



Accessibility Pays Off

Why accessible tourism has stopped being a matter of goodwill and become a matter of economics

Let us begin with a figure that orders the whole discussion and surprises most people in the industry. Among people with disabilities, wheelchair users make up — according to estimates cited in industry studies — about eight per cent. The remaining ninety per cent and more are people with hearing and visual impairments, with mobility limitations that do not require a wheelchair, with cognitive disabilities, on the autism spectrum, and with chronic illnesses affecting stamina and mobility.

“Not every disability is visible at first glance,” the handbook *Accessible Tourism*, edited by Alina Zajadacz (2020), reminds us. People with disabilities also include those living with diabetes, epilepsy or asthma, people after cancer treatment, and people on the autism spectrum. None of them needs a ramp. Each needs something different — and in most cases something cheaper. The conclusion is uncomfortable. A property that has built a ramp and considers the subject of accessibility closed has answered the needs of the smallest part of the group it is talking about — and has most likely spent more money on it than solving the remaining ninety per cent of the problem would have cost. Because those remaining ninety per cent are, for the most part, a matter of information, communication and trained staff, not concrete. This observation leads to the thesis I want to develop here. Accessibility in tourism has stopped being a matter of social sensitivity. It has become at once a legal obligation and one of the most underestimated market segments in the industry. And the main barrier to its implementation is not infrastructure, but people’s competence.



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The structure of accessibility needs

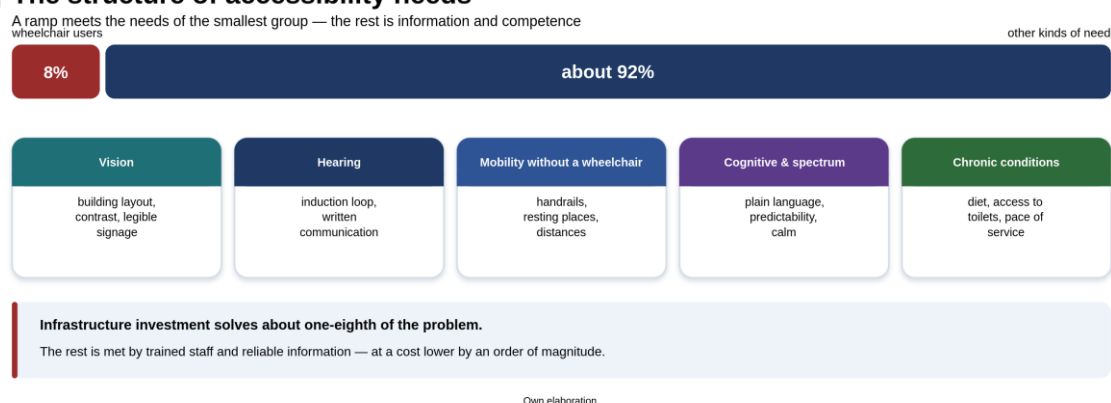


Figure 1. The structure of accessibility needs — why a ramp is not everything. Own elaboration.

A law that came into force quietly and began to bite

On 28 June 2025, the European Accessibility Act — Directive 2019/882, the first regulation imposing uniform accessibility requirements on the private sector across the Union — began to apply in Poland. Until then, obligations of this kind had concerned mainly public bodies, under the 2019 Act on ensuring accessibility and the government's Accessibility Plus programme. Now they cover businesses.

For a tourism property, the key is to understand what the directive actually concerns, because a good deal of misunderstanding circulates in the industry on this point. The Act covers first and foremost digital channels and electronic services: the website, the reservation system, the app, electronic confirmations, tickets, self-service terminals. It does not require rebuilding bathrooms. It asks, rather, whether a person using a screen reader can book a room with you on their own. It is also fair to say what the directive does not require. Microenterprises — employing fewer than ten people and with an annual turnover not exceeding two million euro — are exempt from the obligations concerning the provision of services. That exemption is real and covers a significant share of the bodies operating in Polish tourism regions, including most guesthouses and agritourism farms in Podhale. Exemption from a legal obligation is not, however, exemption from the economic calculation. And it is precisely this calculation that is worth discussing, because it is more interesting than the obligation itself.

It is worth noting that enforcement has moved faster than the industry expected. Since the autumn of 2025, supervisory proceedings have been under way in several member states, and the first lawsuits by advocacy organisations against large market players have appeared. The direction is not in doubt, and the exemption threshold in successive reviews of the directive is more likely to fall than to rise.

A market the industry does not serve

About 87 million people with disabilities live in the European Union — roughly one in five inhabitants. In Poland alone, about 4.5 million people hold a certificate of disability — figures from the Office of the Government Plenipotentiary for Disabled People cited by Zajadacz (2020). That figure alone, however, says little until one adds to it four economic mechanisms that make this group commercially attractive.

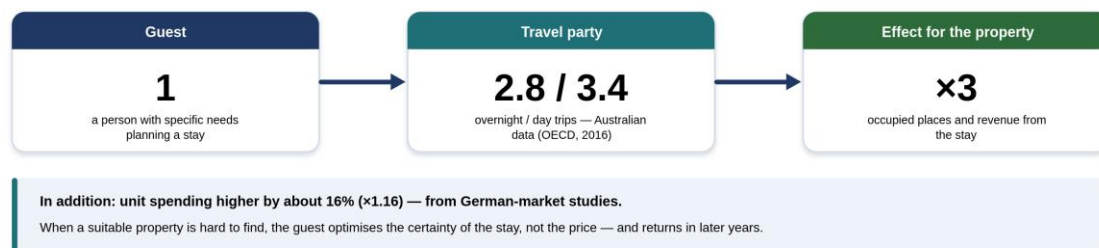
The companion multiplier. People with disabilities rarely travel alone. According to the OECD report Tourism Trends and Policies 2016, in Australia the average size of a travel party including a person with a disability is 2.8 people for overnight trips and 3.4 for day trips; a similar multiplier effect is observed in other markets as well. One guest with specific needs means, in practice, three occupied places and three times the revenue from the

stay. For a property with a dozen or so rooms, that is not a cosmetic difference.

Higher unit spending. Studies from the German market cited in the industry literature indicated that a tourist with a disability spends on average about 1.16 times more than a tourist without one. The mechanism is prosaic: when finding a suitable property is difficult, a person stops optimising price and starts optimising certainty. They pay for the assurance that everything will work on arrival.

The economic multiplier of a guest with specific needs

One guest with specific needs = a travel party = a multiple of the revenue from the stay



Own elaboration.

Figure 2. The economic multiplier of a guest with specific needs. Own elaboration.

Higher loyalty. The same mechanism works after the stay. A property that has proved itself once becomes the default choice for years — because the cost of searching for an alternative is high and the risk of a failed trip is painful. In an industry with notoriously low guest loyalty, that is an asset hard to overvalue.

Seasonality — and this is the most important argument for mountain properties. Accessible tourism, and the closely related senior tourism, record their highest activity outside the peak season. Older people and people with mobility limitations deliberately avoid crowds, queues, high prices and overcrowded trails. For regions such as Podhale, where the structural problem is not a lack of guests in February and August but emptiness in November, April and May, this carries a wholly different weight than general appeals to inclusivity. This is not merely an observation from practice. VisitEngland's research on the so-called purple pound — the purchasing power and spending potential of people with disabilities and their families — found that travel parties including a person with a disability stay longer, spend more than the average party, and travel more often outside the peak season. The value of this segment in the British market grew from £12.1 billion in 2014 to £14.6 billion in 2018. Accessibility is therefore not a support programme. It is a tool for levelling occupancy across the annual cycle — that is, an answer to one of the two main economic problems of mountain tourism, alongside the shortage of staff.

Seasonal complementarity of accessible and senior tourism

Accessible and senior tourism fills the months of lowest occupancy

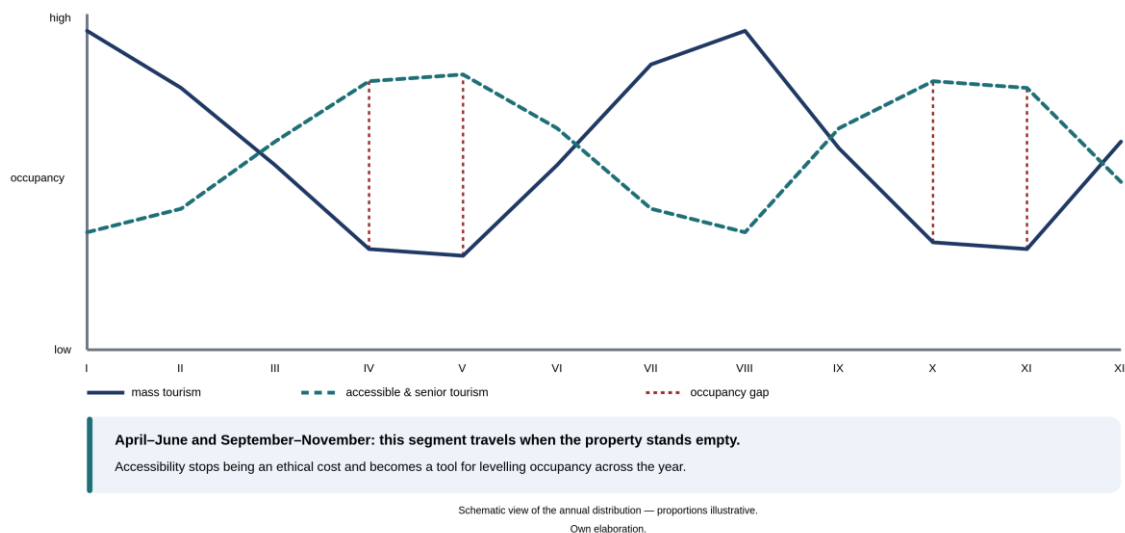


Figure 3. Seasonal complementarity of accessible and senior tourism. Own elaboration.

Added to this is a phenomenon that radically widens the boundaries of this segment. A seventy-five-year-old tourist who would never call themselves a person with a disability needs exactly the same solutions as someone who does: legible signage, handrails, good lighting, a place to rest between reception and the room, staff who speak clearly and without haste. Butlewski and Jabłońska (2014) described this convergence of needs in an ergonomic model of hotel service quality for the elderly and people with disabilities, showing that design solutions for the two groups largely overlap. Europe is ageing at a pace that no business model in tourism can ignore any longer. Designing for accessibility means designing for a market that within a decade will be the main market, not a niche one. Polish data confirm the picture. The study “Tourist activity of people with disabilities,” commissioned by the Ministry of Sport and Tourism under the Tourism Development Programme, found a clear gap between this group’s potential for participation in tourism and its actual travel activity — with the cause identified not as a lack of means or willingness, but a lack of reliable information about the accessibility of properties. This is an information barrier, not an infrastructural one. Lima and Martín-Cejas (2025) reach convergent conclusions in analysing the constraints and facilitators of travel for people with disabilities. Years earlier, in one of the first Polish publications devoted to this segment, exactly the same problem was identified: the main constraint is not a lack of adapted properties, but a lack of exhaustive and reliable information about which properties are adapted and to what extent.

Finally, an observation about competition — or rather its absence. Research on the European market consistently shows that the vast majority of tour operators have no accessible products on offer, and small accommodation providers limit themselves to minimal formal compliance where it is required (Midgett et al., 2020). We are therefore dealing with an unusual situation: a large, solvent, loyal and seasonally complementary segment set against almost absent competition.

The real barrier is not made of concrete

Here we reach the heart of the matter, which is most often lost in discussions of accessibility — and which is the real reason the subject is worth raising. You can build a ramp, widen doors, install a platform lift and an induction loop — and still not provide an accessible service, because the service is performed by a person.



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A receptionist who does not know how to talk to a deaf person and starts speaking louder instead of more clearly. A waiter who addresses the companion rather than the guest in the wheelchair. An employee who, in good faith, grabs the wheelchair without asking permission. A person taking a telephone booking who cannot describe the property to someone who will not see the photographs. Each of these situations nullifies the infrastructural investment — and each is a competence problem, not a building one. The industry literature speaks on this with one voice. Chung, Park and Kim (2025), studying hotel employees' experiences of serving guests with disabilities, point to a widespread sense of unpreparedness, uncertainty about the right behaviour and fear of committing a faux pas — factors that lead to avoidance of contact and worsen service quality more than any lack of infrastructure. Kamyabi and Alipour (2022), studying a Mediterranean destination, show that barriers of staff attitude and competence are sometimes rated by travellers themselves as more severe than physical barriers. From the owner's perspective this is good news, though at first glance it does not sound like a compliment. Training a team in serving guests with specific needs is an outlay of a few thousand złoty. Rebuilding a bathroom is tens of thousands. The order of action should reflect this, and in practice is almost always the reverse. We invest in what shows in the photographs before we invest in what decides how the stay is judged. There is, moreover, a certain irony in this. Tigu and co-authors (2025), analysing the key competencies required in post-pandemic hospitality using Romania as an example, note that soft competencies — communication, flexibility, the ability to read a guest's unspoken need — have risen in the hierarchy of importance, while training spending has remained concentrated on technical skills. The industry knows what it needs and invests elsewhere.

It is worth noting that the Podhale region already has its own experience in this field. The “Accessible Mountains” project, run by the Poland Without Barriers Foundation with the support of the Ministry of Sport and Tourism, trained guides, guesthouse owners and tourist-information staff in the Tatra area in serving people with various kinds of disability. A model worth following also comes from another Polish mountain region: since 2019 the Ładne Historie Foundation has run the “The mountains unite us” programme in the Sudetes, organising mountain expeditions for people with disabilities and their families in a respite-tourism format. Both undertakings show that demand exists and that competence can be built locally — what is missing is a systemic, repeatable mechanism that would also reach the smallest properties, those not taking part in projects. Chudy-Hyski and Żemła (2012) pointed out that the standing of Poland's mountain rural areas is decided not by natural assets alone, but by the ability of local actors to professionalise what they offer — and accessibility is today one of its dimensions.

The thread least often mentioned

There is one more aspect of this matter that is practically absent from the Polish debate, and which — in a sector struggling with a chronic shortage of hands — deserves to be taken seriously.

People with disabilities are not only potential guests. They are also potential employees. According to HOTREC's position of January 2026, European hospitality and catering — some ten million jobs across more than two million enterprises — operates with an average staff shortage of around ten per cent. In this situation, passing over an entire group of candidates is a luxury hard to justify economically, whatever the ethical view. In Polish conditions one further, less obvious argument is added. Radlińska and Gardziejewska (2022) showed that 75.6 per cent of the Polish tourism enterprises surveyed use a labour-hoarding strategy — keeping staff on outside the season, despite the lack of work, in order to have someone to employ at the peak. This behaviour is costly but rational given the staff shortage. Yet since we are paying to keep the team on in the low-occupancy months anyway, the off-season is a natural and, in practice, free training window. The argument “we have no time for training” then loses most of its force — the time is there, it is simply not used. What is more, the two threads interlock. A team that includes a person with a disability acquires service competence naturally — without



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formal training, through daily practice and ordinary observation. The uncertainty that Chung and co-authors (2025) describe as the main barrier of attitude disappears of its own accord once contact ceases to be an exceptional situation. Added to this are employment-support instruments that lower the cost of labour, seldom used in the tourism industry, mainly through unfamiliarity with the procedures.

In other words: employment may be a cheaper and more effective route to accessibility competence than training. That is a conclusion rarely voiced, and worth considering.

Where to begin

Four steps, ordered by the ratio of effect to outlay — not by what is most visible.

First, a digital audit before a building audit. Check whether the website and the reservation system can be operated without a mouse, using the keyboard alone, and whether a screen reader correctly reads out the booking form. This is the cheapest element of the whole puzzle and, at the same time, the only one covered by legal requirements. A basic review takes a few hours.

Second, description instead of declaration. Do not write on your website “property adapted for the disabled.” That sentence carries no information and provokes justified distrust. Write specifically: door width in centimetres, the number of steps at the entrance, bed height, the presence of a threshold in the shower, distance from the car park, availability of a lift. A person planning a trip needs data on which to judge for themselves whether the property suits them — not assurances. Cushley and co-authors (2026), in a review of accessibility for people with visual impairment, identify the lack of reliable advance information as one of the most frequently reported barriers. This costs one afternoon with a tape measure and a camera, and is sometimes the single most effective change one can make.

Third, train the team before investing in infrastructure. One solid training session in serving guests with varied needs changes the quality of service immediately — and it concerns all guests, not only those with specific needs. Staff who can recognise an unspoken need and respond without fuss serve everyone better.

The order of investment — practised vs recommended

Industry practice against the order justified by economics

Practised order



Recommended order



The European Accessibility Act applies chiefly to digital channels.

These are at once the cheapest step and the one most often skipped — hence the reversal in the recommended path.

Own elaboration.

Figure 4. The order of investment — practised vs recommended. Own elaboration.

Fourth, only then infrastructure — and in stages. Starting with the elements of widest impact: lighting, contrast, signage, seating along circulation routes. These are solutions that also serve families with small children and older guests, that is, groups you are already serving — so the return on investment does not depend on acquiring a new segment.



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Competence, not declarations

The common denominator of these four steps is knowledge. Not capital, a building permit or a grant — but knowledge of what the guest really needs and how to serve that need. In the micro- and small-enterprise tourism sector, this knowledge is today a scarce good. Research on the barriers to implementing good practice in small accommodation properties points consistently to the same trio: financial constraints, a lack of access to suitable training on offer, and a lack of external support (Midgett et al., 2020). The first of these barriers is real and hard to remove. The other two are solvable — and it is precisely these that the work we are doing addresses.

The project “Competences of the future in the tourism-services industry,” carried out under the Erasmus+ programme by the Drogowskaz Foundation together with the University of Applied Sciences in Nowy Targ and the Bulgarian HRC Culinary Academy, treats accessible tourism as one of three areas — alongside sustainable and product tourism. It is producing a handbook of practical solutions and packages of training materials addressed directly to the sector’s staff, with particular attention to the smallest properties, which least often have access to professional training support. Among the planned outcomes is also a map of the competence gaps of managerial staff, prepared so that training answers real rather than assumed needs. Because accessibility does not begin with a ramp. It begins with someone who knows what to do when a guest pulls up at the door.

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