

Lake Balaton as an accessible tourism destination – the stakeholders' perspectives

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Abstract

This paper discusses the situation in the emerging field of accessible tourism at the Lake Balaton destination. The main objective of the study was to explore the current situation of accessible tourism at Lake Balaton, focusing on the perspectives of tourism stakeholders. Various issues were reflected upon, such as: a) the “general” accessibility of the destination in terms of the current state of accessibility of the destination as well as the accessibility of information, transportation, accommodation, food and beverage services, tourist attractions, funds and know-how; b) factors that make the destination Lake Balaton competitive as an accessible destination; and c) general attitudes of tourism stakeholders towards accessible tourism. The research focus was on the destination itself, not on individual attractions or tourism service providers. In order to assess the current situation and future prospects for accessible tourism at Lake Balaton, an exploratory quantitative online survey among stakeholders was conducted between 5 September and 5 October 2020. A total of 39 stakeholders participated in the survey, including 11 local municipality stakeholders, 8 local destination management organisations, and 20 tourism service providers (accommodation, catering or attractions/sights). The results show that the Lake Balaton destination accessibility is currently at an early stage of development and tends to target groups with low accessibility needs. Among the factors of destination competitiveness for the accessible tourism market, supportive factors (e.g. accessibility, infrastructure, and the commitment of stakeholders) are ranked first, followed by resources and attractions (landscape, climate, activities, culture, history, tourism service providers, and events) and the quality factor (including value for money, safety, perception and image). Planning and management (including positioning and branding) is the lowest ranked factor even though such aspects are critical factors and foundations for the development of accessible tourism.

Keywords: accessible tourism, stakeholder analysis, tourism service providers, Lake Balaton

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Introduction

In today's world, the issue of accessibility has been gaining growing attention (DARCY, S. *et al.* 2020; GILLOVIC, B. and MCINTOSH, A. 2020). Increasing numbers of people are living with some kind of limitations that constitute leisure constraints for them (e.g. ageing population leads to elderly people with

mobility and sensory impairments, various health problems, including a growing number of people with food allergies) (SMITH, R.W. 1987; HUBER, D. *et al.* 2018). A quarter of the EU-28 population has been experiencing long-standing limitations due to health problems (EUROSTAT, 2020). Furthermore, 37 percent of the EU-28 population aged 15 and older reported (moderate or severe)

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physical or sensory limitations; 26.8 percent of the respective population reported moderate functional limitations of this type and a further 10.1 percent reported severe functional limitations of this type. Consequently, there is a growing need for accessible infrastructure and services, including in tourism.

Tourism plays an important role in life. Indeed, the demand for tourist mobility is increasing. As a result, a larger proportion of the population is involved in tourist activities (e.g. half of the Hungarian population can afford to participate in a domestic overnight trip). In recent decades, accessibility has been gaining more attention on both academic and practical levels. Various international projects are aiming at the development of accessible tourism supply (including transport, services, attractions etc.). The topic is also an established phenomenon in tourism research (DARCY, S. and DICKSON, T.J. 2009; DARCY, S. et al. 2010; DARCY, S. 2010; MICHOPULOU, E. and BUHALIS, D. 2013; MICHOPULOU, E. et al. 2015; VILA, T.D. et al. 2015; GILLOVICH, B. et al. 2018; GILLOVIC, B. and MCINTOSH, A. 2020).

Based on the quantitative research among the stakeholders of the Balaton destination, the article addresses the tourism accessibility in this area. The main goal of the study is to explore the current situation of accessible tourism at Lake Balaton, focusing on the tourism stakeholders' perspectives. The research focus is on the destination itself, not on the accessibility of individual attractions or tourism service providers. Our study refers to tourism destination as a whole entity consisting of various stakeholders (public and private) working together on providing the (accessible) tourism experience for visitors. There are only a few research studies focusing on the accessibility of a tourism destination from the stakeholders' perspective (ex. KASTENHOLZ, E. et al. 2012; NYANJOM, J. et al. 2018), and this research is the first focusing on the destination Balaton. The paper thus contributes to the sparsely researched area of accessible tourism destination development, focusing on stakeholders, as their collaboration in this process has been an important emerging topic.

Theoretical background

Accessible tourism is often associated with the mobility impairment of participants in tourism and the physical accessibility of tourist locations or services (DARCY, S. and DICKSON, T.J. 2009; DARCY, S. et al. 2020). In recent years, however, the definitions have become broader, with the focus shifting to tourism that is accessible to a broad circle of people. Accessible tourism, including 'tourism for all' or 'inclusive tourism' (Takayama Declaration, 2009), is intended for all persons who have restrictions on access to tourist services. These may include elderly, people with a disability, people with health problems or people that do not understand the local language (UNWTO, 2016). Tourism barriers, constraints and obstacles to travel faced by people with disabilities have been recently reconceptualised into a four-tiered framework, consisting of issues faced by all tourists (i.e. issues faced by all people with disabilities), issues unique to specific disabilities and the moderating factors of impairment effects (McKERCHER, B. and DARCY, S. (2018). Appropriate adjustments to tourism programmes and effective strategies in confronting travel constraints are needed for greater inclusiveness (SCHEYVENS, R. and BIDDULPH, R. 2018; HUBER, D. et al. 2018; GABRUČ, J. and MEDARIĆ, Z. 2021). Inclusive tourism and inclusive tourism development are increasingly at the forefront of tourism research (BIDDULPH, R. and SCHEYVENS, R. 2018; SCHEYVENS, R. and BIDDULPH, R. 2018; NYANJOM, J. et al. 2018). Additionally, social tourism scholars are seeking to identify ways in which tourism can be more inclusive, considering it as a social right (McCABE, S. and DIEKMANN, A. 2015) and exposing its inclusive role in societies (DIEKMANN, A. et al. 2018).

Accessible tourism may be seen as "a process of enabling people with disabilities and seniors to function independently and with equity and dignity through the delivery of universal tourism products, services and environments. The definition is inclusive of the mobility, vision, hearing and cognitive dimen-

sions of access” (DARCY, S. and DICKSON, T.J. 2009, 33). It draws attention to the three values in which accessible tourism as a process is grounded, namely: independence, equity and dignity (DARCY, S. and DICKSON, T.J. 2009). In this context, accessible tourism is the process required to ensure that transport, accommodation, destinations and attractions across the tourism system appropriately meet the needs of people with disabilities (DARCY, S. and BUHALIS, D. 2011). DARCY, S. and BUHALIS, D. (2011, 10-11) additionally adapted this definition trying to provide an overall framework for an understanding of accessible tourism:

“Accessible tourism is a form of tourism that involves collaborative processes between stakeholders that enables people with access requirements, including mobility, vision, hearing and cognitive dimensions of access, to function independently and with equity and dignity through the delivery of universally designed tourism products, services and environments. This definition adopts a whole of life approach where people through their lifespan benefit from accessible tourism provision. These include people with permanent and temporary disabilities, seniors, obese, families with young children and those working in safer and more socially sustainably designed environments.”

The definition includes different groups of people and it highlights the importance of the cooperation between stakeholders across demand, supply and coordination (DIEKMANN, A. et al. 2012; NYANJOM, J. et al. 2018), which is crucial for the future development of inclusive destinations and accessible tourism experiences (GILLOVIC, B. and MCINTOSH, A. 2020; DARCY, S. et al. 2020), which other groups of people in the community can also benefit from.

“Tourism destinations are facing intense and increasing competition worldwide, while consumers are ever more demanding, requiring not only service quality but also socially responsible and sustainable destinations” (KASTENHOLZ, E. et al. 2012, 369). The leisure and tourism industry and its services can significantly contribute to social sustainability by enhancing the quality of life of individuals by means of their social/travel inclusion and the provision of accessible services (DARCY, S. et al. 2010; DOLNICAR, S. et al. 2012).

The current discourses on accessible tourism and its understanding, management and development are commonly placed in the context of economically, socially, and environmentally sustainable communities (MICHOPULOU, E. et al. 2015). Nevertheless, in reality, too few tourism stakeholders give any real attention to the business activities that are considered socially, economically and environmentally sustainable. Moreover, the social, environmental and financial considerations of accessible tourism have been so far largely ignored – also in the sustainable tourism research (DARCY, S. et al. 2010, 516).

Accessible tourism is (becoming) a new market niche for the tourism market (ALÉN, E. et al. 2012; VILA, T.D. et al. 2015; BOWTELL, J. 2015; MICHOPULOU, E. et al. 2015; GFK, 2015; GONDOS, B. and NÁRAI, M. 2019). The destinations are often compared in terms of accessibility (VILA, T.D. et al. 2015), and destination competitiveness for the accessible tourism market and related factors and attributes are studied and compared between different destinations. BOWTELL, J. (2015, 203) claims that ‘the accessible tourism market is a distinct sector, possessing the capacity for extensive future growth, and thus presents major travel providers with a potentially substantial and lucrative market, generating potential revenues of 88.6 billion EUR by 2025’.

In 2015, accessible tourism demand within the EU generated a total economic contribution of 786 billion EUR in terms of economic output, 356 billion EUR in terms of gross value added, and 394 billion EUR in terms of GDP. Within the region, 8.7 million people were employed in this area (GFK, 2015). The accessible tourism market has been estimated at approximately 27 percent of the total population and 12 percent of the tourism market. These figures take into account the large proportion of senior travellers (since people over 60 years of age will constitute 22 percent of the global population in 2050), people with disabilities and families with small children. The accessible travel market presents a golden opportunity for destinations that are ready to receive these visitors, since they

tend to travel more frequently during the low season, usually accompanied or in groups, make more return visits and, in some parts of the world, they spend more than average on their trips (UNWTO, 2016, 4-5).

Destination accessibility and accessible market as a market opportunity

Accessible tourism could thus be understood as a tool to increase the destination's competitiveness with a focus on accessible tourism as a core development strategy. MORELLI, L. *et al.* (2006) list a number of factors that make a tourist destination accessible, including significant market volume, the multiplying effect of the presence of people accompanying customers with disabilities, market growth – particularly due to the population ageing, opportunities to develop domestic tourism, the possibilities for off-season business, the positive effects for other tourist groups, benefits for residents etc. However, the successful development of accessible tourism can only be achieved through a stakeholder participatory approach leading to potentially enhanced stakeholder involvement in the destination.

Stakeholder collaboration is an important issue in the development of an accessible tourism destination. In the study by NYANJOM, J. *et al.* (2018), it is pointed out that when multiple and diverse stakeholders exist, an organic, circulatory and developmental approach to stakeholder collaboration should be adopted. This inclusive tourism stakeholder collaboration framework – consisting of people with disabilities, organisations of people with disabilities, tourism service providers and government agencies, as four key stakeholder groups – presents an innovative strategy aimed at increasing stakeholder participation and stimulating system changes by encouraging the central role and involvement of people with disabilities. A significant role in the accessibility of a destination is often played by social tourism stakeholders, who are usually part of the public and non-profit/voluntary sector. In relation

to their role in tourism stakeholder collaboration framework, the research of MINNAERT, L. (2020) reveals their unique and inclusive position in the stakeholder network. Firstly, social tourism organizations are often placed between social and commercial partners (acting as an intermediary), with the focus being on the excluded target groups. Secondly, as a consequence, the collaboration is being formed between atypical partners, usually in the form of a public-private partnership. The social tourism system in the EU and the related relationships and partnerships include three key aspects and associated stakeholders, namely the supply aspect (tourism and social tourism providers), the demand aspect (beneficiaries and social organizations) and the intermediary aspect (social tourism organizations) (DIEKMANN, A. *et al.* 2012).

The integration of the visions of relevant stakeholders is the key basis for the strategic positioning of tourism destinations, and this may lead to a distinctive destination brand, standing for quality, innovation, diversity, inclusion and social responsibility (KASTENHOLZ, E. *et al.* 2012).

The study of ZAJADACZ, A. (2015, 196) reports on a widespread consensus about the demand for accessible tourism products and services, which is characterised by

- its constant growth, due to the incorporation of improvements in infrastructures, information, facilities granted or other determining factors;
- its boosting effect on the image of the destination;
- its significant impact on reducing the seasonality of certain destinations, especially in the case of beach tourism;
- generating more than the average revenue resulting from conventional tourism.

According to the research of VILA, T.D. *et al.* (2015, 269), there are four factors that make destinations competitive for the accessible market: (1) core resources and attractors, (2) supporting factors and resources, (3) qualifying and amplifying determinants and (4) destination planning and development. The last factor of "destination planning and manage-

ment is the most critical factor for the development of accessible tourism provisions, “as it sets the underlying infrastructure for transport, accommodation and attraction that are the key to accessible destination experiences”. In this context, the concept of universal design is recognised as a key factor that supports destination competitiveness (MICHOPULOU, E. et al. 2015, 184) and “had become a central concept in the development and understanding of accessible tourism” (DARCY, S. et al. 2010, 519). Additionally, the study of NZIMANDE, N.P. and FABULA, Sz. (2020) on urban renewal intervention provides informative recommendations about public participation and stakeholder involvement in relation to increasing social sustainability and the accessibility of urban communities, where, interestingly, Airbnb providers are becoming an important destination player (BELOTTI, S. 2019).

Development of infrastructure, product, services, information marketing promotion and dissemination for the accessible tourism market are the common requirements for people with disabilities (VILA, T.D. et al. 2015, 269).

Destinations vary according to their accessibility. VILA, T.D. et al. (2015, 269) present four stages of tourist destination accessibility:

1. Destinations with the highest accessibility, such as big cities and capitals, that provide high levels of accessibility in their tourist offer.
2. Destinations working on accessibility with specific offers.
3. Destinations that have identified a market opportunity and are including accessibility as a differentiator in their policies.
4. Destinations that are not working on accessibility and, therefore, will not take advantage of this segment or, indirectly, of elderly and family tourism.

The same study of VILA, T.D. et al. (2015, 265) introduces the Ritchie and Crouch competitiveness model, a revised version of which consists of four factors of destination competitiveness for the accessible tourism market:

1. *Core resources and attractors*: factors motivating tourists to visit, including physiogra-

phy and climate, mix of activities, culture and history, tourism superstructure, special events, market ties and entertainment.

2. *Supporting factors and resources*: those characteristics that support the development of the tourist industry, including accessibility, infrastructure, hospitality and political will.
3. *Qualifying and amplifying determinants*: defining of the scale, limit or potential of the destinations competitive capacity, which are beyond the control of the tourism sector, such as cost/value, location, safety/security and awareness/image.
4. *Destination planning and management*: the creation of an environment where sustainable tourism can flourish and activities carried out to support and maximise outcomes for the three other factors of the model, including quality of services/experience and positioning and branding.

Additionally, the inclusive tourism framework for accessible tourism has been developed to examine the current state of accessible tourism (SCHEVENS, R. and BIDDULPH, R. 2018); it consists of seven key elements, namely: (1) marginalized people as tourism producers; (2) marginalized people as tourism consumers; (3) changing the tourism map to involve new people and places; (4) widening of participation in tourism decision-making; (5) promotion of mutual understanding and respect; (6) self-representation in dignified and appropriate ways; and (7) power relations transformed in and beyond tourism. The study of GILLOVIC, B. and MCINTOSH, A. (2020, 10) reveals the importance of seven elements of the inclusive tourism framework for accessible tourism, stressing the crucial role of and need for cooperation between *inquiry*, industry and community, including collaborative approaches to the research of accessible tourism.

In reality, the provision of accessible tourism is quite the opposite, and there is only a small share of the market that addresses the needs for accessible tourism. Research has shown that 63 per cent of major travel and leisure companies do not sell accessible products (BOWTELL, J. 2015). Despite strong

evidence of the value of the access market, this segment continues to be largely ignored by the tourism industry worldwide, and it remains neglected to this day (GILLOVIC, B. *et al.* 2018). While accessible tourism is seen as a business opportunity, it is often perceived mainly as accommodating primarily disabled guests and not as a positive feature in comfort and service, potentially addressing all guests including local people and guests. Additionally, it often lacks coordination between stakeholders (GfK, 2015). Therefore, a cooperative approach is required to reshape and transform the future of the accessible tourism industry, where stakeholder cooperation is recognised as key factor for developing accessible tourism solutions, recognising the value of the market and its capitalisation (MICHOPULOU, E. *et al.* 2015). According to a GfK report (2015, 26), several conditions have to be met for the successful future development of accessible tourism, such as political and financial support, awareness raising and the activation of service providers, and for the guests, reliable information on accessible offers and services.

Tourism accessibility in Hungary and at the Lake Balaton destination: Review of legislation, documents and practices

According to the Hungarian Tourism Agency, in recent years there have been significant improvements in several areas across Hungary, including the Balaton region, to make facilities more accessible (UNWTO, 2019). The legal background influencing the development of accessible tourism in Hungary includes Act XXVI of 1998 on the Rights and Equal Opportunities of Persons with Disabilities (Act on the Rights of Persons with Disabilities), which guarantees the rights of persons with disabilities and promotes their equal opportunities, independent living and active involvement in social life (EGERSZEGI, Z. and HEGEDŰS, I. 2020). Additionally, it includes the ratification of the United Nations Convention on the Rights of Persons with

Disabilities that grants equal accessibility for tourism and recreation services for persons with disabilities in all member countries (2007). According to ZSARNOCZKY, M. (2017), the adaptation of the UN's regulation was followed by the implementation of the National Disability Program (2015), which is a long-term strategy. In 2017, special awareness was raised to the importance of universal design planning. Another important document represents the Communication from the Commission 'European Disability Strategy 2010–2020: A Renewed Commitment to a Barrier-Free Europe (COM/2010/636)', which among other aspects focuses on access to the physical environment, transportation, information and communication technologies and systems (ICT), and other facilities and services.

In relation to tourism the strategic document titled The National Disability Program 2015–2025 (OGY, 2015) recognises the problem of the lack of facilities and the need to develop access to the infrastructure. Additionally, the document highlights that accessible tourism has not yet been recognised as a relevant niche, so there is a need for additional surveys on tourism demands in this field as well as training and sensitization of tourism staff. Within the document, the principle of universal design and universal planning has been emphasized, with a focus on accommodation that is accessible for all people with accessibility problems, but interesting also for people without these needs. The document also stresses tourism-oriented packages for people with disabilities, while focusing on the accessibility of accommodation and tourism attractions. The Program furtherly recognises the importance of accessible information, as it foresees the development of accessible websites covering the individual destinations and accommodations and of accessible electronic services.

The Hungarian National Tourism Development Strategy 2030, a core document defining the system of targets and methods for the Hungarian state's tourism management efforts up to 2030, sets a number of goals that

are completed by the designation of horizontal intervention areas (H), including H3 – Accessible tourism. The goal is to achieve physical and informational/communication accessibility as well as to improve the direct physical accessibility of the attractions, accommodations, and restaurants. This area is related to other horizontal areas, like cooperative tourism, which aims to establish a type of tourism that allows for visitors to experience local lifestyles by living together with the local communities, in harmony with the environment, and family-friendly tourism with a focus on establishing tourist attractions that provide shared experiences for multiple generations, and the development of family-friendly accommodation services and transport infrastructure, informative tourism working towards providing visitors with consistent and meaningful information in multiple languages, and also digital tourism that has as its goal to utilise the potential inherent in available digital technologies and then to apply it to every facet of tourism.

Lake Balaton is one of the most popular tourism destinations in Hungary. The area has a wide variety of internationally recognized natural and cultural/man-made attractions. The Balaton Uplands National Park offers visitor centres, hiking tours, and organized tours for travellers where they can get closer to nature. The lake area has been inhabited for thousands of years, so its cultural heritage (including wine and gastronomy) is of high quality and supports modern sustainable tourism. According to the Hungarian Central Statistical Office (HCSO, KSH in Hungarian), commercial accommodation facilities at the lake registered more than 1.9 million guests and almost 6 million guest nights. Two thirds of the guest nights are spent by domestic visitors. The destination's tourism performance is characterised by strong temporal (dominance of the summer months) and spatial (popularity of shore areas) concentrations. Thanks to its role and popularity, Lake Balaton has an increased awareness among 'special needs' targets, including families with small chil-

dren, travellers with dog/pet etc. Recently, there have been various attempts to meet the expectations of such groups, so certain developments have been realised with the objective to make the area more accessible. In 2013, accessible tourism was one of the special themes of the European Destination of Excellence (EDEN). Somogy county and its capital Kaposvár won an award for accessible tourism, with Kaposvár being identified as an accessible city that has a tourist information centre with full wheelchair access, Braille maps and audio guides for the visually impaired, and a film with subtitles for the hearing impaired. Many of the city's museums, art galleries and cultural centres are also fully accessible for all visitors.

A very recent overview of good practices related to accessible tourism in the Balaton area, implemented as a part of the DESTI-SMART Interreg Europe project, identified some good practices in various areas of accessible tourism, such as barrier-free transport, accommodation, services, attractions and communication (EGERSZEGI, Z. and HEGEDŰS, I. 2020) with still some challenges to overcome (*Table 1*).

Lake Balaton can be viewed as a DMO (destination management organization) based destination rather than a resort type area. The tourism value chain includes settlements (local level), destination management organization, attractions, and a wide range of tourism service providers, mostly SMEs. There are no official statistical data on facilities offering accessible tourism services around Lake Balaton, so special communication channels and projects provides an overview about their role. As far as the accommodation platforms are concerned, the number of offers appropriate for tourists with access needs is less than 10 percent (e.g. Booking.com, szallasvadasz.hu). A recently developed accessible tourism database – developed by 'Hungary4All' with the support of the Ministry of Human Capacities – lists 140 service providers (covering accommodation, catering, sights/attractions) engaged in accessible tourism around Lake Balaton.

Table 1. Good practices and challenges in the field of accessible tourism in the Balaton area

Good practice	Challenges
Barrier – free transport	
90 percent discount for travelling with Hungarian State Railways (MÁV) for people with disabilities and the person accompanying them.	Only few of the train carriages are wheelchair accessible and there is a need for careful planning in advance.
90 percent discount for travelling with the National Coach Company (VOLÁN) for people with disabilities and a person accompanying them.	Most of the coaches are inaccessible to wheelchairs.
Accessible catamaran, travelling on Lake Balaton, Siófok–Balatonfüred–Tihany line that offers barrier-free board, barrier-free toilet and special lift for people using the wheelchair.	Only one line available.
Barrier-free accommodations, restaurants and other services	
In the Lake Balaton area, they are listed in the Database http://www.hungary4all.hu/balaton-adatbazis/ , prepared by Hungary4All that organizes trips for people with disabilities. Three colour codes mark the accessibility level – red, orange and green as well as contact information. The data is being constantly updated.	The information is available only in Hungarian, and is less accessible for foreign tourists.
At 7 beaches on the northern shoreline, there are special hydraulic lift-chairs and ramps available that enable access to the water.	Limited to northern shoreline.
ENAT webpage offers information on some of the Accessible Adventure tourism, sports and outdoor possibilities in the Lake Balaton area: accessible kayaking, handcycles for paraplegic people, accessible sailing boats. Further, adventure park, paint-ball games as well as accessible caving (with special guides) for people with disabilities are also possible (ENAT, 2020).	No challenges.
Hungary4All organizes specific barrier-free trips to the Lake Balaton area for different target groups (families, young people as well as elderly people), offering various experiences, gastronomy, sports activities as well as relaxation.	No challenges.

Source: Authors' own research.

Methodology

The use of supply side oriented methods (e.g. the evaluation of the available services or official communication channels and databases) is a well-established approach in accessible tourism research. For the purpose of mapping the current status of accessible tourism at Lake Balaton and its future potential development, an exploratory quantitative survey targeted at stakeholders was employed. The Balaton Tourism Research Centre (BATUKI) at the University of Pannonia runs a tourism stakeholder survey three times per year (since 2015), which enables the collection of longitudinal and topical data from a panel consisting of representa-

tives of municipalities responsible for tourism development, DMOs, tourism, and hospitality businesses and non-governmental organizations (NGOs). Stakeholders may share their opinions voluntary, so the number of respondents varies (between 25 and 80). A voluntary response option is used also by the other panel (e.g. UNWTO World Tourism Barometer where approximately 200 professionals participate regularly from all over the world). The *Balaton Tourism Barometer* questionnaire includes questions related to an evaluation of the past period (3 months), and the expectations for the next period (3 months). Besides the regular questions, the survey includes special sessions (e.g. cycling tourism, local products, employment in tour-

ism, overtourism, sustainable transportation, corporate social responsibility or the effects of COVID-19 on tourism). The results of previous data collection efforts have been published in refereed journals (e.g. FEHÉRVÖLGYI, B. et al. 2019; HAJMÁSY, GY. 2019; TOMEJ, K. 2019; MADARÁSZ, E. 2020), supporting the validation of the applied methodology. This – accessible tourism oriented – survey has been conducted during the COVID-19 pandemic, so rather than conducting personal interviews or focus group discussions, the authors decided to collect data using this panel alone.

For the purposes of this study, additional questions were drafted, aimed at exploring the perceptions of tourism stakeholders on accessible tourism in the Balaton tourism region. These questions (altogether 11 questions) were based on the conceptual framework explained in the literature review chapter (VILA, T.D. et al. 2015), with an adaption to the special features of Lake Balaton. The respondents were asked to evaluate (5 items Likert-scale) the ‘general’ accessibility of the destination and the availability for special groups. Three special segments have been identified: 1) people living with disabilities (physical, sensory, mental); 2) periodically accruing mobility problems (e.g. accident, baby carriage); and 3) groups with special needs (e.g. food allergy, elderly age groups). Services and information provided about accessible tourism were also evaluated on a 5 items Likert-scale. The survey also mapped the available accessible tourism products and services, including the information format and content about it, as well as the reasons for not offering any accessible tourism product or service. The stakeholders had also the possibility to share their views about the future development needs of accessible tourism at Lake Balaton.

A random sample of tourism stakeholders around Lake Balaton was used (based on the BATUKI’s contacts). The online survey ran between 5 September and 5 October 2020, with one email reminder. Altogether 39 stakeholders participated in the research, including 11 local municipality stakeholders, 8 local destination management organizations, and 20

tourism service providers (accommodation, catering or attraction/sight). Although the sample size is limited, if one considers that the number of stakeholders involved in accessible tourism is only a small portion of the number of total tourism stakeholders, the outcomes of this exploratory research can provide a good initial point for future research. Further, in line with previous BATUKI panel surveys, the results may be considered relevant for the destination under inquiry and to some extent also for similar destinations.

The results of the survey have been analysed by using descriptive statistics. The respondents were grouped into local municipalities (public sector), destination management organisations (public sector), and service providers (private sector).

Results

Lake Balaton as an accessible tourism destination – stakeholders’ perceptions

Stakeholders participating in the survey have a positive attitude towards Lake Balaton as an accessible tourism destination. Fifteen of the 39 respondents to this question agreed with the statement ‘*Lake Balaton is a destination that has acknowledged the market opportunity of accessible tourism, and considers it as a potential USP*⁵. A further 14 respondents are of the opinion that ‘*Lake Balaton does not care about accessible tourism*’. Nine stakeholders agreed that the destination offers special services for those seeking accessible tourism, and only one service provider said that the area is an outstanding place for accessible tourism. Twenty-one of the stakeholders think accessible tourism is a necessity for Lake Balaton, while 18 other respondents think it is an opportunity.

⁵ In *marketing*, the unique selling proposition (*USP*), also called the unique selling point, or the unique value proposition (*UVP*) in the *business model canvas*, is the *marketing strategy* of informing *customers* about how one’s own *brand* or *product* is superior to its *competitors* (in addition to its other *values*).

When asking about the accessibility of Lake Balaton for certain target groups, some differences emerged. According to the stakeholders, the region is the most feasible for special needs groups (e.g. food allergy, elderly people), followed by visitors with temporary mobility problems (e.g. accident, baby carriage), and lastly for those living with a disability (physical, sensual or mental) (Table 2, Figure 1).

The survey also addressed special areas of providing an accessible tourism experience (Table 3). According to the participating stakeholders, Lake Balaton shows the best performance regarding tourism attractions (3.51), catering services (3.43), and information available on-site (3.39). At the same time, there is a room for development regarding the resources of local DMOs and know-how.

Transportation infrastructure together with information available online were deemed slightly better than average. It is noteworthy that in three cases (information available online, transportation infrastructure, and resources for local DMOs) the best grade given by respondents was 4 (on a 5-item scale). The various stakeholders had different views: local governments are more positive about online and on-site available information about accessible tourism. The local DMOs are the most critical about transportation infrastructure, and – not surprisingly – resources dedicated to local DMOs with the objective of developing accessible tourism. Service providers gave lower grades for catering services and tourism attractions. Improved professional knowledge and know-how would be

Table 2. Accessibility of Lake Balaton for certain segments

Segment	Mean	Standard deviation	Range (min. to max.)
Visitors living with a disability (physical, sensual or mental)	3.21	0.923	1 to 5
Visitors with temporary mobility problems (e.g. accident, baby carriage)	3.44	0.882	2 to 5
Special needs groups (e.g. food allergy, elderly people)	3.67	1.132	1 to 5

Note: 1 to 5 scale: 1 = not accessible at all, 5 = completely accessible. Source: Authors' own research (n = 39).

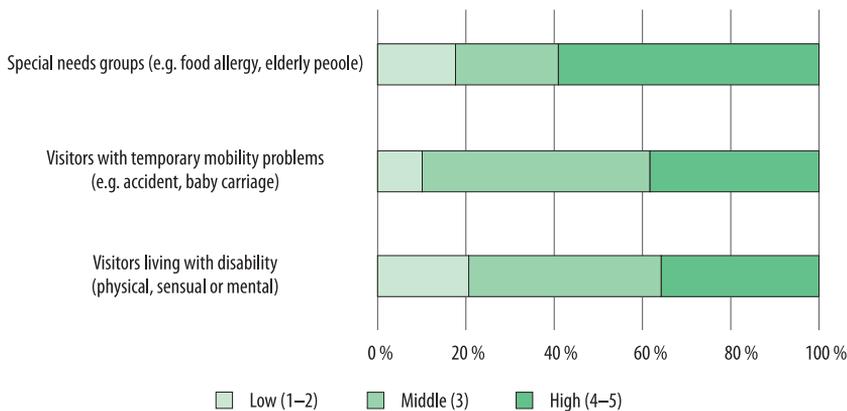


Fig. 1. Accessibility of Lake Balaton for certain segments (connecting to Table 2). Note: 1 to 5 scale: 1-2 = not accessible; 3 = middle value; 4-5 = accessible. Source: Authors' own research (n = 39)

Table 3. Evaluation of accessible tourism features at Lake Balaton

Indicators	Number of respondents	Mean	Standard Deviation	Minimum	Maximum
Information available online about accessible services	34	3.15	0.784	1	4
Information available on-site about accessible services (e.g. information office)	36	3.39	0.838	1	5
Transportation infrastructure	37	3.16	0.898	1	4
Catering services (e.g. design/architecture, food)	37	3.43	0.899	1	5
Tourism attractions (monuments, museums, natural sights)	37	3.51	0.768	2	5
Resources of local DMOs dedicated for accessible tourism	32	2.75	1.107	1	4
Know-how, professional knowledge about accessible tourism	33	3.03	0.984	1	5

Note: 1 to 5 scale: 1 = not accessible at all, 5 = completely accessible. Source: Authors' own research.

welcome by all of the stakeholders at Lake Balaton. Only three respondents (all of them service providers) stated that they have human resources with dedicated know-how about accessible tourism.

Accessible tourism experiences, services offered

Sixteen stakeholders reported on accessible tourism experiences and the services offered to their guests (max. 3 services reported). The most common service was related to catering (e.g. food for guests with allergies) (7 respondents), followed by accessible design of the building/facility (6 respondents). Accessible accommodation/rooms, accessible restrooms, parking, personal information/help, museum/attraction, transportation, website, beach, and information office were the other elements mentioned as accessible tourism services.

Respondents shared their views about the reasons for not offering accessible tourism services: lack of financial resources (13 respondents), lack of professional knowledge (9 respondents), demand is small and unstable (8 respondents), and physical, technical limitations (1 respondent).

Communication of accessible tourism experiences, services

Most of the stakeholders provided some information about accessible tourism (Table 4). The survey has monitored the communication channels used and the type of information content. The table below illustrates that the most 'popular' communication channels include the respondent's own website, on-site information, and own social media platforms. Brochures, information boards and on-site signposts play a less significant role in supporting accessible tourism. Brochures were highlighted only by the local municipality

Table 4. Communication channels providing information about accessible tourism

Communication channel	Number of respondents
Own website	18
On the premises of the service, product	13
Own social media	11
Information board	6
Brochure, leaflet	3
Other	1

Source: Authors' own research.

and the local DMO; none of the respondent service providers reported having a brochure with information about accessible tourism.

The information provided is mostly in text/description format (21 respondents use it), followed by photos (7 respondents) and pictograms (7 respondents). None of the stakeholders provide other types of information (e.g. plan).

Future development potential and needs

The survey also mapped the stakeholders' views about certain needs (ranking four factors) and future development options (Figure 2). For the involved participants, supporting factors (e.g. accessibility, infrastructure, and stakeholders' commitment) are the most important when it comes to developing Lake Balaton as an accessible destination (11 respondents ranked it as first, and 14 other respondents ranked it as second). This is followed by resources and attractions (landscape, climate, activities, culture, history, tourism service providers, and events) (1st place – 13 respondents, 2nd place – 8 respondents). Parallel with this, the quality factor (including price-value ratio, safety, perception

and image), and planning and management (including positioning and branding) are among the other priorities.

As the last point of the survey, respondents were asked to share their recommendations (within an open-ended question) regarding the future development potential of accessible tourism at Lake Balaton. The most fundamental issues are financial resources (6 respondents mentioned it) and transportation (6 respondents), followed by the need for shaping attitudes of both stakeholders and travellers (4 respondents). Three stakeholders highlighted general infrastructure and beaches (the latter being a dominant product at Lake Balaton). Two of the respondents think there is a need for more accessible tourism service providers. One respondent argued for enhancing and improving accommodation options, attractions, events, and information for guests.

Discussion and conclusions

Since the perceptions, involvement and cooperation of tourism stakeholders play a key role in the potential development of an acces-

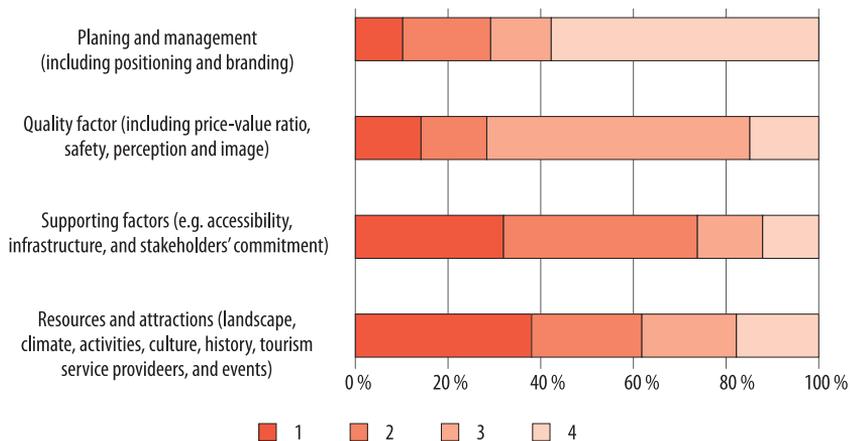


Fig. 2. Ranking of certain features, needs. Note: 1 = most important; 4 = least important. Source: Authors' own research (number of responses).

sible tourism destination (KASTENHOLZ, E. *et al.* 2012), the aim of this study was to explore the views of tourism stakeholders in the Lake Balaton area. The research design was based on a literature review about accessible tourism and to a large extent on the above presented theoretical framework of VILA, T.D. *et al.* (2015).

Taking into account the exploratory nature of the study and the limitations regarding data collection, the research has valuable theoretical and practical implications. The results show that the stakeholders at Lake Balaton have a generally positive perception of destination accessibility. While the present assessment of Lake Balaton accessibility is not very favourable (with the majority of respondents claiming that the destination does not care about accessible tourism), the future position of accessible tourism is recognised as a market opportunity with a USP potential. Even if accessible service provision is poor at Lake Balaton today, as is often the case at many major travel companies (SHAW, G. and COLES, T. 2004; BOWTELL, J. 2015) and many other tourism destinations (DARCY, S. 2010), the accessibility awareness and future opportunities for increasing the destination's competitiveness are recognised by a majority of tourism stakeholders. Although accessibility is integrated into numerous new developments, accessible tourism itself is still a special segment product, especially at a destination like Lake Balaton where tourism performance is dominated by another product (e.g. summer holiday at Lake Balaton).

In case of the addressed destination, accessible tourism is perceived both as a future necessity and as a future opportunity. From the public perspective, which includes the views of the local municipalities and DMOs, accessibility is understood more as a future necessity or request for destination development, which encompasses accessibility solutions that reflect the criteria of the development funds (e.g. the accessibility of new facilities). This is very much in line with the research conducted by VILA, T.D. *et al.* (2015), where destination planning and management are presented as critical factors for the develop-

ment of accessible tourism provision, and as such provide the necessary foundation for accessible transport, accommodation and attraction infrastructure. From the perspective of tourism service providers, accessible tourism is recognised as a future market opportunity, despite the critical nature of the current state of accessibility at the Lake Balaton destination. All this reflects the growing number of visitors with special needs – people with temporary mobility limitations or such limitations as food allergies, so not accessible tourists with access needs in the strict sense. In practice, a wide range of service providers offer services to such travellers.

According to our research, accessible tourism attractions, catering services, online or on-site information, and transportation infrastructure are all indicators that provide evidence of physical and informational barriers that must be addressed. They are perceived as important elements in terms of the accessible tourism experience and environmental sustainability. A lack of knowledge of accessibility on the part of public and private tourism providers and the very limited financial resources spent on accessibility issues show that negative or unfavourable attitudes still exist in the tourism market, hindering the accessibility development path of the destination. For the successful development of accessible tourism, both environmental and attitudinal barriers need to be negotiated among the relevant tourism destination stakeholders. According to our research, supporting factors, such as accessibility, infrastructure and stakeholders' commitment, are the core requirements for developing Lake Balaton as an accessible destination.

In line with the literature review, the stakeholders at Lake Balaton perceive accessibility as an opportunity and a means for a sustainable future. The complexity of a destination, and so of an accessible tourism destination, is also reflected in the different views and expectations expressed by the respondents (local municipality, destination management organizations, service providers). According to the results of the survey, information pro-

vided about accessible tourism – besides infrastructure – may have an important role and may support development in an efficient way. From a practical point of view, the study identified differences between certain groups of actors that can have implications for outlining tasks and responsibilities. The concept of accessibility should include the wider phenomena, beyond travellers with mobility problems (e.g. those with food allergies), that reflect the general consumer and tourism trends, which are also seen at the selected destination, Lake Balaton.

Among the limitations of the research, low sample size and the COVID-19 effect should be highlighted, as the field work was conducted in 2020. Taking this into account, future research directions could be to extend the sample, to conduct similar studies in other destinations, and to employ other research methods like focus group discussions or interviews. An important validated outcome may be the need for a complex understanding of accessible tourism, going beyond the needs of visitors with mobility impairments and mapping the perceptions and potential roles of different stakeholder groups (in the public and private sectors).

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