"Accessi Tourisme Symposium"

Barcelona, 30 November – 1 December 2009

Cooperation and Competitiveness in European Tourism for All

Ivor Ambrose

Managing Director, ENAT

Overview

1. **Why Accessible Tourism? The 3 big issues…**

2. **Improving Access and Social Inclusion in Tourism Businesses**

3. **The Role of ENAT and the CETA Network**

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Why Accessible Tourism?

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Accessible Tourism

The 3 big issues:

- **World recession:** Increasing global competition in terms of price and quality.
- **Demographic ageing** is happening now
- **Rights of persons with disabilities** to equal participation in society must be respected by travel and tourism providers.

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There are at least 3 good reasons – 3 big issues, when answering the question: Why do we focus on accessible tourism?

• Tourism destinations in Europe face increasing global competition in terms of price and quality.

• Demographic ageing is happening now, and

• The rights of persons with disabilities to equal participation in society must be respected by travel and tourism providers

The 3 Big Issues

1. Tourism destinations face increasing global competition in terms of price and quality

- Providers must adapt rapidly to new market conditions, to keep competitive advantage and gain market share.
- *Improving accessibility* can enhance the overall quality of the tourism offer for all customers.
- Better accessibility can broaden the customer base, contribute to long-term sustainability and enhance the visitor experience significantly.

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Tourism enterprises and organisations, with the support of the public sector, must adapt to new market conditions, so they can keep their competitive advantage and gain their share of the market.

Improving accessibility can definitely enhance the overall quality of the tourism offer for all customers.

Better accessibility can broaden the customer base, contribute to long-term sustainability and enhance the visitor experience significantly.

These are facts which some tourism providers have already realised (to their benefit) but the huge majority have still not got the message – and have not started to act.

Accessible Tourism Market

The Business Case

•The European accessible travel market is estimated at at 127 million people or 27% of the EU population

• Includes people with disabilities, elderly and their fellow travellers

• Worth €80 billions per annum

• All tourists benefit from better accessibility!

Source: University of Surrey / OSSATE, 2005

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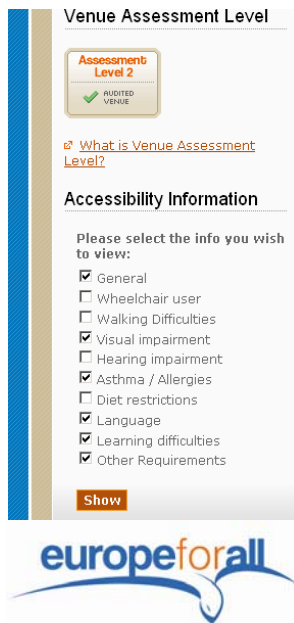There is a clear business case in favour of accessible tourism.

The market is out there but there is limited supply of accessible offers.

•The European accessible travel market is estimated at at 127 million people or 27% of the EU population

• Includes people with disabilities, elderly and their fellow travellers

• Worth €80 billions per annum

• All tourists benefit from better accessibility!
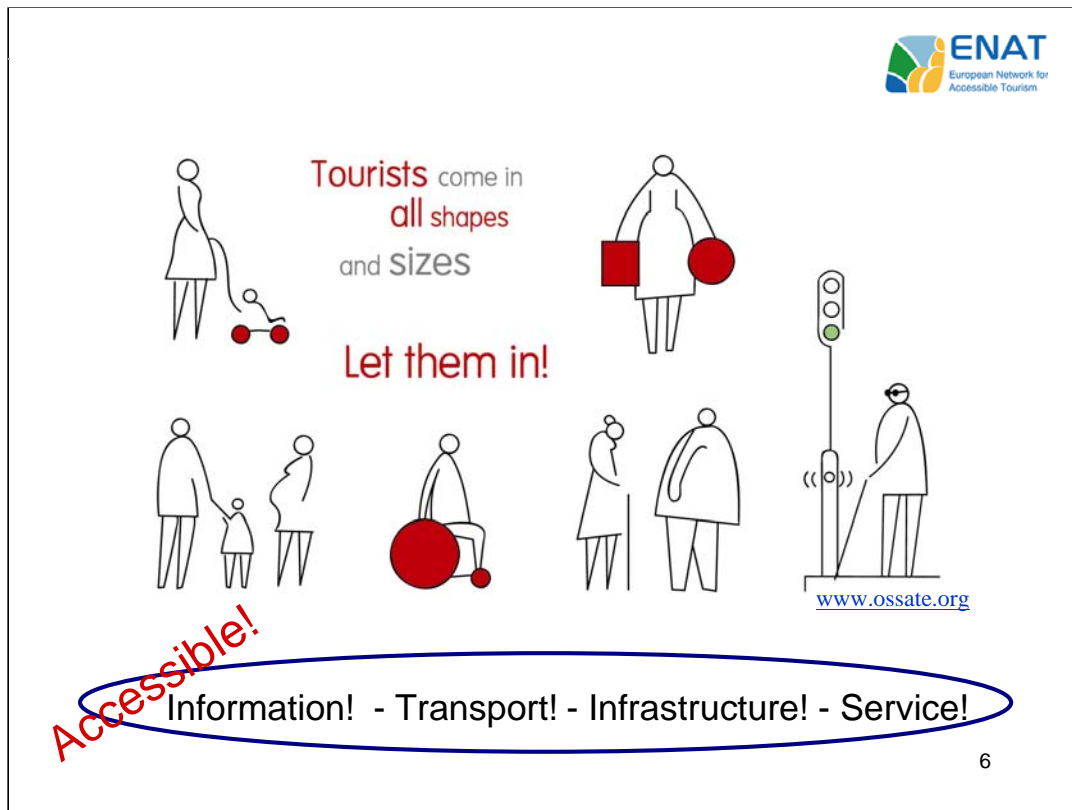
1. Tourism providers need to let in all visitors.
2. It's not so difficult – you just have to get some good advice and then plan it, like everything else!

Who are the people who need "accessible tourism"?

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Venue Assessment Level

Assessment
Level 2

AUDITED
VENUE

↗ What is Venue Assessment
Level?

Accessibility Information

Please select the info you wish
to view:

☑ General
☐ Wheelchair user
☐ Walking Difficulties
☑ Visual impairment
☐ Hearing impairment
☑ Asthma / Allergies
☐ Diet restrictions
☑ Language
☑ Learning difficulties
☑ Other Requirements

Show

europeforall

- Wheelchair user
- Walking difficulties
- Visual impairment
- Hearing impairment
- Asthma / allergies
- Diet restrictions
- Not understanding the language
- Learning difficulties
- And other requirements
- Multiple disabilities

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www.EuropeforAll.com is a web portal which provides venue accessibility information for visitors with many kinds of access needs. It was developed by EWORX S.A., Greece, together with a transnational consortium in the OSSATE project in 2005 – 2007, funded by the eContent programme. All these groups of tourists need accessible tourism…
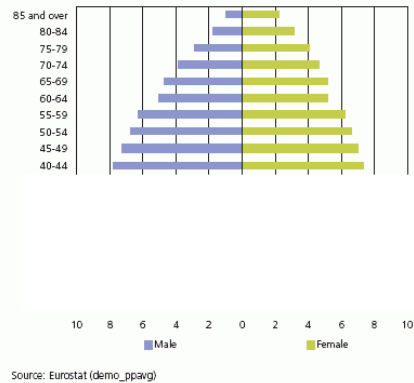
Disabled people want the same kind of travel and tourism experiences as everyone else!

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The 3 Big Issues

2. Demographic ageing is happening now!

. . . Age pyramid

Source: Eurostat (demo_ppavg)

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The shape of the tourism market is changing

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The 3 Big Issues

2. Demographic ageing is happening now!

... Age pyramid **?**

85 and over	
80-84	
75-79	
70-74	
65-69	
60-64	
55-59	
50-54	
45-49	
40-44	
35-39	
30-34	
25-29	
20-24	
15-19	
10-14	
5-9	
0-4	

10 8 6 4 2 0 2 4 6 8 10

■ Male   ■ Female
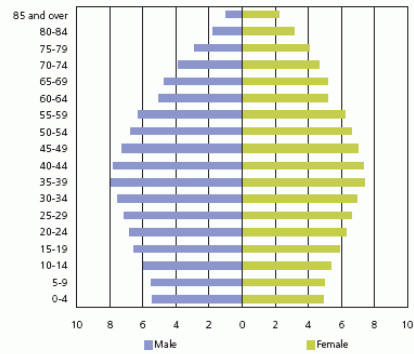
Source: Eurostat (demo_ppavg)

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That's not a pyramid any longer!

From the European Commission Ageing Report, 2009, the projected growth of the EU-27 population 2008 – 2060 is only from 495,4m to 505,7m
(2.1 %).

2008 – median age is around 40 years

In 2060 it is projected to be around 48 years.

42% of the population will be over 65 years of age in 2060…!

As a result of these different trends among age groups, the old-age dependency ratio (people aged 65 or above relative to the working-age population aged 15-64) is projected to increase from 25.4% to 53.5% in the EU over the projection period 2008 – 2060.

Ageing Europe
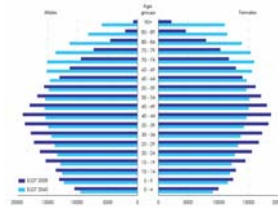
- The shape of the tourism market is changing
- Accessible tourism is not a "niche" market. "Older people" will soon make up 25% of the European population, rising to 42% by 2060
- Disability increases with age
- <u>Older people want to travel!</u>
- Wealth (revenues) in Europe of persons over 65 is over 3000 B€
- **Focusing on accessibility is a rational response to foreseeable changes in the tourism market** 12

The impact of demographic change in most European countries is likely to be of major significance in the coming decades. Consistently low birth rates and higher life expectancy will transform the structure of the Europe's age pyramid; probably the most important change will be the marked transition towards a much older population.

The demographic ageing of western populations has major implications for the shape of the European tourism market now and, especially, in the future.

Accessible tourism is not about providing for a "niche market". Older people, (who still want and are able to travel), will soon make up 25% of the European population. (If you want to call 25% a "niche", then I think we must redefine our terminology)!

Disability increases with age – but <u>the will to travel</u> does not necessarily diminish!

Focusing on accessibility is a rational response to foreseeable changes in the tourism market.

• 80+ population doubles until 2050; 60+ from 20% (1995) to 25% (2020)

• 21% of 50+ population has severe vision/hearing/dexterity problems

Economic opportunity

• Wealth and revenues in Europe of persons over 65 is over 3000 B€

Making tourism accessible for all is a rational response to a foreseeable demographic trend, and a massive economic opportunity for the tourism sector.

The 3 Big Issues

3. The rights of persons with disabilities to equal participation in society must be respected by travel and tourism providers

- Overall strengthening of rights, with legal powers
- Spain and the European Union have signed the UN Convention on the Rights of Persons with Disabilities
- European Commission has proposed EC Regulation on equal access to goods and services for disabled people.
- **Tourism providers must be equipped with the confidence and ability to meet their legal responsibilities.**

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The rights of persons with disabilities to equal participation in society are being strengthened throughout the world.

The ratification of the UN Declaration on the Rights of Persons with Disabilities (2006), as well as recent initiatives at European level by the European Commission and some Member States are driving forward an equal access agenda, based on the principle of non-discrimination and equal participation of persons with disabilities.

Following the principle of universal access, the UN Convention puts the onus on society to remove barriers to full participation of persons with disabilities.

Providing equal access to goods and services will be a "must" for all service providers – also those in the tourism sector.

Therefore, public and private providers need to be equipped with the confidence and the ability to meet their legal responsibilities under existing and future legislation.

Our message is that: ENAT will support tourism providers in meeting their obligations.

Spain: Respecting the Rights of Persons with Disabilities

- UN Convention on the Rights of Persons with Disabilities (CRPD)
  - Ratified by Spain, 3 December 2007
- Optional Protocol
  - Signed by Spain, 3 December 2007

- Article 30. Equal access to Leisure, Sport and Tourism
- **After signing comes…..*Implementation!***

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Congratulations to Spain as one of the first ratify the CRPD and sign the optional protocol.

Article 30 of the CRPD addresses Equal access to Leisure, Sport and Tourism

The real work of IMPLEMENTATION is of course the most important phase of the CRPD!

The role of ENAT and the CETA Project

ENAT - European Network for Accessible Tourism non-profit association

CETA project: "Competitiveness for a European Accessible Tourism for All"

- **Enabling small businesses to be competitive and sustainable**

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ENAT (project period): European Start Funding 2006 - 2007

• A **European Network for Accessible Tourism**

• Building on the experiences of key National Tourism Organisations, tourism businesses and disability/ consumer advocacy groups

• A multi/stakeholder network

• Co-funded by the European Commission under action line: Pilot Actions for Mainstreaming Disability"

• Supporting the EC Disability Action Plan (2003 –2010)
   - for non-discrimination and equal opportunities

• Supporting 2007 Euro Parliament Resolution on Tourism

• Supporting EC Strategy on competitiveness and sustainability in tourism

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ENAT was set up to fill a gap between the mainstream tourism sector and the interests of customers who need better access when they travel for business or for pleasure people.

We decided a network was the best solution to share experiences between members, to engage the different stakeholders and to help spread the word…

Our timing (and our idea) was fortunate, as we managed to get EU funding to support ENAT for 2 years.

The EU funding was intended for projects to support the EU disability action plan – which was entirely within the scope of what we wanted to do.

We also work towards the goals of the European Parliament (2007) resolution on Tourism in Europe and the EC strategy.

In May 2008 ENAT became an NGO registered in Brussels.

ENAT's Mission

The mission of the European Network for Accessible Tourism is to make European tourism destinations, products and services accessible to all travellers and to promote accessible tourism around the world.

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ENAT's vision

- Practical change: Overcome access barriers
- Improving the quality of the tourism experiences for everyone
- Organisation: Improving the way we work in the Tourism Sector
  - Effectiveness
  - Collaboration
  - Economic, Social and Environmental sustainability
- Inclusive Society: Travel and Tourism for All

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ENAT is now addressing the challenges we have identified.
- Spread the word about Accessible Tourism!
- Improve marketing and customer information
- Develop and introduce Service Standards for Accessibility in the travel and tourism industry
- Help create Accessible Destinations through improved public-private-NGO joint actions
- Stimulate new projects and networking opportunities with actors and stakeholders
- Publicise accessible travel and destinations!

ENAT membership

Who Can Join ENAT?
Who Should Join ENAT?

- Travel and tourism industry
- Public sector
- Professionals
- Non-Governmental Organisations
- Individual members

City Tourism Development Offices, National and Regional Tourist Boards, Access Consultants, Students, Tour Operators, Small Tourism Enterprises, Attractions, Travel Agents, Conference and Events Organisers, etc. etc.

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ENAT today

- An association for the "front-runners" in accessible tourism

- Over 200 members in more than 30 countries

- Tourism businesses (55%)

- Public sector (12%)

- NGOs (33%)

- in Europe, Africa, Middle East, North and South America, Asia, Australia

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ENAT gained a worldwide following during the project phase 2006-2007.

In 2008 the ENAT non-profit association was launched. It now has over 200 members: tourism and travel businesses, tourist boards, NGOs, Public authorities, universities…
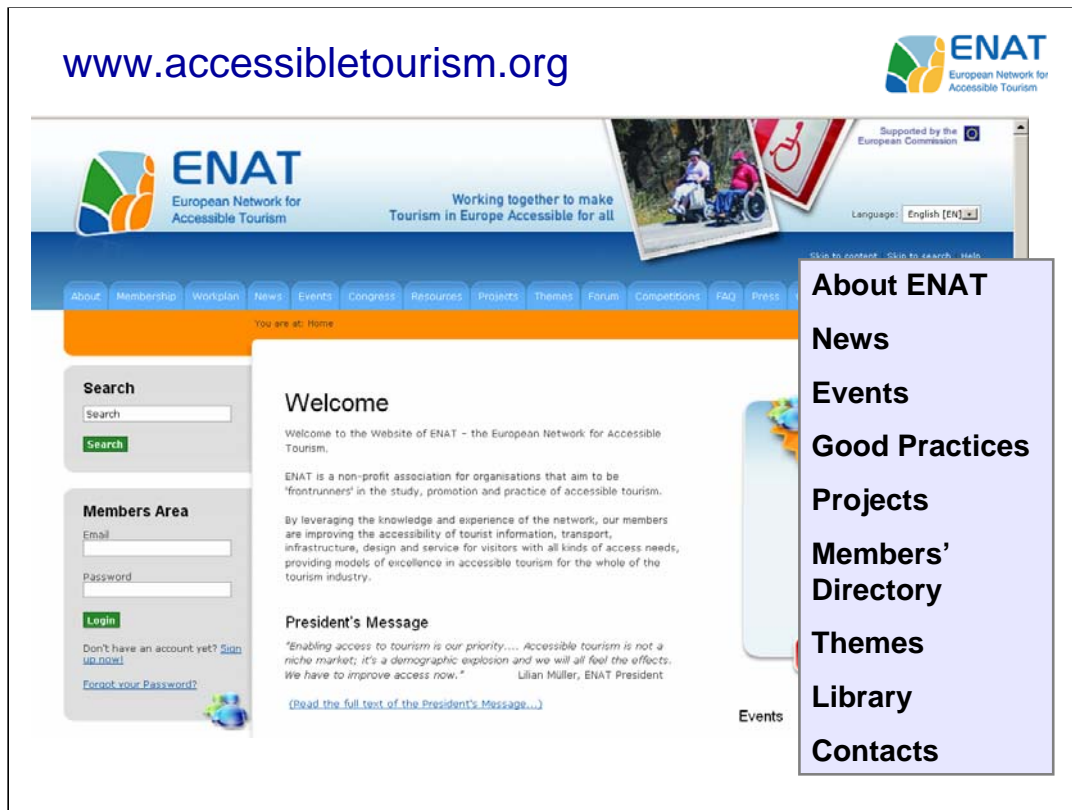
The ENAT website reaches about 4,000 unique visitors per month.

We have: Membership pages, Resources (Publications, Funding, Projects and Good Practices) News, Links, Themes…etc.

Members can search the profiles of their colleagues, gather information and upload articles, news, comments, events information and other items.

ENAT's activities cover a wide spectrum including projects, a database of good practices, technical support services, EuropeforAll marketing, policies and standards development and the Code of Good Conduct scheme.

ENAT Workplan 2010 – 2014 highlights…

- **Web Portal:** dissemination and members' B2B services

- **ENAT Code of Good Conduct:** promotion, monitoring

- **CEN Workshop:** on EU Accessible Tourism Services

- **SME support** – CETA accessibility management tools

- **ENAT Training** curriculum and material (ETCAATS, ATHENA and ITTI projects)

- **EU Indicators** for sustainable tourist destinations

- **ENAT Technical Support** for transnational projects and initiatives, e.g. CALYPSO (Social Tourism), ESF and Regional Funds projects

- **International Events:** Seminars and Bi-Annual Congress

The ENAT Workplan for 2010 to 2014 will be published in January 2010. Here is a preview of a few highlights:

Web Portal: continuing and upgrading online information, publicity for Members and enabling networking between stakeholders

ENAT Code of Good Conduct: promotion of the Code to consumers monitoring its use

CEN Workshop: Standards activity to produce consensus document on Accessible Tourism Services will be launched

SME support – CETA accessibility management tools will be disseminated, sector networking continuing

ENAT Training curriculum and material (ETCAATS, ATHENA and ITTI projects) with EU training certification

EU Indicators for sustainable tourist destinations – piloting the indicators proposed by the EU Tourism Sustainability Group

ENAT Technical Support for transnational projects and initiatives, e.g. CALYPSO (EU cross-border Social Tourism arrangements), projects funded by the European Social Funds and Regional Development Funds. Consulting and monitoring system to ensure that access is adequately included in every project.

International Events: Annual Seminars and Bi-Annual ENAT Congress.

The ENAT Code of Good Conduct is a new service we started on 1st October 2009.

It is the first **Europe-wide label, showing commitment to accessible tourism.**

The Code is a set of 8 principles on how to work towards the continual improvement of accessible tourism services.

It is not a label to denote the accessibility of a venue.

The ENAT Board is responsible for ensuring that members comply with the Code.

By signing the Code, ENAT Members also get support to help them fulfill their responsibilities.

We believe customers are looking for such a label – a marketing tool which will give ENAT Members the visibility they want in the market.

The ENAT Code of Good Conduct

is for all tourism providers:

• Small and family businesses

• Large, international chains

• Tour and transport operators

• Travel agents

• Destinations of all kinds

• Cities, Regions

• Public authorities

• Consultants, Researchers

• NGOs

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The Code of Good Conduct can be used by all kinds of tourism providers, of all sizes and all kinds of activities.

The ENAT Code of Good Conduct

Our Commitment:

1. Recognition of equal rights: We recognise that all people have the right to enjoy tourism, whatever their background or abilities, and we work to promote this right in our activities.

2. Personal attention: We welcome all customers and make it our priority to meet their individual needs.

http://www.accessibletourism.org/?i=enat.en.enat-code-of-good-conduct

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These are the principles of the Code (1, 2)

The ENAT Code of Good Conduct

Our Commitment:

3. Removing and preventing access barriers: We are committed to planning and carrying out improvements to our infrastructure, products, services and information, using a 'design-for-all' approach, in order to remove or minimise access barriers and contribute to sustainable and accessible tourism for all.

4. Improving our knowledge, competences and skills: We follow recognised "good practices" and guidance for tourism accessibility provided by ENAT, and we are committed to continual staff training which takes into account respect for human diversity and disability awareness, ensuring that all customers are welcomed and served appropriately.

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These are the principles of the Code (3, 4)

Our Commitment:

5. Monitoring: Our organisation ensures that customer services are monitored and access is improved as far as possible, within our financial means.

6. Our suppliers: Wherever possible, we work with suppliers who also recognise and respect the principles contained in the ENAT Code of Good Conduct.

http://www.accessibletourism.org/?i=enat.en.enat-code-of-good-conduct

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These are the principles , (5, 6)

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Our Commitment:

7. Complaints handling: Our organisation has a complaints procedure available to customers so that they may report their possible dissatisfaction with our advertising, information, facilities or services. All complaints are handled promptly and fully.
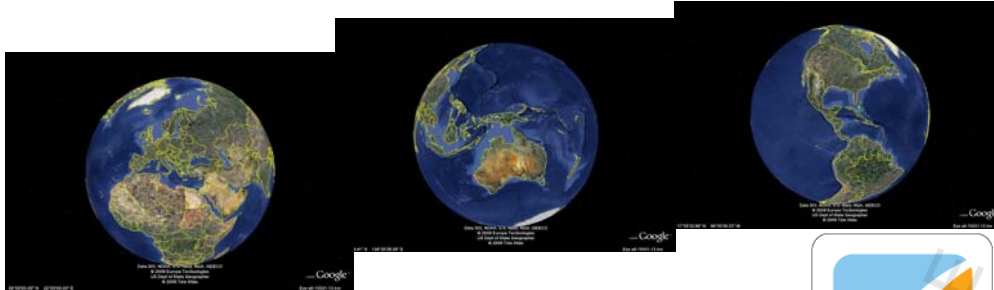
8. Management responsibility: We regard good access for all visitors as part of our wider Social Responsibility.
Name: ....
Position: ....
Email: ....
Telephone: ……………………..
Signature: ....
Date: ....

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These are the principles of the Code (7, 8)

In Europe and around the world

The ENAT Code of Good Conduct is exclusive to Members of The European Network for Accessible Tourism non-profit association

http://www.accessibletourism.org/?i=enat.en.enat-code-of-good-conduct

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The ENAT Code of Good Conduct is exclusive to Members of The European Network for Accessible Tourism non-profit association

The CETA Project: targetting SMEs

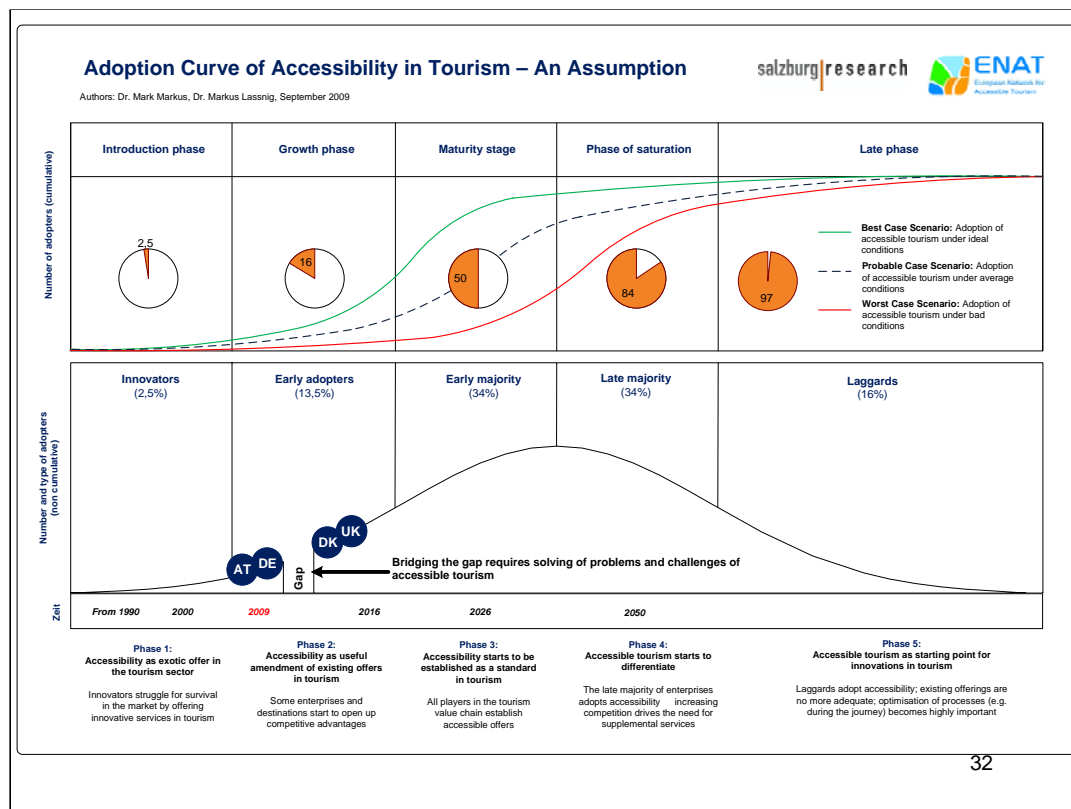**Competitiveness for a European Accessible Tourism for All**

DG Enterprise and Industry Call for Proposals

ENT/CIP/08/B/N05S00 (**2008**)

"…to support initiatives of public and private bodies, or their existing networks, to contribute to enhancing the sustainability and competitiveness of European Tourism especially for SMEs, while allowing for wider economic, social and environmental benefits to be gained."

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The CETA project is an 8-month project focusing on providing information and access management tools for small and medium sized tourism enterprises in Europe.

Adoption Curve of Accessibility in Tourism – An Assumption

Authors: Dr. Mark Markus, Dr. Markus Lassnig, September 2009

Where do we stand today in the development of accessible, inclusive tourism?

Is it a niche, a trend, a virtual market or a real one?

This adoption curve for accessible tourism in Europe has been produced by
Dr. Mark Markus & Dr. Markus Lassnig

e-Motion – ICT Research in the Tourism, Sport and Leisure Industries

c/o Salzburg Research Forschungsgesellschaft mbH

mark.markus@salzburgresearch.at

markus.lassnig@salzburgresearch.at

They have analysed current trends and come up with a hypothesis that accessibility will follow this take-up curve, leading to maturity by 2026…… quite some years away.

We are now in the early growth phase, where early adopters are gaining competitive advantage in the market.

But where standards are lacking and the accessibility chain is still restricted to certain areas and market chains.

(The recent year's progress in Catalunya and Spain's accessible tourism has not probably been taken sufficiently into account in this analysis; I will check this with the authors).

By enabling SMEs to improve their practices, through the CETA project we hope to force the growth of accessible tourism offers and enable more business to become front-runners in the accessible tourism field.

The CETA Project - Partners
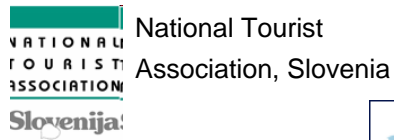
National Tourist
Association, Slovenia

ANLH asbl.,

Belgium

CO.IN, Italy

Vellinge
Municipality,
Sweden

University of Surrey,
School of Management, UK

Tourism for All, Sweden

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Improving Access and Social Inclusion in Tourism Businesses

… Technical and Management Challenges for SMEs

- What can I do? (- What must I do?)

- Where do I get the information?

- Getting support and advice

- Making my business visible

- Being part of an accessible destination

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There are both Technical and a Management Challenges for Small and Medium-sized Enterprises

when they seek to improve access and social inclusion in their business.

CETA Results for Businesses

Online networking:

- CETA Web Portal, **on-line resources:** http://ceta.enat.be

- CETA Web 2.0 **Networking:** www.accessibletourism.ning.com

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ANLH

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Two websites have been developed for CETA by ENAT and ANLH, Belgium.

One site as a showcase for project results and resources, the second is a Web 2.0 networking site, (moderated by ENAT), where users can add their own content, discuss and develop ideas.

CETA Web Portal, providing a showcase for good practices in accessible, sustainable destination development…

CETA Web Portal

and at: **www.accessibletourism.ning.com**

Moderated Web 2.0 SME-Networking site, focusing on access information & media tools for tourism businesses

CETA **Web 2.0 SME-Networking site,** focusing on access information and multi-media tools for businesses in the tourism sector

CETA Results for Businesses

Research and Knowledge Management

- **Examples of Good Practice Training**
  - **Training tools for SMEs**

- **Research on needs and solutions for business**
  - **Focus Group studies with tourism SMEs, identifying barriers and networking solutions**

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These are the planned outputs of the CETA project with their responsible lead partners:

Research and Knowledge Management

Examples of Good Practice Training - Training tools for SMEs. Developed by COIN, Italy.

Research on needs and solutions for business - Focus Group studies with tourism SMEs, identifying barriers and networking solutions. Developed by Surrey University.

CETA Results for Businesses

- **Sustainability and competitiveness indicators**, helping SMEs to develop and fine-tune their business activities

- **Guidelines for promoting sustainable tourism destinations, involving SMEs in public-private partnerships of regional tourism networks.**

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 Sustainability and competitiveness indicators, helping SMEs to develop and fine-tune their business activities. Developed by the Slovenian National Tourist Association.

Guidelines for promoting sustainable tourism destinations, involving SMEs in public-private partnerships of regional tourism networks. Developed by Tourism for All in Sweden and the Municipality of Vellinge, "Destination Söderslätt".

CETA Results for Businesses

EU Tourism Sustainability Group:
Sustainable Tourism Destination Indicators

1. Percentage of sites considered accessible
2. Percentage satisfaction level of customers with disabilities
3. Percentage of hotels with accessible rooms
4. Participation in recognised accessible information schemes (0 – 100%)
5. Percentage of visitor attractions/sites that are recognised information schemes (0 – 100%)
6. Availability of local public transport system and vehicles that are accessible for wheelchair users (bus, tram, metro, light railway, taxi, mini bus) (yes/no) to each modal category
   - *Visitor surveys to be developed, to collect data*

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ENAT has also directly contributed to the work of the EU Tourism Sustainability Group which published its 30 **Sustainable Destination Indicators** this November.

One set of indicators concerns social sustainability and equality, in which **accessibility of the destination** plays a part.

The total set of indicators will be tested / validated in a trial period involving the « European Destinations of Excellence ». *Visitor surveys will be developed, to collect these data.* Of course they may also be used by all destinations to benchmark their progress.

With ENAT and the CETA project we aim to foster cooperation and create more competitive businesses, delivering accessible tourism for all throughout Europe.

The examples and presentations at this event give good cause for optimism in accessible tourism: a sector of tourism which is clearly vibrant and strong, despite the prevailing economic crisis.

Contact: Mr. Ivor Ambrose
Email: enat@accessibletourism.org

Thankyou