Accessible Tourism in Europe: Setting the Scene
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What is Accessible Tourism

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

Accessible Tourism is...
Providing Great Experiences for Everyone

Accessible Tourism is....
What people do…. Being part of the scene…

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Project website: http://www.accessibletourism.org/elevator
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

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

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

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”.
So…
• Is it about Human Rights?
• Is it about Ethics?
• Is it about Business?

Tourism for All is about all of these:

And …
Yes, it is about Business

It is about great business opportunities

Because demand is outstripping demand by far…

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

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.

Developing the tourism supply chain:
…the 4 essentials

Accessible…
• Information - search, bookings, Websites, mobile applications…

...throughout the entire delivery chain

Developing the tourism supply chain:
…the 4 essentials

Accessible…
• Transport - vehicles, terminals, transfers, assistance…

...throughout the entire delivery chain
Developing the tourism supply chain: …the 4 essentials

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

...throughout the entire delivery chain

The Accessible Tourism Supply Chain

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

The Accessible Tourism Supply Chain

If just one link in the chain is broken (inaccessible) the trip will be spoiled…

Background figures & trends

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

An ever-rising number of tourists

Source: World Tourism Organization (UNWTO)
Tourism receipts growing

Global population is getting older

Seniors are 65% of the Accessible Tourism Market

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, 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

Accessible Tourism Supports Jobs and Growth

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

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
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

Forecasted Demand for Accessible Tourism in Europe

1. 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

Accessible Tourism Market - England

- Accessible Tourism spend: £12.4 BN

Source: VisitEngland

Actual Market Figures for Accessible Tourism Demand

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

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

Accessible Tourism Market - England

- Stay longer
- Spend more

Source: VisitEngland
Why is Tourism not Accessible for Everyone?


- 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.

Accessible Tourism Suppliers in Europe

Actions are needed on every level

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

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 @EUaccessstourism
Working Together: Just some of ENAT’s Members & Partners

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

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

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

https://Pantou.org

The Accessible Tourism Directory by ENAT & EWORX
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

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 3% 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.

Pillars of Accessible Tourism

- Information
- Customer Service
- Facilities
- Built Environment
- Transport

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

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

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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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Accessibility is part of our brand

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http://www.barcelonaturisme.com

T-Guide e-Learning Website

Welcome to the T-Guide Training Course
Register in two steps

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http://www.accesstraining.eu/t-guide
E-Learning modules: www.accesstraining.eu/t-guide

T-Guide test-training at the British Museum

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.
Thank you

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ENAT on Social Media, Web and Contact Address

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

Twitter @EUaccessstourism

ENAT LinkedIn Group
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