ECONOMIC IMPACT AND TRAVEL PATTERNS OF ACCESSIBLE TOURISM IN EUROPE

Presentation of the key study findings

Service Contract SI2.ACPROCE052481700 – European Commission, DG Enterprise and Industry

Objectives and methodology

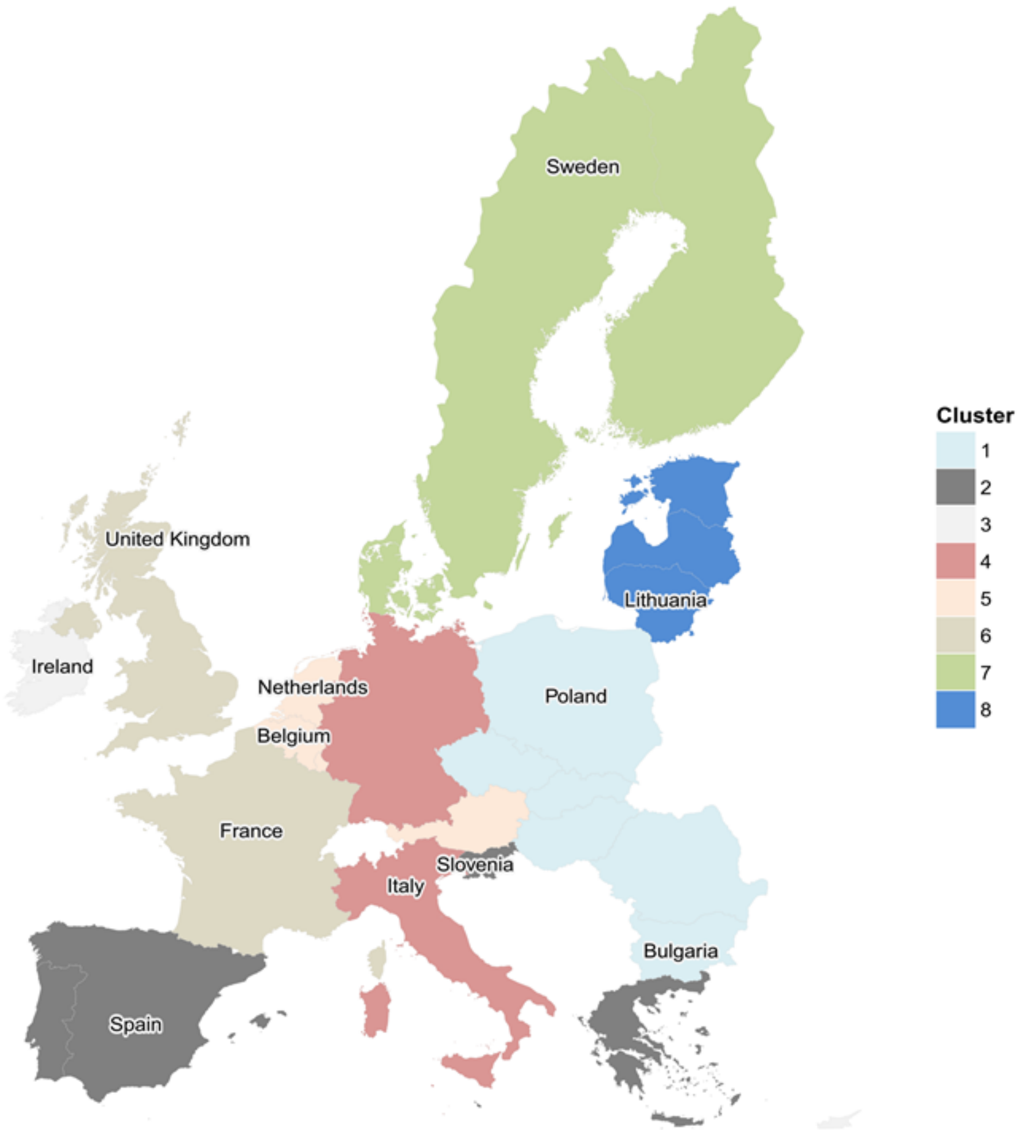
Methodology - Overview

Task 1: Current and future demand for Accessible Tourism in Europe and beyond	• Task 1a – Cluster analysis and current demand • Task 1b - Forecasting
Task 2: Travel patterns and behaviour of people with access needs	• Task 2a – Website and brochure analysis • Task 2b - Online survey and senior focus groups
Task 3: Tourist experience across different tourism sectors	• Task 3a – Case-studies • Task 3b – Desk research on barriers
Task 4: Current and future economic contribution of Accessible Tourism	• Task 4a – Stakeholder consultation • Task 4b – Scenarios and impact assessment

Task 5: Recommendations and success factors

Task 1 – Demographic profiling of tourists with special access needs

Cluster analysis – Key findings



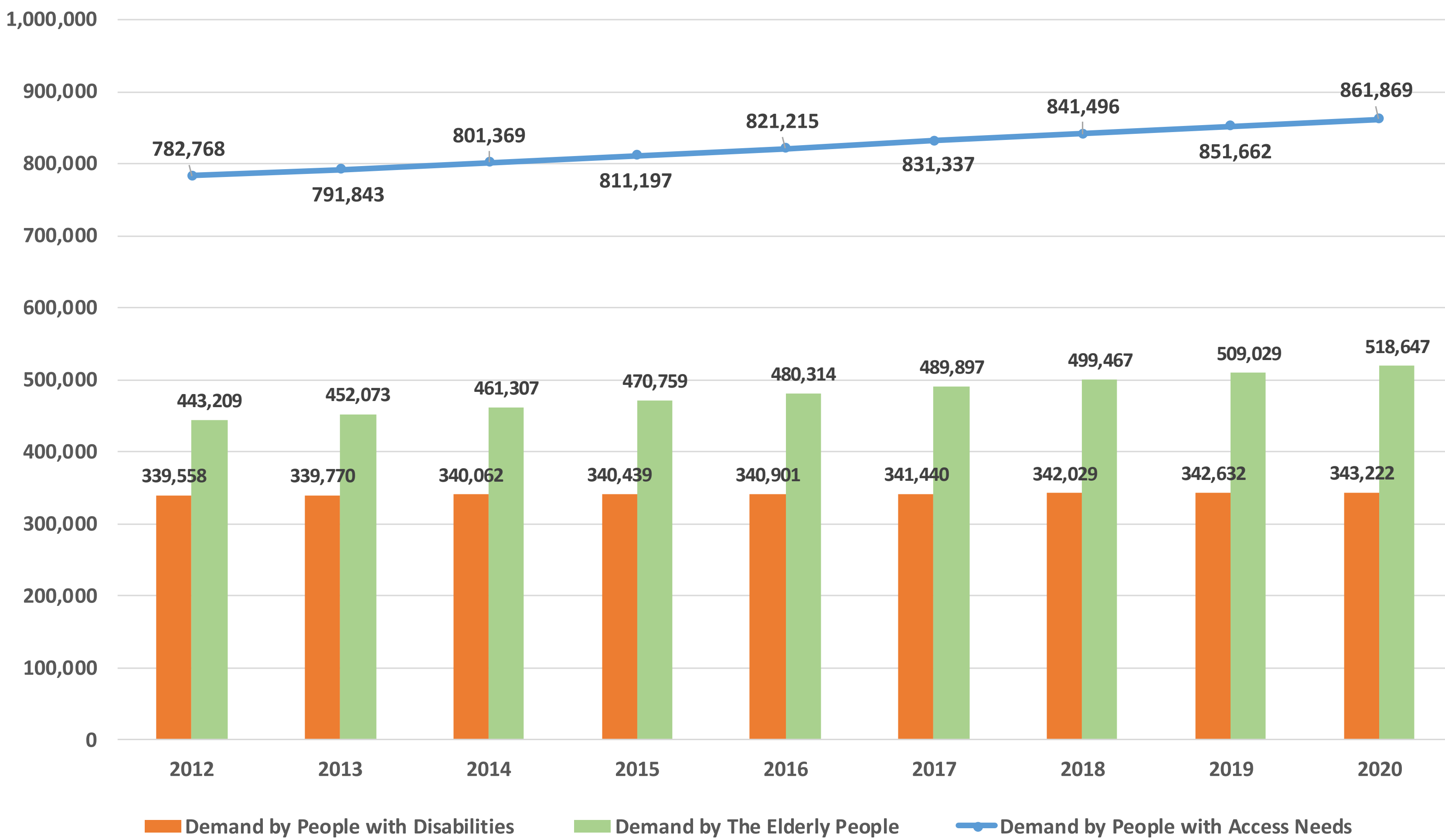
Current demand and forecasting – Key findings

1. As of 2011, there were 138.6 million people with access needs in the EU, of which 35.9% were people with disabilities aged 15-64, and 64.1% were the elderly population aged 65 or above.

2. Among the EU27 countries, UK, France, Germany, Italy and Spain are countries with the largest population of people with access needs, all above 10 million.

3. In 2012, people with access needs in the EU took approximately **783 million trips** within the EU, and the demand is anticipated to grow to about **862 million** trips per year by 2020, equivalent to an average growth rate of 1.2% annually.

Current demand and forecasting– Key findings



Current and future demand for EU's accessible tourism by EU27 countries (2012-2020)

Current demand and forecasting– Key findings

4. In 2012 more than half of the individuals with disabilities in the EU travelled; a slightly smaller proportion of the elderly people travelled during the same period.

5. The majority of the trips, either day or overnight trips, took place within the EU, particularly in home country.

Group	People with Disabilities		The Elderly population	
Travel Type	Day Trips	Overnight Trips	Day Trips	Overnight Trips
Travel Propensity	51.8%	58.1%	36.4%	47.5%
Travel Frequency	6.7	6.7	6.9	5.5
Of these, spent in				
Domestic (%)	87.1%	60.1%	87.3%	70.0%
EU (%)	10.4%	27.4%	12.1%	22.8%
International (%)	2.5%	12.5%	0.5%	7.2%

Travel behaviour of people with access needs: EU27 averages, 2012

Task 2 – Behavioural profiling of tourist with special access needs

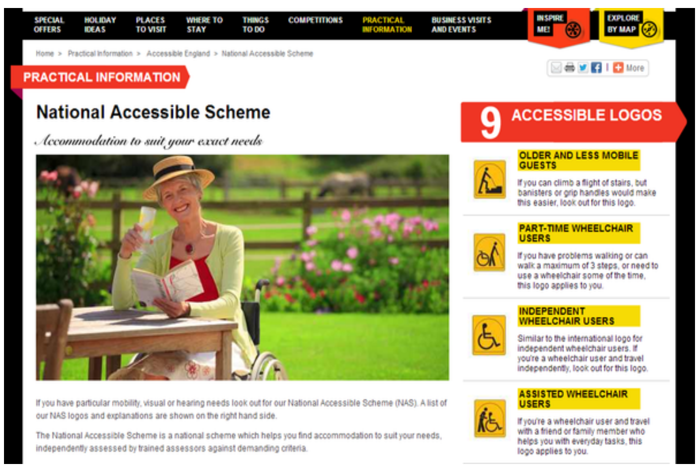
Website analysis - Key findings

70 % of all 66 surveyed websites **provide information on accessible offers.**

Destination, railway companies and airline websites fare better than tour operators and hotel chains.

61% of the surveyed websites **do not have basic accessibility features** (e.g. contrast, text alternative to images, no frames…)

Accessible features are **almost never used to promote a destination**.



Good practice - Visit England website

- Focus on marketing and travel recommendations
- Information on accessibility fully integrated in the main website
- Inclusive communication without discrimination

Brochure analysis – Key findings

2 of 12 tourism boards **do not send printed brochures** anymore

None of the 12 tourism board provided **special interest brochures** for people with access needs although **in 4 cases** information for people with access needs is given **in the main brochure**

In terms of the accessibility of the brochures themselves:

- The brochures were mostly **well laid out** and dazzle-free
- The **contrast between text and background** was sufficient in most cases
- But the **font size** was **too small** in most brochures analysed

Online survey and focus groups – Travel behavioural patterns

Overall, people with access needs share many behavioural patterns with other travellers. They **tend to use standard infrastructures**, with minorities selecting answers specific to this group.

However, people with access needs have **specific behavioural patterns when preparing a trip:**

- Many use **specialised information sources** or **book through an institution or group.**
- A majority **checks accessibility conditions** and/or available help before travelling.

- Large majorities find **information about accessibility** at destination sufficient, reliable and accessible, although this is an issue for a minority.
- The focus groups show evidence of **advance planning** aiming at preventing issues and fulfilling specific needs.

Online survey and focus groups – Barriers

People with access needs **experience obstacles** of different kinds when travelling but **may not always perceive them as barriers**.

The availability of medical help and **health treatments** get low satisfaction scores and are mentioned fairly frequently as barriers.

Among accessibility-related aspects, the **availability of information about accessible services** and **accessible locations** are also mentioned as barriers.

There is evidence of issues with the **price of accessibility**, with some people saying they had to pay more than the standard price or had to switch to a more expensive product or service at least sometimes for them to be accessible.

Many people do not perceive barriers as such or have developed strategies to avoid experiencing barriers, including advance planning.

People with access needs are **not a uniform group** and their attitudes and behaviour vary across countries, types of access needs and types of limitation.

Online survey and focus groups – Improvements to accessibility and behavioural changes

Improvements to accessibility may lead to behavioural changes among sizeable proportions of people with access needs

Improvements to accessibility

Possible behavioural changes

- Seniors and people with limitations most often mention **medical help** and menus for **special dietary needs**.
- These items are also mentioned often by people who travel with children, together with **equipment and activities for children**.
- In terms of building accessibility, the aspects seen as most important by all three groups are **accessible toilets**, **accessible parking spaces** and the **ease of use of lifts.**

- Sizeable minorities would consider increasing their **travel budget** or **travelling more often**
- **Over 80%** say they are **likely to return** to a destination when they are satisfied with accessibility

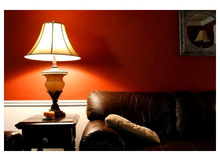
Task 3 – Evaluation of the tourist experience across different tourism sectors

Case studies

Case studies	
	City of Erfurt
	Accessible Poland Tours
	Chateau des Ducs de Bretagne
	St. Martin Wine Cellar
	Berlin
	Barcelona Metro
	Scandic Hotels
	GVAM Mobile Guides for All
	Restaurant Monnalisa
	Restaurant Girasoli

Case-studies – Key findings

1. Although social responsibility is a motivation, it can be combined with a **focus on business**. In mainstream tourism services investment in accessibility results in **increased client numbers**. The return on investment correlates with a correct management of the 7 Success Factors



2. Destinations that take care of accessibility are usually focused on **service quality in general**. Some destinations succeed in including accessibility, comfort and services in their **branding**. The **communication style** for accessible facilities is always **positive** and avoids “charity or social service” style language.

Case-studies – Key findings

3. Successful accessible destinations show some kind of **cooperation among service providers** or accessible services are guaranteed along the tourism chain. The **commitment of the decision makers** and **training of the staff** are key aspects.

4. The **importance of investment varies largely** depending on the type of services provided and whether the accessibility improvements have been **included since inception**, have been planned or have been made **in response to demand**. To **plan the actions** and anticipate the results before starting is also a key element of success.

Barriers encountered during travel – Key findings

- At the pre-travel stage: The **lack or limited availability of information** about accessible services represents the biggest barrier.
- At the transit/ transport stage: airlines cause the most difficulties particularly with regard to the **lack of toilets**.
- At a destination, people with access needs encounter different levels of frequency of barriers across key tourism sectors.
  - Barriers in the **transport** sector at the destination are faced more often compared to other sectors.
  - For people with sensory, communication and hidden limitations, barriers in the **food and beverage** sector are encountered significantly more often than in the accommodation sector.
  - **Nature based activities** are associated with the most important barriers at 10 out of 15 destinations.
  - The lack of accessible **toilets** represents an important barrier across all sectors.
- **Overall, attitudinal barriers are encountered more often than physical access barriers**

Task 4 - Estimate of the current and future economic contribution of accessible tourism

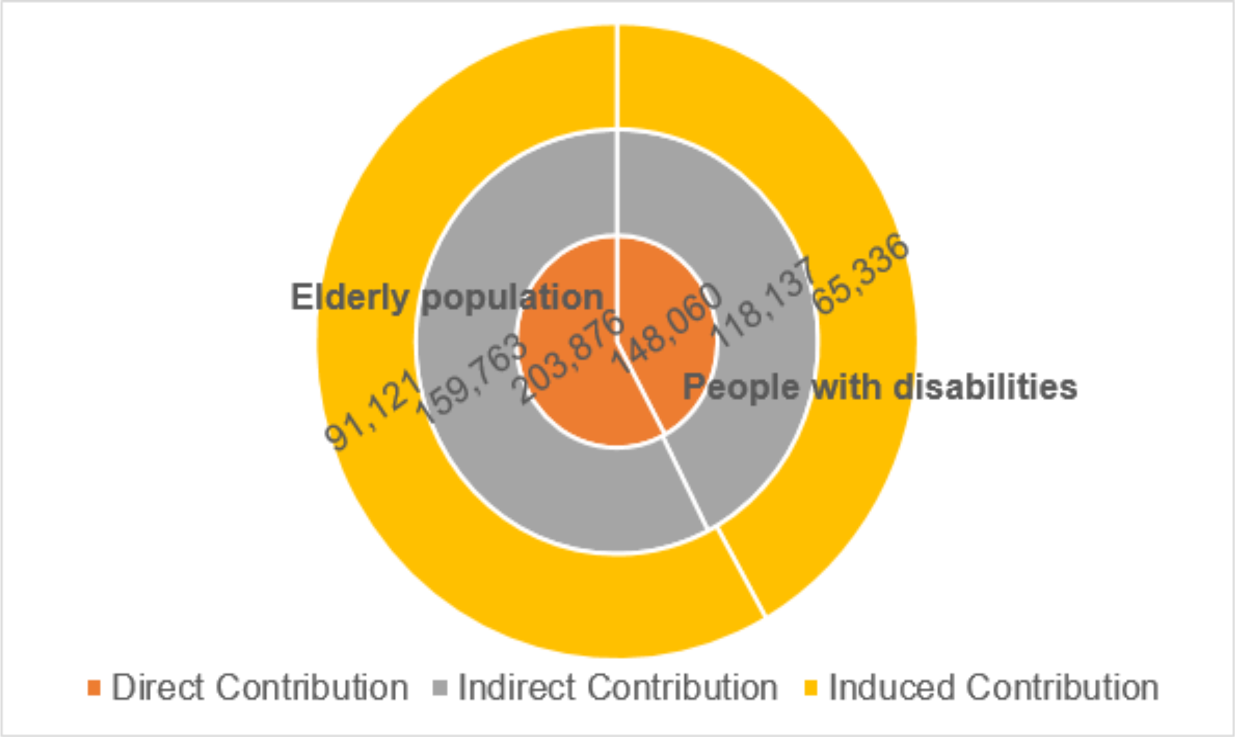
Stakeholder consultation – Key findings

1. Accessible tourism is considered a **business opportunity** but there is a **lack of coordination**, particularly between the public and private sector.
2. Accessibility is **mainly understood as a feature for disabled guests** and almost never understood as a plus in comfort and service. Therefore product development and marketing mainly targets disabled people and **accessibility is not used in marketing** and advertising.
3. For the tourism business, **political and financial support, awareness raising** and **engagement of service providers** are important drivers.
4. For the guest, **reliable information on accessible offers and services** is a key factor for success.

Economic impact assessment – Key findings

Economic impact assessment – Key findings

1. The direct gross turnover of EU's Accessible Tourism in 2012 was about **€352 billion**; after taking the multiplier effect into account, the total gross turnover contribution amounted to about **€786 billion**.



Current gross turnover contribution in 2012 (€ million)

Economic impact assessment – Key findings

2. The direct gross value added of EU's Accessible Tourism in 2012 was about **€150 billion**; after taking the multiplier effect into account, the total gross value added contribution amounted to about **€356 billion**.

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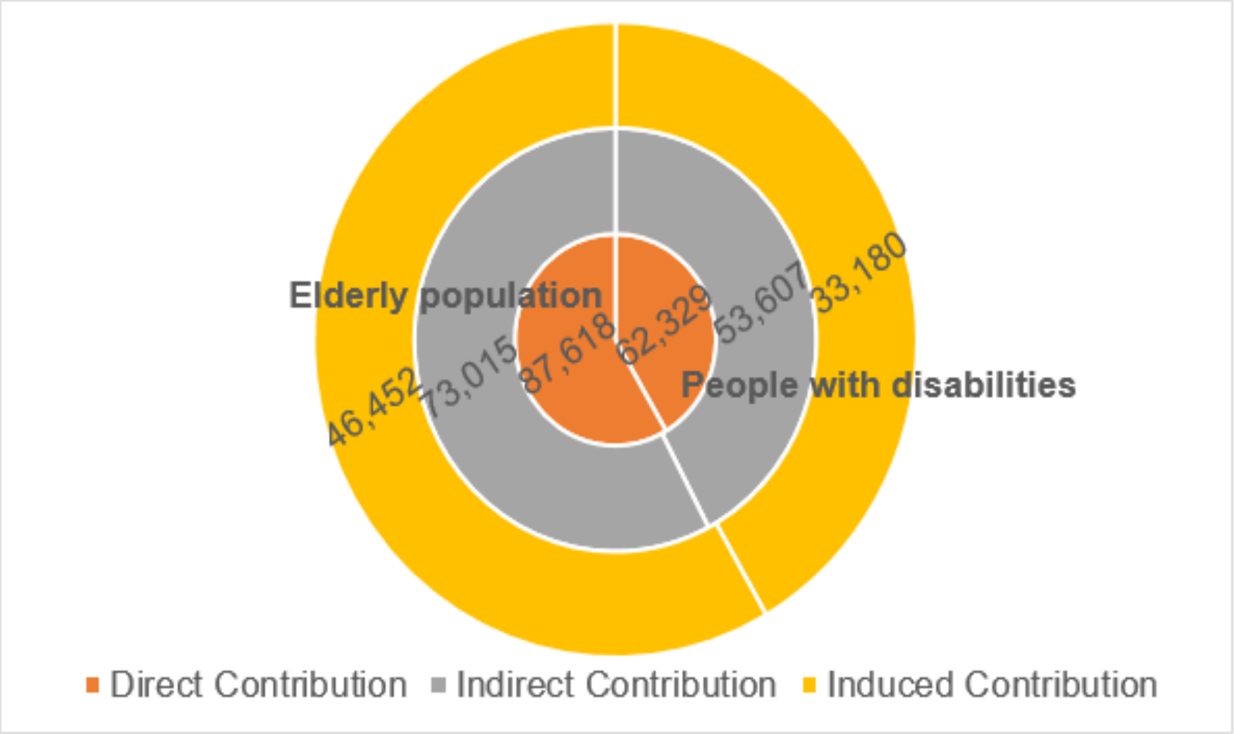
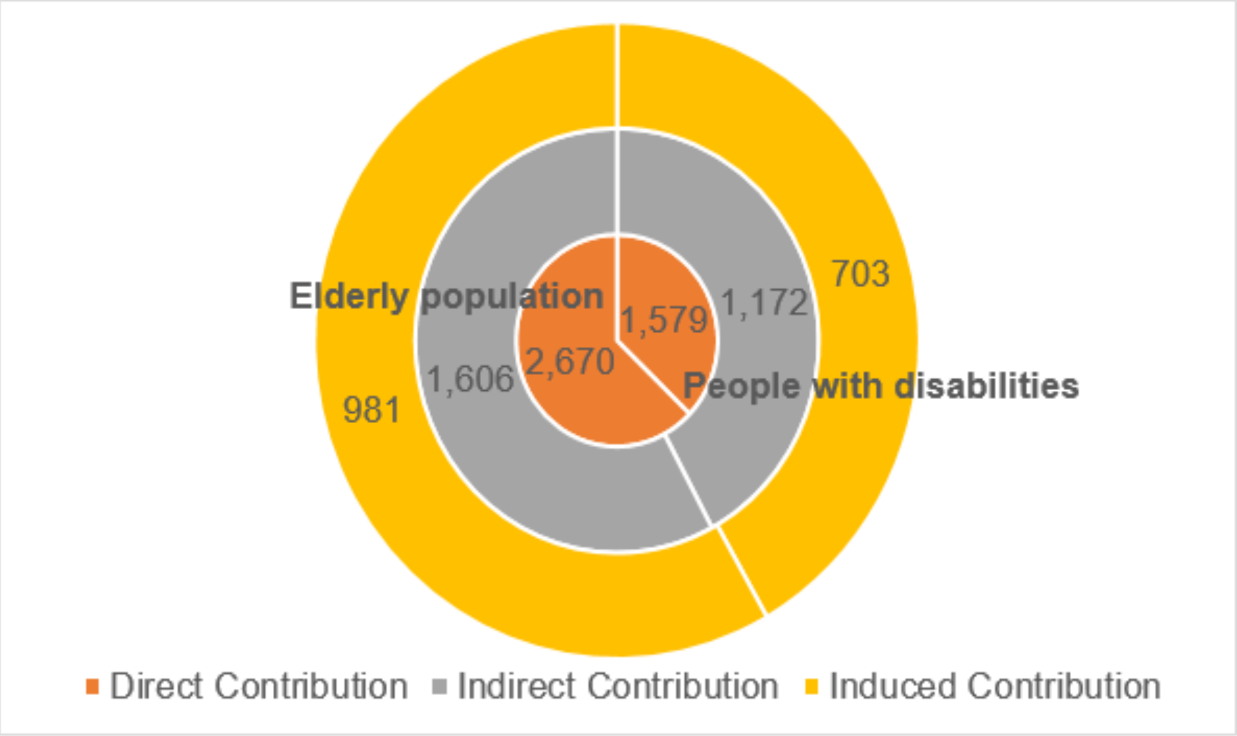


Current gross value added contribution in 2012 (€ million)

Economic impact assessment – Key findings

3. The direct employment contribution of EU's Accessible Tourism in 2012 was about 4.2 million persons; after taking the multiplier effect into account, the total employment generated was about 8.7 million persons.



Current employment contribution in 2012 ('000 persons)

Scenario analysis

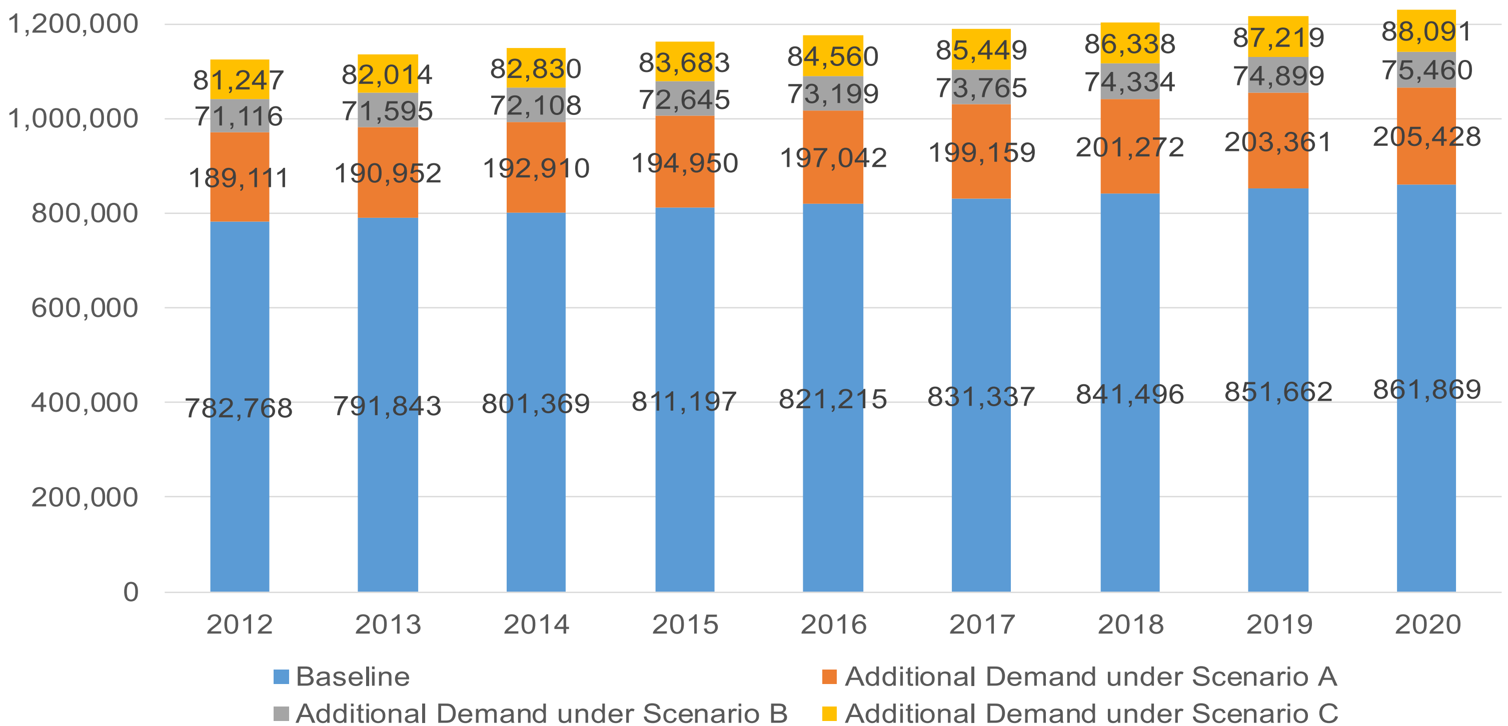
Scenario A: At the destination some buildings and types of transport are made accessible, but not all of them. The services provided by some of the hotels, restaurants and museums have been adapted for special needs, but no other services – like wheelchairs – are available. The staff know very little about special needs and cannot help much. Information about accessibility is difficult to find and not reliable.

Scenario B: At the destination most buildings and types of transport are made accessible. The services provided by most of the hotels, restaurants and museums are adapted for special needs, and some services – like wheelchairs, visual or hearing aids – are available. The staff have basic knowledge of special needs and can help a little. Information on accessibility and services is available when requested and is reliable.

Scenario C: At the destination almost all buildings and types of transport are made accessible. The services provided by almost all of the hotels, restaurants and museums are adapted for special needs, and many services – like wheelchairs, visual or hearing aids, medical services, dedicated personal assistants etc. – are available. The staff have good knowledge of special needs and can help a lot. Information on accessibility is easy to find, reliable and indicates if a location may be difficult to access.

Scenario analysis – Key findings

1. With improvements of accessibility, current tourism demand in 2012 could potentially increase against the current level by **24.2%**, **33.2%** and **43.6%** under Scenarios A, B and C, respectively.



Potential Demand for EU's Accessible Tourism by people with access needs in the EU27 countries ('000 trips)

Scenario analysis – Key findings

2. If accessibility is improved, the total economic contribution generated by the EU tourists is expected to increase against the current contribution by roughly **18%**, **25%** and **36%** under Scenarios A, B and C, respectively.

3. The existing travellers would be the major driving forces of Accessible Tourism under all three scenarios, although the share of contributions by the new travellers gets higher and higher with improvements of accessibility.

Scenario	Scenario A		Scenario B		Scenario C	
Group	People with disabilities	The elderly population	People with disabilities	The elderly population	People with disabilities	The elderly population
Direct economic contribution (gross turnover, € million) of which, generated by	176,668	239,277	191,878	247,192	209,461	270,505
Existing travellers	85.7%	85.3%	79.9%	82.8%	77.4%	78.2%
New travellers	14.3%	14.7%	20.1%	17.2%	22.6%	21.8%

Distribution of direct economic contribution under different scenarios between existing travellers and new travellers

Travel companions – Key findings

1. On average, people with access needs in the EU travel with about **1.9 companions**; people with disabilities tend to travel with more companions than the elderly population (**2.2** and **1.6**, respectively).

2. The economic contribution of Accessible Tourism will be amplified by a similar scale if the travel companion effect is taken into account.

Key findings

Key findings – Task 1

Task 1a – Cluster analysis

- A cluster analysis based on travel behaviour (with 13 criteria related location, demographics, income and education) was used to group EU Member States in 8 clusters.
- 12 representative countries were selected: Belgium, Bulgaria, France, Ireland, Italy, Lithuania, the Netherlands, Poland, Slovenia, Spain, Sweden, and the United Kingdom.

Task 1b – Forecasting

- In 2012, people with access needs in the EU took approximately 783 million trips within the EU, and the demand is anticipated to grow to about 862 million trips per year by 2020.

Key findings – Task 2

Website and

- Almost 70 % of all 66 surveyed websites provide information on accessible offers, but accessible features are almost never used to promote a destination.
- Special interest brochures with information for people with access needs were not always available from the tourism boards of the 12 surveyed countries.

Task 2b - Online survey and senior focus groups

- 2534 people with access needs were surveyed in total in 12 EU Member States and 4 inbound markets (Russia, China, Brazil and the US) and 2 focus groups of 12 participants each were organised in Lithuania and Ireland with people above 65.
- Overall, people with access needs share many behavioural patterns with other travellers, although they differentiate themselves in the preparation process.
- The price of accessibility, medical help, the availability of information about accessibility and the accessibility of locations itself are seen as issues by some.
- There is evidence that many people with access needs adapt to issues as they arise and do not perceive them as barriers as such.
- People with access needs are not a uniform group: results vary between people who travel with children, people aged 65 and above and people with limitations, and across countries and limitations.
- Results point towards possible behaviour changes if accessibility conditions were improved, such as an increase in travel budget or travel frequency.

Key findings – Task 3

Task 3a – Case-studies

- 10 case-studies were analysed across the EU.
- In most cases accessibility is integrated as part of the quality policy.
- The closer the cooperation with other local service providers the greater the success.
- Although social responsibility is a motivation, it does not imply that the company deviates from its own business focus.
- The engagement and training of the staff is a key issue in improving results.
- Knowledge transfer flows more easily when the organisation is part of professional networks.
- Planning and anticipating the results before starting is also a key element of success.

Task 3b – Desk research on barriers

- People with access needs experience different levels of frequency of barriers across key tourism sectors. The barriers experienced in the transport stage (at the destination) are faced more often compared to other sectors
- The identification of different barriers for each tourism sector helps to remove existing obstacles for people with different access needs
- Overall, attitudinal barriers are encountered more often than physical access barriers across all sectors

Key findings – Task 4

Task 4a – Stakeholder consultation

- 21 stakeholders took part in a pre-focus group and 15 in the main focus group. This consultation was completed by 11 telephone interviews.
- Accessible tourism is considered a business opportunity but there is a lack of coordination, particularly between the public and private sector.
- Accessibility is mainly understood as a feature for disabled guests and almost never as a plus in comfort and service and, therefore, not widely used in marketing and advertising.
- For the tourism business, political and financial support, awareness raising and engagement of service providers are important drivers.
- For the guest, reliable information on accessible offers and services is a key factor for success.

Task 4b – Scenarios and impact assessment

- Under scenarios of minimum, medium and extensive improvements, the tourism demand could potentially increase against the current level by 24.2%, 33.2% and 43.6%, respectively.
- The current tourism demand in 2012 generated €786 billion of gross turnover and €394 billion of GDP, equivalent to about 2.75% of the total EU27 GDP, and 8.7 million persons of employment within the EU, considering direct, indirect and induced contributions.
- The EU economy could benefit from further contribution under scenarios of minimum, medium and extensive improvements by about 18%, 25% and 36% against the current level, respectively.

Recommendations and success factors

Task 5: Recommendations and success factors (1)

1. Commitment of the decision-makers

- Integration in mainstream offers
- Encourage service providers to invest in accessible tourism and demonstrate its economic and social benefits
- Harmonise standards and legislation to provide better guidance for providers and clearer information for users
- Strong and on-going support from politicians, administrators and decision makers in business – including education and training as well as direct financial support

2. Coordinating and continuity

- Improve the industry's coordination efforts, particularly through public-private partnerships and on local and regional levels
- Assign dedicated work unit or coordinator within the management structure of tourism organisations with appropriate resources

Task 5: Recommendations and success factors (2)

3. Networking and participation

- Encourage knowledge transfer, particularly through professional networks
- Guarantee the accessible offer across all categories of services and prices offered at the destination

4. Strategic planning

- Step 1: awareness of the diversity of access needs and patterns of travel behaviour across different groups and countries, but also across individuals within groups, to target them in the most appropriate way
- Step 2: an inventory of the current offer in terms of infrastructure, services and possibilities for improvement
- Step 3: improve the offer gradually, include accessibility in long-term planning and investments and develop feedback tools for customers to establish accessibility priorities
- Step 4: improve marketing and advertising strategies by taking into account accessibility features

Task 5: Recommendations and success factors (3)

5. Knowledge management and qualification

- Staff with a solid knowledge base on accessibility through good knowledge management
- Regular training of staff and management

6. Optimisation of resources

- Using as many resources as possible for a strategic development of accessible tourism
- Prioritising tasks along the service chain

7. Communication and marketing

- Include sufficient accessibility information in mainstream tourism information
- Take personal information and recommendations into account in marketing strategies (e.g. through social media)

THANK YOU FOR YOUR ATTENTION

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