

ELEVATOR 

**Accessible Tourism in Europe:
Setting the Scene**
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Project website: <http://www.accessibletourism.org/elevator>

Accessible Tourism is...

“Universally Designed Tourism for All”

It’s about making environments, venues and services suitable for the widest range of customers, including:

- Seniors,
- Families with small children,
- People with disabilities,
- People with long-term health conditions
- ... and many more.

Ensuring equal opportunities for everyone to enjoy tourism experiences

What is Accessible Tourism

?

Accessible Tourism is...

Providing Great Experiences for Everyone



Barcelonaturisme.com



“Tourism for All”

Accessible Tourism is....

What people do.... Being part of the scene...



Joëlette & Co

Accessible Tourism is... NOT a niche

...Part of every kind of tourism offer

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



HOTEL
ACCOMMODATION



RESTAURANTS



SHOPPING



TOURS & ATTRACTIONS

The Problem... for Visitors



- Travel for people with access requirements is unpredictable, difficult or sometimes even impossible
- Lack of choice and information about accessibility
- Quality of infrastructure, transport, services, and information varies widely from place to place
- Lack of access standards increases uncertainty, reduces travel options and allows a lack of accountability to prevail.

Tourism – open to everyone

Tourists come in all shapes and sizes

Let them in!



The Problem... For Industry - Tourism Businesses



- The accessible tourism market is relatively unknown and it seems difficult to attract with existing channels.
- Visitors' needs and requirements are unknown or misunderstood. Therefore the market is avoided.
- Investment costs are misunderstood and often exaggerated
- Access is seen mainly as a "problem" rather than a "golden opportunity".

In fact...

- 70% of disabilities are invisible!
- Guests with a temporary disability
- Guests with a long-term health condition
- Guests who are frail, with age-related health problems



Not all disabilities look like this.



Some look like this.



Not all disabilities are visible!
Please don't be so quick to judge.

positivelivingwithms.com

The Problem... for Tourism Authorities and Public Sector Agencies ("The Destination")



- Lack of political leadership on Accessibility as a quality factor in tourism development
- Lack of awareness of international commitments and Standards
- Visitors' needs and requirements are framed in terms of disability legislation alone – not the wider market
- Investment costs are misunderstood and often exaggerated
- Access is seen in terms of "compliance" where businesses resist... rather than a "golden opportunity".

The Problem...

So...

- Is it about Human Rights?
- Is it about Ethics?
- Is it about Business?

Tourism for All is about all of these:

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The Problem...

And ...

Yes, it is about **Business**

It is about **great business opportunities**

Because demand is outstripping supply by far...

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 **A matter of Rights:**
UN Convention on the Rights of People with Disabilities (2006)

- Aims to “**promote, protect and ensure the full and equal enjoyment of all human rights and fundamental freedoms by all persons with disabilities, and to promote respect for their inherent dignity**”.
- 1 billion people have a disability (World Bank, 2011)

1 000 000 000 One in seven people, worldwide

- Article 30 requires : “**Equal access to participation in cultural life, including leisure, tourism and sport**”
- Convention signed by 177 States parties (July 2016).
- Optional Protocol Ratifications/Accessions by 92 States parties

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Developing the tourism supply chain:
...the 4 essentials

Accessible...

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

...throughout the entire delivery chain

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Tourism for All: A matter of Ethics
(UNWTO 1999)

- A comprehensive set of principles designed to guide key-players in tourism development.
- Addressed to governments, the travel industry, communities and tourists
- Aims to help maximise the sector’s benefits while minimising its potentially negative impact on the environment, cultural heritage and societies across the globe.



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Developing the tourism supply chain:
...the 4 essentials

Accessible...

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

...throughout the entire delivery chain

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Developing the tourism supply chain:
...the 4 essentials

Accessible...

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



...throughout the entire delivery chain

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The Accessible Tourism Supply Chain



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Developing the tourism supply chain:
...the 4 essentials

Accessible...

• **Services**

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



...throughout the entire delivery chain

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Background figures & trends

- Tourism numbers rising
- Tourism receipts growing
- Global population ageing
- Increasing demand for inclusive experiences



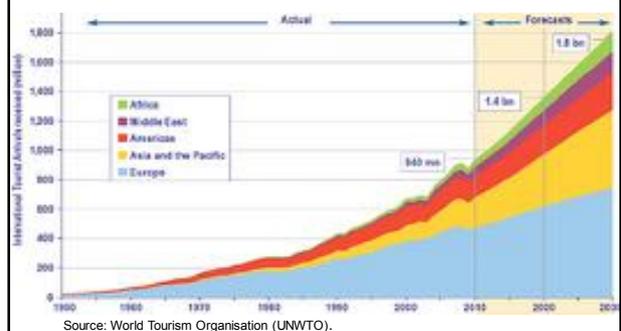
The Accessible Tourism Supply Chain

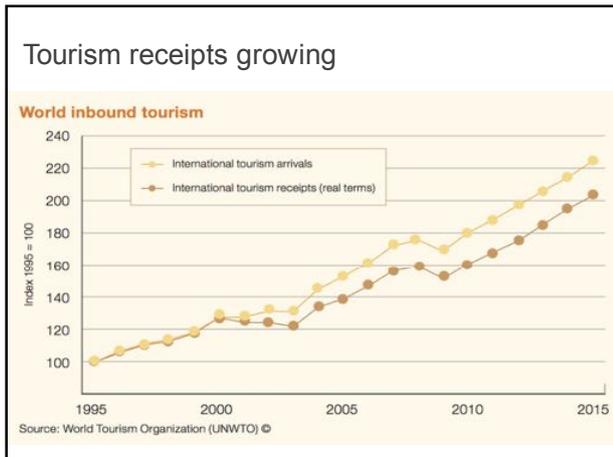
“A chain is only as strong as the weakest link...”



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An ever-rising number of tourists

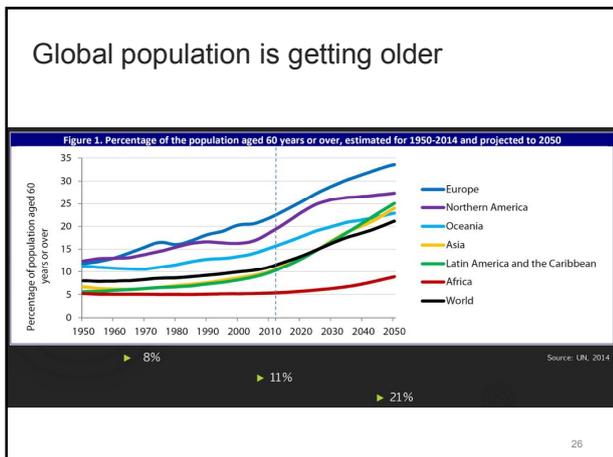




Accessible Tourism Market - Europe

- **138.6 million people with access needs in the EU (2011)**
 - **35% people with disabilities** aged 15-64, and
 - **65% older people**, aged 65 and above **UK, France,**
- **UK, France, Germany, Italy and Spain** have largest populations of people with access needs, **all above 10 million.**
- **People with access needs took 783 million trips** within the EU (2012)
- **Demand is expected to grow to 862 million trips per year by 2020, (+ 1.2% per year).**

Source: EU Study, 2015, GfK



Travel Companions

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

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



Seniors are 65% of the Accessible Tourism Market

ENAT Study of Tourism Demand for EU Commission (2014)

- 1 in 5 persons in Europe are over 60
- They want to travel and enjoy life
- Seniors from Europe take 6 to 7 trips a year
- Most discretionary income
- More active, "youthful"
- Most overseas trips

Accessible Tourism Supports Jobs and Growth

- "Accessible tourism" generated €786 billion gross turnover in 2012
- Supports 9 million jobs in Europe

Demand for Accessible Tourism in Europe

17.6 million trips to Europe in 2012 by people with specific access requirements from outside Europe

US, Switzerland and Russia as top generating markets

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Accessible Tourism Market - England

- Accessible Tourism spend: **£12.4 BN**

Source: VisitEngland

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Forecasted Demand for Accessible Tourism in Europe

- Baseline forecasts show by 2020 demand for accessible tourism from within Europe will be 862 million trips per year

Adding 21 million inbound trip per year

A FULLY ACCESSIBLE TOURISM SECTOR WOULD RESULT IN AN ADDITIONAL

€142 BILLION CONTRIBUTION TO GDP

3.4 MILLION JOBS FOR EUROPEAN ECONOMY

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Accessible Tourism Market - England

- Which disabilities?**
- Visitor Survey (2013)**
 - groups where one of the members has a disability or long-term health condition

Source: VisitEngland

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Actual Market Figures for Accessible Tourism Demand

... are still hard to come by...

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Accessible Tourism Market - England

- Stay longer
- Spend more

Source: VisitEngland

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Why is Tourism not Accessible for Everyone?

ENAT Study of Tourism Supply for EU Commission (2015)

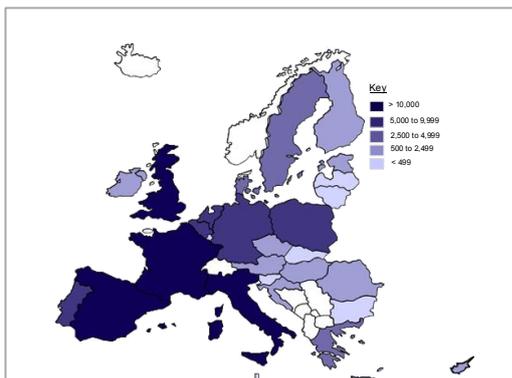
- Only **9%** of European Tourism Suppliers have "accessible" offers
- Over 3 million tourism businesses in Europe are not prepared to cater adequately to the accessibility market.
- By 2020, an additional 1.2 million enterprises need to provide accessible services in order to meet forecasted demand.

Actions are needed on every level



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Accessible Tourism Suppliers in Europe
EU Study, 2014. European Commission.



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Examples of Good Practice - Accessible Tourism Destinations - Training and Marketing

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Why is Tourism not Accessible for Everyone?

ENAT Study of Tourism Supply for EU Commission (2015)

- Businesses lack awareness of the growing market
- Destination Management Organisations need to support local businesses and networks with practical tools and information
- National and Regional Tourist Boards need to lay out strategies and begin marketing Accessible Tourism.
- **Public sector needs to ensure accessibility in public transport and the built environment.**

ENAT – in Europe & Around the World



The mission of the European Network for Accessible Tourism (ENAT) is:

to make European tourism destinations, products and services accessible to all travellers and to promote accessible tourism around the world.

[#tourism4all](https://twitter.com/tourism4all)

[@EUaccesstourism](https://twitter.com/EUaccesstourism)

Working Together: Just some of ENAT's Members & Partners

Pantou

<https://Pantou.org>

The Accessible Tourism Directory by ENAT & EWORX

ENAT – in Europe & Around the World

With almost 100 members in more than 30 countries

in Europe, Middle East, Africa, North and South America, Asia, Australasia – Pacific regions

More than 5000 followers in social media

Pantou <https://Pantou.org>

The European Accessible Tourism Directory

- Initially Funded by European Commission, SME Support Programme
- Supports Tourism SMEs
- Includes over 70 types of services, e.g. cultural heritage, accommodation, equipment suppliers, tourist guides...
- Covers ALL customer types and access needs
- Over 750 suppliers already registered**
- Free of charge**
- “Pantou” means EVERYWHERE in Greek**

Visit: www.accessibletourism.org

ENAT: Accessible Tourism Resources for Businesses and Destinations

AND LAUNCHING THIS SUMMER:

- **The World Tourism for All Quality Programme** by ENAT

VisitEngland

- England's National Tourist Board
- Lead the industry in harnessing the growing accessible tourism market
- Goal: Leading destination for people with access needs
- Business case
- Business Support tools & guidance
- Accessibility Strategy 2011
- Access for All project with National Marketing Campaign, 2016



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Business Support Resources



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VisitEngland, Accessibility Plan 2011

Vision

To harness the growing, high value accessible tourism market to become internationally recognised as a leading destination for people with access needs. This will contribute to 5% growth, year on year, in the England tourism market by 2020.

Objectives

1. To motivate tourism businesses across all sectors to improve accessibility.
2. To improve and develop tourism products across all sectors to meet the requirements of people with access needs by:
 - a. Ensuring staff are access aware and have the key skills and knowledge to meet the requirements of people with access needs.
 - b. Providing information on the accessibility of facilities and services that is detailed, accurate and readily available to enable people with access needs to make an informed choice.
 - c. Improving facilities and making reasonable adjustments as per the Equality Act 2010 for people with access needs.
3. To increase consumer awareness of accessibility initiatives and the accessibility of tourism products.



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Flanders: Heading for an accessible travel destination (since 2001)

Pillars of Accessible Tourism



Information **Customer Service** **Facilities** **Built Environment** **Transport**



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Accessibility action plan

- Awareness raising & training
- Infrastructure, equipment and events
- Reliable, objective information




Accessible tourism is...

- profitable
- sustainable
- important for the reputation of a destination

Accessible tourism is attractive



Portugal - "All for All" Programme



National Accessible Tourism Support programme

- 5 MEURO budget for 2016-17
- Applicants may be businesses or destinations
- Grants of 90%
- Up to 200,000 EURO per project
- Applicants define their priorities and requirements

Turismo de Portugal is following up the projects to extract learning and define new targets for adjusting their programme.

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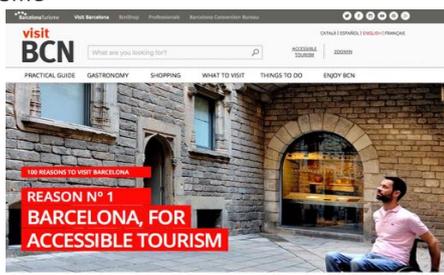
Accessible tourism is...

- profitable
- sustainable
- important for the reputation of a destination

Accessibility is part of our brand

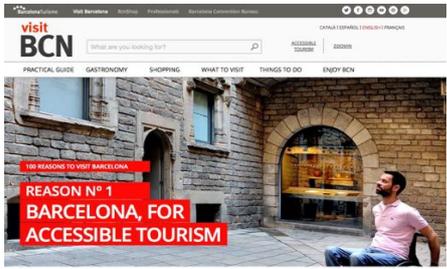


Barcelona Turisme <http://www.barcelonaturisme.com> 



Plan your trip | Must see | Buy your tickets | Move around

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Working Together....

All tourism actors and stakeholders **working together** can make **Tourism for All** a reality

Because: "Everybody deserves to live in a society that encourages them to reach their potential as equals."
 - Phil Biggs.

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Visitors	Businesses	Destinations
Win	Win	Win

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Thank you

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ENAT on Social Media,
Web and Contact Address



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