Opportunities and Benefits of Accessible Tourism for All: Experiences in Germany

Dr. Peter Neumann
Department of Geography, WWU Münster

1) Introduction
2) Travel behaviour
3) Requirements
4) Economic Effects
5) Conclusion
6) Discussion
Tourism in Europe:

- **Product quality and innovation** are important factors for tourism businesses and destinations to remain competitive.
- The current situation of tourism industry in Europe is characterised by a lack of innovation to meet the main challenges.

The main challenges are:

- Reducing the **seasonality of demand**
- Minimising **resource use**
- Responding to the **climate change**
- Responding to the **demographic change**
- Responding to the **financial crisis**
- Making **holidays available to all**
Tourism and Demographic Change:

- The increasing number of people over 60 years and people with disabilities will create **new demands**
- **Tourism industry will find new markets** and **increase of turnover** if they’ll cater for the new and growing consumer groups and their demands

Questions:

- Which **demands** do the new and growing consumer groups have?
- Which segments of **tourist offers** must be newly designed or modified?
- What are the **economic effects** resulting from more accessibility and DfA in tourism?
- What are **success factors** and measures to **improve quality** in tourism?
Introduction

Study commissioned by the German Federal Ministry of Economics and Technology:
„Economic Impulses of Accessible Tourism for All“ (2003)

Methods:
- Written survey among 20,000 disabled Germans
- Special oral survey among persons with activity limitations as part of the F.U.R German Travel Analysis 2003 (7,970 persons)
- Guided interviews with 259 tourists with activity limitations and 91 tourism practitioners in 5 different tourist destinations
- Mystery Mailings and analysis of web sites
Study commissioned by the German Federal Ministry of Economics and Technology:
“Analysis of Success Factors and actions to improve quality in Accessible Tourism for All in Germany“ (2008)

Introduction

Methods:

- Special oral survey among persons with activity limitations as part of the F.U.R German Travel Analysis 2007 (7,671 persons)
- Desktop research of all 16 federal states and written interviews of 51 federal and 19 national institutions
- Comparative case studies of 6 different tourist destinations (desktop research, focus group interviews and guided interviews of travellers and tourism practitioners)
- Public discussion of first results on ITB 2008, followed by written interviews and further focus group interviews
Introduction

Accessibility is...

- Essential for the 10% of the population
- Comfortable for the 100% of the population
- Necessary for the 40% of the population

Barriers and Obstacles

- Built environment
- Information and Communication
- Service
Travel Behaviour

Travel intensity percentage (> 5 days)

<table>
<thead>
<tr>
<th></th>
<th>Total population</th>
<th>People with mobility or activity limitations</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>75,3</td>
<td>54,3</td>
</tr>
<tr>
<td>2006</td>
<td>74,7</td>
<td>58,3</td>
</tr>
<tr>
<td>Difference</td>
<td>- 0,6</td>
<td>+ 4,0</td>
</tr>
</tbody>
</table>

## Travel Behaviour

### Travel frequency (more than 5 days)

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Population</th>
<th>People with mobility or activity limitations</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>1,3</td>
<td>1,3</td>
</tr>
<tr>
<td>2006</td>
<td>1,3</td>
<td>1,4</td>
</tr>
</tbody>
</table>


### Travel destination

<table>
<thead>
<tr>
<th>Travel Destinations</th>
<th>Total Population (in %)</th>
<th>People with activity or mobility limitations (in %)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inland</td>
<td>28,4</td>
<td>42,9</td>
</tr>
<tr>
<td>Abroad</td>
<td>71,6</td>
<td>57,1</td>
</tr>
</tbody>
</table>

### Access to Internet

<table>
<thead>
<tr>
<th>Total population</th>
<th>People with mobility or activity limitations</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006 56,2</td>
<td>30,8</td>
</tr>
</tbody>
</table>


### Use of Internet (only those who have internet access)

<table>
<thead>
<tr>
<th></th>
<th>Total population</th>
<th>People with mobility or activity limitations</th>
</tr>
</thead>
<tbody>
<tr>
<td>used to get information</td>
<td>70 %</td>
<td>70 %</td>
</tr>
<tr>
<td>interested in information</td>
<td>17 %</td>
<td>21 %</td>
</tr>
<tr>
<td>used for bookings</td>
<td>34 %</td>
<td>35 %</td>
</tr>
<tr>
<td>interested in bookings</td>
<td>29 %</td>
<td>30 %</td>
</tr>
</tbody>
</table>

Travel Behaviour

Travel-Behaviour
(of German disabled tourists)

- 37% have previously decided not to travel due to the lack of accessible facilities (or information)
- 48% would travel more frequently if more accessible services were available
- 60% would be willing to pay higher travel expenses for improved accessible facilities
- 17% decided to travel abroad specifically because of the accessible facilities (or information) there

Travel Behaviour

Comparison of travel behavior of travellers with mobility or activity limitations and the average

- Hardly any difference between travel intention and behavior
- Lower travel intensity
- Loyalty to travel destinations above average
- Importance of health and nature holidays above average

- Marketing of touristic themes, instead of addressing “target groups“ (like disabled people or wheel chair users)
Consideration of the entire tourism chain:

Organisation of the trip
Excursions & Shopping
Entertainment & Culture
Services on location
Activities & Sports

Travel & Departure
Reminder & Confirmation
Arrival & moving around
Accommodation & Lodging
Food & Beverage

(Source: ADAC 2003)
### Requirements

**Other requirements:**

- Stronger consideration of demands of older and disabled travellers
- Respectful, authentic and friendly interacting with all guests

- Orienting products, services and businesses towards Design for All!

---

### Economic Effects

[Image: Accessible sign]

**Economic Effects**
Current net turnover generated by German disabled travellers

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Holidays:</td>
<td>1,5 bn Euro</td>
</tr>
<tr>
<td>Short breaks:</td>
<td>1 bn Euro</td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td><strong>2,5 bn Euro</strong></td>
</tr>
</tbody>
</table>

Economic significance of accessible tourism

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Full-time jobs:</td>
<td>65,000</td>
</tr>
</tbody>
</table>

Economic Impulses

<p>| |</p>
<table>
<thead>
<tr>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Maximum additional economic impact: up to 4.8 bn Euro</td>
</tr>
</tbody>
</table>

<p>| |</p>
<table>
<thead>
<tr>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional full-time jobs in all areas of the economy: up to 90,000</td>
</tr>
</tbody>
</table>

Source: Neumann/Reuber 2004
Further potential is available in the following areas and target groups

- Day-trip tourism
- Event & Conference tourism
- Overnight stays with friends and relatives
- Travelling companions
- Foreign tourists
- ... 

Since everyone has accessibility requirements, the actual figure of the economic effects is therefore expected to be much higher
• There is a lack of knowledge transfer on national and international level

• Accessibility is hardly considered strategically and on a long term basis

• Most activities in Accessible Tourism for All are carried out by single initiatives

• Single destinations have become leaders and secure competitive advantages

Conclusion

„Accessible Tourist Destinations in Germany“

• Realisation of an initial action recommendation of the 2008 study

• 6 founding members

• Sustainable promotion of accessible tourism

• Continuous cooperation of destinations

• Constant exchange of experiences and promotional cooperation
Conclusion

www.barrierefreie-reiseziele.de

Holidays for everyone

The members of our association “Barrier-Free Destinations in Germany” offer holidays that are accessible to all.

We are strongly committed to developing inclusive packages for visitors with special needs and those who are deaf, hard of hearing, blind or partially sighted.

Every one of our holiday regions has its own unmistakable character - from urban regions, to upland areas and the coast. Values, the arts, activities, or simply relaxation - we guarantee there won’t be a dull moment.

Further information:

Conclusion

www.erfurt-tourismus.de
Tourism industry and businesses could successfully benefit from the potentials of accessibility by understanding it as a cross-sectoral task and a quality benchmark.
Conclusion

Accessibility guaranteed sustainable turnover in tourism and improves service quality for all!

Opportunities and Benefits of Accessible Tourism for All: Experiences in Germany

Thank you for your attention!

peter.neumann@uni-muenster.de
www.uni-muenster.de/geographie
References


