The Impact of Accessible Tourism

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Accessible Tourism is:
“Tourism for All”
– making environments, venues and services suitable for the widest range of customers, including people with disabilities, seniors, families with small children… and many more.

Photo: Srin Madipalli
Tourists come in all shapes and sizes
Let them in!
Why Accessible Tourism?

- **Market:** Demographic ageing is happening now! Increasing demand for access.

- **Price & Quality:** Increasing global competition in terms of price and quality of tourism and travel offers.
  
  *Accessible Tourism = Quality tourism business.*

- **Rights:** The rights of persons with disabilities to equal participation in society must be respected by travel and tourism providers.
Visit: www.accessibletourism.org
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.
In Europe and around the world

- Private non-profit organisation. Founded Belgium, 2008
- Began as an EU Pilot project: “Mainstreaming Disability Policies in the Tourism Sector” (2006 -7)
- Founded by a multi-stakeholder consortium united in the purpose of developing and promoting better accessibility in tourism for ALL visitors
- Open to all organisations and persons who support its Statutes
In Europe and around the world

100 members in more than 50 countries

In Europe, Middle East, Africa, North and South America, Asia, Australasia – Pacific regions
In Europe and around the world

• The ENAT “Code of Good Conduct”
• The European Accessible Tourism Directory – [http://pantou.org](http://pantou.org)
• Website and Social Media
• ENAT Consultants:
  • International Project Management
  • Accessibility Development
  • Training and e-Learning Programmes
• ENAT Quality Label (launching 2016)
A few of ENAT’s members and partners
Why is Tourism and Travel not accessible for everyone?

ENAT Study of Tourism Supply for the EU Commission (2015)

- Only 9% of European Tourism Suppliers have “accessible” offers
- Over 3 million tourism businesses in Europe are not prepared to cater adequately to the accessibility market.
- By 2020, an additional 1.2 million enterprises need to provide accessible services in order to meet forecasted demand.
- Training hospitality managers and staff is a must.
Visitors
1. In 2011, there were 138.6 million people with access needs in the EU, of which 36% were people with disabilities aged 15-64, and 64% were elderly, aged 65 or above.

2. UK, France, Germany, Italy and Spain have largest population of people with access needs, above 10 million.

3. In 2012, people with access needs in the EU took approximately 783 million trips within the EU.

4. Demand is anticipated to grow to about 862 million trips per year by 2020, equivalent to an average growth rate of 1.2% annually.
Seniors

...are 65% of the accessible tourism market

- 1 in 5 persons in Europe are over 60
- They want to travel, enjoy life and stay well
- Seniors from Europe take 6 to 7 trips a year
- Most discretionary income
- More active “youthful”
- Most overseas trips
Relation between Ageing and Disability

World Report on Disability, 2011
People with access needs in the EU travel with about **1.9 companions**

- People with disabilities average x **2.2**
- Elderly population average x **1.6**.
Visitor Surveys by VisitEngland

Did you know...

Trip groups where a member of the party has an impairment

**Trip length and spend**

**Longer stay and higher spend**

- **AVERAGE LENGTH OF STAY**
  - OVERNIGHT TRIPS: 3.3 NIGHTS
  - ALL: 2.9 NIGHTS

- **AVERAGE SPEND**
  - OVERNIGHT TRIPS: £191
  - ALL: £184

Source: VisitEngland
£12.4BN

Spent on trips where a member of the party has an impairment.

TOTAL SPEND £12.4BN

£9.4BN
Source: ONS (2015)

Day trips

£2.7BN
Source: CTS (2015)

Domestic overnight trips

£0.3BN
Source: ONS (2015)

Inbound trips

Number of trips 0.6M
Source: CTS (2015)

Number of trips 271M
Source: CTS (2015)

Number of trips 14M
Source: CTS (2015)

Source: VisitEngland
Visitor Surveys by VisitEngland

- Day trips, 2013 (271 Million, £Billion 9.4)
- Domestic overnight trips, 2013 (14 Million, £Billion 2.7)
- Inbound trips, 2013 (0.6 Million, £Billion 0.3)
- Total trips in 2013 - (285.6 Million)
- Total spend in 2013 (£Billion 12.4)
- Average stay: 3.3 nights against 2.9 for All
- Average spend: £191 against £184 for All
- Increase in visitor numbers since 2009 (+19%)
- Increase in value since 2009 (+33%)

Source: VisitEngland
Businesses
Tourism value chain: …the 4 essentials

Accessible…

✓ **Information** - search, bookings, Websites, mobile...

✓ **Transport** - vehicles, terminals, transfers, assistance...

✓ **Infrastructure** - attractions, accommodation, restaurants, streets, beaches...

✓ **Services** - hospitality, packages, guiding, excursions, special menus, activities, tech-aids, assistance...

…throughout the entire delivery chain
Tourism value chain: …the 4 essentials

Accessible...

- **Information**: Search, bookings, Websites, mobile…
Tourism value chain: ...the 4 essentials

Accessible...

- **Transport:** Vehicles, terminals, transfers, assistance
Tourism value chain: 
…the 4 essentials

Accessible...

- **Infrastructure** - attractions, accommodation, restaurants, streets, paths, beaches...

![Infrastructure examples](images)
Tourism value chain: ...the 4 essentials

Accessible...

• Services
  - hospitality, packages, tourist guiding, excursions, special menus, activities, technical aids, personal assistance...

...throughout the entire delivery chain
Destinations
Actions are needed on every level

- International Destination (Continent)
- National Destination
- Regional Destination
- Local Destination
- Tourism Businesses
Benefits to Business & Destination

Accessibility

Improve Quality

Differentiate

New Market Opportunities

Civic Pride

More Competitive

A Better Welcome

Social Responsibility

Repeat Visits & Recommendations

Respond to Changing Markets

Create a Unique Selling Proposition

Reduce Seasonality

Inward Investment

Economic, Social & Environmental Sustainability
Benefits to Visitors

- Accessibility
  - Being Included!
  - Feeling Welcome
  - Personalized Services
  - Travel with Family or Friends
  - Unique Experiences
  - Personal Fulfillment
  - Enhanced Self Esteem
  - Greater Independence
  - Enjoy Events, Culture, Arts, Sports…
  - Opportunities for Education, Business, Cultural Exchange
“Mind the Gap” 2014
ENAT Video


• https://youtu.be/uNgEQvPj1N8
Accessible Tourism

Visitors  Businesses  Destinations

WIN  WIN  WIN
ENAT on Social Media, Web and Contact Address

ENAT Facebook
https://www.facebook.com/accessibletourism

Twitter  https://twitter.com/euaccessstourism

ENAT LinkedIn Group
https://www.linkedin.com/grp/home?gid=4003674

ENAT Facebook Group
https://www.facebook.com/groups/accessibletourism/

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Thank you

Photo credits:
Accessible Portugal
Azores for All – Cresaçor
Ivor Ambrose
European Greenways Association
Eurotaxi
Innsbruck Tourist Information Bureau
Kaya Izmir Thermal and Convention Hotel
JOB Beach Wheelchairs
Keroul
Oestetur, Portugal
Scandic Hotels
Srin Madipalli
Virgin Airlines
VisitBritain
VisitEngland
VisitFlanderners