



ACCESSIBILITY:

AN IMPORTANT ECONOMIC OPPORTUNITY FOR THE EUROPEAN TOURISM SECTOR

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(One-Stop-Shop for Accessible Tourism in Europe) – Project)



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Methodology



Methodology

- Comprehensive literature review of reports, statistical accounts and websites.
- Currently: limited research on disability at a broader scale and figures vary from source to source.
- Sources that were used to gather the prevalence figures of disability and the elderly population include:
 - Eurostat
 - Eurobarometer
 - US Census Bureau (for demographic data)
- Data sets from surveys or studies at the regional and national level have been incorporated to:
 - Compare existing data sets
 - Validate general findings



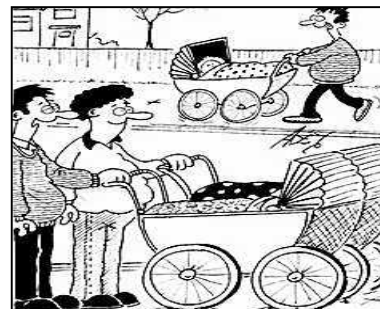
General Demand for Accessibility in Europe

Target Markets

- People with impairments
 - In Europe: > 46 million* (population aged 16 to 64)
 - Worldwide: between 600 and 900 million citizens**

- The ageing population
 - EU (currently): > 75 million***

- Able-bodied citizens
 - Almost everyone



* Eurostat 2003, 2005
** Daruwalla & Darcy 2005; Smith 1987; Horgan-Jones & Ringaert 2004
*** U.S. Census Bureau 2005

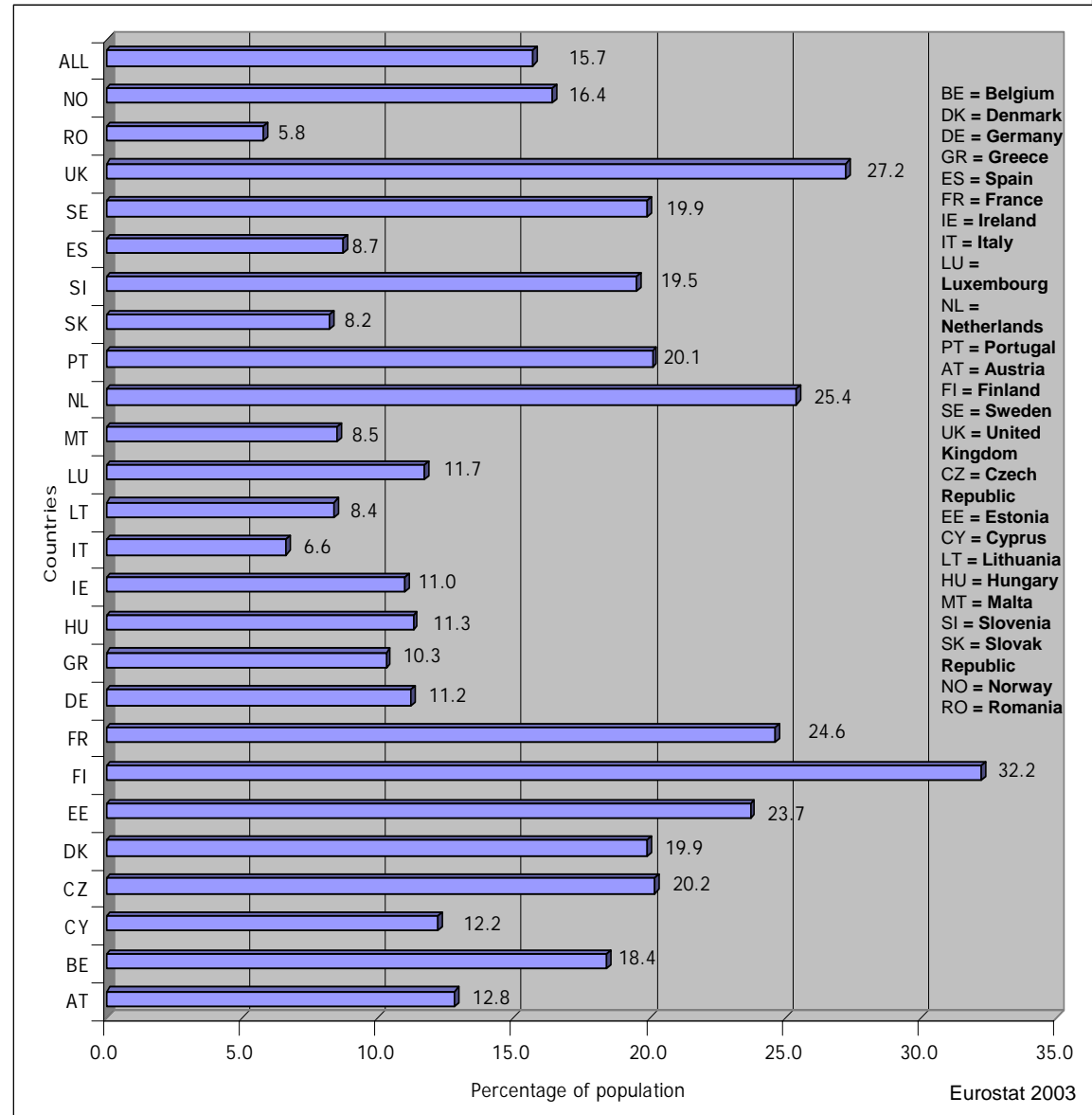
People with Impairments (1)

- Total number of the population with Long-Standing Health Problems and Disabilities (LSHPD) (aged 16 to 64) =

> 46 million citizens

(in 25 European countries)

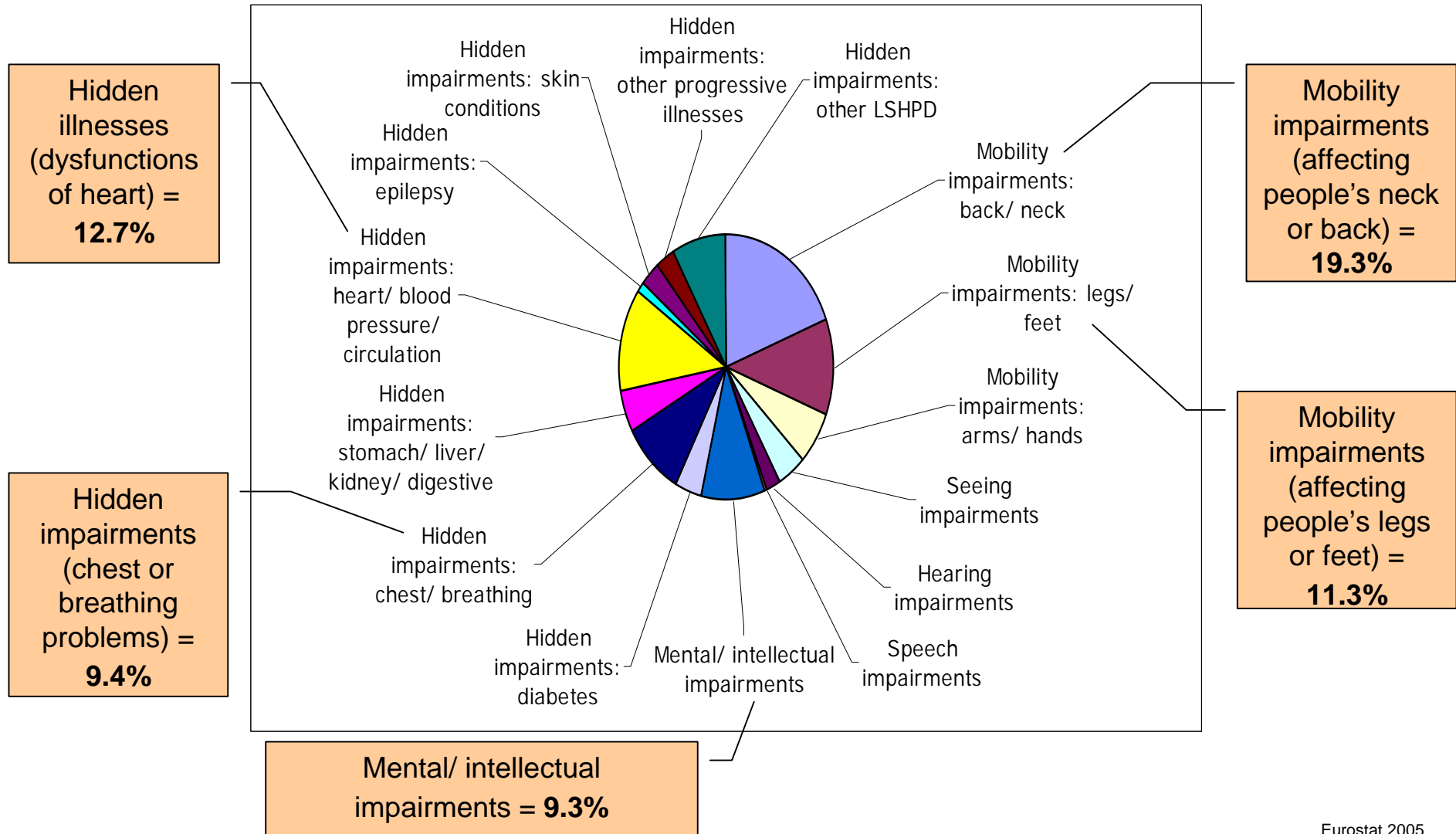
- One in six persons (15.7%)
- Most prudent/conservative estimation





People with Impairments (2)

Among the most prevailing subcategories of LSHPD:



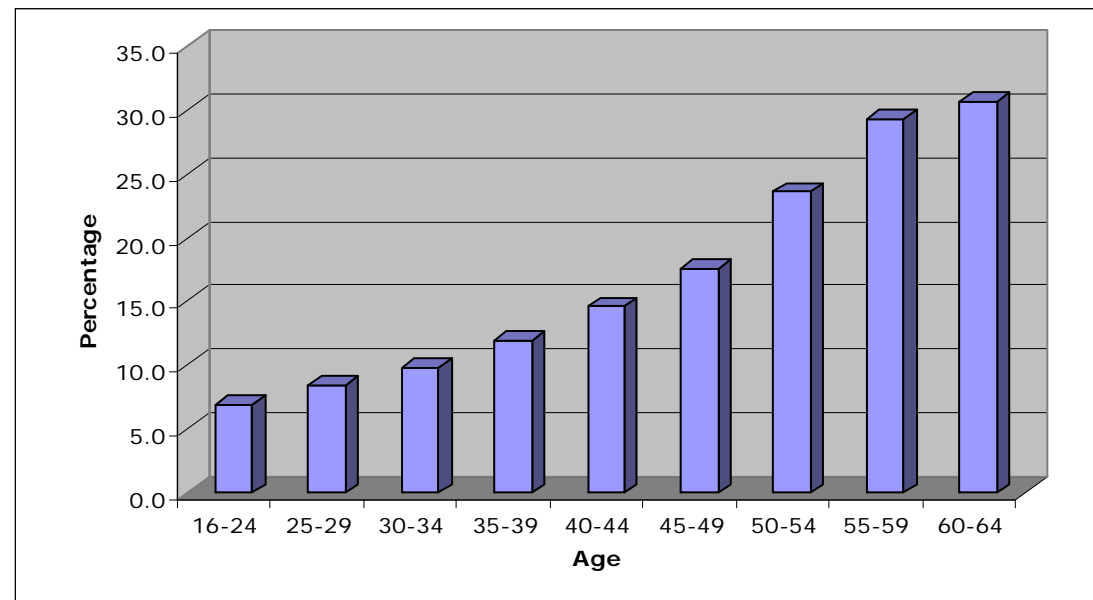
Eurostat 2005

The Elderly Population

- There is a strong and positive correlation between ageing and LSHPD

- Thus: elderly population has similar accessibility requirements as people with impairments

- Currently: Elderly population in Europe and worldwide is continuously ageing



25 European countries include = Belgium, Denmark, Germany, Greece, Spain, France, Ireland, Italy, Luxembourg, Netherlands, Portugal, Austria, Finland, Sweden, United Kingdom, Czech Republic, Estonia, Cyprus, Lithuania, Hungary, Malta, Slovenia, Slovak Republic, Norway & Romania

- By looking at European figures alone, the total number of elderly citizens is estimated to increase by nearly **35%*** by the end of 2025

* Eurostat 2003

** U.S. Census Bureau 2005

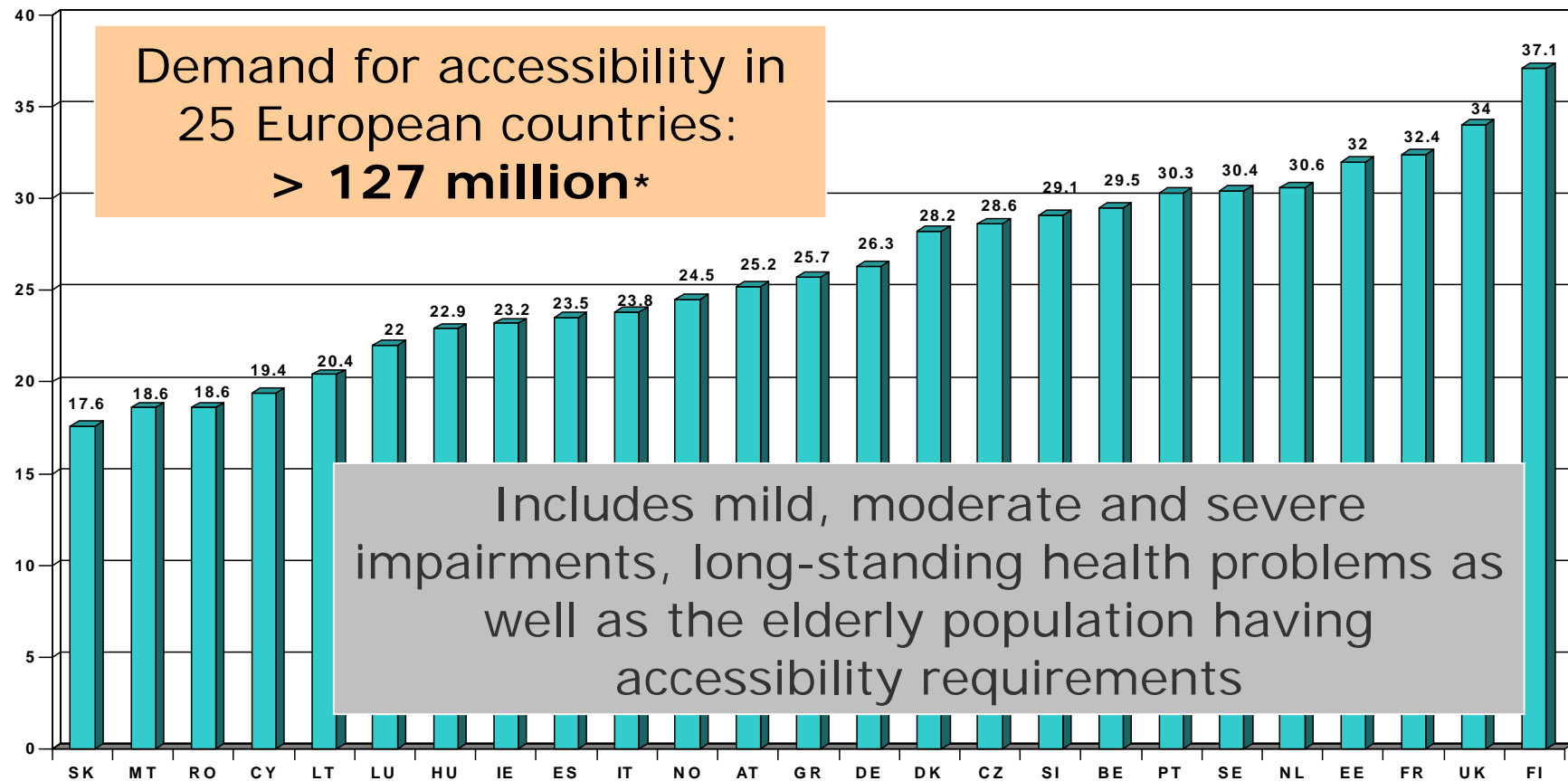
Able-Bodied Population

- Able-bodied citizens also have accessibility needs that have to be catered for
- Ability exists on a continuum of high, mid-range and low ability
- Often people have temporary limitations during the normal course of their life
- Almost everyone tends to lose ability as they age
- The “average” person often has “non-average” needs or limitations
- **Thus: Need to bring disability/ accessibility into the mainstream**



Market Size - General

Providing information about accessibility for particular people with impairments and the elderly decides whether they engage in the travel process or not.



General demand for accessibility in Europe per country (% of population)

* Eurostat 2003, 2005;
U.S. Census Bureau 2005



Tourism Market Potential in Europe

Potential Travel Market

- General demand for accessibility: **127.5 million**

- Market research has shown:
 - 70%* of the population in demand for accessibility has both, the physical as well as financial means to travel.
 - Thus: potential travel market: > **89 million**

- Further research revealed that people with accessibility needs seldom travel alone:
 - Thus: multiplier effect for friends and family members: **0.5***

**Total potential travel market in Europe:
> 133 million**

* Deloitte Touche 'Tourism for All in Europe' 1993



Potential Tourism Revenues

- Potential Tourism Revenues (average holiday expenditure in EU in 2003=620 Euro* per arrival):
> **80 billion Euros**

- In reality, these figures will even be higher due to two reasons:
 - 1. calculations based only on people with impairments, the elderly population and their friends and family members

 - 2. calculations based on Europeans. However, there are also people from all over the world which choose Europe as their holiday destination

* Eurostat 2005



Other Case Studies

Other case studies (1)

■ US:

- Figures from 1997: nearly **21%** of the US population (approx. 54 million people with impairments)*.
- By 2030: The total disabled population will increase by 30.9 million and the severely disabled population will increase by 21 million, when compared to 1997*.
- American adults with impairments spend \$13.6 billion on travel each year*
- More than 2 out of 5, who travel outside the US choose Europe as holiday destination

■ Canada:

- Figures from 1991: **15.5%** of the Canadian population (approx. 2.7 million people with impairments)**
- In 1991: 45% of persons with disabilities were 65 years of age or older***
- By 2041: ~ 23% of the Canadians will be over 65, up from 12% in 1995***

* Open Doors Organisation, 2005
** van Horn, 2002
*** Horgan-Jones & Ringaert, 2004

■ **Australia:**

- Figures from 1993: **18%** of the Australian population (approx: > 3 million persons with impairments)
- For people 75 years and older: the disability rate is 14 times in comparison to people aged 35 to 44 years.

■ **New Zealand:**

- Figures from 1997: ~ 20% of the population (approx. 80.000 people with impairments) **

* Darcy, 1998

** Shelton & Tucker, 2005

SUMMARY:

- Potentially, this is a huge market
- It will depend on the tourism industry to respond to this potential with the development of a coherent strategy to adequately target this market.



OSSATE

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THANK YOU!

**For more information about
market analysis and potential:**

www.ossate.org

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