

## Let's Make Europe a Tourism Destination for All!



we want



for All

**Ivor Ambrose**

**Managing Director**

**European Network for Accessible Tourism – ENAT**

Web: [www.accessibletourism.org](http://www.accessibletourism.org)

Email: [enat@accessibletourism.org](mailto:enat@accessibletourism.org)

**EDF Freedom of Movement campaign:** <http://www.edf-feph.org>

In Europe, the subject of *access to tourism, travel and leisure for persons with disabilities* has been relatively neglected by policy makers compared with, for example, access to employment, education, assistive technologies or personal assistance.

European businesses generally have little knowledge – and many misconceptions – about the market of tourists with access needs.

EDF's *Freedom of Movement campaign* is rightly focusing on cross-border mobility and targeting the barriers that stand in the way of free movement of disabled citizens. The campaign is very much needed and is an important reminder of how far European society still has to go to ensure that citizens with disabilities can exercise their rights equitably – also as tourists.

Travelling for business or for pleasure is no less relevant for a European citizen who is disabled but the barriers are far greater. The list of difficulties is legion and every part of the visitor's journey can be affected. Surveys have shown that a third to one half of all persons with a disability do not take holidays because of poor accessibility or unknown accessibility conditions in transportation or at the destination.

### **Who needs good accessibility?**

One of our ENAT partners in Belgium, The Accessibility Office – TGB, has produced this cartoon sketch of the range of people who need good accessibility.



It is important to note that young and old, visitors and employees, parents with small children, people with a permanent or temporary disability and those carrying heavy luggage all need good access. We should also remember that around 30% of people with a disability have a condition which is "invisible" and people may have more than one disability.

The customers who need good access can have various requirements. Their demands depend on the circumstances of each individual but if we categorise and analyse the main types of needs it is then possible to make the necessary provisions to cater for everyone. Tourism and transport providers must look at their ways of doing things and adjust their offers and products to take the various needs into account – this is the meaning of "Accessible Tourism for All".

Today, all European Union (EU) Member States have different forms of legislation which require specific access measures for people with disabilities to the built environment. However, the European Union as a whole does not have a single set of agreed standards for disabled access. Nor are there common standards for accessibility in relation to *tourism venues* or *tourism services*, in particular. Moreover, in the few EU Member States and neighbouring European countries which do have technical standards or guidelines for disabled access in tourism, these standards are not harmonised with each other.

For any disabled or elderly traveller either from an EU member state or from overseas who wishes travel to an EU country the lack of similar or coordinated access standards presents a big challenge. The choice of suitable holiday destinations is significantly limited by the varied quality of accessibility in *transport, venues and services*.

In general, the larger part of the tourism industry is not at all familiar with the customers who make up the accessible tourism market. Visitors' needs and requirements are unknown or misunderstood. Therefore the market is avoided.

Investment costs are misunderstood and exaggerated. Access is seen mainly as a "problem" rather than a "golden opportunity". This is a communication issue and a cultural issue, as well as being an economic and technical one. Businesses are hesitant about this market and many are lacking the confidence to find out how to serve customers with access needs.

In fact, the accessible tourism market is part of every tourism market – or at least it should be. The needs of disabled visitors and others who require accessible services and facilities should be considered as part of all tourism offers. What is important to these tourists is that their access requirements needs are catered for throughout their entire journey. This means, from the moment of browsing websites and catalogues to booking the trip; to taking the train, bus, ferry or aeroplane; through to the hotel, food and drink, activities and excursions and then sharing the experience with others when they come home again, *every aspect of the journey must be accessible.*

Most importantly, *accessible tourism is not meant to be a new kind of tourism, offering segregated travel, only for people with disabilities.* Instead, accessibility must be integrated in every kind of tourism offer and experience, allowing all people to take part in cultural, rural, gastronomy, adventure tourism, or whatever it may be. Good access makes it possible to decide and take the trip or holiday you prefer.

ENAT emphasises that accessibility needs to be addressed in **information, transport, infrastructure and services.** We refer to “*the chain of accessibility*” being only as good as the weakest link. And if one part of the chain is missing, then the trip will be spoiled.

### **Accessible information**

Disabled travellers need accurate and reliable information about access conditions at destinations, venues, and in transport and accommodation. The general lack of this kind of information in marketing and publicity materials is a huge limitation which narrows the choices of where to go and what to do. Even where accessible facilities exist they are often not advertised or the information is tucked away in the back of brochures and the depths of websites.

### **Accessible transport**

Transport is still a major barrier for many persons with disabilities, despite several EU regulations in recent years and gradual improvements in practices in the Member States. Most trains (and many metro and tram systems) in European countries are inaccessible for wheelchair users and it can be necessary to give notice 24 or even 48 hours before taking a journey in order to have an assistant to provide an access ramp at the platform of departure and arrival.

Taking an aeroplane - which is a common occurrence for many non-disabled people nowadays - can be physically troublesome and psychologically challenging for the disabled traveller. Stories abound about the trials and tragedies of disabled people passing through airports, security check-points and on aeroplanes. EU regulations place certain requirements to provide assistance in the larger airports but many disabled travellers have negative experiences of air travel. There is still a long way to go before all passengers receive the same level of customer care, comfort and respect throughout the whole of Europe.

### **Accessible infrastructure**

In the outdoor environment many physical barriers limit the movement of people with mobility, visual and other impairments or restrictions. Public spaces in villages, towns

and cities are an essential ingredient in the visitor's experience of Europe. The quality and attraction of these spaces often relates to their historical character with features that have remained unchanged, even for centuries. Many projects and initiatives have shown that such environments can be preserved *and* made more accessible for people with reduced mobility but all too often older - and even newer - urban environments are difficult places to navigate and manoeuvre through for older and disabled visitors

In many of Europe's hotels and other overnight accommodation the most basic facilities - *well-designed toilets and bathrooms that are accessible for all guests* are still the exception. Vibrating fire alarms which can be placed under the pillow are an important safety device for hotel guests who are deaf but these are rarely available. Provision of a shower chair and a non-slip bath mat are cheap and effective ways to ensure a guest's comfort and safety but they are seldom to be found. Building entrances and their surroundings, internal spaces, passenger lifts and other facilities must be upgraded wherever they are inadequate for guests with access needs.

Here, in particular, a single set of European standards for physical accessibility would provide a much needed benchmark and a common language for defining and specifying accessible solutions which could be applied to tourism infrastructure, as well as all other types of buildings and environments. ENAT supports the current efforts by the European Commission to develop commonly defined EU standards for the built environment, as these could support efforts to improve access and reduce the uncertainty of travel for millions of disabled tourists.

### **Accessible services**

Visitor attractions and activities at tourist venues frequently present access problems for customers with reduced mobility or those who are deaf, blind or partially sighted, and children or adults with learning difficulties. Visitors with disabilities are limited in their possibilities for participation when the services on offer do not take into account their needs and abilities; consequently, their holiday experiences can be greatly limited.

Staff awareness of disabled customers requirements, as well as basic knowledge and skills must be developed through training, so that all customers can receive the services they need – in a relaxed and friendly manner.

Appropriate measures should be taken to ensure that communication with guests is smooth and easy. It is important to provide information with clear signage and also in alternative formats such as large-print menus, information in Braille and written information. Hearing loops in reception areas, ticket booths and conference rooms to enable people who use a hearing aid to hear comfortably.

New types of information and navigation services that are offered via smart phones and other new technologies can also be a useful aid for visitors at a destination. These applications, that are increasing rapidly in the market place, should be designed to be accessible to persons with disabilities – and they should include content which describes the accessibility features (or barriers) of the places and the

activities on offer. Online ticketing and payment systems should also be accessible to persons with disabilities, which is not always the case.

### **Travel and Tourism is international!**

It is obvious that travel and tourism often involves crossing national boundaries. This can bring particular difficulties for disabled visitors. Foreign visitors with disabilities (either from other EU countries or from overseas) can be refused entry to tourist attractions at reduced prices or they may have to pay a ticket for a personal assistant, although disabled people from that country may not be so obliged.

Visitors in wheelchairs and with walking difficulties have been denied the use of equipment such as lifts in ferry-boats and entrance to attractions and monuments on the grounds that they do not have the disability card which is issued by the national authorities.

For local transportation in cities, airport transfers and at other destinations, lack of a disabled citizen's pass or other requirements can prevent disabled visitors from using services such as accessible minivans. Where the only alternatives are private hire vehicles this can result in exorbitant charges (as compared to regular taxis).

### **A Call for Accessible Travel and Tourism for All**

With the examples given above, it is abundantly clear that there are many and varied challenges for disabled travellers in Europe today. These challenges need to be addressed by a wide variety of actors in the tourism and travel sector working together – and also with organisations of disabled people. From the public policymakers and destination managers to the small hotel owners, from the travel agents to the pursers on the passenger ferries, from the airline manufacturers to the car rental firms and from the designers of tourist websites to the sales departments of international tour operators – all must play their part.

It is time to face up to these challenges and make a decisive push towards accessible tourism for at least *three important reasons*. These are:

1. The moral duty and legal imperative of making reasonable adjustments to customers' needs;
2. Demographic ageing and the growing market of people with access needs; and
3. The business case for accessible tourism: how better access can generate profits and improve the competitiveness of destinations and enterprises.

Let us consider these points, one-by one:

#### **Moral duty and legal obligations**

Some people may feel it is counter-productive to emphasise *moral duties* and *legal obligations* when talking to the tourism industry about improving their accessibility. While large sections of the tourism industry may not be aware of it, *the rights of persons with disabilities to equal participation in society* are being strengthened in Europe and throughout the world.

The most significant development to be aware of in this area is the *UN Convention on the Rights of Persons with Disabilities (2007)*, which has been ratified by the whole of the European Union and by 14 Member States so far. *Article 30* of the UN Convention includes the objective of ensuring equal access to Leisure, Sport and Tourism. According to the convention, reasonable accommodations must be made by providers to ensure that tourism venues and services are accessible for all customers, without discrimination.

EU Member States are driving forward an *equal access agenda*, based on the principle of non-discrimination and equal participation of persons with disabilities. National laws are being modified and adapted to meet the objectives in the UN Convention and to implement the *Optional Protocol*.

In Europe as a whole, service providers – including those in the tourism sector – can expect that new rules will be introduced to create a single European market for goods and services which are accessible to all citizens. The “legacy” problems of outdated buildings, inaccessible transport systems, and “old ways of doing things” must be firmly tackled by public bodies and private enterprises everywhere. The old ways must be replaced by a *new, inclusive approach* to the design and construction of tourist facilities and services for citizens and visitors alike.

As a non-governmental organisation which has been specially formed to promote accessible tourism in enterprises, ENAT is concerned that public and private tourism providers must have the right tools to address their legal responsibilities with confidence, under existing and future legislation. Access improvements will not come overnight and they cannot be achieved without sound advice and qualified guidance.

By working together with public authorities, tourism operators, NGOs and suppliers, ENAT is seeking to ensure that information on “best practices” in accessible tourism reach the tourism industry and that new guidelines and standards can be developed in order to allow all players to deliver accessible tourism to their guests. In this effort, ENAT is pleased to work with the European Disability Forum and to cooperate in the *Freedom of Movement* campaign.

### **Demographics point the way**

The population of Europe is rapidly changing towards a society with a higher proportion of older citizens. Indeed, demographic ageing is increasing in Europe and developed countries worldwide. Currently, more than 75 million people in Europe over 65 years of age. Looking at European figures alone, the total number of elderly citizens is estimated to increase to nearly **35%** by the end of 2025. This has huge implications for the tourism sector, especially regarding access issues.

It is well known that the incidence of disability increases with age. At age 60 to 64, 60% of the population has some kind of permanent health problem or disabilities. But the new generations of older citizens in Europe want to travel, whether or not they may be disabled or have some mobility difficulties or a health condition. They have been used to travelling and exercising their independence throughout their lives and being able to do so for as long as possible is, for many, a defining part of their existence.

Considering the wider population of those who require good access, it is evident that accessible tourism is not a small “niche” market. A study by the University of Surrey in 2005 showed that the potential accessible travel market is estimated at more than 133 million tourists, taking into account those with disabilities and long-term health problems, together with their travel companions. The potential tourism revenue (based on average holiday expenditure in EU in 2003, of 620 Euro per arrival) is greater than 80 billion Euros. In reality, these figures will even be higher for two reasons. Firstly, calculations are based only on people with disabilities, the elderly population and their friends and family members. The market is much wider than that. Secondly, the calculations are only based on Europeans. However, there are also people from all over the world who choose Europe as their holiday destination and many of these are seniors and people with disabilities or reduced mobility. So these must be added to the overall numbers.

### **The business case for accessible tourism**

Rather surprisingly, it has been difficult to gain an accurate picture of how many people with disabilities *actually* travel, until quite recently.

In Australia, the USA and in England a few studies and surveys have begun to show the size and nature of the actual accessible tourism market.

#### **Australia**

Tourism expert, Professor Simon Darcy, of the Technical University of Sydney puts the percentage of Australian tourists with disabilities at around 11% of the total number of tourists. In Australia in 2003–04 it is estimated that tourists with a disability:

- spent between \$8034.68 million and \$11980.272 million
- contributed between \$3075.5243 million and \$4580.219 million to Tourism Gross Value Added (12.27%–15.60 % of total tourism GVA)
- contributed between \$ 3885.168 million and \$5787.435 million to Tourism Gross Domestic Product (11.02%–16.41% of total)
- sustained between 51 820 and 77 495 direct jobs in the tourism industry (11.6%–17.3% of direct tourism employment)

Source: Dwyer & Darcy 2008 Economic Contribution of Accessible Tourism in Australia

#### **USA**

“American adults with disabilities or reduced mobility currently spend an average of 13.6 billion dollars a year on travel. Creating accessible cruise ships, accessible ship terminals, accessible ground transportation, and accessible tourist destinations is not charity – it is just good business”.

Dr. Scott Rains, Disabled travel expert and educator. [www.rollinggrains.com](http://www.rollinggrains.com)

## England

In 2009, for the first time, the national tourism authority, “VisitEngland” asked the UK Visitor Survey to include a question for guests staying in overnight accommodation:

- *Do you or does anyone travelling with you have a disability or a long-term health problem?*
- 11% of all visitors answered “yes”.
- Based on the figures for overnight accommodation and spending, disabled visitors contributed almost £2bn to the English domestic visitor economy in 2009.

Interestingly, the survey showed that disabled visitors stay longer and spend more per visit on average. From other surveys it is also shown that disabled visitors are also more likely to return to an accessible venue, following a good first experience.

Responding to the English market figures, above, James Berresford, Chief Executive of VisitEngland said:

*“It is vital that our tourism industry is in a position to cater for specific needs of anyone travelling with a health condition or impairment. VisitEngland will be leading the industry to implement a programme to improve accessibility for disabled visitors.”*

VisitEngland has produced a number of guidance documents for tourism providers, helping to raise awareness of the market opportunities and dissolving the myths about the difficulties of providing good access. With the Olympic and Paralympic Games taking place in London in 2012, tourism enterprises need to be ready for a large influx of visitors, both during Games time and in the long period of post-Games visits which invariably follow this major global event.

The market data from Australia, USA and England also point to the need for regular visitor statistics in all countries, with a focus on the market that needs good access. Policy-makers, decision-makers and tourism enterprises in the EU need to have a better overview of the full facts about the accessible tourism market in order to anticipate, plan and meet market demand. As long as there is no obligation on national tourist authorities to count the numbers of tourists with disabilities and long-term health problems, this market will continue to be overlooked. Having good statistics will demonstrate the value of this market and encourage tourism authorities and businesses to address the market more seriously and with greater enthusiasm.

## National Tourist Organisations must show leadership

In general, national tourist organisations (NTOs) have a rather varied record in the area of promoting *accessible tourism for all*. A survey conducted by ENAT in the summer of 2011 shows that of 39 NTOs in Europe (the EU-27 Member States plus 12 others), only 12 have a website which is rated as accessible for persons with disabilities. This finding is based on automated testing of the websites *at the lowest level of compliance* with the International Web Content Accessibility Guidelines (level A, version 1.0). Many NTO websites show little or no indication that web accessibility has been considered in their design, despite wide publicity on this issue in the EU and despite governments’ stated commitments to make their public websites accessible.



Moreover, only 19 of the NTO websites tested actually have information about accessible offers and places to visit for persons with disabilities. Those that do present access information vary from some excellent examples, which provide whole sections devoted to accessibility, including published audits of accommodation and premises, access statements, labelling systems and explanation of standards; to those that only show links to external websites. Yet 50% of the surveyed tourist boards carry no information for the tourist who is disabled, elderly or otherwise in need of good access. Besides this being a poor reflection on the social responsibilities of these NTOs, this must seriously lessen their chances of attracting customers and having a piece of the 80 billion Euro accessible tourism market.

### **Early adopters point the way**

Among private tourism enterprises, those who have made a commitment to accessibility are already reaping the economic rewards. They have gained a competitive edge which others envy and are now seeking to emulate. The following example taken from a recent press release can illustrate this.

**ENAT member, Scandic Hotels** is intensifying its successful focus on improved accessibility. This year, over 100 new disabled rooms will be added to the portfolio and in 2012 there will be even more to meet the large and growing demand. More and more companies and organisations seek rooms and conference facilities that are accessible to all. At the same time the numbers of older, active private travellers who are attracted by improved accessibility are increasing. Improving accessibility has proven to be a commercial success for Scandic, the Nordic region's leading hotel chain. Design for All is a key concept in Scandic's accessibility work. The aim is for the disabled rooms to be just as well designed as any other room, with practical solutions that go almost unnoticed, except by those who really need them. Hooks, mirrors and keyholes at two heights are appreciated by children, short adults and those who use a wheelchair. Height-adjustable beds and extra spacious bathrooms are popular with all guests. Scandic's comprehensive 110-point accessibility programme covers everything from team member training to adapted rooms and extensive, detailed accessibility information on every hotel's website.

*"When we take over a hotel, we implement our accessibility programme within three months and, after just one year, we tend to notice more bookings from private guests and from companies and organisations, thanks to our accessibility work. This gives us a clear competitive advantage and, as well as showing our commitment to social responsibility, we see major commercial benefits in being accessible to all,"* relates Magnus Berglund, Disability Ambassador at Scandic.

**Scandic Press Release. 21 September 2011**

## Accessible tourism – Good for business, good for tourists

The experience of Scandic Hotels and businesses like them leads us to conclude that those enterprises and destinations that fully embrace the principles of accessible tourism will see the rewards, both on their financial “bottom-line” and in terms of positive reputation as socially responsible enterprises.

To support and promote tourism businesses in Europe and around the world in their efforts, ENAT has developed the *ENAT Code of Good Conduct* commitment label. Launched in 2009, this is the first and only commitment label for NTOs, tourism businesses and organisations, recognising their efforts to promote accessible travel and tourism. Over 50 organisations have signed the ENAT Code.

### ***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.
- 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.
- 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.
- 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. Our management team includes a resource person who is responsible for accessibility matters and who can be contacted by staff and clients.

Catering for visitors with disabilities is a key factor for the development of a competitive tourism industry in Europe. Accessibility places an emphasis on high quality services, sustainability and equitable access for all. Improving accessibility can give an exceptional return on investment, enabling businesses to attract a wider market and serving all customers better.

Promoting and adopting accessible tourism will undoubtedly lead to greater *Freedom of Movement* for disabled people in Europe and for those visitors who come from around the world to experience accessible Europe.

By working together, tourism authorities, businesses, educators and NGOs can and must make European tourism accessible for all.

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## **Contact**

European Network for Accessible Tourism asbl.  
ENAT Secretariat c/o EWORX S.A.,  
Jean Moreas St. 66  
GR-15231 Halandri, Athens  
Greece.

Tel. 0030 210 614 8380  
Fax. 0030 210 672 9312  
E-mail: [enat@accessibletourism.org](mailto:enat@accessibletourism.org)

ENAT Web Site: <http://www.accessibletourism.org>  
ENAT Facebook: <http://www.facebook.com/accessibletourism>  
ENAT Twitter: <http://twitter.com/EUaccesstourism>

ENAT: The European Network for Accessible Tourism asbl is a non-profit association of organisations and individuals from the private, public and NGO sectors. Our mission is to make European tourism destinations, products and services accessible to all visitors and to help promote Accessible Tourism around the world.

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