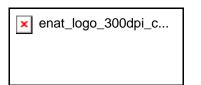


The Economic Impact of Accessible Tourism

Ivor Ambrose

Managing Director, ENAT Lucignano, 21 March 2016



The Demand for Accessible Tourism

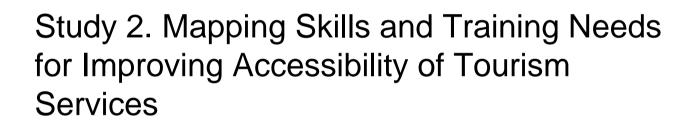
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EU Accessible Tourism Studies

- Under the European Union Preparatory Action on Accessible Tourism 2012 - 2014, funded by European Parliament

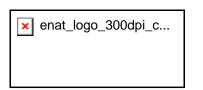


Study 1. Economic impact and travel patterns of Accessible Tourism in Europe





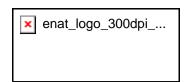
Study 3. Mapping the Supply and Performance Check of Accessible Tourism Services in Europe



Accessible Tourism Demand Study, 2014

- •"Accessible tourism" generated €786 billion gross turnover in 2012
- •Supports 9 million jobs
- •But: only 9% of Europe's tourism services are accessible to some degree, for some visitors

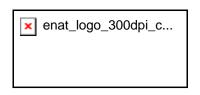
Accessible Tourism Demand Study, 2014



By 2020, demand will rise to 862 million trips per year

- •An additional 1.2 million enterprises need to provide accessible services to meet future demand
- •Improvements could raise the economic contribution of Accessible Tourism by up to 25%...
- •... and could attract up to 75% more international travellers

Lack of Accessibility is a Cost to the Tourism Sector

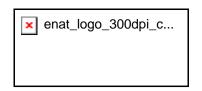


EU Demand Study showed estimated lost income at € 142 Billion each year

- •Over 80% of travellers say they are likely to return when they are satisfied with accessibility...
- •...and they would even consider increasing their travel budget or travelling more often



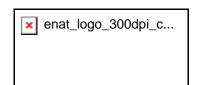
Travel companions: Multiplier effect



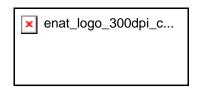
- On average, people with access needs in the EU travel with about
 1.9 companions;
- People with disabilities travel with 2.2 companions on average
- Older people travel with 1.6 companions, on average

 The economic contribution of Accessible Tourism to the economy will be increased on a similar scale if the travel companion effect is taken into account.



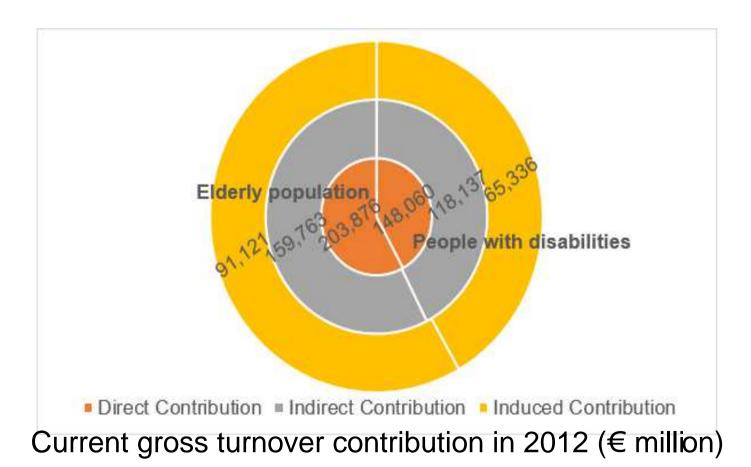


Macro-economic Impact of Accessible Tourism in the EU



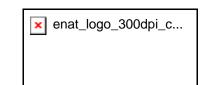
Gross Turnover

1. The direct gross turnover of EU's Accessible Tourism in 2012 was about €352 billion; after taking the multiplier effect into account, the total gross turnover contribution amounted to about €786 billion





http://www.accessibletourism.org/?i=enat.en.presentations.1578



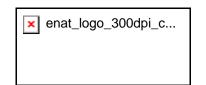
Gross Value Added

2. The direct gross value added of EU's Accessible Tourism in 2012 was about €150 billion; after taking the multiplier effect into account, the total gross value added contribution amounted to about €356 billion

eople with disabilities Direct Contribution
 Indirect Contribution
 Induced Contribution

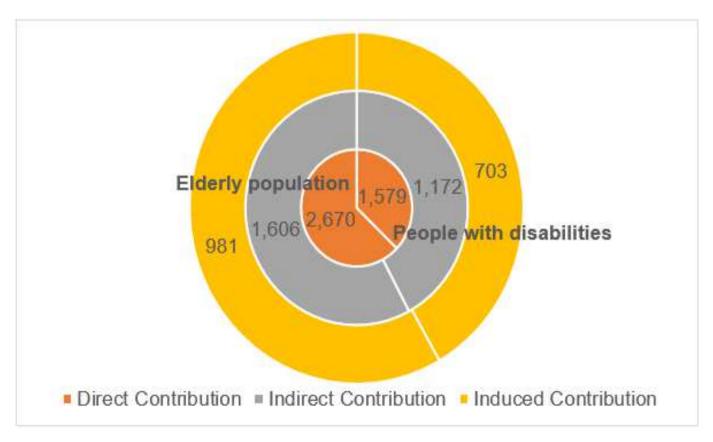


Current gross value added contribution in 2012 (€ million)



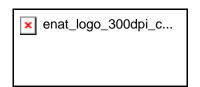
Contribution to Employment

3. The direct employment contribution of EU's Accessible Tourism in 2012 was about **4.2 million persons**; Taking the multiplier effect into account, the total employment generated was about **8.7 million persons**.



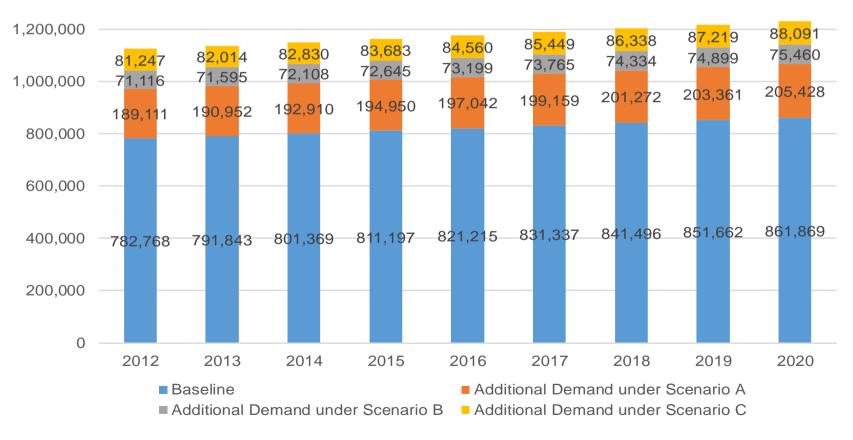


Current employment contribution in 2012 ('000 persons)



Scenario analysis – Key findings

With investments to improve accessibility, tourism demand could potentially increase by **24.2%**, **33.2%** and **43.6%** under Scenarios A, B and C, respectively. (Based on 2012 travel data).





Potential Demand for EU's Accessible Tourism by people with access needs in EU27 countries ('000 trips)

■ enat_logo_300dpi_c...

Consumer Surveys on Accessible Tourism

Understanding the Accessible Tourism Market





Open Doors Organization

Opening doors for people with disabilities in travel and tourism

USA Consumer Survey Report, 2015

Trips taken, spending

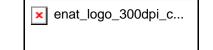
- •In 2013-14, more than **26 million adults with disabilities** traveled for pleasure and/or business, taking **73 million trips**.
- •Many barriers to access still remain in air travel, hotels and restaurants, although these have decreased significantly since the previous study in 2005.
- •Spending \$17.3 billion annually, up from \$13.6 billion in 2002.
- •Individuals typically travel with one or more other adults, so economic impact is actually double, or \$34.6 billion.

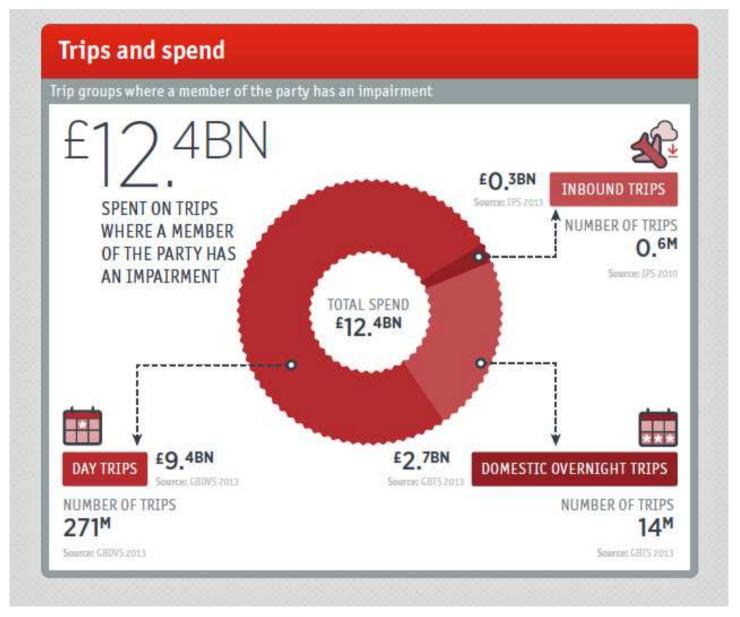
Travel barriers and obstacles decreasing but still high

- •Air travel: 72% said they encountered major obstacles with airlines and 65% with airports, down from 84% and 82% in 2005, respectively.
- •At hotels and restaurants, problems with customer service or communication barriers has significantly decreased as well.

Source: http://opendoorsnfp.org/

The UK Overnight Visitor Survey 2012-2013

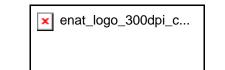


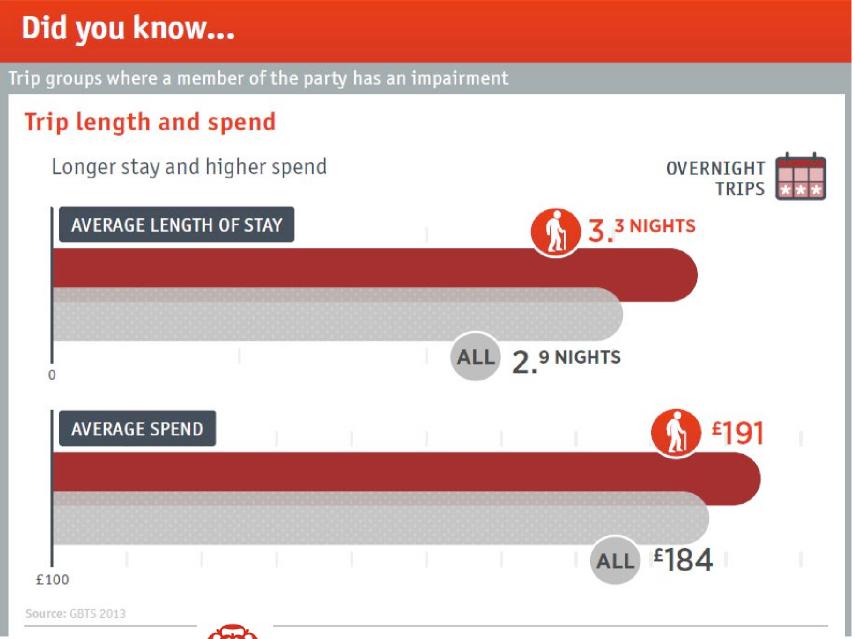




The UK Overnight Visitor Survey 2012-2013

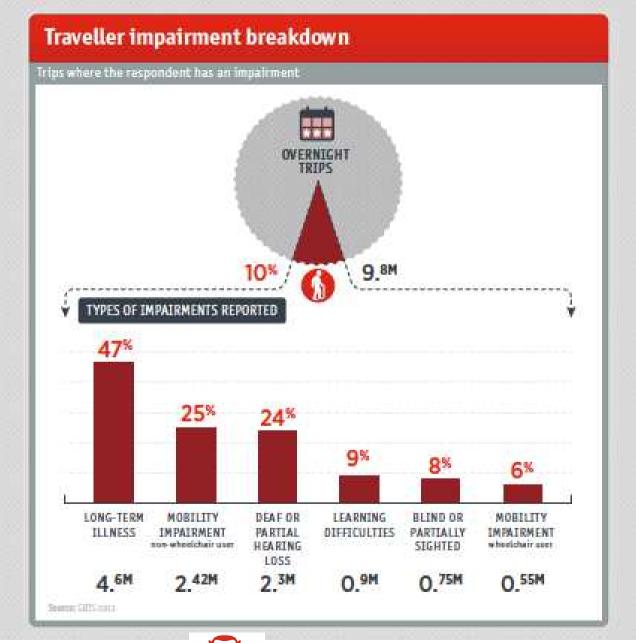
Visit**England**





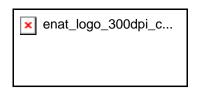
The UK Overnight Visitor Survey 2012-2013







The UK Accessible Tourism Market Visitor Survey 2013



- Day trips, 2013 (271 Million, £Billion 9.4)
- Domestic overnight trips, 2013 (14 Million, £Billion 2.7)
- Inbound trips, 2013 (0.6 Million, £Billion 0.3)
- Total trips in 2013 (285.6 Million)
- Total spend in 2013 (£Billion 12.4)
- Average stay: 3.3 nights against 2.9 for All
- Average spend: £191 against £184 for All

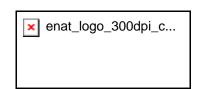


The UK Accessible Tourism Market: Visitor Survey 2013

- Increase in visitor numbers since 2009 (+19%)
- Increase in value since 2009 (+33%)





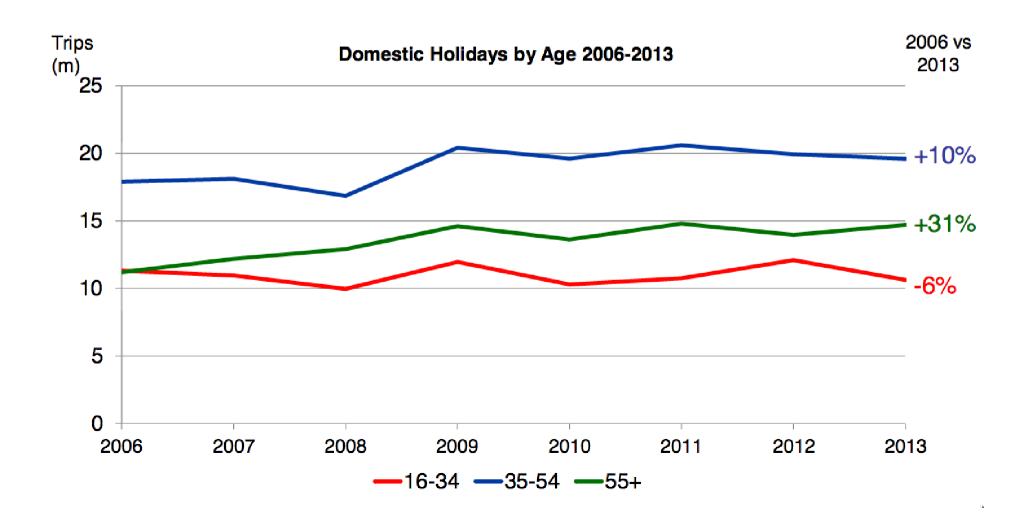


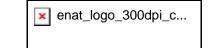
The UK Accessible Tourism Market: Visitor Survey 2013



Purple Pound Conference 2015

Massive uplift in trips taken by over 55's

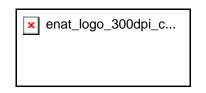




Mapping and Performance Check of Supply of Accessible Tourism Services in Europe



How many accessible tourism suppliers?

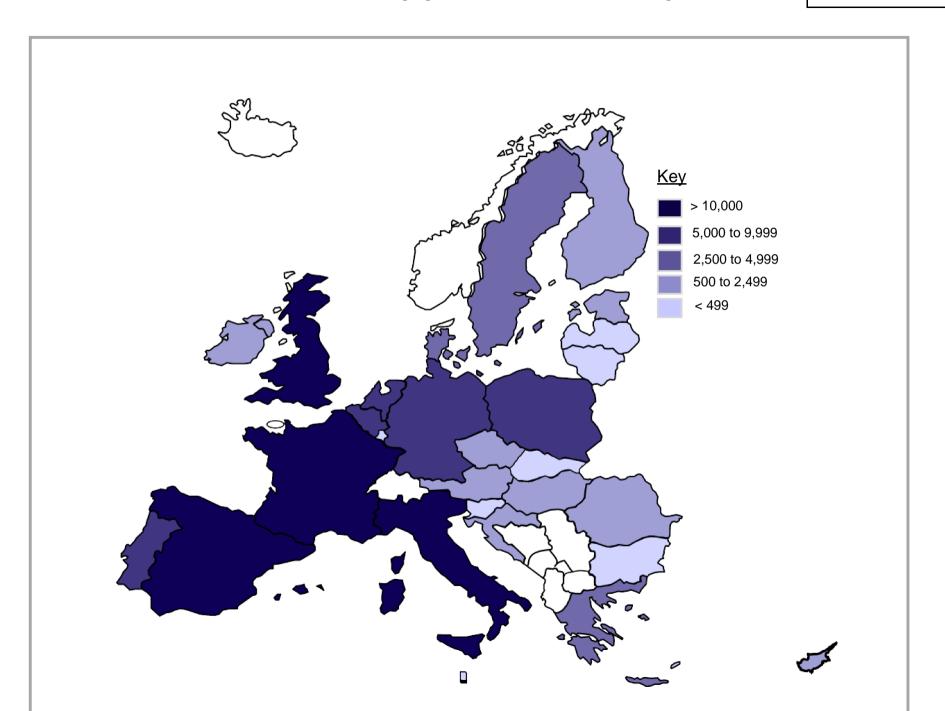


The study identified 313,286 accessible tourism suppliers in EU Member States. (9% of all tourism suppliers)

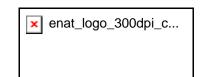
- Over 3 million tourism businesses in Europe are not prepared to cater adequately to the accessibility market.
- ➤ By 2020, an additional 1.2 million enterprises need to provide accessible services in order to meet forecasted demand.

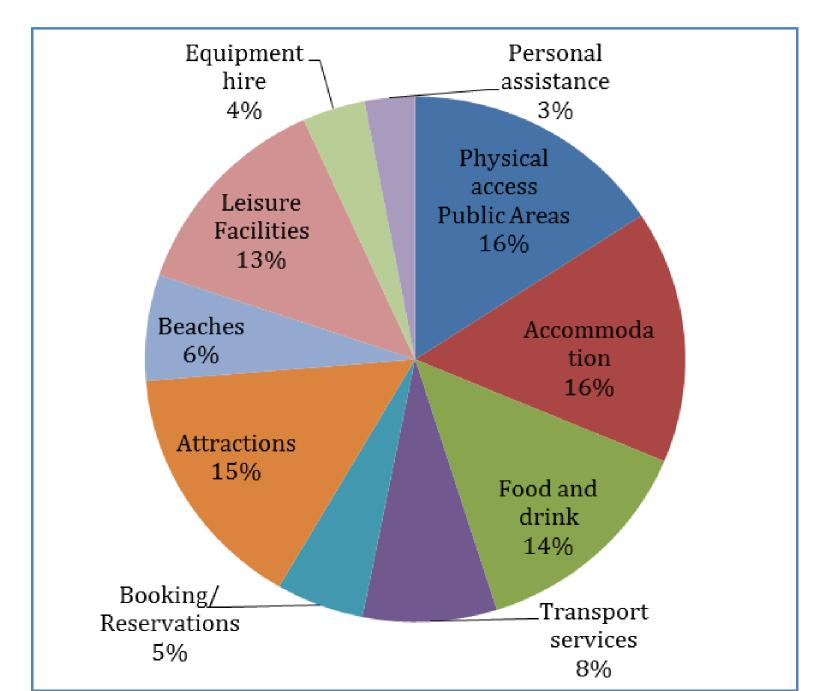
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Accessible Tourism Suppliers in Europe

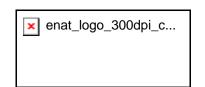


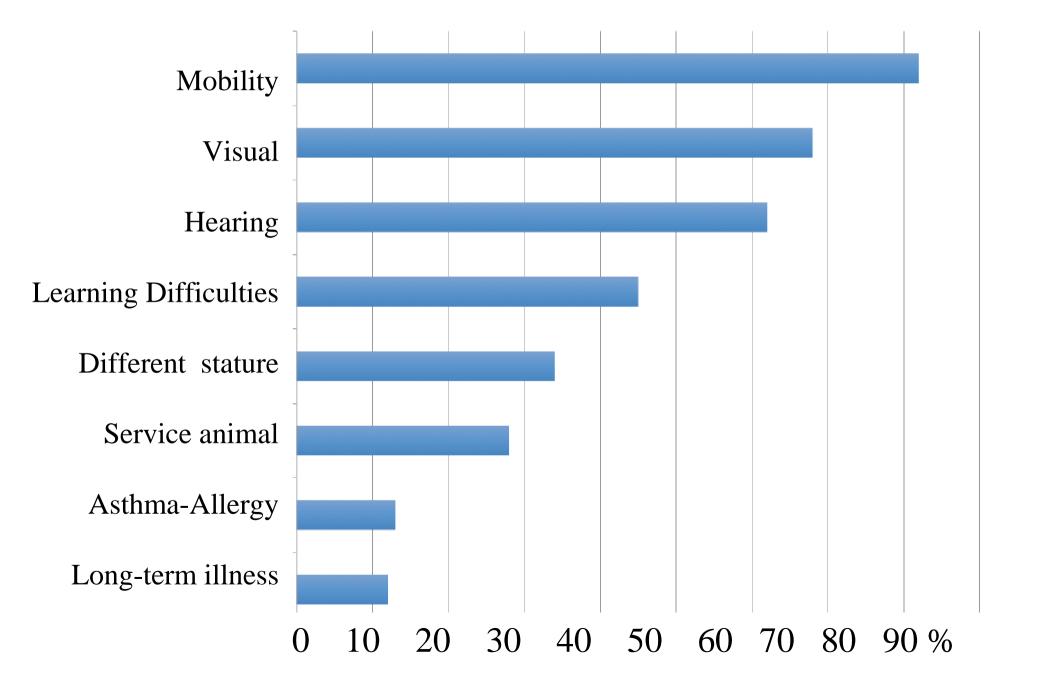
Accessible Tourism Services in 79 National and Regional Access Information Schemes (%).

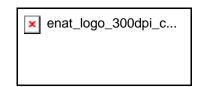




Frequencies of Types of Access Needs Covered by National and Regional AIS.







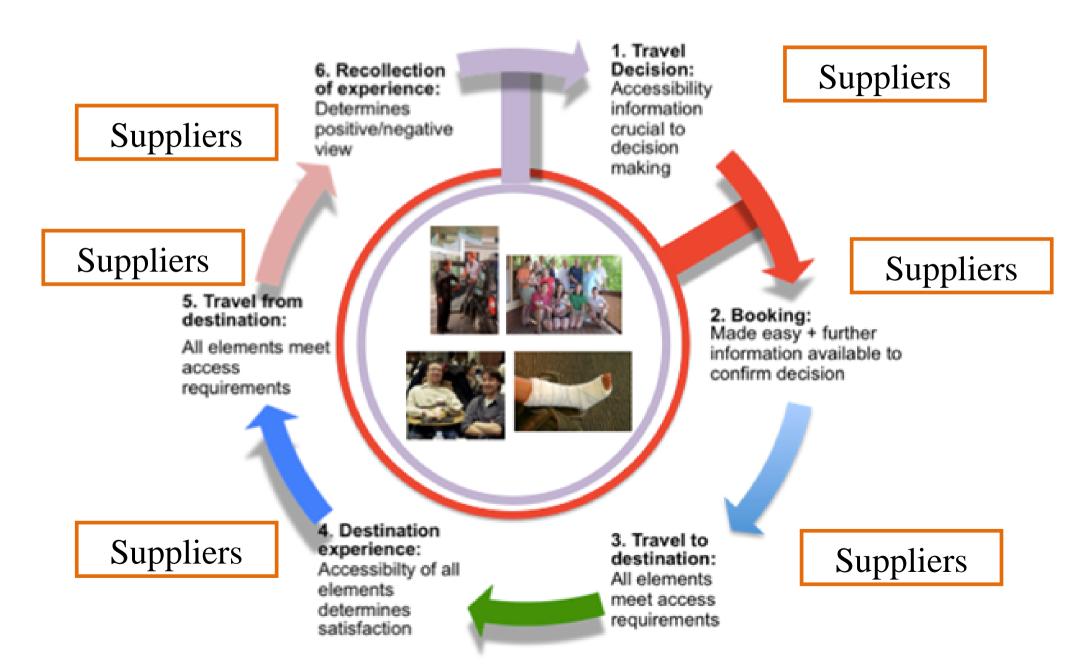
Initiatives by
National Tourist Boards
and Destinations
to improve the product and
promote Accessible Tourism



NTO and Business Challenges

- Understand the market
- Staff training
- Supply chain development
- Develop the offer
- Information and marketing

The Visitor Journey



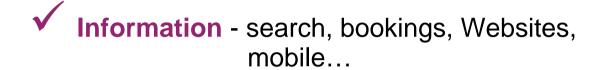


Developing the tourism supply chain: ...the 4 essentials

Accessible...











✓ Transport - vehicles, terminals, transfers, assistance...





✓ Infrastructure - attractions, accommodation restaurants, streets, beaches...



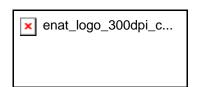






- hospitality, packages, guiding, excursions, special menus, activities, tech-aids, assistance...

...throughout the entire delivery chain



Making Customer Service Accessible

Step 1 Improve knowledge and skills

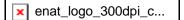
Train managers and staff

Step 2 Improve the offer

- Analyse infrastructure and services
- Make an Accessibility Action Plan
- Implement the Plan

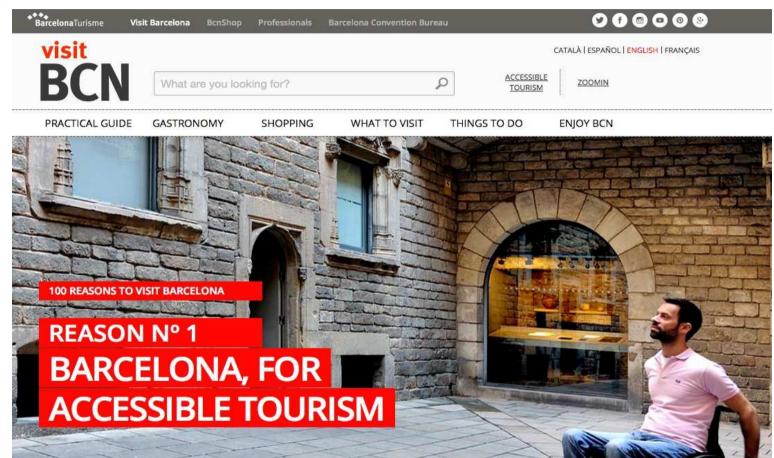
Step 3 Communicate!

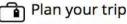
- Provide more and better information about accessible facilities and services
- Use appropriate images in marketing
- Adopt the Universal Design approach to engage with all your customers





http://www.barcelonaturisme.com





Will the weather be fine in Barcelona? Will people understand what I'm saving? Take a look and you'll find the answer to some of the most frequently asked questions before you pack your case.



Must see

Wherever you are in Barcelona, there's always something to see around the neighbourhood or district: jewels of home-grown Catalan architecture, modernisme, and contemporary architecture, markets that are a treat for the senses. treasures of the ancient



Buy your tickets

Tours, museums, leisure, entertainments, tickets... At BCNSHOP you'll find the services, activities and experiences the city offers so you can plan your visit to Barcelona. Enjoy discounts and other great offers!



Move around

Barcelona and its metropolitan area have a wide range of public transport options, so that you can get to where you want to go in the city easily and conveniently.

Catalunya Accessible Tourism Plan (2008) Access Audit > Marketing > Promotion







PROMOTION MARKET LAUNCH

Preliminary audit

On-the-ground verification of the accessibility of tourist facilities and resources

Promotion and market launch of accessible tourist services and products





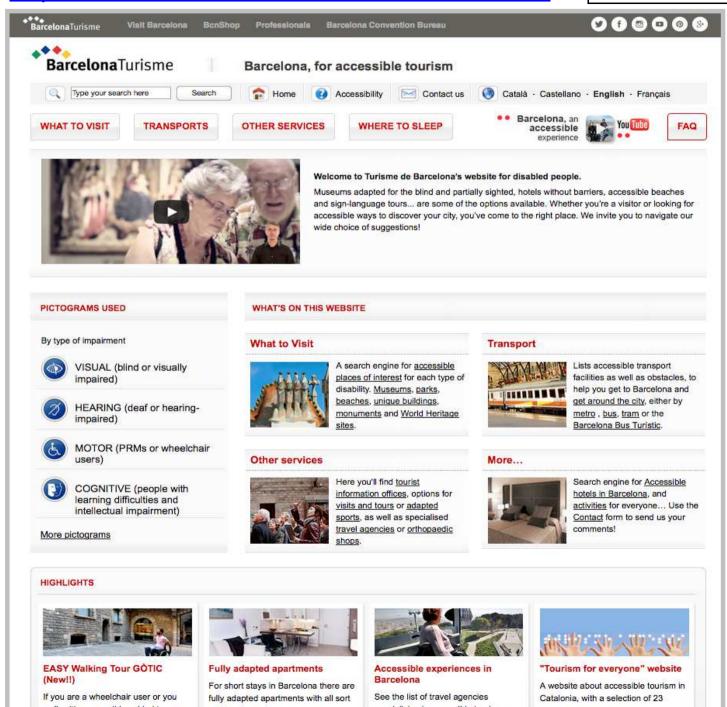
Technological platform Design of promotional and marketing supports for the Guide and Website: presentations, presence at trade fairs, participation in press / fam trips

Participation of both public and private stakeholders in the tourist industry.



Barcelona Turisme

http://www.barcelona-access.cat/?idioma=3



"Tourism for All" means: Great Experiences for Everyone







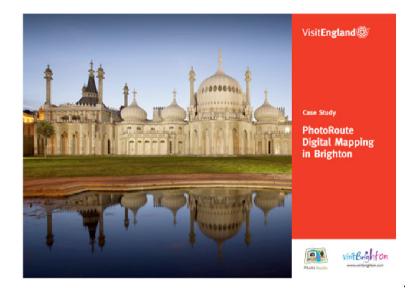
Barcelonaturisme.com

Brighton, UK. Accessible Photo Route

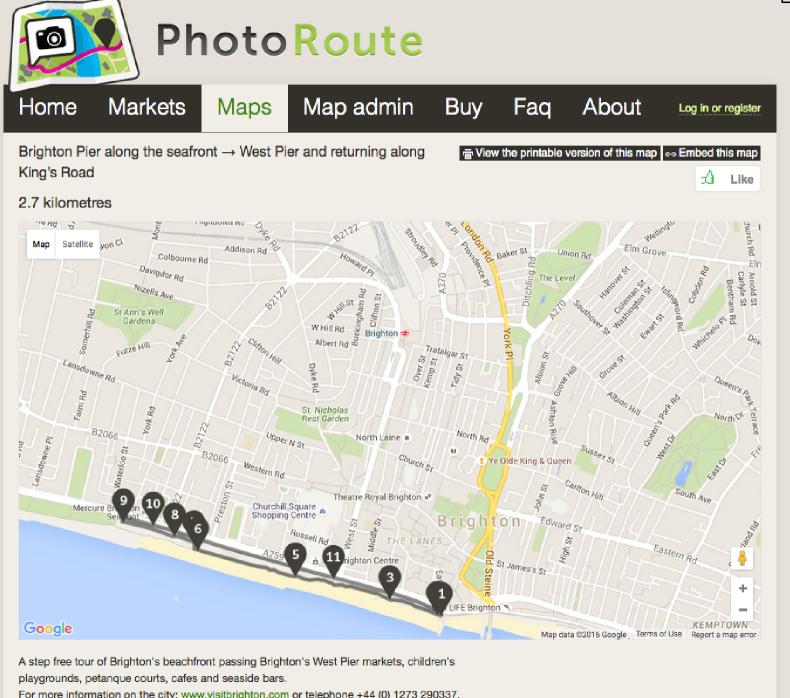
VisitBrighton worked with PhotoRoute to improve the accessibility of the destination.

- •PhotoRoute helps visitors to plan their trip.
- •Step-free routes routes in the destination.
- •Maps with directional arrows and photos.
- •Links to accessible accommodation
- •Particularly aimed at people with disabilities, older visitors, the elderly, parents with pushchairs and visitors who speak English as a second language.

http://photoroute.com Mobile app.

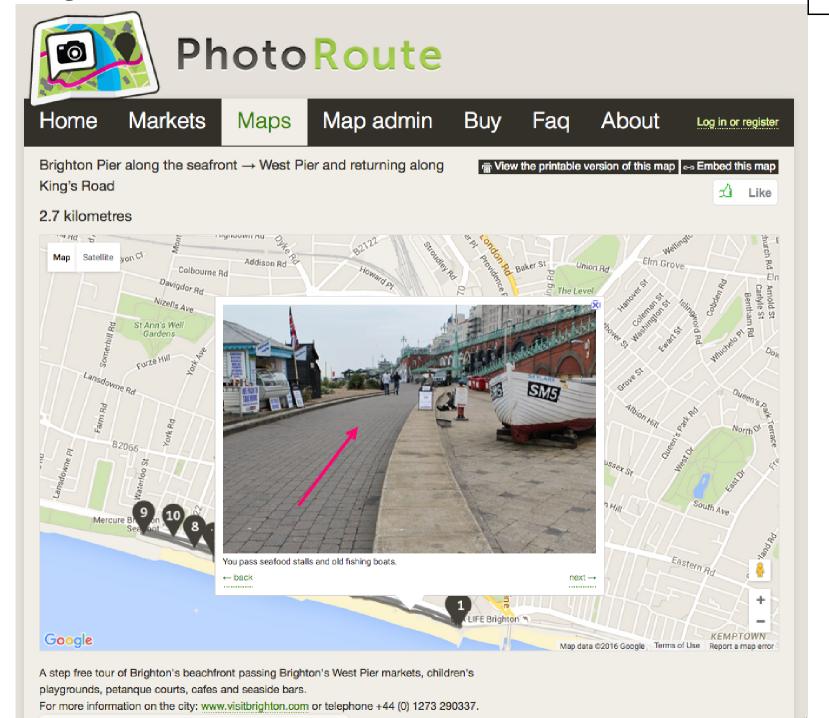


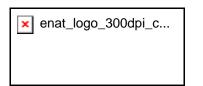
Brighton, UK. Accessible Photo Route



For more information on the city: www.visitbrighton.com or telephone +44 (0) 1273 290337.

Brighton, UK. Accessible Photo Route





Improving Accessible Tourism Business Supply Chains

"Mainstream" Providers Adapting to AT Market





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Buy Online

Single trip travel insurance

Annual Multi trip travel insurance

Cruise travel insurance Medical travel insurance •

Over 50's travel insurance

More from Avanti •

https://blog.avantitravelinsurance.co.uk/2016/03/15/accessible-holiday-destinations/

< Blog Home

The Most Accessible Holiday Destinations



Where To Go For a Worry-Free Holiday

For the estimated 650 million people in the world living with a disability, going on holiday can be a stressful experience. For a hassle-free trip try heading to one of these top accessible and disability-friendly locations.

Everyone loves a holiday, but for people with limited mobility due to disability or medical condition such as arthritis, COPD or the after-effects of a stroke, going on vacation can often be a stressful and frustrating experience.

Luckily, more and more destinations and holiday companies are cottoning on to the fact that accessibility is a key consideration for many holidaymakers, and facilities are being adapted accordingly. If you're looking for an accessible, worry-free holiday, try heading to one of these disability-friendly holiday locations.

Get a Quote or Buy online

Search for:

Search

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Cycling Holidays For Over 50s

A Gastronomic Holiday in Provence

The Most Accessible Holiday Destinations

Walking Holidays in the Czech Republic

Our Favourite Holiday Bargains of 2016

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Avanti Evergreer

Brenda and Teds Adventures

Company News

Insurance News

Press

ake a trip to...

Travel Blo

Travel Destinations

Uncategorize

seful travel tips

Accessibility Information & Marketing

The European Accessible Tourism Directory,

http://pantou.org





European Accessible Tourism Directory

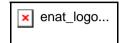


- Pantou is the Greek word for "everywhere"
- Identifies all kinds of suppliers who provide accessible tourism services
- The accessibility of the supplier's service(s) is audited either by:
 - An international / national / regional Accessibility Information Scheme (AIS), or by
 - A Pantou Access Statement, provided by the supplier (self-assessment)

www.pantou.org



Hantou http://Pantou.org



The European Accessible **Tourism Directory**

- Funded by European Commission
- 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 500 suppliers already registered Free of charge

Recently Registered



accessible touristic offer for and tourists in general. Verona in tandem offer a...



Planet Viaggi Responsabili

Planet Vlaggi Responsabili is a tour operator that organizes and



"La Tarente" - the gite is named after a local species of gecko - is situated in the centre of the Montfrin on the



tourist places in Greece.



Figeac. We rent fishing...



Making travel, tourism & destination websites a better accessible experience for the disabled, aging and everyone else If you have gone to...



Lausă, Portural

The Palácio da Lousă is an emblazoned building of the XVII century, formerly palace of Viscondessa do Espinhal, it is



Sur une exploitation agricole. Nathalle et François vous accueillent dans leur gite rural rénové, indépendant, situé à proximité de leur maison



accessible tourism, enabling users to find apps that are relevant to



Providing wheelchair accessible

transportation for travelers with physical challenges in Istanbul. Izmir, Kusadasi Ephesus Turkey



BTU - BULGARIAN TOURIST

 Information · Reservations



The "Parques de Sintra Welcome

Better* project is underway to improve access to the parks and palaces that are managed by Parques de Sintra,.



The "Centro Servizi Foligno" is a type B social cooperative founded in 1996. The social purpose of the cooperative is to promote and to



Metro4All

navigation project made for 2

1) collect and analyze data on accessibility of public transport.



Mobility Scooters Menorca

and accessible Island of the Balearic Islands, Mobility Scoote



Holiday Tour Operator

Located in Puglia, TourNelSud.com - Green Holiday Tour Operator aims to improve local tourism incoming-systems by



Fouldment Hire, Loan, Repair and

VIAGGI CARMEN

30 years of inbound experience



mobility to swap or rent their adapted properties with other people who have similar.



Cooperating Accessibility Information Schemes

- Reference accessibility information linked from the supplier's profile page

Accessibility Information Scheme	Country or Region	Mebsite http://www.accescity.be http://www.brusselvoorallen.be/?lang=fr
Acces City	Belgium	http://www.accescity.be
Brussels for All	Belgium	http://www.brusselvoorallen.be/?lang=fr
Toegankelijk Vlaanderen	Belgium	http://toevla.vlaanderen.be/publiek/nl/register/start
Disway	Czech Republic	http://www.disway.org/ PARTNER
Jedemetaky	Czech Republic	http://www.jedemetaky.cz/
Handistrict	France	http://handistrict.com/
Jaccede	France	http://www.jaccede.com/en/
Tourisme et Handicaps	France	http://dgcisth.armadillo.fr/app/photopro.sk/handicap/?#sessionhistory- ready, http://www.tourisme-handicaps.org/
Access Iceland	Iceland	http://www.gottadgengi.is/
ANGOLOGIRO	Italy	http://www.accessibilitagarantita.it/
Like Home	Italy	http://www.likehome.it/ita/home_ita.html
Südtirol für alle	Italy	http://www.suedtirolfueralle.it/
Turismabile	Italy	http://www.turismabile.it
Village for All	Italy	http://www.villageforall.net/en/cerca-struttura/
Portugal Acessivel	Portugal	http://www.portugalacessivel.com/default/home/id/1
Motivation Accessibility Map	Romania	http://www.accesibil.org
Zavod Premiki	Slovenia	http://premiki.com/?page_id=6
Agencia Catalana de Turisme	Spain	http://www.turismeperatothom.com/en/
OpenBritain	United Kingdom	http://www.openbritain.net
The National Accessible Scheme (England)	United Kingdom	http://www.visitengland.org/busdev/accreditation/nas/
Tourism for All UK	United Kingdom	http://www.tourismforall.org.uk/TFA-Directory.html

Supplier Name

Customer groups

Service information

Service description

Link to Accessibility information AIS "Tourisme et Handicap"

Website:

http://maison-charolais.com

Address:

43 route de Mâcon

Postcode:

71120

Telephone:

0385880400

Email:

maisonducharolais@orange.fr



Promoting Accessible Tourism in Europe

About ▼ Access Statement Accessibility Info Press & Media

REGIE MAISON DU CHAROLAIS





Customer Groups

Small Children

People with motor impairments

People who use a wheelchair

People who are deaf or have hearing impairments

People without speech or with speech impairments

People who are blind or have vision impairments

People with service animals

Services Information

Food and Beverage

Restaurant

Transport:

Disabled Vehicle Parking

Indoor Attractions

Information & Booking:

Guide books, leaflets, tourism information

Audio/Video guide, smartphone application

Accessible Tourism Network

Outdoor Attractions:

Childrens' playground

Conference and Exhibition:

Trade and exhibition centre

Accessibility Information

Tourisme et Handicaps

Country

France

Like 2 7 Tweet in Share 6- Share +4 Share this on Google

Pantou Supplier Profile

Supplier name

Customer groups

Service description

Services information

Link to Accessibility information Pantou Access Statement

Website:

http://www.algarveseniorliving.com

Address:

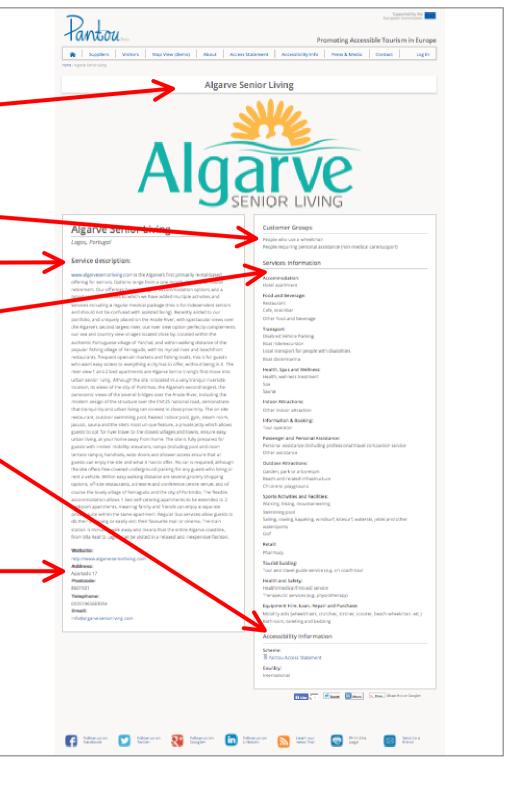
Apartado 17, Lagos

Postcode: 8601901

Telephone: 00351965683054

Email:

info@algarveseniorliving.com

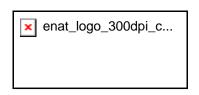


The European Accessible Tourism Directory

- •Customers can find accessible tourism suppliers across the whole of Europe in one website.
- •Suppliers can find business connections, stimulating growth and development
- •Creating accessible supply chains
- •Building accessible tourist destinations.



Accessible Destination Case Studies



- ◆ Lack of accessible services and facilities must be addressed by convincing businesses to invest in the provision of such services.
- ◆ The business case for investment in the field of accessible tourism is demonstrated in 15 Accessible Tourism Case Studies
 - London, United Kingdom
 - Frankfurt, Germany
 - Arona, Spain
 - Stockholm, Sweden
 - Lousã Accessible Destination, Portugal
 - Paris Ile de France, France
 - Disneyland Paris, France
 - Slovenia NTA, ŠENT NGO and Premiki, Slovenia

- Moravia-Silesia and Tešín, Czech Republic
- Athens Historical Centre, Greece
- Trentino, Italy
- Schloss Schönbrunn, Vienna, Austria
- Hérault, le Languedoc, France
- Barcelona Cruise Destination,
 Spain
- Rovaniemi, Finland

http://www.accessibletourism.org/?i=enat.en.reports.1739

"Bloggers": Your Sales Agents











ABOUT MARTYN SIBLEY



My name is Martyn Sibley. I am a regular guy who happens to have a disability called Spinal Muscular Atrophy (SMA). This means I cannot walk, lift anything heavier than a book or shower myself. Nonetheless I run Disability Horizons, am the author of 'Everything is Possible', I have a Degree in Economics & a Masters in Marketing. I love adventure travels (including an epic visit to Australia), I have great people in my life (including my soul mate), I drive my own adapted car, run my own business, have flown a plane, enjoyed skiling & SCUBA diving, and live independently on earth.

www.martynsibley.com



"Bloggers": Your Sales Agents

enat_logo_300dpi_c...

"I wish AISM the best of luck with the rest of this project (they will feedback to the vendors and the Commission).

My biggest hope is that the occasional issues we faced are turned into positives, by creating change.

Mostly by showing what is possible, I hope many more disabled people feel confident to travel"

Martyn

Tweets @martynsibley
World Changer @ www.martynsibley.com
LinkedIn Profile @ www.linkedin.com
Co Founder @ www.disabilityhorizons.com
Healthy Goodness @ www.todaherbal.co.uk



ENAT on Social Media, Web and Contact Address







https://www.facebook.com/accessibletourism



Twitter https://twitter.com/euaccesstourism



ENAT LinkedIn

Grouphttps://www.linkedin.com/grp/home?gid=4003674



ENAT Facebook Group

https://www.facebook.com/groups/accessibletourism/

Web: www.accessibletourism.org

Email: enat@accessibletourism.org



Thank you

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