



Technical INSTO Webinar on Accessibility

7th September 2021

Measuring the Economic Impact of Accessible Tourism within the European Union and Beyond

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<https://www.accessibletourism.org>

#EUaccesstourism

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Key Points of the Presentation



1. Accessible Tourism - developing Destinations for All
2. The Visitor Journey
3. Accessible Tourism Market Data – Europe and the UK
4. Planning the Accessible Tourism Destination

<https://www.accessibletourism.org>

#EUaccesstourism

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Tourism
for All

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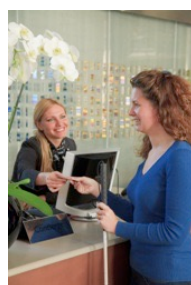
Accessible Tourism - Tourism for All

Tourists come in all shapes and sizes

Let them in!

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Accessible Tourism – Open to Everyone



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Accessible Tourism Destinations...



Provide great experiences for everyone!



Barcelonaturisme.com

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Accessible Tourism is not “special” tourism...



It is part of every kind of offer

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



ACCOMODATION



RESTAURANTS



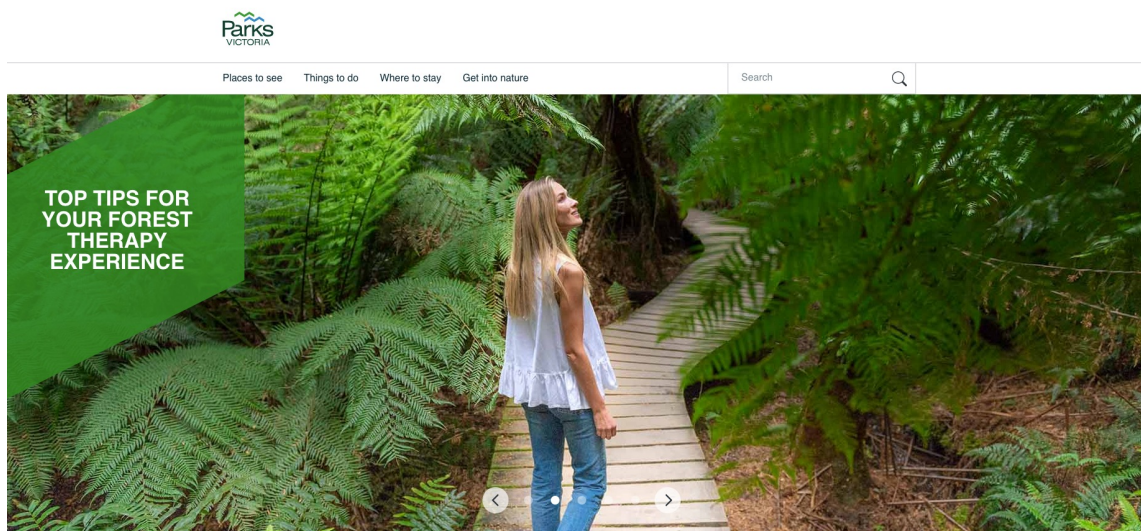
SHOPPING



TOURS & ATRACTIONS

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Parks Victoria – Home Page image carousel (1)



<https://www.parks.vic.gov.au/>

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Parks Victoria – Home Page image carousel (2)



Places to see Things to do Where to stay Get into nature

Search



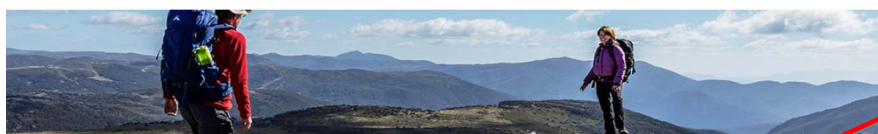
<https://www.parks.vic.gov.au/>

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Parks Victoria – “Things to do” Webpage



Home > Things to do



All Abilities Access

Places to see

Bays, lakes and rivers
Beaches and coasts
Mountain peaks
Rugged bushland
Tall forests
Urban parks

Things to do

4WD
Birdwatching
Canoeing and kayaking
Cycling
Hiking
Junior Rangers
Mountain biking
Rock climbing
Tours
Bushwalking
Wildlife viewing

Where to stay

Alpine
Baw Baw
Buchan Caves
Budj Bim
Cape Conran
Cathedral Range
Croajingolong
Gippsland Lakes
The Grampians
The Otways
Kinglake
Lake Eildon
Lower Glenelg
Mount Buffalo
The Prom

Get into nature

All Abilities Access
Community engagement
Conservation and science
Careers
Corporate partnerships
Doing business with us
Event and filming permits
Learning in nature
Meet our rangers
Safety
Tenders
Tour operators
Volunteering

Parks Victoria

About us
Child safety
Healthy Parks Healthy People
Managing Country Together
Land management
Water management
Fire management
Heritage management
Projects
Public notices
Notices to mariners
Media Centre
Forms
Contact us

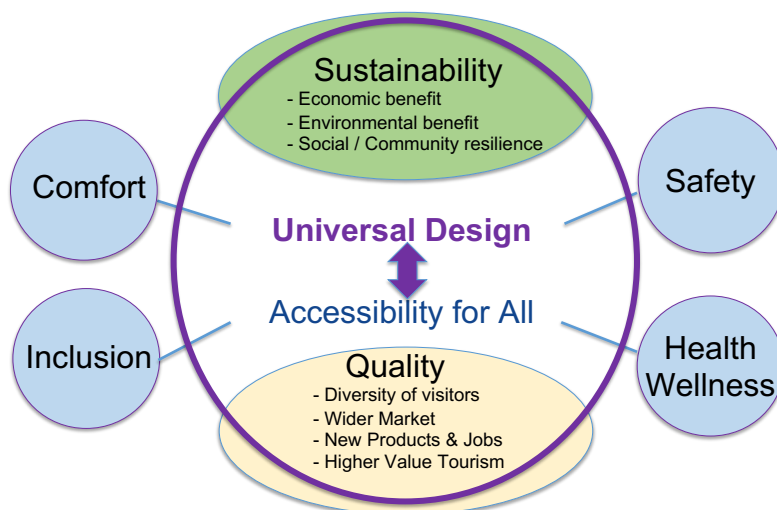


<https://www.parks.vic.gov.au/things-to-do>



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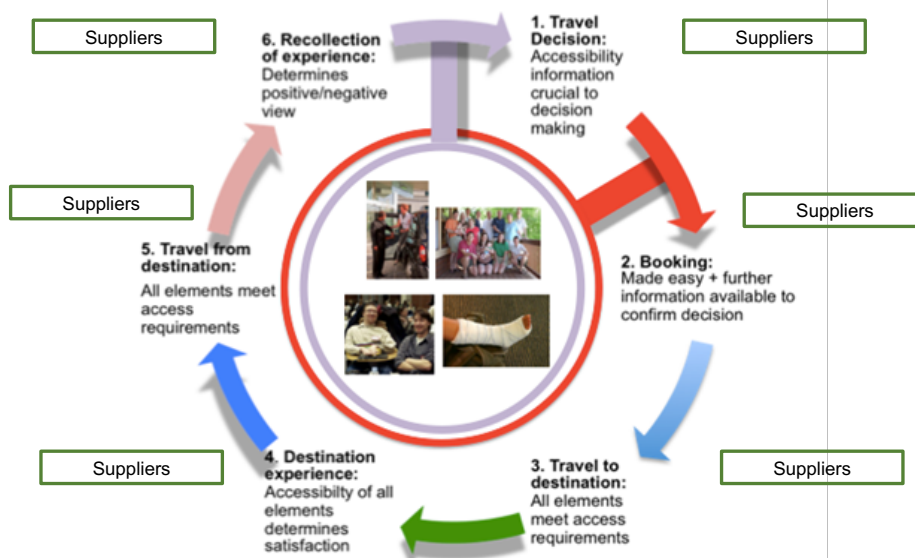
Universal Design – Key to Accessible Tourism



Accessibility contributes to economic, environmental and social/community sustainability

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The Visitor Journey



Adapted from Lane (2007)

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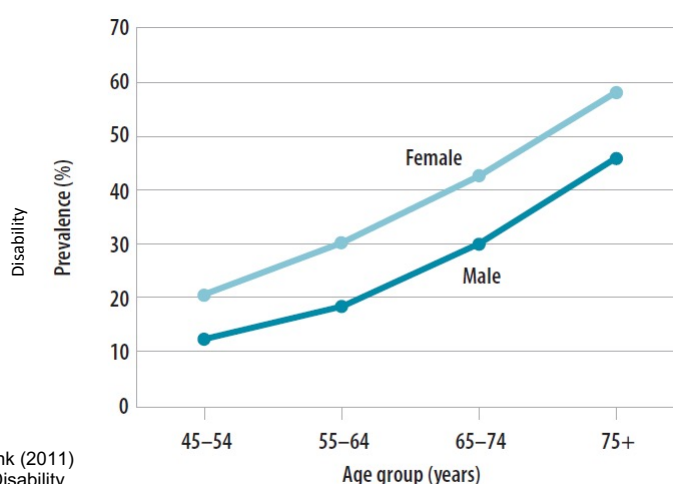
Accessible Tourism in European Union. Some figures...



- Accessible Tourism in Europe generated €400 billion revenues per annum and is expected to grow annually by 1% for the coming years
- Accessible Tourism accounted for 3% of total EU GDP
- It supports 9 million jobs
- **But: only 9% of EU tourism providers promote themselves as "accessible"**
- ❖ Market demand for accessible tourism could rise 44% per year if appropriate services were put in place
- ❖ Improvements in access could raise the economic contribution of Accessible Tourism by 25%
- ❖ And improved accessibility could attract up to 75% more international travellers
- (European Commission Study by GfK, University of Surrey and others, 2014)

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Relation between ageing and disability



Source: World Bank (2011)
World Report on Disability.
http://www.who.int/disabilities/world_report/2011/en/

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“Seniors” are 65% of the Accessible Tourism Market



- 1 in 5 persons in European Union are over 60
- They want to travel and enjoy life
- Seniors from Europe take 6 to 7 trips a year
- They have most discretionary income
- They are more active, “youthful”
- They take most overseas trips
- They travel around the year

IMPACTOUR Webinar | 8th June 2021

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A fact about “PRMs” (pre-COVID data)



“The annual growth in PRM numbers is at least six times that of the overall rate of passenger growth at many airports globally”

European Regions Airline Association, 2018



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Travel companions – the “multiplier effect”



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

On average:

- People with disabilities have **+2.2** companions
- Older people **+1.6** companions

AND they...

- Stay longer
- Spend more
- Make more repeat visits
- Travel throughout the year

(EC Study 2014)

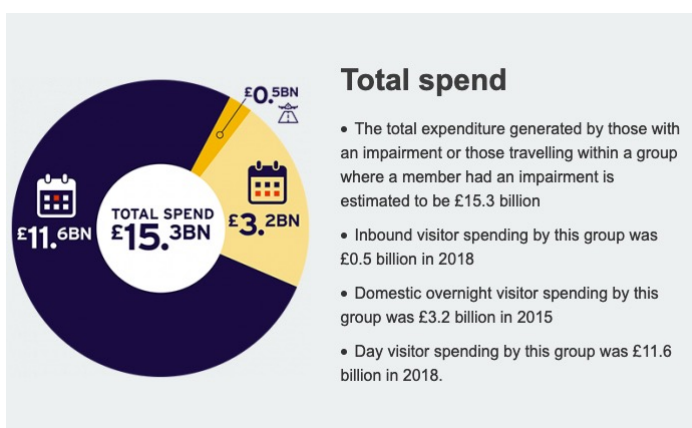


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The Business Case for Accessible Tourism



Total value of accessible tourism market in Great Britain is around **£15.3 billion**
Graph of trips taken by those with an impairment and their travelling companions in 2018



GBP 15.3 Billion

EUR 17.78 Billion

USD 21.17 Billion

GBP 11.6 Billion

EUR 13.5 Billion

USD 16 Billion

GBP 3.2 Billion

EUR 3.72 Billion

USD 4.43 Billion

Great Britain Day Visitor Survey 2018, Great Britain Tourism Survey 2015 and International Passenger Survey 2018

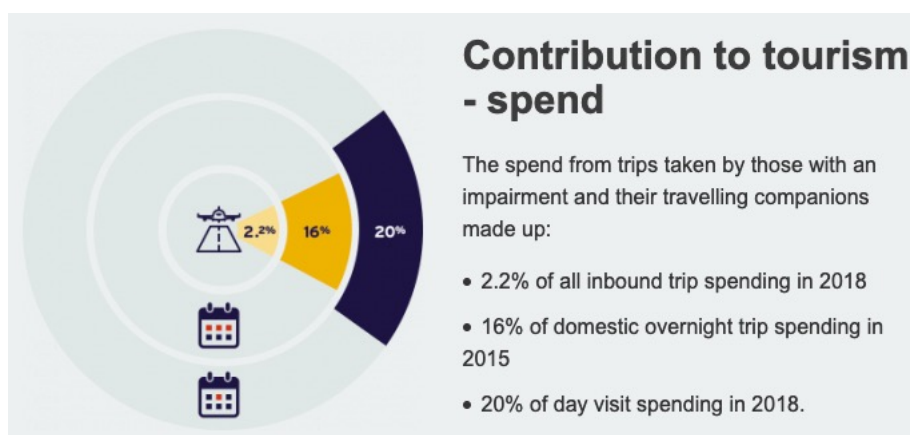


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The Business Case for Accessible Tourism



England trips taken by those with an impairment and their travelling companions in 2018



Great Britain Day Visitor Survey 2018, Great Britain Tourism Survey 2015 and International Passenger Survey 2018



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The Business Case for Accessible Tourism



England trips taken by those with an impairment and their travelling companions in 2018

Average spend

- The average spend per inbound visit was £660 for all trips, compared to £740 for trips taken by those with an impairment and their travelling companions.
- The average spend per domestic overnight trip was £191 for all trips, compared to £210 for trips taken by those with an impairment and their travelling companions.



Great Britain Day Visitor Survey 2018, Great Britain Tourism Survey 2015 and International Passenger Survey 2018

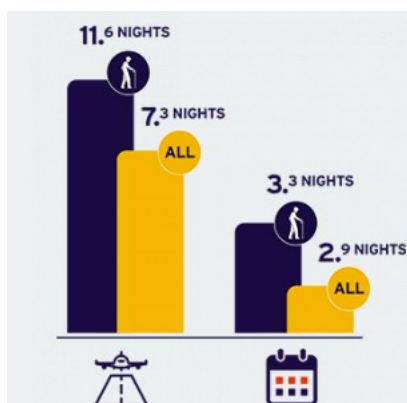


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The Business Case for Accessible Tourism



England trips taken by those with an impairment and their travelling companions in 2018



Average length of stay

- The average length of stay per inbound visit was 7.3 nights for all trips, compared to 11.6 nights for trips taken by those with an impairment and their travelling companions.
- The average length of stay per domestic overnight trip was 2.9 nights for all trips, compared to 3.3 nights for trips taken by those with an impairment and their travelling companions.

Great Britain Day Visitor Survey 2018, Great Britain Tourism Survey 2015 and International Passenger Survey 2018

Source: <https://www.visitbritain.org/business-advice/value-purple-pound>



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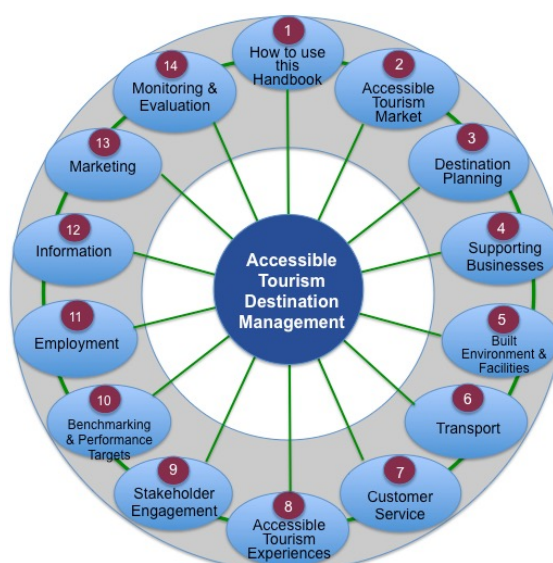
Planning Accessible Tourism Destinations



Accessible Tourism Destinations Handbook

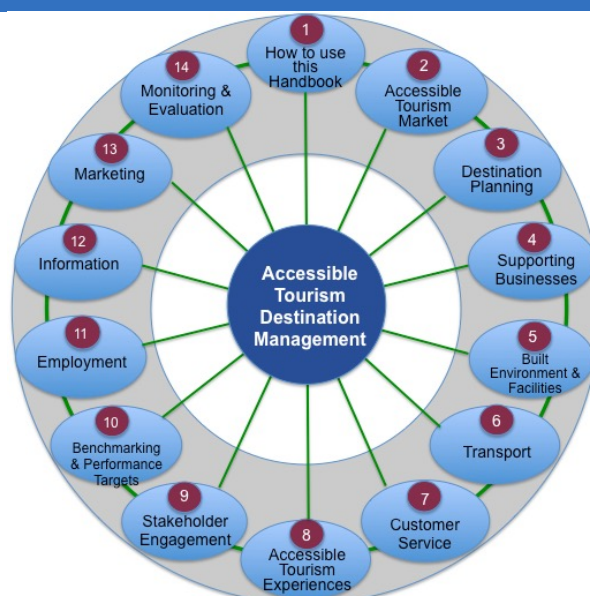
Ivor Ambrose Katerina Papamichail
Ana Garcia Chris Veitch

ENAT



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Planning Accessible Tourism Destinations



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Handbook Contents



1. How to use this Handbook
2. Accessible Tourism Market
3. Destination Planning
4. Supporting Businesses
5. Built Environment and Facilities
6. Transport
7. Customer Service
8. Accessible Tourism Experiences
9. Stakeholder Engagement
10. Benchmarking and Performance Targets
11. Employment
12. Information
13. Marketing
14. Monitoring and Evaluation



Signpost, Parques De Sintra, Portugal.



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3. Destination Planning



“The foundation of any accessible tourism policy is to take the political decision to create an accessible, inclusive tourist destination for all visitors.

This decision must be followed up by concrete objectives, plans and actions to establish an appropriate strategy and guide future development.”

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14. Monitoring and Evaluation



- Understanding success
- Key indicators for Accessible Tourism Destinations
- Reference documents



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15. Annexes

- On-line Resources

16. Bibliography

- Further reading....

17. Glossary

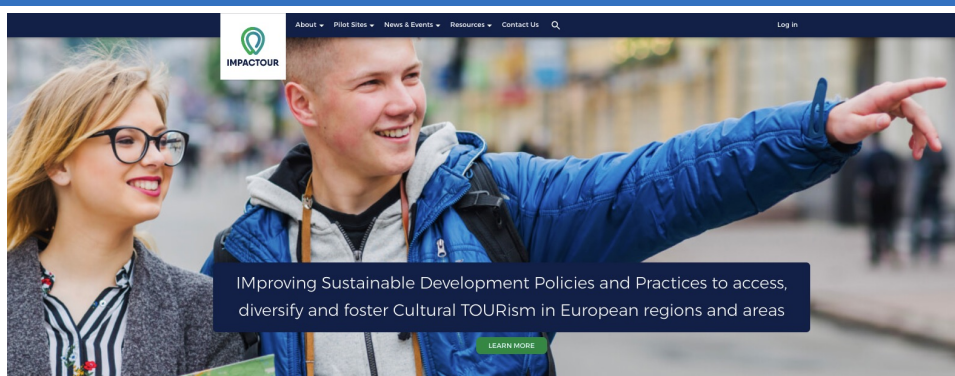
- Explaining the terminology

Download the Handbook:

<http://business.turismodeportugal.pt/pt/Conhecer/estrategia-turismo/programas-iniciativas/all-for-all/Paginas/construir-um-destino-acessivel.aspx>

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Project IMPACTOUR “IMproving Sustainable Development Policies and Practices to access, diversify and foster Cultural TOURism in European regions and areas”



Project Website: www.impactour.eu

Coordinator: UNINOVA, Portugal

Partner: European Network for Accessible Tourism (ENAT)



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 870747.

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Improving Sustainable Development Policies and Practices to access, diversify and foster Cultural TOURism in European regions and areas



Development of **accessibility indicators** for sustainable tourism destinations, leading to the **IMPACTOUR Management Tool**.

Accessible Tourism Destination Management – resources

- ENAT Accessible Destination Management Handbook (Turismo de Portugal)
- UNWTO Accessible Tourism Manuals – Criteria and Indicators
- Accessible Tourism Observatory Study, Spain 2017 (Fundación ONCE)
- ISO Standard 21902:2021 Accessible Tourism Services.
- Review of GSTC, ETIS and other destination management systems.

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Accessible Tourism: Cooperate to succeed!



**ENAT NTOs' and DMOs' Learning Group
Paris, 2017**

1. Develop National and Regional policies and Action Plans, in cooperation with tourism actors and stakeholders
2. Engage with international networks
3. Improve skills (training & education)
4. Improve the offer (infrastructure and activities)
5. Improve communication and information (to businesses & visitors)
6. **Go digital: Collect data on supply side performance and use visitor surveys to inform decisions and guide your next steps.**

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Building Back Better with Accessible Tourism



- Improve physical access conditions in destinations and local communities
- Improve access in local transport and mobility services
- Train staff, local jobs, better service
- Tourism products for the wider market – catering to all ages and interests
- Market accessible destinations in Access Guides, websites and apps
- Foster local and domestic tourism.

Accessibility from start to finish....

...**Improve the quality of tourism**

... Leave no-one behind

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- **Make Accessibility an integral part of your Sustainable Tourism Destination!**
- **Plan, measure, analyse and report your progress!**
- **Enjoy your work!**

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Thank you for your attention!

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<https://www.accessibletourism.org>
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References and Further Reading



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World Tourism Organization (2015) Manual on Accessible Tourism. Module IV: Indicators for Assessing Accessibility in Tourism (Español), <https://webunwto.s3-eu-west-1.amazonaws.com/2019-08/150616turaccsmodulo4webacc.pdf>

World Tourism Organization (2020) *Inclusive Recovery Guide - Sociocultural Impacts of COVID-19, Issue I: Persons with Disabilities*, <https://doi.org/10.18111/9789284422296>

Other links:

Parks Victoria (Australia) <https://www.parks.vic.gov.au>

Project IMPACTOUR <https://www.impactour.eu>

VisitBritain – Value of the Purple Pound (2020) <https://www.visitbritain.org/business-advice/value-purple-pound>

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