1st Open Webinar on Emerging Inclusive Tourism Markets: New Business Opportunities for Greece

European Network for Accessible Tourism a.s.b.l.
In collaboration with inclusivegreece.com
9 February 2022

https://www.accessibletourism.org #EUaccessstourism

Speakers

- Ivor Ambrose, Managing Director, ENAT
- Dimitrios Buhalis, Professor, Bournemouth University Business School, UK and Visiting Professor, School of Hotel and Tourism Management, The Hong Kong Polytechnic University
- Magnus Berglund, Former Director of Accessibility, Scandic Hotels, Sweden
- Katerina Papamichail, Architect, Expert in Accessibility and Universal Design, ENAT
- Ignatios Fotiou, CEO, TOBEA A/S, Inventor and supplier of “Seatrac”.
- Sabine Switalla, CEO, InclusiveGreece.

Discussant: George Pelekenakis, President, Hotel Managers’ Association in Greece.

Questions and Answers via Zoom chat

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Emerging Inclusive Tourism Markets – the New Business Opportunities for Greece

- What are the challenges?
- How have other countries and regions tackled these issues and what can Greek businesses and destinations learn from them?
- Will Greece reap the benefits of the 130 Billion Euro accessible tourism market, or will the country miss out on this enormous economic opportunity?
- How can Greek tourism businesses prepare for this emerging market?

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About ENAT

- EU project, 2006 to 2007
- Mainstreaming disability
- Combating discrimination
- ENAT founded as non-profit association, Brussels 2008
- International Board of Directors
- Multi-stakeholder network

Who we are:

- 250+ members
- 50+ countries world-wide

Promoting Tourism for All

www.accessibletourism.org
A few ENAT Members and Partners

Tourism for All
Accessible, Inclusive Tourism is not “special” tourism…

It is part of every kind of offer

• Accommodation
• Adventure
• Culture
• Gastronomy
• Conferences & Fairs
• With kids
• Education
• Nature in the city
• City Break
• Religion
• Sports & Events
• Festivals

The Visitor Journey

Adapted from Lane (2007)
The Accessible Tourism Market in the European Union. Some figures…

- Accessible Tourism in Europe generated €400 billion revenues per annum and is expected to grow annually by 1% for the coming years
- Accessible Tourism accounted for 3% of total EU GDP
- It supports 9 million jobs
- **But: only 9% of EU tourism providers promote themselves as “accessible”**
  - Market demand for accessible tourism could rise 44% per year if appropriate services were put in place
  - Improvements in access could raise the economic contribution of Accessible Tourism by 25%
  - And improved accessibility could attract up to 75% more international travellers

*(European Commission Study by GFK, University of Surrey and others, 2014)*

Relation between ageing and disability

![Graph showing the relation between ageing and disability](http://www.who.int/disabilities/world_report/2011/en/)

“Seniors” are 65% of the Accessible Tourism Market

- 1 in 5 persons in European Union are over 60
- They want to travel and enjoy life
- Seniors from Europe take 6 to 7 trips a year
- They have most discretionary income
- They are more active, “youthful”
- They take most overseas trips
- They travel around the year

“PRMs” are a growing proportion of the total market

“The annual growth in PRM numbers is at least six times that of the overall rate of passenger growth at many airports globally”

European Regions Airline Association, 2018
Travel companions – the “multiplier effect”

People with access requirements travel with **1.9 companions** (on average)

**On average:**
- People with disabilities have +2.2 companions
- Older people +1.6 companions

**AND they…**
- Stay longer
- Spend more
- Make more repeat visits
- Travel throughout the year

(EC Study 2014)

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The Business Case for Accessible Tourism

Total value of accessible tourism market in Great Britain is around £15.3 billion

**Graph of trips taken by those with an impairment and their travelling companions in 2018**

- Total spend
  - The total expenditure generated by those with an impairment or those travelling within a group where a member had an impairment is estimated to be £15.3 billion
  - Inbound visitor spending by this group was £0.5 billion in 2018
  - Domestic overnight visitor spending by this group was £3.2 billion in 2015
  - Day visitor spending by this group was £11.6 billion in 2018.

**Currency Values:**
- GBP 15.3 Billion
- EUR 17.78 Billion
- USD 21.17 Billion
- GBP 11.6 Billion
- EUR 13.5 Billion
- USD 16 Billion
- GBP 3.2 Billion
- EUR 3.72 Billion
- USD 4.43 Billion

Great Britain Day Visitor Survey 2018, Great Britain Tourism Survey 2015 and International Passenger Survey 2018
The Business Case for Accessible Tourism

England trips taken by those with an impairment and their travelling companions in 2018

Contribution to tourism - spend

The spend from trips taken by those with an impairment and their travelling companions made up:

- 2.2% of all inbound trip spending in 2018
- 16% of domestic overnight trip spending in 2015
- 20% of day visit spending in 2018.

Great Britain Day Visitor Survey 2018, Great Britain Tourism Survey 2015 and International Passenger Survey 2018

The Business Case for Accessible Tourism

England trips taken by those with an impairment and their travelling companions in 2018

Average spend

- The average spend per inbound visit was £660 for all trips, compared to £740 for trips taken by those with an impairment and their travelling companions.
- The average spend per domestic overnight trip was £191 for all trips, compared to £210 for trips taken by those with an impairment and their travelling companions.

Great Britain Day Visitor Survey 2018, Great Britain Tourism Survey 2015 and International Passenger Survey 2018
The Business Case for Accessible Tourism

England trips taken by those with an impairment and their travelling companions in 2018

Average length of stay

- The average length of stay per inbound visit was 7.3 nights for all trips, compared to 11.6 nights for trips taken by those with an impairment and their travelling companions.
- The average length of stay per domestic overnight trip was 2.9 nights for all trips, compared to 3.3 nights for trips taken by those with an impairment and their travelling companions.

Great Britain Day Visitor Survey 2018, Great Britain Tourism Survey 2015 and International Passenger Survey 2018

The Business Case for Accessible Tourism

Open Doors Organization / Harris Poll, USA Market Study, 2020
Research Among Adults with Disabilities: Travel and Hospitality

General Travel

In the past two years, 27 million US travelers with disabilities have taken

- A total of 81 million trips and
- Spent $58.7 billion (up from $34.6 billion in 2015).
- 38% of adults with disabilities have taken a flight on a trip (31% in 2015), amounting to nearly 15 million air travelers taking 29.6 million air trips
- Generating $11 billion in spending (up from $9 billion in 2015).
The Business Case for Accessible Tourism

Open Doors Organization / Harris Poll, USA Market Study, 2020
Research Among Adults with Disabilities: Travel and Hospitality

• In 2018-2019, the majority of adults with disabilities (70%) have taken at least one trip – and over 4 in 10 (42%) have taken 3 or more.

• Nearly one-fifth (19%) were frequent travelers, taking 6 or more trips over the 2-year period, a slight increase from 2015 (17%)

• Almost all traveled at least once for pleasure (69%), taking 2 trips on average over the 2-year period; while 13% took at least one business trip, making 2 such trips on average;

• 14% took at least one combination trip (business & pleasure), making 3 such trips on average.

• When taking a trip, the majority of travelers with disabilities are generally accompanied by someone (69%); fewer than one-third travel alone (31%).
Accessible, Inclusive Tourism: How to proceed?

1. Improve your knowledge and skills through training & education
   [Link to ENAT Training]

2. Improve your offer (infrastructure, services)
   [Link to ENAT Projects and Good Practices]

3. Improve communication and information to business partners & visitors
   [Link to Pantou]

Building Back Better with Accessible Tourism

- Improve physical access conditions in destinations and local communities
- Improve access in local transport and mobility services
- Train staff, local jobs, better service
- Tourism products for the wider market – catering to all ages and interests
- Market accessible destinations in Access Guides, websites and apps
- Foster local and domestic tourism.

Accessibility from start to finish...

...Improve the quality of tourism

... Leave no-one behind
Thank you for your attention!

Contact: enat@accessibletourism.org

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