

PALMA DE MALLORCA

STUDY ON TOURISM EXCHANGES IN EUROPE

CALYPSO PREPARATORY ACTION

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PRESENTATION CALYPSO PROJECT

OVERALL APPROACH TO THE ASSIGNMENT

- The sub-sector of transnational (European) social tourism needs to be seen and thoroughly assessed from both demand and supply perspective, to realise the potential for economic growth, social cohesion and European citizenship.
- The study consists of five separate, but closely connected tasks.
- Results of the study shall be operational and applicable, in order to provide a solid basis decision making and future development of the area.
- The definition of Social Tourism is in this study not exclusive of people who already go on holiday, abroad or domestic.

TASKS OF THE STUDY

Task 1

- To catalogue main good practices concerning the four target groups across Europe (in participating countries)

Task 2

- To undertake a scoping exercise aimed at better insight of concerned target markets

Task 3

- Develop recommendations for appropriate mechanisms for tourism exchanges among participating countries

Task 4

- To identify ways and means to increase the attractiveness of schemes

Task 5

- To carry out a study among MS not participating in the study



Finland

Sweden

Estonia

Ireland

Denmark

Latvia

UK

Netherlands

Lithuania

Poland

Belgium

Germany

Czech Rep.

Lux.

Slovakia

France

Austria

Hungary

Slovenia

Croatia

Romania

Portugal

Italy

Slovenia

Bulgaria

Spain

FYROM

Greece

Turkey

Malta

Cyprus

OUTPUTS OF THE STUDY

- Compendium of **Good Practices**
- **Country Profiles** of all participating countries, including:
 - Scoping of the target groups, main features, demand etc
 - Mapping of main stakeholders involved
 - Analysis of supply side and tourism sector
 - Analysis of main trends in tourism
- **Final report**
 - Aggregate scoping of target groups and markets
 - Analysis of legislative issues
 - Recommendations for mechanisms and future actions

CALYPSO FINDINGS

THE RATIONALE OF CALYPSO AND POTENTIAL IN OFF SEASON TOURISM



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SOCIAL TOURISM – A TRADITIONAL FIELD OF PUBLIC INTERVENTION

- Right to holiday and recreation for all: the view that everyone is entitled to a holiday is largely shared, and social tourism is considered a justified public intervention
- Supply specifically designed for social tourism, especially families
- Many non-specialized tourism facilities involved in social tourism based on charity considerations
- Most current social tourism initiatives take place in country, on a national or regional level
- Movement is towards less specialised supply, towards “tourism for all” to provide opportunities to go on holiday on the same conditions as everybody else – confirmed by responses from non participating countries

CALYPSO – FOCUSING ON TOURISM EXCHANGE AND EUROPEAN DIMENSION

- A double focus, with a connection made between access to tourism and off season tourism and economic development
- A European perspective, with transnational exchange as a final aim
- Contribution to social and economic cohesion in Europe and strengthening European citizenship
- Dependent on participating states willingness and interest to invest – an EC driven mechanism would not be feasible nor sustainable
- Current economic situation highlights the findings – any actions supporting off season exchanges needs to benefit the economic development in tourist destinations AND be cost neutral to the Member States.

SEASONALITY ASPECTS IN EUROPEAN TOURISM DESTINATIONS

- Extending seasons is a high priority for suppliers in participating countries, particularly around summer vacations.
- The seasonality patterns differ between countries, and also within countries with diverse tourism profiles (sun, sea and mountain)
- Conclusion is that off-season from a European perspective exists almost year round
- The different target groups have varying degrees of possibilities to travel in off-season
- For example families with school children have constraints, however vacations do not overlap completely

SCHOOL SUMMER HOLIDAYS IN A SAMPLE OF COUNTRIES – POTENTIAL FOR EXTENDING SEASONS

Country	June				July				Aug				Sept			
Austria						■	■	■	■	■	■	■	■			
Bulgaria					■	■	■	■	■	■	■	■	■	■		
Cyprus			■	■	■	■	■	■	■	■	■	■	■			
France					■	■	■	■	■	■	■	■				
Hungary			■	■	■	■	■	■	■	■	■	■				
Italy			■	■	■	■	■	■	■	■	■	■	■	■		
Lithuania					■	■	■	■	■	■	■	■				
Poland				■	■	■	■	■	■	■	■	■				
Slovakia					■	■	■	■	■	■	■	■				
Spain				■	■	■	■	■	■	■	■	■	■	■		

IMPACT OF LOWER PRICES TO PROMOTE HOLIDAYS OFF-SEASON

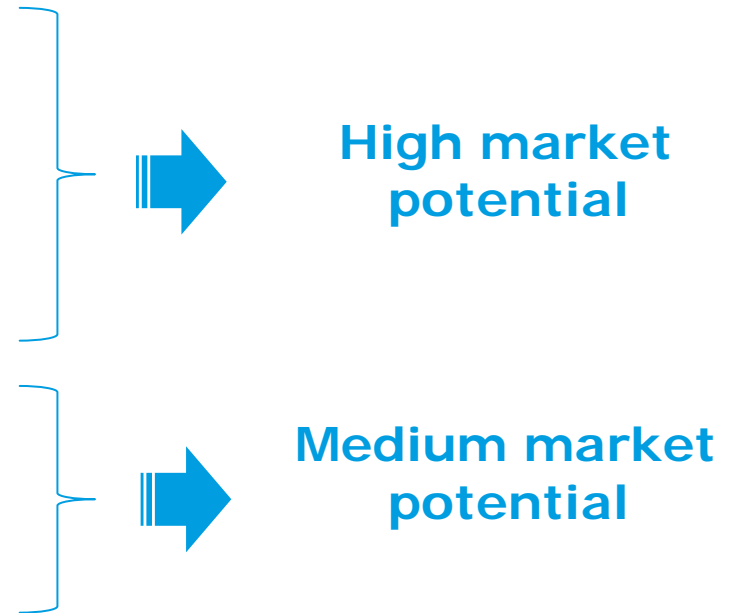
		Current travel habits and trends		
		Many stays off-season	Some stays off-season	Few stays off-season
Impact of low prices on travel habits	Decisive		<ul style="list-style-type: none"> • Young workers and unemployed • Individuals and groups of adults w. disability 	
	Incentive	<ul style="list-style-type: none"> • Seniors 	<ul style="list-style-type: none"> • Students • Adults w. disability autonomous travellers 	
	Irrelevant			<ul style="list-style-type: none"> • Families • Adults w. disability accompanied by family

CONCLUSIONS TO DRAW OUT OF THE SEASONALITY ASPECTS

- Seniors
- Young workers and unemployed
- Individuals and groups of adults w. disability with accompanying person

- Students
- Adults w. disability autonomous travellers

- Families
- Adults w. disability accompanied by family



CALYPSO FINDINGS

FEASIBILITY OF THE FOUR DIFFERENT TARGET GROUPS



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MAIN CHARACTERISTICS AND FEATURES OF THE TARGET GROUP FAMILIES

- Covers multiple types of families (ie. Low income, single parents, large families, social difficulties etc.)
- Families do in general not have the possibility to travel off-season (in particular families with school-aged children)
- European exchange mechanisms are rare and mostly consist of bilateral agreements between associations
- Stakeholders on the national level mainly include ministries responsible for social support, child benefits etc.
- Assessed as challenging as Calypso target group in the short term, due to the extensive need of support, both social and economical

MAIN CHARACTERISTICS AND FEATURES OF THE TARGET GROUP YOUTH

- A large target group, 66 million people aged between 20 and 29 years of age and 96 million people aged between 15 and 29.
- According to Eurostat 20% of young Europeans aged 16–24 are at risk of poverty, higher than total population
- Major motivations for young travellers are cultural discovery and personal experience. Study abroad, work abroad, volunteering, language courses represent about 20% of youth travels
- Several international discount cards targeting young travellers: ISIC, IYHF, IYTC, EURO 26; Youth hostels: EUFED, online selling platforms
- Easily accessible as target group, and several offers exists already to build from which should facilitate the development of a targeted Calypso action for Youth

MAIN CHARACTERISTICS AND FEATURES OF THE TARGET GROUP PWD

- Very heterogeneous target group: Population experiencing long-standing health problems or disabilities in EU-27 working age population: 46 million
- About 26 million people w. disability are unemployed. In a majority of participating countries, the level of pension doesn't allow disabled people to go on holiday, especially abroad
- Mainstream tourism accommodation generally preferred. Specialized tourism accommodation when need for specialized care, medical treatment and services
- PWD is generally considered to be a transversal group, and in particular related to the seniors segment. Accessibility is key for this target group, both as a specific and transversal group
- Needs to be included in a Calypso Action, due to the transversal nature of target

MAIN CHARACTERISTICS AND FEATURES OF THE TARGET GROUP SENIORS

- Senior tourism is possibly one of the segments with more growth potential over the coming years in Europe, due to an ageing and active population
- Current European tourism reality (countries that issue tourists and receive tourists), as for example seen in Spain and Portugal
- High availability and interest in off season travel
- Apart from accessibility, other factors equally important such as cultural supply, food, medical care, translation etc
- High potential as Calypso target group

CALYPSO RECOMMENDATION I

CRITERIA FOR PARTICIPATION IN CALYPSO – ON DEMAND AND SUPPLY



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A RECOMMENDATION IS TO WORK ON CRITERIA FOR DEMAND

- Criteria for the different target groups differ to a large extent in participating countries – assessed as hard to harmonise
- In order for Calypso to have the possibility to generate economic benefits, it needs to be open to all travellers, not only travellers in need of financial support
- Needs to explore the possibility of European income related criteria, and whether levels should be set on European level or should be set at national level
- The opinion of the study is that criteria for target groups should be set mainly at a national level, since situations differ and any direct subsidies to travellers would be national.

CURRENT CRITERIA FOR "FAMILIES FACING DIFFICULT SOCIAL CIRCUMSTANCES"

Type of definition	Countries
Income related	Croatia, Cyprus, Slovenia, Greece, Turkey, Hungary
Income and situation (unemployment, single parent, number of children, health etc)	Belgium, Romania, Bulgaria
Multiple criteria (health, addictions, large families)	Lithuania, Slovakia
No national definition	Austria, France, Latvia, Ireland, Malta, Poland, Czech Republic, Portugal, Spain

A RECOMMENDATION IS TO WORK ON CRITERIA FOR SUPPLY

- Today national criteria exist in some areas, for example accessibility and environment, but not in all countries
- Information on accessibility is a challenge for PWD, as criteria and systems are not harmonised in Europe
- Needs to be established who and what structures/stakeholders at national level should be responsible for verification of the the supply and quality control
- Important to note that not only accessibility is important, depending on target group other factors need to be taken into account such as information services, health services, activities etc.

CALYPSO RECOMMENDATION II

MECHANISMS AND STRUCTURES IN PARTICIPATING COUNTRIES



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EXISTING STRUCTURES AND SUPPORT FOR A CALYPSO ACTION

- A necessity in future action will be development of structures and mechanisms for support in participating countries
- Different levels of readiness, in some countries established structures for the specific target groups, in others no established structures at all
- High level of diversity in support structures, from national to regional and association based mechanisms
- A Calypso action should work to establish the support structures necessary for implementation, by supporting participating countries in establishing relevant structures and mechanisms.

STATE OF PLAY IN PARTICIPATING COUNTRIES

Current situation	Countries
Established structures and responsibilities for Social Tourism	France, Spain, Portugal, Italy, Belgium
Few/No established structures and responsibilities for Social Tourism	Bulgaria, Croatia, Czech Rep. Hungary, Ireland, Lithuania, Malta, Poland, Slovakia, Slovenia, Turkey, Austria, Greece

IMPORTANT FACTORS REGARDING MECHANISMS AND STRUCTURES

- Needs to take into account both demand and supply, i.e. be the entry point for both consumers and the tourism operators
- Important to set up one entry point per target and country, i.e. identify the most appropriate Calypso organisations. Likely to differ from country to country, and between target group.
- Needs to be clear on roles and responsibilities, in particular regarding the following:
 - Setting up of criteria for tourists from target groups
 - Assessing and certifying the supply, f.ex accessibility and quality of operators
 - Ensure that competition is not distorted

RECOMMENDATION FOR CALYPSO ACTION

- To support the setting up and testing of exchange mechanisms in participating countries
- A pilot could preferably involve 3 countries or more, who in collaboration develop a proposal to be supported by the Calypso Action.
- The proposals should be limited to the following concrete fields of activity:
 - Benchlearning and support to develop national structures
 - Studies on cost benefits for member states and tourism industry to engage in Calypso
 - Pilot projects with tourism exchange

CALYPSO RECOMMENDATION II

A PLATFORM FOR CONNECTING SUPPLY AND DEMAND



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One Calypso platform with one channel per target

DEMAND

SUPPLY

