Accessible Tourism in Europe:
Meeting the Challenges, Gaining the Rewards

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European Network for Accessible Tourism (ENAT)

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Overview

1. Why accessibility? Who needs accessible tourism?
2. Accessible Tourism in Europe: Challenges and Trends
    a. Market Potential
    b. Demographics & Human Rights
    c. The Business Case – Examples of Good Practices
1. Gaining the Rewards: Being part of the solution

Part 1. Why accessibility? Who needs accessible tourism?

Toegankelijkheidsbureau vzw. Belgium

Demand….

Access requirements:

- Hearing impairments
- Visual impairments
- Wheelchair users
- Walking difficulties
- Allergies / Diets
- Small or large stature
- Learning difficulties
- Frail, elderly
- Small children
- Long-term illness
- Service animal
- Understanding the language

Supply

Accessible provisions in:

- Travel offers
- Information (www…)
- Booking
- Transport
- Accommodation
- Facilities
- Diet meals
- Attractions
- Excursions, activities
- Care Services

The Problem:

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For visitors

- Travel for people with disabilities is unpredictable, difficult or sometimes even impossible
- Quality of infrastructure, transport, services, and information varies widely from place to place as well as between EU Member States
- Lack of access standards increases uncertainty, reduces travel options and allows a lack of accountability to prevail.

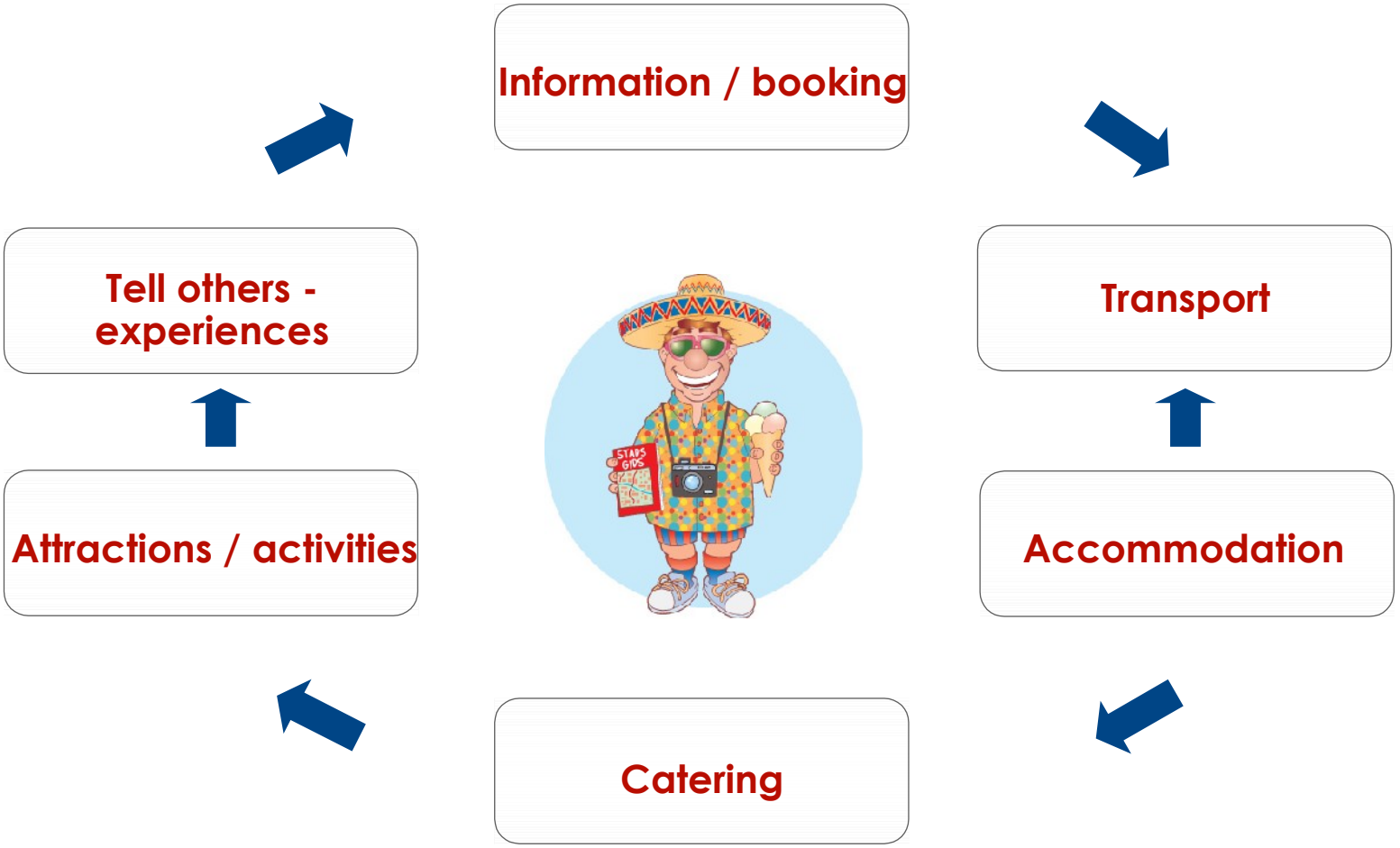
The Problem:

For the tourism industry

- 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, exaggerated
- Access is seen mainly as a ”problem” rather than a ”golden opportunity”.

When do customers need accessible tourism?

- **Throughout the "visitor journey" and the whole value chain!**



Tourism Services

Accessible… throughout entire delivery chain

- 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…

Quiz time!

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… can you see it?

Part 2.

Accessible Tourism in Europe: Challenges and Trends

a. Demographics and Market Potential

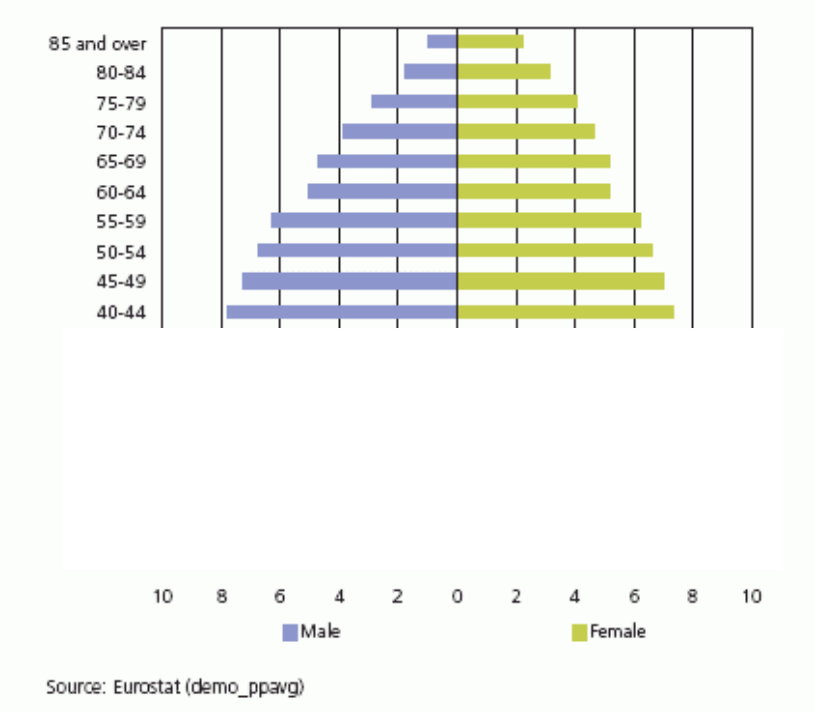
b. Human Rights

c. The Business Case – Good Practices

Demographics

Demographic ageing in Europe

… Age pyramid

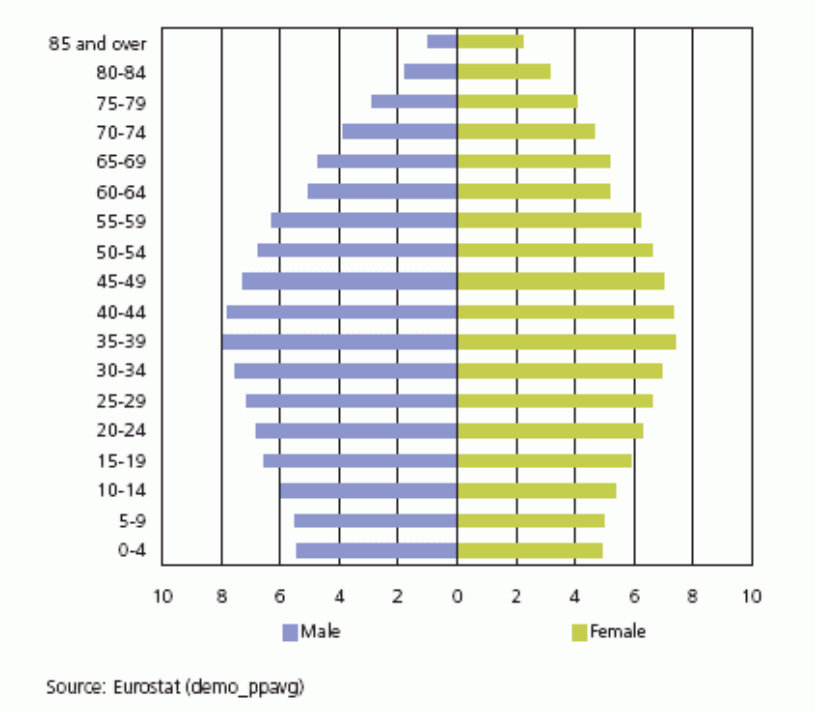


Demographics

Demographic ageing in Europe

… Age pyramid?

Link: Ageing and Disability



Ageing Europe

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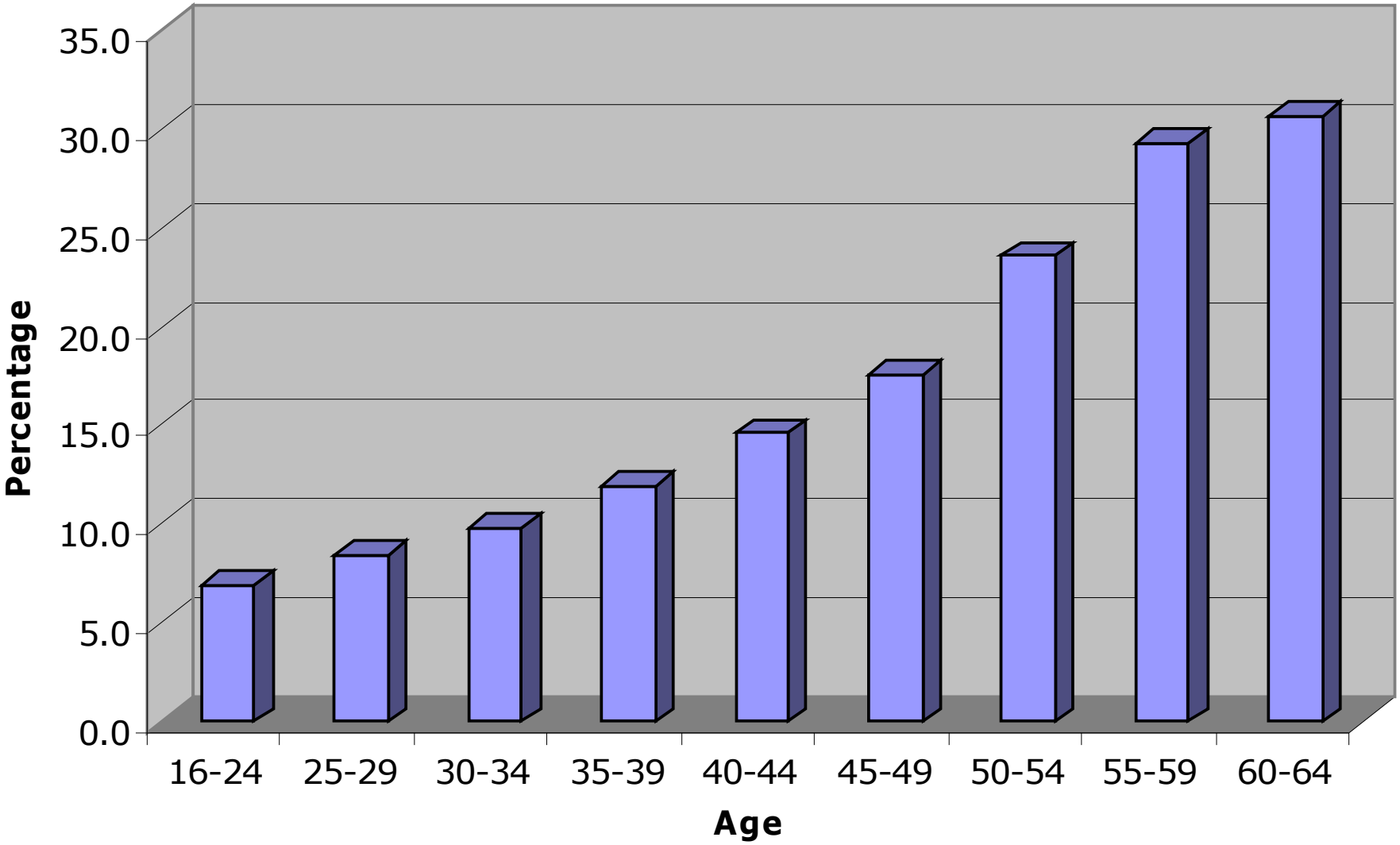
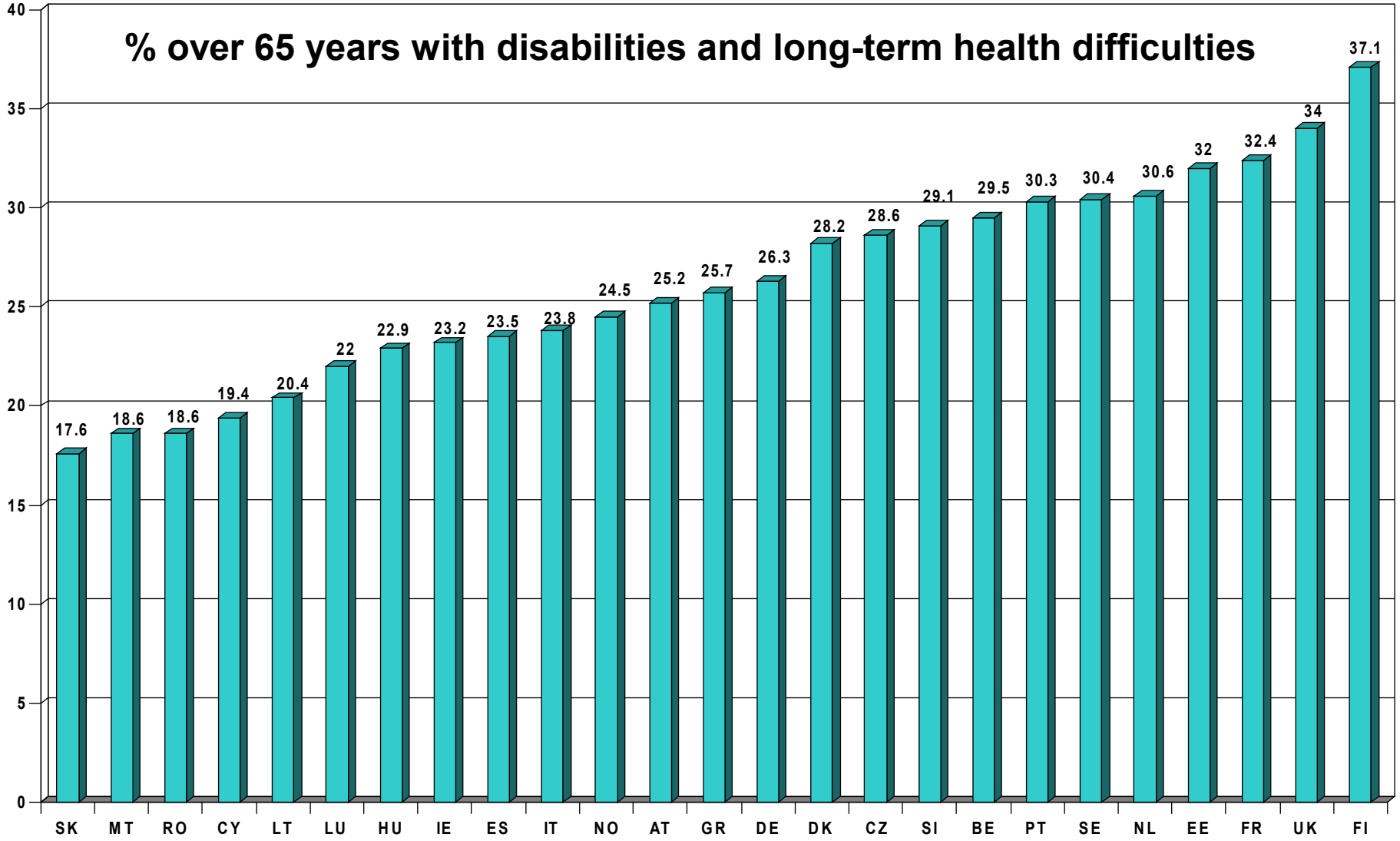


Demand for accessible tourism in Europe



Potential market for accessible tourism in Europe

- If:

  70% of the population that requires accessible tourism provisions has both the physical and the financial means to travel.

  – The potential travel market is: **> 89 million**

- But:

  – people with accessibility needs seldom travel alone:

  – With a multiplier effect for friends and family members: **x 1.5**

- Then the general demand for accessible tourism is:

  127.5 million persons

- Which is **27%** of the European population

Total potential travel market in Europe:
> 133 million tourists

Total potential travel market in Europe:
> €89 billion

Human Rights

The rights of persons with disabilities to equal participation in society must be respected by travel and tourism providers

- Overall strengthening of rights in EU states with legal powers
- Europe has signed the UN Declaration on the Rights of Persons with Disabilities
- The European Commission has proposed a Regulation on equal access to goods and services for disabled people.
- **Tourism providers must be equipped with the confidence and ability to meet their legal responsibilities.**

UNITED NATIONS enable

For Diversity Against Discrimination

Business Case

- **Good Practices in accessible tourism** are found in many EU member States.
- The important thing is to learn from them and to improve, by following the good examples.

- Projects and Good Practices on the ENAT website: http://www.accessibletourism.org/?i=enat.en.projects

Business Case

england

VisitEngland

- **"VisitEngland"** is the national tourist board for England, responsible for marketing England to domestic and established overseas markets and for improving England's tourism product.

- It provides advice to tourism enterprises, publishes market data and promotes England as a destination.

- The 2012 Olympics and Paralympic Games in London are the focus of many initiatives to improve accessibility – and not only in London.

- Compliance with the UK Disability Discrimination Act impacts the sector.

http://www.visitengland.org/

Business Case

england

VisitEngland

In 2009 "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".**

➢ Disabled visitors contributed almost £2bn to the English domestic visitor economy in 2009. (11% of total spending)
➢ Disabled visitors stay longer and spend more per visit, on average.

http://www.visitengland.org/

Business Case

england

VisitEngland

James Berresford, Chief Executive:

"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."

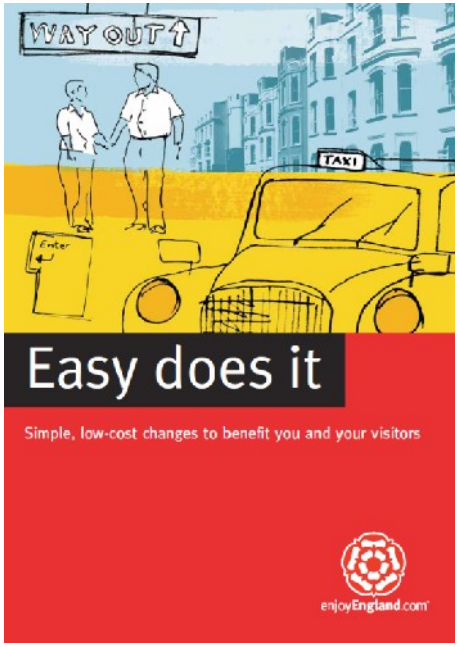
- ***Access statements*** *for tourism businesses – downloadable templates*
- *Brochures* ***"Easy Does It", "One Step Ahead"*** *and* ***"At Your Service"***

http://www.visitengland.org/

Business Case

england

VisitEngland



http://www.visitengland.org/

Business Case

Great Britain

Accessibility information on tourist-travel booking websites

• In Britain, **over 7000 hotels and Bed & Breakfast establishments** publish accessibility information on their websites, enabling customers to find out what to expect before they book.

• The access information is collected as part of the VB Quality Scheme, using the access audit questions developed by the EU-funded **OSSATE** project ("One-Stop-Shop for Accessible Tourism in Europe")

• **Web statistics have shown that in 2010, sites which display access information achieve 25% more "click-through-to-booking" than sites which have no access information.**

http://www.visitbritain.org/

Business Case

Spain

EUROTAXI – White Paper 2011

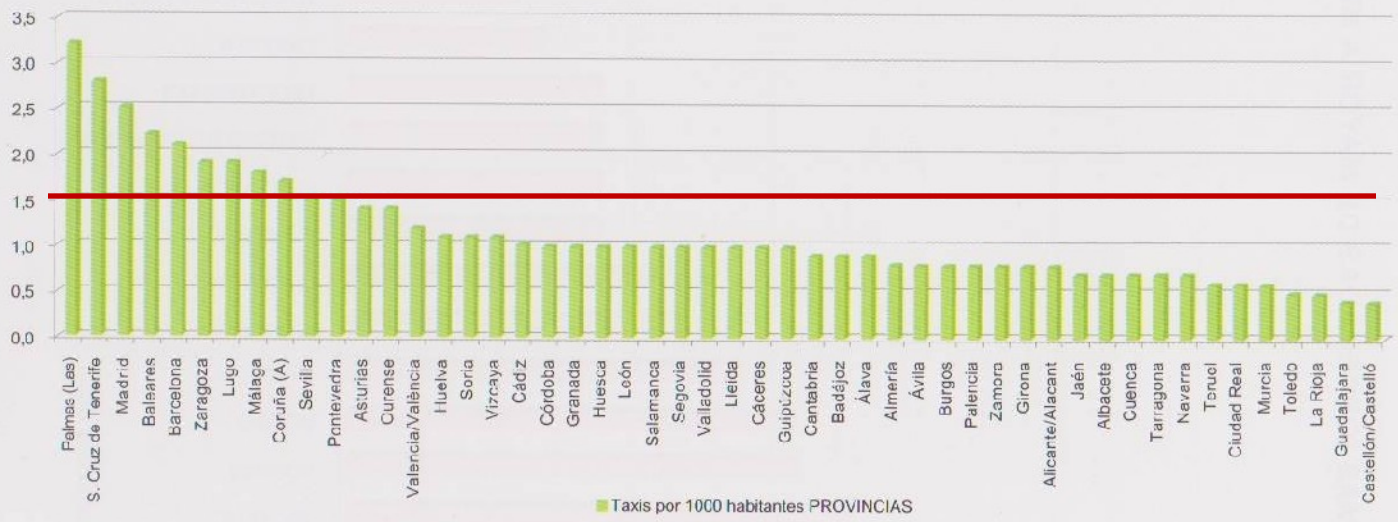
1.Design and development of a Taxi for All customers
2.A national support programme for procurement of accessible taxis
3.Development of systems of taxi concessions and services at Municipal level
4.Industrial production programme, cost reduction, standards.

http://www.accessibletourism.org/?i=enat.en.news.1118

Business Case

3.5
3.0
2.5
1.5
1.0
0.5
0.0

Spanish Provinces: provision of taxis per 1,000 inhabitants



LIBRO BLANCO DEL EUROTAXI, UN TAXI PARA TODOS

_____ shows national average: 1.5 taxis per 1,000 inhabitants

Business Case

Spain

Fundación ONCE
para la cooperación e integración social
de personas con discapacidad

CERMI
COMITÉ ESPAÑOL
DE REPRESENTANTES
DE PERSONAS
CON DISCAPACIDAD

EUROTAXI

http://www.accessibletourism.org/?i=enat.en.news.1118

Business Case

Spain

EUROTAXI: procurement > service > requirement

- ✓ Stage 1. Public-private support for technical development and procurement
- ✓ Stage 2. Service development and increasing customer use / demand
- ✓ Stage 3. Legislated targets and full implementation in specified communities
- ✓ 2017 – Status review

http://www.accessibletourism.org/?i=enat.en.news.1118

Business Case

Portugal

Accessible Portugal Travel Agency

1. SME – small beginnings, fast growth
2. Inclusive holidays for people with disabilities, families and friends
3. Entrepreneur and Tourism Awards
4. “Accessible Destination” development partner

http://www.accessibleportugal.com/

Business Case

Portugal

http://www.accessibleportugal.com/

Business Case

Portugal

Accessible Portugal is contributing to:
Infrastructure analysis & access upgrading, Information, Activities, Services, Events, Marketing, and ENAT Access Certification

http://www.accessibleportugal.com/

Part 3.
Gaining the rewards, being part of the solution

Successful Accessible Tourism Enterprises and Destinations…

1. Work out a policy and a strategy
   - Leadership comes from the top of the organisation
1. Use networks and form partnerships
   - Discuss ideas, find partners, collaborate with NGOs and experts
1. Address the whole access chain
   - Connect with other suppliers, develop new synergies
1. Develop and market the destination
   - work from local to global level to improve facilities to high standards and reach target markets
5. Deliver accessible tourism experiences
   - Aim to give every visitor a good, accessible experience!

In practical terms….

- Be prepared to welcome all visitors
- Question and revise ‘normal’ policies and practices
- Show leadership, find your allies
- Get access to resources and expertise
- Network with suppliers, stakeholders and supporters
- Encourage new businesses, focusing on access
- Invest in training and planning
- And don’t forget to tell what you have done!

The Rewards of Accessible Tourism

- More visitors
- Longer tourist season
- New business opportunities
- Increased income
- General improvements for local population and environment
- Happy customers, coming back again!

Networking & partnering for success

Accessible Tourism "to do" list

- Influence EU policies on accessibility for all
- Take an active part in (proposed) *ENAT – CEN Workshop Agreement on "Accessible Tourism Services"* (proposed)
- Contribute to accessible tourism events
- Include the tourism sector in your R & D strategies and projects
- Tell us your wishes! So we can support you…

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Where do you fit in?

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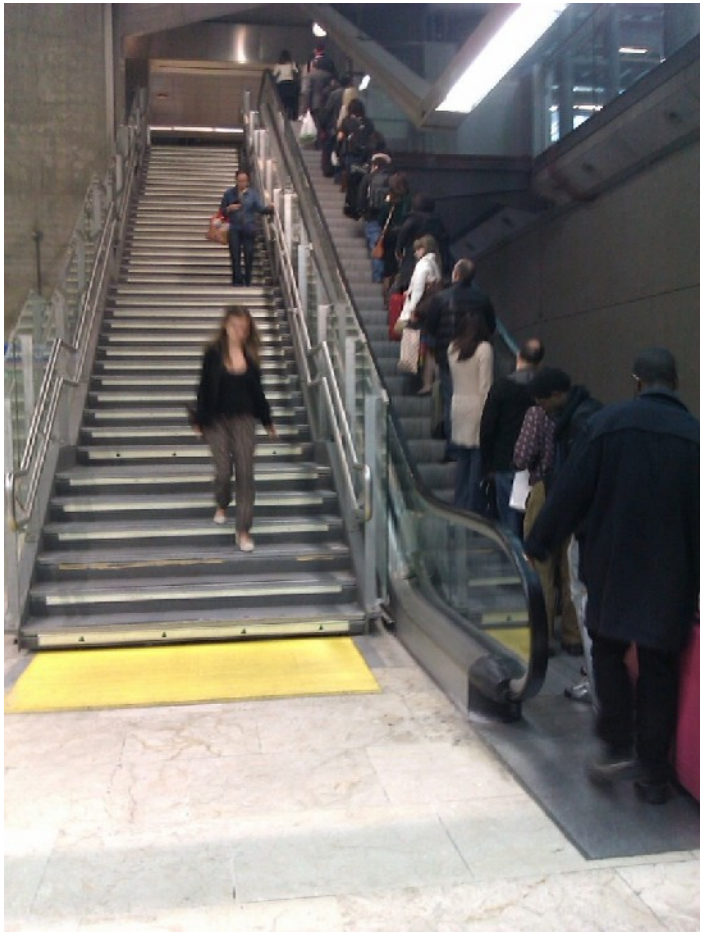
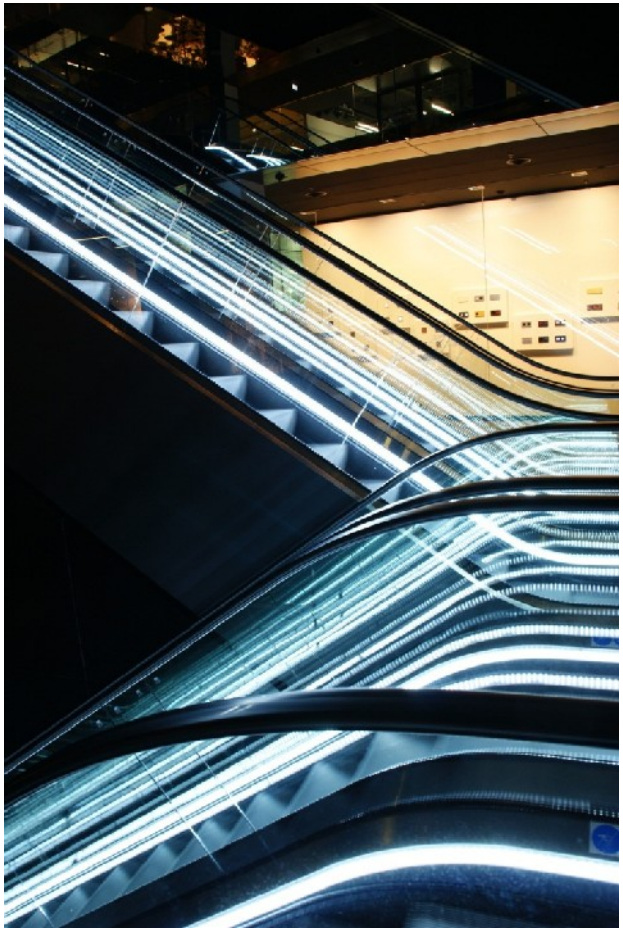
Practical and aesthetic





Overcoming long distances

Many airports are notorious for the long, long walk to get to the gate...

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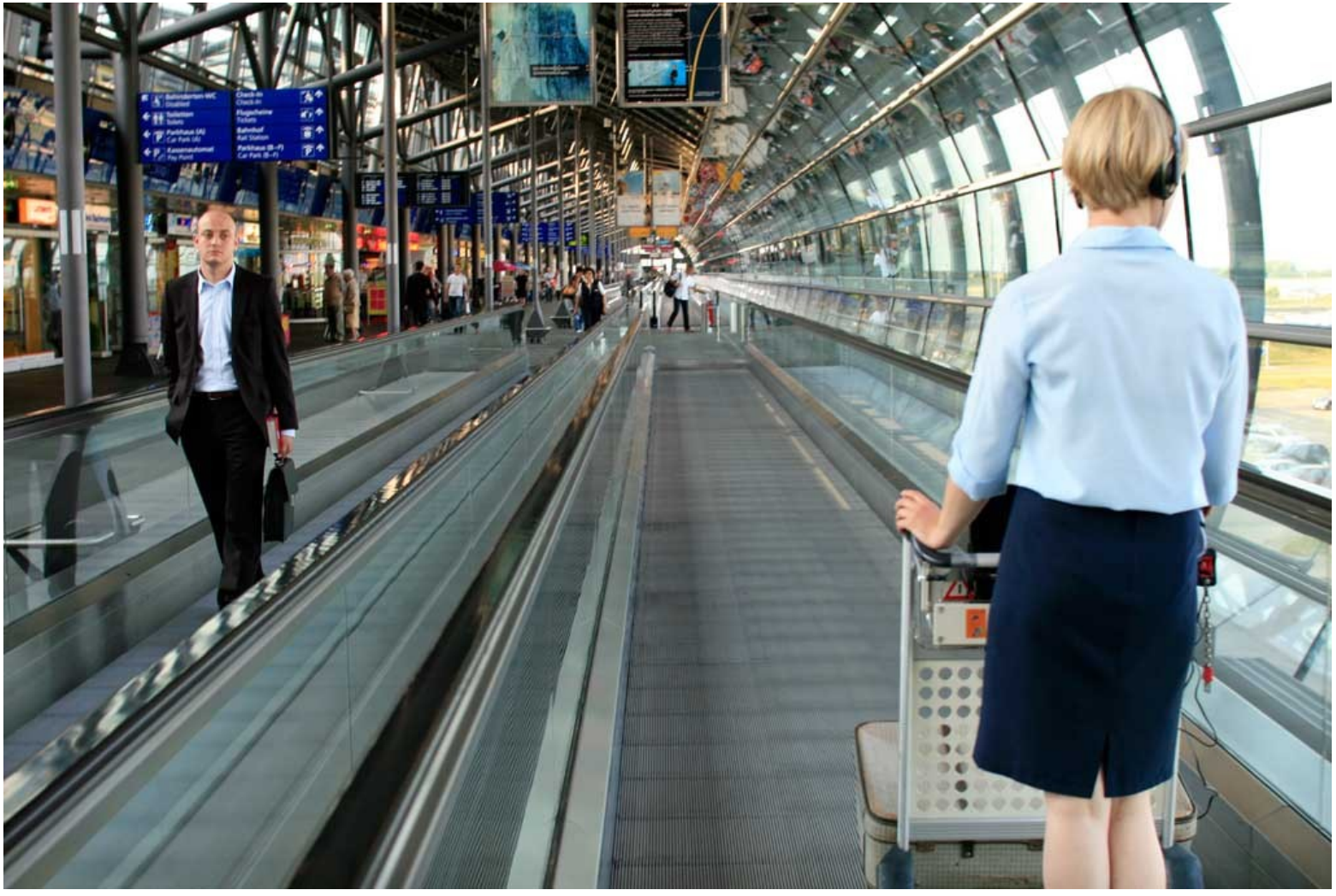
Overcoming long distances



Overcoming long distances

... Not only indoors!

Hotel “ups and downs”

... Extreme Sports Hotel?

Communications…

... good to know

Increasing comfort, safety and value…

New buildings:
- *Design in* good access for all citizens
- For better comfort, safety and value.

Adaptations:
- Making adaptations is often seen as a costly burden.
-Adding good access solutions will increase the VALUE of buildings and infrastructure.

Acropolis of Athens

United Nations
Educational, Scientific and
Cultural Organization

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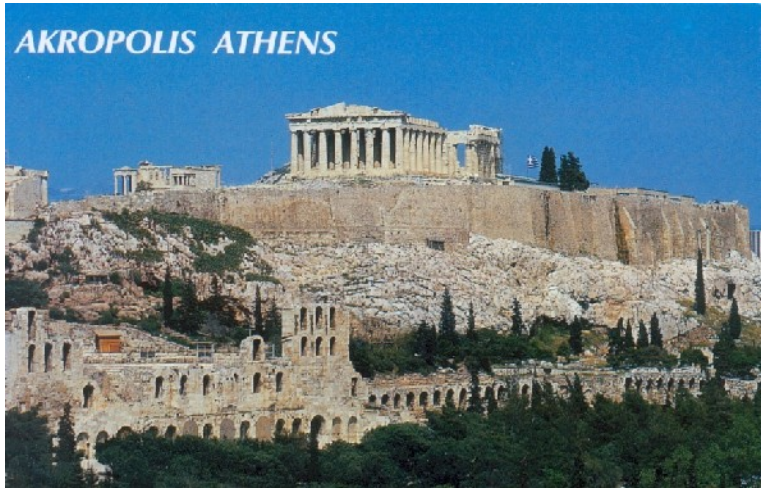

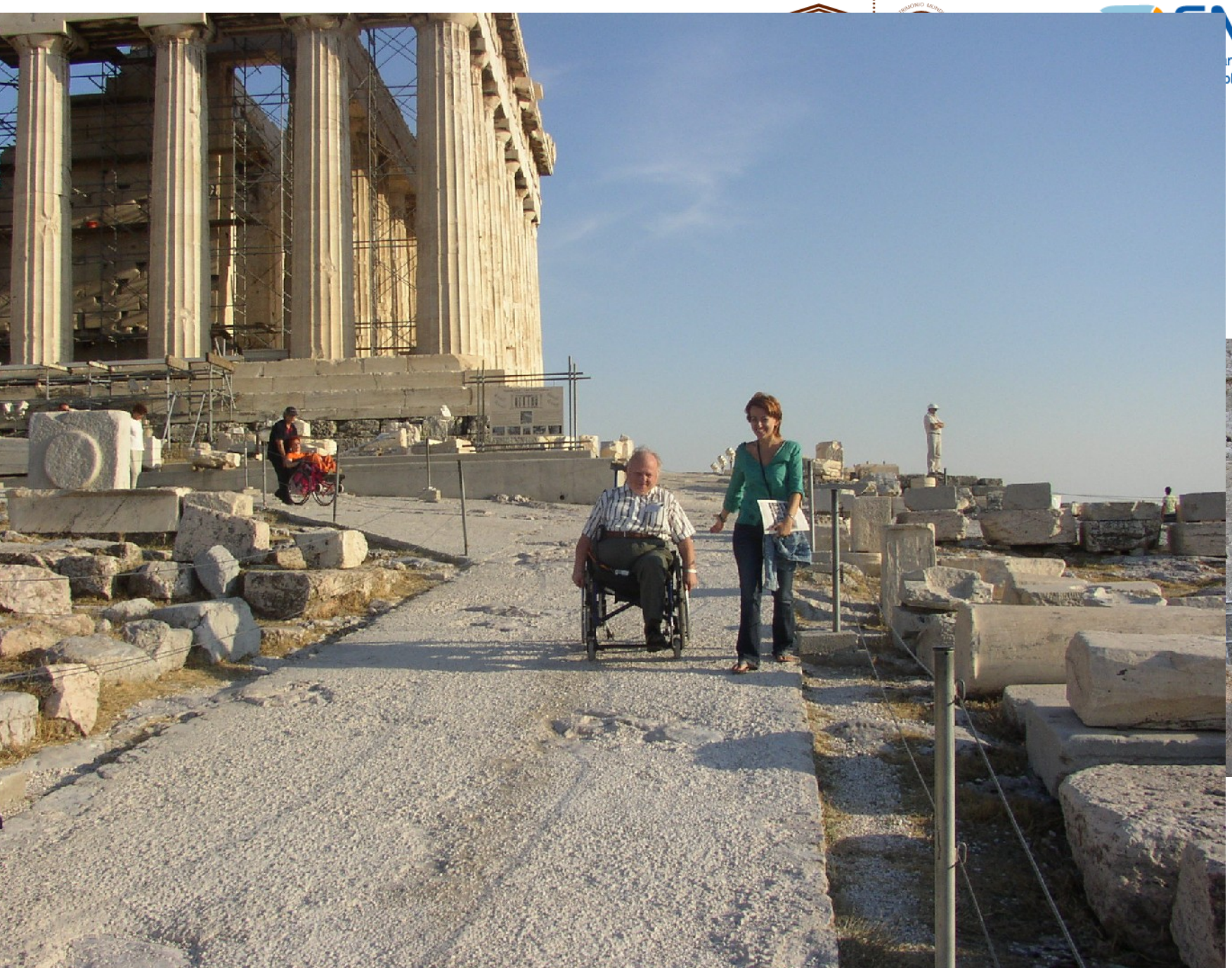

ENAT Website www.accessibletourism.org

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ENAT Code

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Thankyou