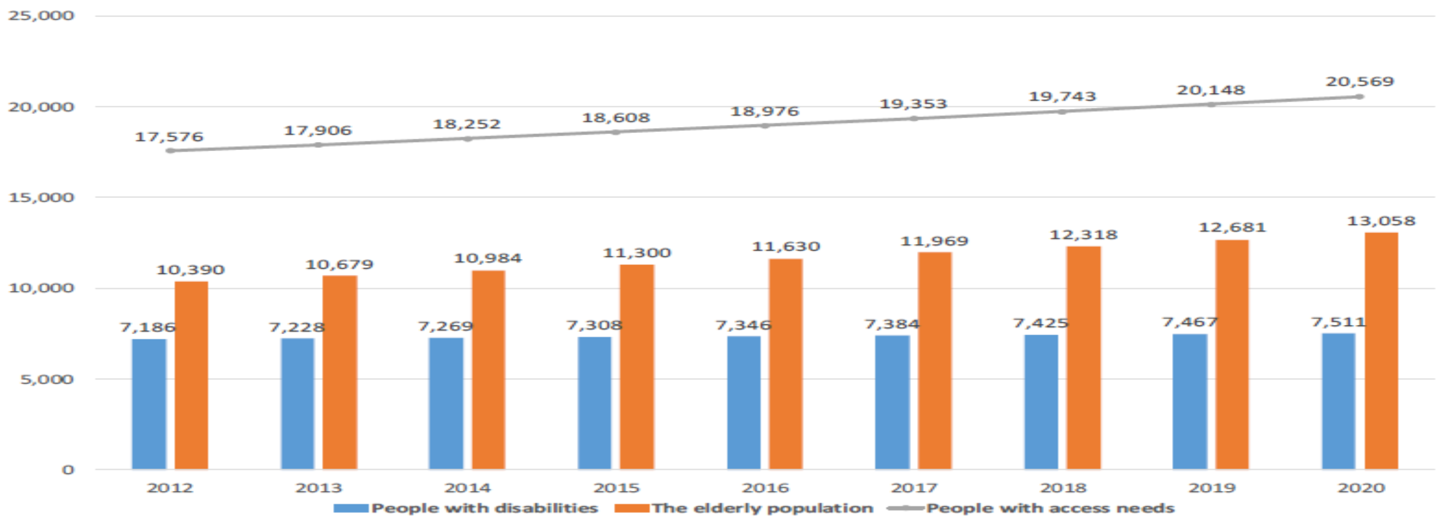
Table 1: People with access needs in the EU27 countries as of 2011

	Austria	Belgium	Bulgaria	Cyprus	Czech Rep.	Denmark	Estonia	Finland	France	Germany	Greece	Hungary	Ireland	Italy
The elderly (Age 65 or above)	1,504	1,938	1,325	132	1,606	940	232	956	11,169	16,829	2,112	1,664	534	12,509
People with disabilities (Age 15-64)	729	1,327	64	96	1,506	724	79	1,141	10,394	4,534	776	780	364	2,621
Access Needs	2,233	3,265	1,389	228	3,112	1,664	311	2,097	21,563	21,636	2,888	2,444	898	15,13
	Latvia	**Lithuania**	**Luxemburg**	**Malta**	**Holland**	**Polland**	**Portugal**	**Romania**	**Slovakia**	**Slovenia**	**Spain**	**Sweden**	**U.K.**	**EU27 Countries**
The elderly (Age 65 or above)	396	517	72	61	2,629	5,278	1,934	3,207	668	343	7,918	1,755	10,547	88,778
People with disabilities (Age 15-64)	84	260	41	18	2,829	3,334	1,454	866	325	277	2,726	1,258	11,219	49,825
Access Needs	480	777	113	79	8,612	8,612	3,388	4,073	993	620	10,644	3,013	21,766	138,603

Source: European Commission, 2014

Figure 1 presents the current and future demand for EU's accessible tourism by the people with access needs from the key international inbound markets from 2012 until 2020. As it is shown in Figure 1, there is a continuing increase in the demand for accessible tourism.

Figure 1. Current and future demand for EU's accessible tourism by the people with access needs from the key international inbound markets from 2012-2020.



Source: European Commission, 2014

The estimated increases in the future demand according to the European Commission (2014, p. 43) are based on that people with disabilities are believed to be more willing to travel and should also increase their budget to explore new destinations that they have not been before. Their prediction is based on the travel propensity and travel frequency researches that have been conducted.

Evolution of the population is grown steadily at an average annual rate of 0.5% (European Commission, 2014, p.44). According to the EU (OECD/EU, 2018) research "Health at a Glance: Europe 2018" presents that the life expectancy of the EU population is expected to increase between 2012 and 2020. According to the European Network of Accessible Tourism (ETCAATS, 2016), these are two main factors in the steady increase of accessible tourism in Europe.

Based on the assumption that disabled people travel alone, and they are willing to explore new destinations, Table 2 presents an overall prediction of the value of the accessible tourism market. As it is presented, the Greek total market value is expected to increase by 75 per cent and the world total market value is expected to increase by 65 per cent. From 2011 to 2020, the population of the people with access needs in the EU27 area is expected to experience a mild growth of 1.2% per year (European Commission, 2014). By looking at the European figures alone, as they are presented in Table 2, the total number of elderly citizens is estimated to increase by nearly 35% by the end of 2025. In 2005 in Greece, one in six persons (15.7%) used to live with impairment (ENAT, 2014).

Table 2. Accessible tourism market value forecast between 2005 – 2025 (in EUR) focusing on the elderly (>65) consumer segment

Accessible tourism market value forecast 2005-2025 (in EUR) focusing on the elderly (>65) consumer segment

Country (EU27 exc. Bulgaria, Croatia)	2005					2025						
	Elderly population >65 in 2005 (million PAX)	GDP/ capital 2005 (€)	Factor	Av. spend/ holiday/ head (€)	Market value 2005 (in € million)	Elderly population >65 in 2025 (million PAX)	GDP/ capital 2025 (€)	Factor	Av. spend/ holiday/ head (€)	Market value 2025 (in € million)	Elderly population change 2005 - 2025 (%)	Market value change 2005 - 2025 (%)
Austria	1,36	29,753	1,11	861	1.168	1,88	40,741	37	1.178	2.210	38	89
Belgium	1,81	29,182	1,09	844	1.525	2,39	39,046	34	1.129	2.699	32	77
Cyprus	0,09	13,536	0,5	391	35	0,16	12,797	-5	370	57	74	65
Czech Republic	1,46	9,776	0,36	283	412	2,25	17,077	75	494	1.113	55	170
Denmark	0,82	38,131	1,42	1.103	901	1,21	44,054	16	1.274	1.538	48	71
Estonia	0,22	8,378	0,31	242	54	0,26	16,884	102	488	127	17	135
Finland	0,83	30,556	1,14	884	734	1,29	41,952	37	1.213	1.565	55	113
France	9,96	27,193	1,01	786	7.835	13,98	30,99	14	896	12.530	40	60
Germany	15,58	26,831	1	776	12.088	19,82	37,582	40	1.087	21.537	27	78
Greece	2,01	18,237	0,68	527	1.059	2,47	19,631	8	568	1.404	23	33
Hungary	1,51	8,807	0,33	255	384	2,01	13,191	50	381	766	33	100
Ireland	0,64	38,632	1,44	1.117	711	0,81	35,540	-8	1.028	834	28	17
Italy	11,29	24,266	0,9	702	7.923	13,9	25,302	4	732	10.169	23	28
Latvia	0,37	5,63	0,21	163	60	0,41	10,879	93	315	130	12	116
Lithuania	0,55	5,806	0,22	168	92	0,71	12,411	114	359	253	29	176
Luxembourg	0,07	64,545	2,41	1.867	127	0,10	77,287	20	2.235	232	53	83
Malta	0,05	12,02	0,45	348	19	0,10	18,165	51	525	52	83	177
Netherlands	2,31	31,457	1,17	910	2.104	3,75	35,48	13	1.026	3.848	62	83
Poland	5,09	6,336	0,24	183	933	8,05	13,362	111	386	3.111	58	233
Portugal	1,8	14,591	0,54	422	760	2,33	15,745	8	455	1.061	29	40
Romania	3,26	3,584	0,13	104	337	-	6,896	92	200	-	-	-
Slovakia	0,64	9,972	0,37	288	185	1,06	20,377	104	589	622	64	236
Slovenia	0,31	14,288	0,53	413	128	0,45	21,576	51	624	283	47	122
Spain	7,1	20,778	0,77	601	4.269	9,00	20,653	-1	597	5.378	27	26
Sweden	1,57	33,091	1,23	957	1.501	2,16	47,497	44	1.374	2.964	38	98
UK	9,54	30,301	1,13	876	8.357	13,00	37,414	23	1.082	14.063	36	68
	80,22			618	53.701	103,54			793	88.549	29	65

Notes: a German data used as guideline for EU total spend/person/holiday (BMWA 2004, Buhalis et al., 2005, Euromonitor); b Assuming Average spend/person/holiday grows at the same rate as GDP/Capita between 2005 and 2025; c Unreliable or uncertain data

Source: Ratio of travel spend between able bodied and disabled tourists – BMWA (2004) in Buhalis et al. (2005); Population figures – US Census Bureau (2005) in Buhalis et al. (2005); German Travel Spend – BMWA 2004, Buhalis et al., 2005, Euromonitor (2013); GDP/CAPITA 2005-2025 – World Bank (2013)

Source: Bowtell, 2015

According to the potential market for European travelers that want to benefit from the accessibility, the anticipated demand for accessible tourism will double over the forthcoming years, as it is presented below in Table 3.

Based on the population figures of the people with access needs from Table 2, together with the travel behavioral profiling, the current and the future demand for accessible tourism is presented. The people with a disability tend to take their specific needs into account when preparing and booking their trip, with many checking accessibility conditions in advance or selecting trips where issues are unlikely to arise.

Table 3. The potential market for European travelers benefiting from the increased accessibility and tourist revenue

Overall demand	70% are physically and financially to travel	Multiplier effect of friend and family	Number of friends and family	Total potential market of travellers	Average spending per person and per vacation	Potential revenues from tourism
27,5 million	89,3 million	0,5	44,7 million	134 million	620 €	83 billion €
		2	178,6 million	267,9 million		166 billion €

Source: Alén, Dominguez and Losada, 2012

Therefore, the overall demand for accessible tourism in Europe is estimated to be more than 27.5 million people by 2025 and the businesses need to provide affordable services to meet the projected demand.

According to the World Tourism Organization (2011), it is estimated that 650 million people in the world live with some form of disability. If you include the family members of the disabled people to this group directly affected by disabilities, then the total tourist market would be estimated to be around two billion people, which accounts for almost one-third of the world's population (WTO, 2013).

The tourism industry has been paying more attention to the needs and requests of the tourists with disabilities, recognizing that those people have the same needs and desires for tourism as others (Loi and Kong, 2015). Therefore, it is important to take into account that people with disabilities have special and particular needs, but they have the same ambitions and human rights to travel (Buhalis et.al, 2005). However, Darcy and Buhalis (2011) showed that several factors affect the demand for the accessible tourism sector, such as the ageing population and the development of the tourism sector.

3.1.1 Market segmentation

Accessibility improvements do not only benefit disabled people, but also pregnant women and those with temporarily restricted capacities, such as children and families (Buhalis and Michopoulou, 2011). Senior tourism is directly linked to accessible tourism because disability is often directly related to the elderly population (Popiel, 2014). According to the World Health Organization (2011), 35% of people over 65 have some type of disability. In general, everyone benefits from accessibility (Buhalis and Michopoulou, 2011).

According to European Network for Accessible Tourism (ENAT), the future tourist market for accessible tourism in Europe is estimated to reach 130 million people with an annual turnover of over 68 billion € (Naniopoulos, Tsalis, and Nalmpantis, 2016).

3.1.2 Characteristics of tourists

Disabled travelers are more likely to take longer trips and if they have received excellent service, disabled customers will be loyal and be more likely to leave reviews and comments at the web sites dedicated to accessible travel (Alén, Dominguez and Losada, 2012).

For people with disabilities or special needs in the tourism sector, it has been observed that (Souca, 2010):

- They become regular customers after they find a tourist unit that suits their needs.
- They tend to take longer holiday breaks than average, so they spend more money per trip than an average tourist.
- They tend not to travel alone, but they are usually accompanied by someone who cares for them, their family and their friends. Statistics show that 50% travel with a company, 20% travel with the family or with a child, 20-25% with a companion and only a small percentage of about 5-10% travel alone.

Accessible tourism can contribute to reducing tourist seasonality as people with disabilities and their escorts choose to travel in the times of low season of tourist demand (European Commission, 2013). The concept of accessibility must be understood as a means of improving the overall tourist product and as an economic opportunity, which can contribute to providing higher quality services, hospitality, security, comfort and sustainability for all. Some of the more important advantages are (ETCAATS, 2016):

- Growing market segment through demographic and lifestyle changes
- Business opportunity
- Shifting away from seasonality
- Competitive and quality tourism.

According to Taleb Rifai, (UNWTO Secretary-General, 2017, p. 1), "Accessibility is a central element of any responsible and sustainable tourism policy. It is both a human right and an exceptional business opportunity. Above all, we must come to appreciate that accessible tourism does not only benefit persons with disabilities or special needs, but it also benefits us all".

3.2 Accessible tourism: supply side

Tourism service providers who are directly engaged in the tourism supply side have the most important role to play in the development of accessible tourism. Their opinion and attitudes towards accessible tourism will determine the future of this industry.

From the supply side, working with accessibility in the tourism sector results in a number of advantages. The later can be converted into opportunities that are reflected in the elderly tourist segment, in the disabled tourists, or those with temporarily restricted capacities (Alén, Dominguez & Losada, 2012).

Direct tourism suppliers refer to the hotels/accommodation, restaurants, cafés & bars, transportation services, tour operators, destination management organizations etc. The tourism supply chain can be divided into two main categories. Category one includes the information, the booking, the transport, the accommodation, the entertainment/leisure, culture etc. Category two includes different types of barriers such as physical barriers, operational system, information and social norms.

In category one, there are three basic approaches to accessible tourism (ENAT, 2014). The first approach refers to venues, facilities or service that are measured against specific performance standards for one or more sets of disability requirements to see if they comply or do not comply with the standards. The second approach refers to venues, facilities or services that are measured and described in detail, based on audits or self-assessment. The third approach refers to venues, facilities or services that are given a "rating", evaluated by a user or by self-assessment.

Tourism consists of a big complex system of activities and services, which have numerous inter-relationships. These activities are, to a large extent, linked directly to the whole journey that a tourist makes. Accessible tourism considers this complexity. This implies that accessibility should be integrated within the whole chain; in booking, information provision, transport, the accommodation itself, attractions, staff attitudes, excursions, meals, etc.

Accessible tourism is often described as a chain with many different links that are highly interdepended on each other cross over the different stages of the process. This complexity makes it very hard to find correct measurement tools and so far the appropriate measurements haven't been discovered. Thus making statistics hard to find that would more accurately describe the different links in the supply side (Darcy and Dickson, 2009).

Lots of businesses do not fully comprehend the meaning of accessible tourism, and therefore do not proceed with the implementation of some basic principles (ENAT, 2014). The supply side needs to understand and realize that accessibility benefits tourism. The enterprises should realize that accessible tourism is one of the fast growing markets, while the supply chain grounds its values on three important axels: Independence, Equity and Dignity.

The essential factor for the growth of accessible tourism is that the target group of accessible tourism isn't limited to tourists with and without disabilities, but includes also people working within the tourism sector, policy makers, etc. Efforts to improve the accessibility of hotels, transport, travel agencies, etc. do not only benefit tourists. Another important economic aspect (besides the higher market segment attracted) is the creation of new employment opportunities for people with disabilities (ENAT, 2014).

Supply-side improvement in accessibility of tourism will, therefore, improve the quality and comfort of all travelers, visitors and

4. Research design: developing the case and measuring

The research methodology presented in this paper is mainly quantitative and it is based on a properly formulated questionnaire by collecting information on accessible tourism. The methodological approach was based on a multi scientific method, which was built on an extensive literature review and internet research.

Initially, the research questions and objectives were identified and the criteria for sampling and the parameters of the research were set.

The questionnaire was distributed both electronically and in hard copies. Prior to the final publication of the questionnaire, a pilot survey was conducted to check the questionnaire and correct any unclear questions, errors, and omissions.

After the end of the pilot survey, the questionnaire was posted on the social media networks: Facebook, LinkedIn and Google+ and was sent via e-mail to tourism businesses and public institutions across the Greek

4.1. Duration of the research

As preliminary research, the administration of the survey lasted for two months. The distribution of the questionnaire and the collection of data began in January 2018 and were completed at the end of February 2018. After the data collection, the analysis of the results was carried out.

4.2. Research objectives

The aim is to probe the current situation of accessible tourism across the Greek tourism industry. Therefore, the survey's main objective is to probe the level of tourist infrastructure, customer services, and tourist activities offered to people with disabilities by tourist enterprises and the public sector.

4.3. Sub-questions include

The secondary sub-questions and goals of the survey were:

- The degree to which tourists and businesses want to target the disabled market or not.
- Exploring the proportion that tour operators and businesses have accessibility certifications
- Determining whether the services, products, and activities offered are in line with the principles of universal design.
- Exploring whether and how tourist agencies and businesses inform and advertise infrastructure, services, and activities aimed at people with disabilities.
- Finally, if the staff of the operators and the companies are properly trained for the personalized service for the people with disabilities.

4.4. Limitations

The literature has demonstrated that (i) there is limited research examining various issues of disabled and (ii) figures related to disabled tourists vary from source to source. The current academic literature on that topic concerning Greece seems insufficient to address what this group of travelers may need and desire. The main limitation of this research analysis is the extremely small sample and the time constraints while conducting the research.

4.5. Data analysis

Through our research, all twelve regions of Greece were covered as it is shown in Table 4. During our research, we focused more on covering the Greek region that every year attracts the most inbound arrivals from Europe. Our research was based on the annual stats of the Greek Tourism Confederation (SETE) on tourism arrivals per Greek region. We had a limited time to complete the survey, that's why we received 164 questionnaires meeting our restrictions.

Table 4. Area of tourist activity

	Area	%
1	Macedonia	34.8%
2	Dodecanese	27.2%
3	Attica	8.3%
4	Ionian islands	6.3%
5	Crete	5.1%
6	South Aegean Islands	4.4%
7	Thessaly	3.8%
8	Epirus	3.2%
9	Peloponnese	2.5%
10	Central Greece	2.5%
11	North Aegean Islands	1.3%
12	Thrace	0.6%

Source: Authors' own calculations

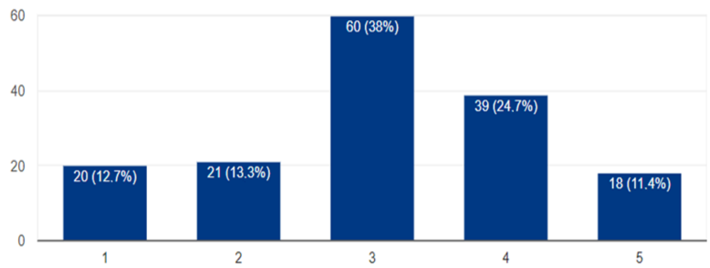
The responses regarding the business engagement of respondents are shown in Table 5. The majority of answers (54.4%) was provided by the people working in the "hotel & resorts" sector, while 21.5% was provided by the people working in the "Restaurant, Cafe & Bar" sector. A small percentage (4.4%) was derived from tourist offices' employees.

Table 5: Results of tourism businesses

	Tourism Buisnesses	%
1	Hotel & Resorts	54.4%
2	Restaurant, Café & Bar	21.5%
3	Rooms (For Rent, AirBnB etc)	5.7%
4	Tourist office	4.4%
5	Sales (Tourism products)	3.9%
6	Car rental office	1.9%
7	Businessmen in Tourism Sector	1.6%
8	Tourism Education	1.2%
9	Super Market	0.6%
10	Hotel Management Companies	0.6%
11	Public Tourism Organizations	0.6%
12	Water Sports - Diving Centers	0.6%
13	Lifeguard / Lifesaving	0.6%
14	Reception	0.6%
15	Animation	0.6%
16	Hotel Web Portal	0.6%
17	Tourist Guides	0.6%

Source: Authors' own calculations

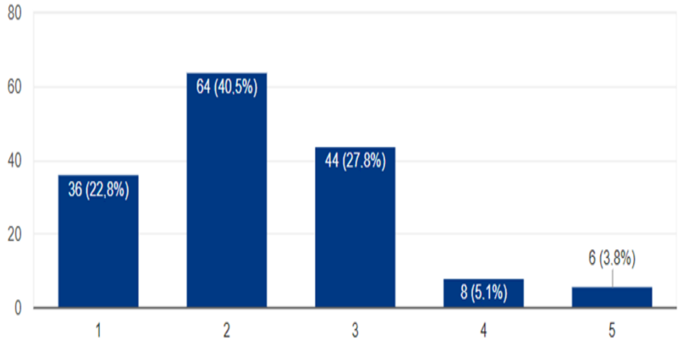
Regarding the question about the extent to which respondents are aware of accessible tourism, the majority of responses (38%) ranged to neutral answers (Figure 4). A percentage of 26% responded that they did not know at all/or had little knowledge of accessible tourism. The positive element, which results from the survey results, is that a percentage of 36% knows enough or "have a great knowledge" about the requirements of accessible tourism.



Source: Authors' own calculations

Figure 4. Knowledge of accessible tourism

Regarding the question about how accessible their tourist area would be considered for disabled people, the results were disappointing and somehow reflect the current situation of the Greek reality. The largest percentage (63.3%) responded that the level of accessibility is far from satisfactory. 27.8% of the respondents claimed that the level of accessibility of their destination was satisfactory. Only a small percentage (3.8%) mentioned that their site is friendly and easily accessible for people with disabilities



Source: Authors' own calculations

Figure 5. Easy Access

Table 6 illustrates the results of the questionnaire regarding the accessibility levels by tourism chain category of the.

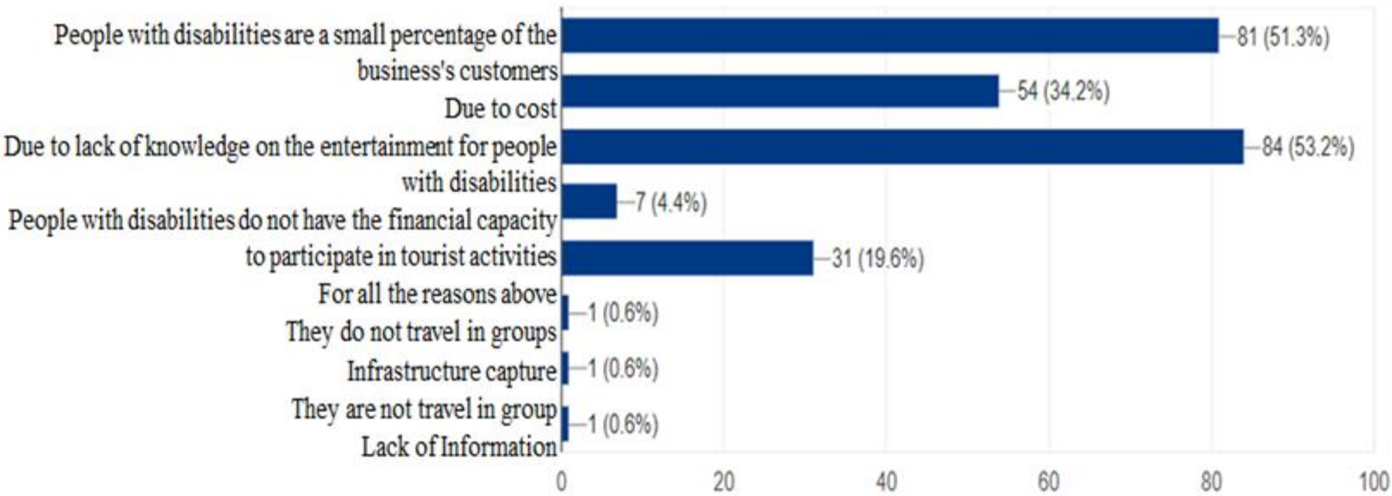
Overall, the assessment of the accessibility level is that, apart from the area of residence and shops, the other sectors that make up the "tourism chain" have a level of accessibility characterized by "no satisfactory" to "satisfactory". Table 6 clearly illustrates the current state of accessible tourism in Greece. The Greek tourist product of accessible tourism can be characterized as "not as satisfactory".

On our try to investigate the reasons for lack of services and products for the people with disabilities, the respondents answered that the reasons for lack of appropriate activities for the people with disabilities are by 53.2%, due to the lack of knowledge on ways of entertainment of people with disabilities and 51.3%, that people with disabilities represent a small percentage of the total clientele of a business. And finally, a small percentage of 4.4%, argues that people with disabilities do not have the financial capacity to participate in tourist activities (Figure 6).

Table 6. Accessibility Levels

	I do not know	Not at all satisfactory	Not so satisfactory	Satisfactory	Very satisfactory
Accommodation	7.5%	15.1%	36.7%	35.5%	5.2%
Restaurant, Bar and Café's	3.2%	26.5%	33%	31.6%	5.7%
Public Transport	3.2%	54.5%	26.5%	13.9%	1.9%
Tourist excursions	9.5%	31.1%	35.4%	20.2%	3.8%
Natural environment	4.4%	26.5%	34.1%	27.4%	7.6%
Tourist Attractions	6.9%	22.7%	29.1%	31.2%	10.1%
Cultural venues	4.4%	21.5%	28.4%	33.5%	12.2%
Shopping Malls	3.9%	21.5%	28.4%	38.6%	7.6%

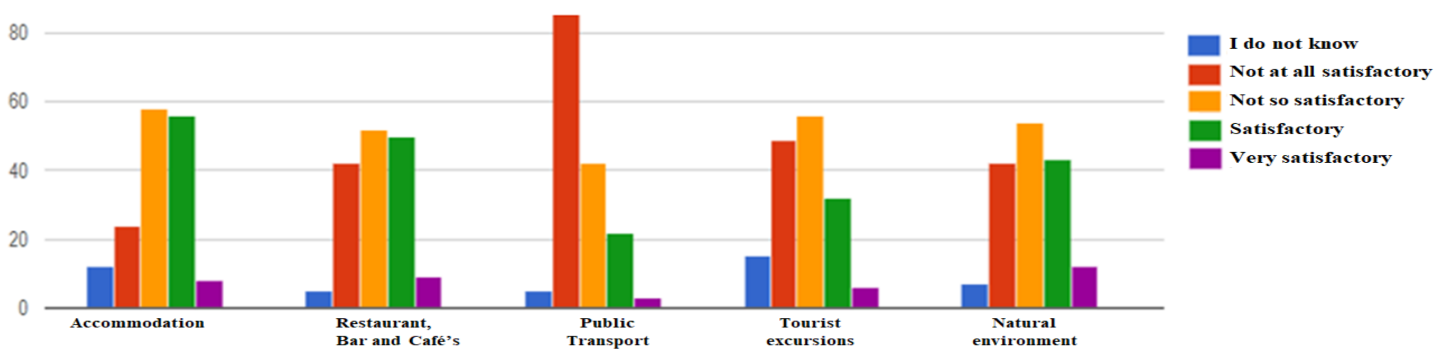
Source: Authors' own calculations



Source: Authors' own calculations

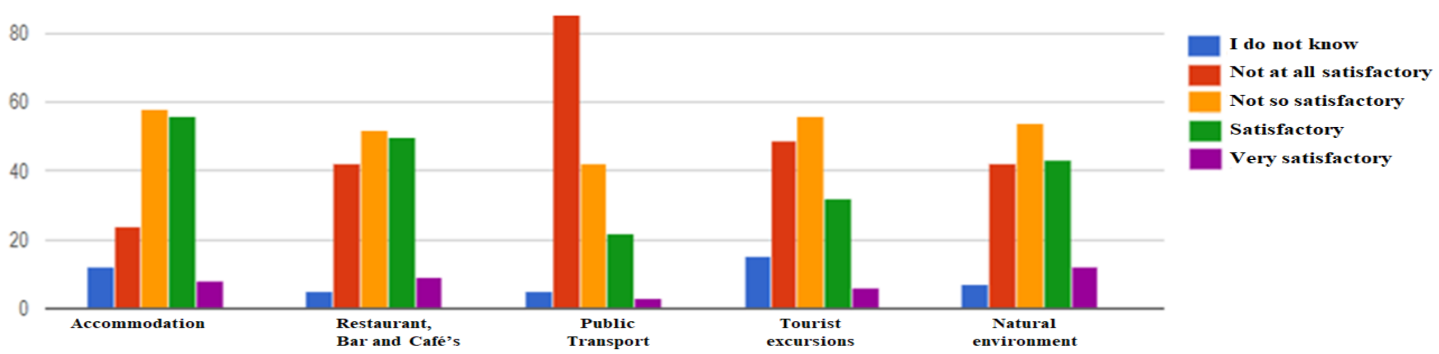
Figure 6. Reasons for lack of services and products for people with disabilities

Figures 7a and 7b illustrate the accessibility levels of the Greek tourism sector by category. The tourist areas that provide a good level of accessibility are shopping malls and cultural venues (cinemas, theatres, etc.) and the accommodation industry. On the contrary, the level of accessibility of public transport and tourist excursions is characterized by the majority as unsatisfactory. No one in the tourist chain has high rates of "high satisfaction".



Source: Authors' own calculations

Figure 7a. Level of Accessibility



Source: Authors' own calculations

Figure 7b. Level of Accessibility

The conclusion that emerges from the above diagram is that, although significant steps have been taken to improve accessibility conditions across tourism, many problems still exist. It is also noted that the "accessible tourist chain" is not uniform. While accommodation has satisfactory levels of accessibility, its approachability faces serious problems, which is a large disincentive for disabled people planning to travel to Greece.

5. Empirical findings

The results of the survey, with regard to the current state of the tourist infrastructure, services and activities, lead to the conclusion that the current state of Greece's accessible tourist product for travel, accommodation and recreation for the individuals with special access needs is too limited.

Tourist demand remains limited as Greece tourist destinations lack the appropriate infrastructure and easy access to public transport. The lack of easy accessibility by public transportation is the most dissuasive factor in making a trip for a disabled person. Most cultural venues are accessible at least to some extent, while most hotel complexes provide easy access to the rooms, but they have not made it easier to use communal facilities.

The fact that many of the infrastructures, services, and activities do not have satisfactory accessibility automatically deprives the tourism industry of a large number of visitors (p-consulting.gr, 2018).

The lack of valid and adequate information on the profit benefits of complying with accessibility is what makes it harder for hotels and tourist businesses to engage in such changes. The lack of information on how to adapt rooms, how to develop activities and change the accessibility infrastructure are also the factors that prohibit the supply side from quick adaptation to this tourism segment.

In order for disabled people to choose a destination, it is not enough to simply find the right hotel, but there are other activities so that people with disabilities do not stay in the hotel but they are given the opportunity to explore nearby venues, facilities and important cultural heritage.

What emerges from the analysis of the primary research is that to develop accessibility in the Greek territory, special attention and priority must be given to improve the infrastructure that will facilitate accessibility, not only on roads and transport but also in hotels, museums, shops, archaeological sites and other places of interest.

6. Conclusions

Globally, Greece is gaining ever higher ranking and has an increasing share of the global tourism market. In order to continue with this increase, there could be a vast improvement in the level of accessibility across the Greek territory, both in the public and in the private sector.

Greece has some of the most beautiful natural landscapes and cultural heritage buildings in Europe. Monuments, sights, and museums are the poles of attraction around which important economic activities are developed based on the principle of sustainable development.

The economic argument must be addressed, particularly in mature destinations where accessibility can provide a powerful competitive advantage over emerging markets that may be lacking in accessibility issues.

Greece could become an important accessible tourist destination if the government and the private sector were to give priority in developing accessible infrastructures and facilities that would be suitable for disabled tourists (Dimou and Velissariou, 2016).

Tourism is a part of society that has the potential to improve the quality of life for people with disabilities. A change of perception can highlight the social responsibility of businesses and help increase their share of the tourist market.

As we observed, there is a big gap between demand and supply in the accessible tourist infrastructure, services, and products. On the business side, there is a weakness in the hospitality of the people with disabilities because businesses - limited exceptions - have not made the appropriate investments to offer the right and suitable accessible services to their guests (Dwyer & Darcy, 2011).

Vogel (2006) sets three main reasons why the tourist industry is unaware of accessible tourism. The first reason is that people generally do not feel comfortable with the people with disabilities; the second reason concerns the belief that special needs of people with disabilities belong to a small niche market and the third reason is that the businesses are afraid of providing the "wrong" services to this group of people.

As can be seen from the analysis of literature references and the results of the research, the development of accessible tourism in the future will affect the competitiveness of tourist destinations. As the demand for accessible traveling will continue to increase due to the ageing population, the largest untapped opportunity for the travel industry will also be created accordingly.

If the turbulent tourism market is overlooked by the Greek tourism destinations, long-term results will be very negative as many tour operators are moving to meet this growing demand (ETCAATS, 2016).

Areas that could benefit from further research are:

- Further analysis of the tourist sub-groups of the tourist chain, providing useful data for understanding the needs of the specific tourist market.
- Further analysis of economic and social benefits from the development of accessible tourism.
- Exploring incentives, activities, interests and attitudes in the search for authenticity and focusing on the tourist experiences of the people with disabilities.

As society increasingly understands the needs of those with mobility restrictions and tourist destinations discover the potential of economic profit by improving accessibility, the process towards accessible tourism will continue to evolve and grow.

Accessible tourism is the responsibility of everyone; the public sector must lead this process by involving businesses and sensitize the whole society. We want to believe that in the nearest future, as farfetched as it might seem, our society will be accessible to everyone and to its fullest extent.

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