Technical INSTO Webinar on Accessibility
7th September 2021
Measuring the Economic Impact of Accessible Tourism within the European Union and Beyond
Ivor Ambrose
Managing Director
European Network for Accessible Tourism a.s.b.l.

https://www.accessibletourism.org #EUaccesstourism

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
Accessible Tourism - Tourism for All

Tourists come in all shapes and sizes
Let them in!
Accessible Tourism – Open to Everyone

Provide great experiences for everyone!
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

Parks Victoria – Home Page image carousel (1)

Universal Design – Key to Accessible Tourism

Sustainability
- Economic benefit
- Environmental benefit
- Social / Community resilience

Universal Design
Accessibility for All

Safety

Health Wellness

Comfort

Inclusion

Quality
- Diversity of visitors
- Wider Market
- New Products & Jobs
- Higher Value Tourism

Accessibility contributes to economic, environmental and social/community sustainability

The Visitor Journey

1. Travel Decision: Accessibility information crucial to decision making

2. Booking: Made easy + further information available to confirm decision

3. Travel to destination: All elements meet access requirements

4. Destination experience: Accessibility of all elements determines satisfaction

5. Travel from destination: All elements meet access requirements

6. Recollection of experience: Determines positive/negative view

Adapted from Lane (2007)
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)

---

Relation between ageing and disability

“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

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
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)

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

**Contribution to tourism - spend**

The spend from trips taken by those with an impairment and their travelling companions made up:

- 2.2% of all inbound trip spending in 2018
- 16% of domestic overnight trip spending in 2015
- 20% of day visit spending 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
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.

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

Planning Accessible Tourism Destinations

Accessible Tourism Destinations Handbook
Ivor Ambrose  Katerina Papamichail
Ana Garcia  Chris Veitch
ENAT
Planning Accessible Tourism Destinations

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.
3. Destination Planning

- National Strategy
- Vision / Aim
- Legislation & Standards
- Framework
- Research & Education
- Business Case
- Destination Management
- Delivering Accessible Tourism

“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.”

14. Monitoring and Evaluation

- Understanding success
- Key indicators for Accessible Tourism Destinations
- Reference documents
15. Annexes
• On-line Resources

16. Bibliography
• Further reading….

17. Glossary
• Explaining the terminology

Download the Handbook:

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

**IMPACTOUR**

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)
- Review of GSTC, ETIS and other destination management systems.

Accessible Tourism: Cooperate to succeed!

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.

ENAT NTOs’ and DMOs’ Learning Group
Paris, 2017
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

Make Accessibility an integral part of your Sustainable Tourism Destination!

Plan, measure, analyse and report your progress!

Enjoy your work!
Technical INSTO Webinar on Accessibility
7th September 2021

Thank you for your attention!

Ivor Ambrose
https://www.accessibletourism.org
enat@accessibletourism.org

References and Further Reading


Other links:

Parks Victoria (Australia) https://www.parks.vic.gov.au
Project IMPACTOUR https://www.impactour.eu