ECONOMIC IMPACT AND TRAVEL PATTERNS OF ACCESSIBLE TOURISM IN EUROPE

Presentation of the key study findings

Service Contract SI2.ACPROCE052481700 – European Commission, DG Enterprise and Industry

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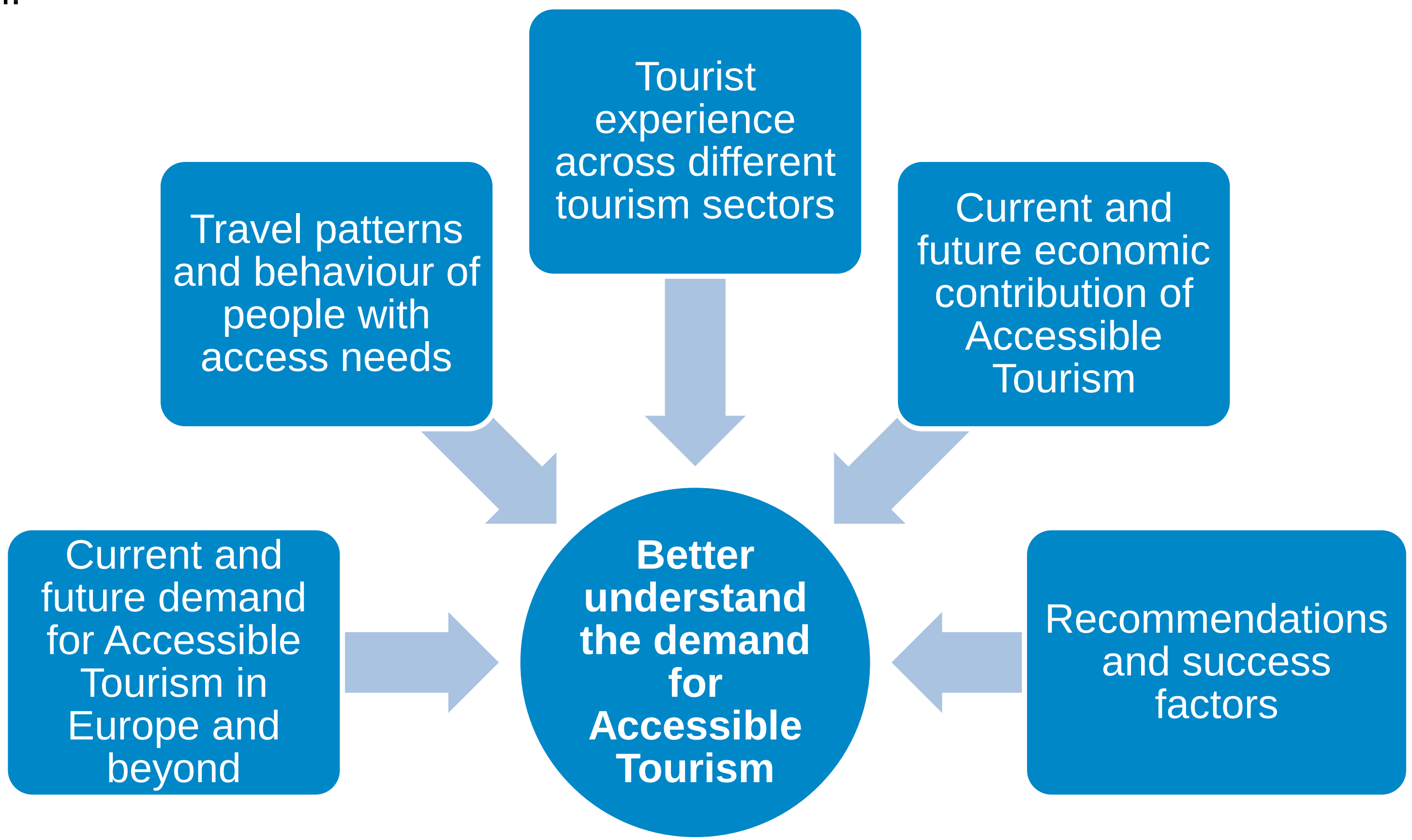
Objectives and methodology

Objectives - overview

This is one of three studies commissioned by the European Commission, DG Enterprise and Industry in 2012-2013 in order to build a comprehensive picture of Accessible Tourism in the European Union.

The study addresses 5 key topics in order to better understand the demand for Accessible Tourism:



Methodology - Overview

Task 1: Current and future demand for Accessible Tourism in Europe and beyond

- Task 1a – Cluster analysis
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Task 2: Travel patterns and behaviour of people with access needs

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Task 5: Recommendations and success factors

Executive summary

Key findings – Task 1

Task 1a – Cluster analysis

- A cluster analysis based on travel behaviour (with 13 criteria related location, demographics, income and education) was used to group EU Member States in 8 clusters.
- 12 representative countries were selected: Belgium, Bulgaria, France, Ireland, Italy, Lithuania, the Netherlands, Poland, Slovenia, Spain, Sweden, and the United Kingdom.

Task 1b – Forecasting

- In 2012, people with access needs in the EU took approximately 783 million trips within the EU, and the demand is anticipated to grow to about 862 million trips per year by 2020.

Key findings – Task 2

Task 2a – Website and brochure analysis

- Almost 70 % of all 66 surveyed websites provide information on accessible offers, but accessible features are almost never used to promote a destination.
- Special interest brochures with information for guests with access needs were not always available from the tourism boards of the 12 surveyed countries.

Task 2b - Online survey and senior focus groups

- 2534 people with access needs were surveyed in total in 12 EU Member States and 4 inbound markets (Russia, China, Brazil and the US) and 2 focus groups of 12 participants each were organised in Lithuania and Ireland with people above 65.
- Overall, people with access needs share many behavioural patterns with other travellers, although they differentiate themselves in the preparation process.
- The price of accessibility, medical help, the availability of information about accessibility and the accessibility of locations itself are seen as issues by some.
- There is evidence that many people with access needs adapt to issues as they arise and do not perceive them as barriers as such.
- People with access needs are not a uniform group: results vary between people who travel with children, people aged 65 and above and people with limitations, and across countries and limitations.
- Results point towards possible behaviour changes if accessibility conditions were improved, such as an increase in travel budget or travel frequency.

Key findings – Task 3

Task 3a – Case-studies

- 10 case-studies were analysed across the EU.
- In most cases accessibility is integrated as part of the quality policy.
- The closer the cooperation with other local service providers the greater the success.
- Although social responsibility is a motivation, it does not imply that the company deviates from its own business focus.
- The engagement and training of the staff is a key issue in improving results.
- Knowledge transfer flows more easily when the organisation is part of professional networks.
- Planning and anticipating the results before starting is also a key element of success.

Task 3b – Desk research on barriers

- People with access needs experience different levels of frequency of barriers across key tourism sectors. The barriers experienced in the transport stage (at the destination) are faced more often compared to other sectors
- The identification of different barriers for each tourism sector helps to remove existing obstacles for people with different access needs
- Overall, attitudinal barriers are encountered more often than physical access barriers across all sectors

Key findings – Task 4

Task 4a – Stakeholder consultation

- 21 stakeholders took part in a pre-focus group and 15 in the main focus group. This consultation was completed by 11 telephone interviews.
- Accessible tourism is considered a business opportunity but there is a lack of coordination, particularly between the public and private sector.
- Accessibility is mainly understood as a feature for disabled guests and almost never as a plus in comfort and service and, therefore, not widely used in marketing and advertising.
- For the tourism business, political and financial support, awareness raising and engagement of service providers are important drivers.
- For the guest, reliable information on accessible offers and services is a key factor for success.

Task 4b – Scenarios and impact assessment

- Under scenarios of minimum, medium and extensive improvements, the tourism demand could potentially increase against the current level by 24.2%, 33.2% and 43.6%, respectively.
- The current tourism demand in 2012 generated €786 billion of gross turnover and €394 billion of GDP, equivalent to 3% of the total EU27 GDP, and 8.7 million persons of employment within the EU, considering direct, indirect and induced contributions.
- The EU economy could benefit from further contribution under scenarios of minimum, medium and extensive improvements by about 18%, 25% and 36% against the current level, respectively.

Task 5: Recommendations and success factors (1)

1. Commitment of the decision-makers

- Integration in mainstream offers
- Encourage service providers to invest in accessible tourism and demonstrate its economic and social benefits
- Harmonise standards and legislation to provide better guidance for providers and clearer information for users
- Strong and on-going support from politicians, administrators and decision makers in business – including education and training as well as direct financial support

2. Coordinating and continuity

- Improve the industry's coordination efforts, particularly through public-private partnerships and on local and regional levels
- Assign dedicated work unit or coordinator within the management structure of tourism organisations with appropriate resources

Task 5: Recommendations and success factors (2)

3. Networking and participation

- Encourage knowledge transfer, particularly through professional networks
- Guarantee the accessible offer across all categories of services and prices offered at the destination

4. Strategic planning

- Step 1: awareness of the diversity of access needs and patterns of travel behaviour across different groups and countries, but also across individuals within groups, to target them in the most appropriate way
- Step 2: an inventory of the current offer in terms of infrastructure, services and possibilities for improvement
- Step 3: improve the offer gradually, include accessibility in long-term planning and investments and develop feedback tools for customers to establish accessibility priorities
- Step 4: improve marketing and advertising strategies by taking into account accessibility features

Task 5: Recommendations and success factors (3)

5. Knowledge management and qualification

- Staff with a solid knowledge base on accessibility through good knowledge management
- Regular training of staff and management

6. Optimisation of resources

- Using as many resources as possible for a strategic development of accessible tourism
- Prioritising tasks along the service chain

7. Communication and marketing

- Include sufficient accessibility information in mainstream tourism information
- Take personal information and recommendations into account in marketing strategies (e.g. through social media)

Task 1 – Demographic profiling of tourists with special access needs

Task 1 - Objectives

Task 1: Demographic profiling of people with access needs

1a: To analyse the current demand for accessible tourism, including people with different types of impairment and the elderly population

1b: To forecast the future demand for accessible tourism, including people with disabilities and the elderly population

Task 1 - Methodology

1. **Desk research**

- Research was conducted on the trend of population with access needs in the EU Member States and the key international inbound markets.

2. **Cluster analysis**

- EU27 Member States were grouped into 8 clusters, according to demographic and socio-economic parameters.

3. **Online survey**

- Primary data on travel profiling figures were collected in the 12 representative countries of the 8 clusters.

4. **Estimation and forecasting**

- Current and future tourism demand were estimated based on the data collected from desk research and online survey. Relevant Eurostat statistics were used for validation and necessary adjustments.

Key Findings – Task 1

1. As of 2011, there were 138.6 million people with access needs in the EU, of which 35.9% were people with disabilities aged 15-64, and 64.1% were the elderly population aged 65 or above.

2. Among the EU27 countries, UK, France, Germany, Italy and Spain are countries with the largest population of people with access needs, all above 10 million.

3. The population of people with access needs in the EU is anticipated to grow from 138.6 million in 2011 to 154.6 million in 2020, equivalent to an average growth rate of 1.2% annually; the growth rate of people with disabilities is merely 0.1%, whereas that of the elderly population is 1.8%.

Key Findings – Task 1

4. In 2012 more than half of the individuals with disabilities in the EU travelled; a slightly smaller proportion of the elderly people travelled during the same period.

5. The majority of the trips, either day or overnight trips, took place within the EU, particularly in home country.

Group	People with Disabilities		The Elderly population	
Travel Type	Day Trips	Overnight Trips	Day Trips	Overnight Trips
Travel Propensity	51.8%	58.1%	36.4%	47.5%
Travel Frequency	6.7	6.7	6.9	5.5
Of these, spent in				
Domestic (%)	87.1%	60.1%	87.3%	70.0%
EU (%)	10.4%	27.4%	12.1%	22.8%
International (%)	2.5%	12.5%	0.5%	7.2%

Travel behaviour of people with access needs: EU27 averages, 2012

Key Findings – Task 1

6. About 32.7%, 46.4% and 53.2% of the **people with disabilities** that **travelled in the last 12 months** would like to visit some of the EU destinations if their accessibility could be improved under Scenarios A, B and C, respectively.

7. Among the **elderly population** that **travelled over the last 12 months**, about 20.5%, 29.5% and 38.0% would like visit some EU destinations under Scenarios A, B and C, respectively.

8. Under different scenarios, 24.2%, 36.8% and 44.2% of the **people with disabilities** that **didn't travel over the last 12 months** would be willing to visit some EU destinations should accessibility be improved.

9. Of the **elderly population** that **didn't travel over the last 12 months**, 16.1%, 19.5% and 25.3% would be willing to travel under different scenarios.

Key Findings – Task 1 (International markets)

1. As of 2011, there were 457.9 million people with access needs in the 11 key international markets, of which 36.5% were people with disabilities aged 15-64, and 63.5% were the elderly population aged 65 or above.

2. Among the 11 markets, China, India and USA are countries with the largest population of people with access needs, all above 50 million, but USA, Switzerland and Russia show the highest demand for EU tourism.

3. The population of people with access needs in these international markets is anticipated to grow from 457.9 million in 2011 to 553.9 million in 2020 (=2% annually), with the elderly population growing much faster than the people with disabilities.

Key Findings – Task 1 (International markets)

4. Norway and Switzerland have the highest ratios of people travelling to the EU, whereas China and India have the lowest figures.

Source Market	Australia	Brazil	Canada	China	India	Japan
Departure to EU per 100 people (travel propensity × travel frequency)	18.59	1.66	11.00	0.38	0.16	4.51

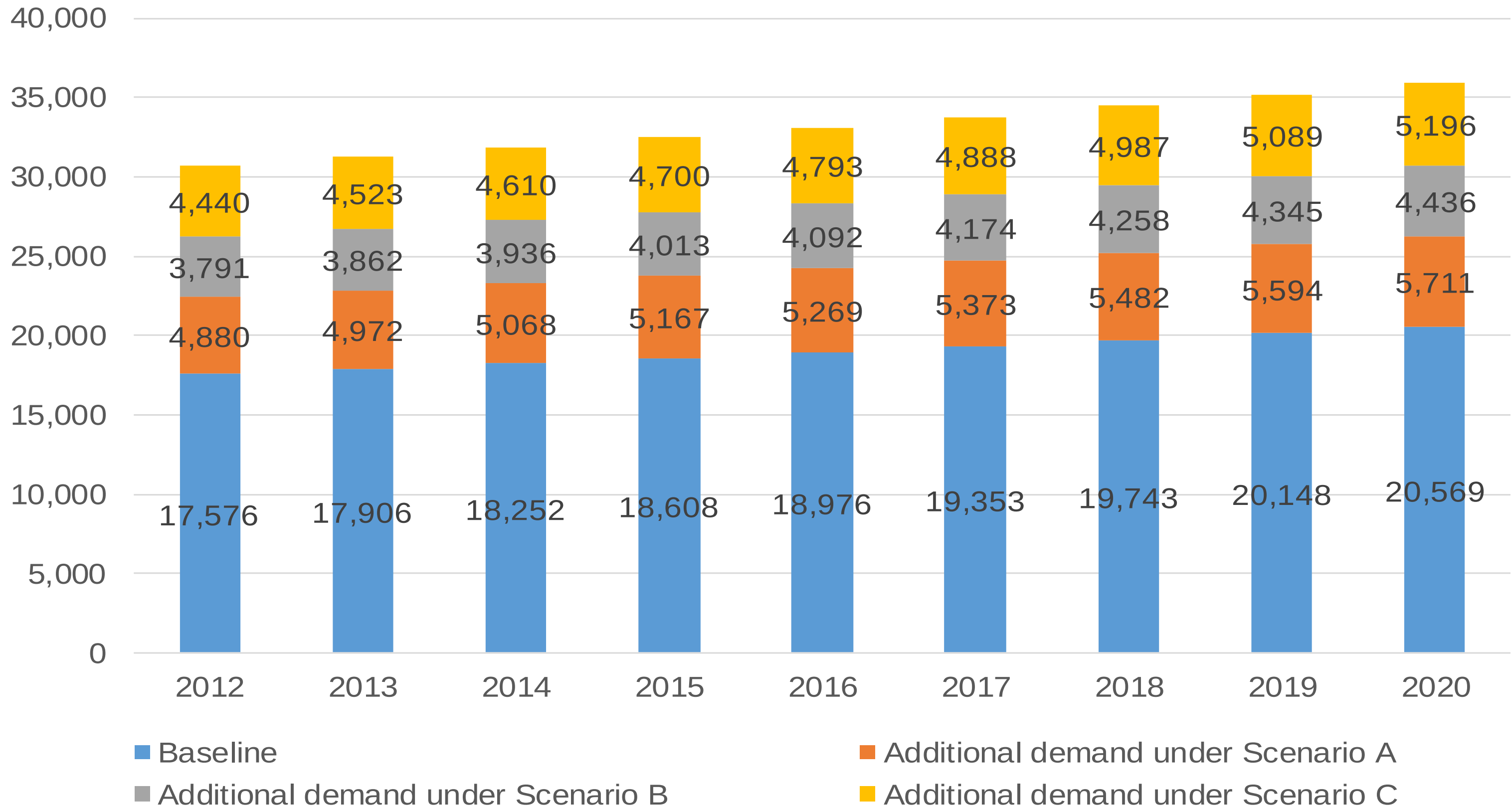
Source Market	Norway	Russia	South Africa	Switzerland	USA
Departure to EU per 100 people (travel propensity × travel frequency)	120.15	6.99	1.12	137.85	6.87

Departure to the EU per 100 people in 2011 by all tourists from the 11 key international inbound markets (unit: trips per year)

Source of calculation: Eurostat (2012) and World Bank (2012)

Key Findings – Task 1 (International markets)

5. With improvements of accessibility, current tourism demand in 2012 by the key international markets can potentially increase against the baseline by 27.8%, 49.3% and 74.6% under Scenarios A, B and C, respectively.



Potential Demand for EU's Accessible Tourism by people with access needs from key international markets ('000 trips)

Task 2 – Behavioural profiling of tourist with special access needs

Task 2 - Objectives

Task 2: Behavioural profiling of people with access needs

2a: Supply: To investigate the provision of information and communication strategies about accessible offerings

2b: Demand: To investigate the travel patterns and behaviour of people with access needs, including travel intensity and frequency

Task 2 - Methodology

1. Website analysis

- 66 websites were analysed in terms of accessibility and content across tourism sectors in 12 EU Member States

2. Brochure analysis

- Brochures providing general information on tourism and for guests with access needs were ordered in 12 EU Member States.

3. Online survey

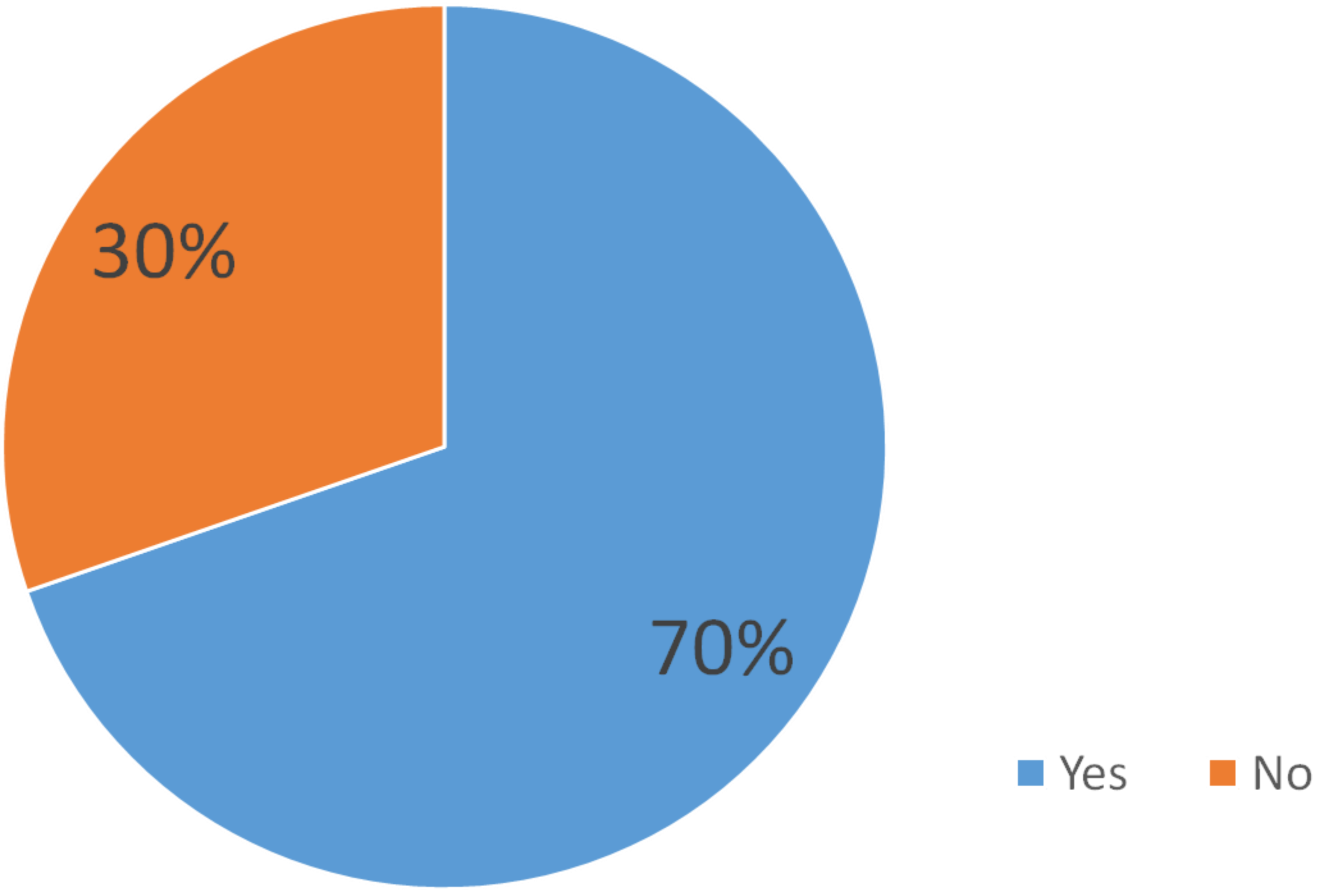
- 2534 people with access needs from 12 EU Member States, Russia, China, the US and Brazil answered an online survey on their travel behaviour, satisfaction and expectations.

4. Focus groups with seniors

- 2 focus groups were conducted in Ireland and Lithuania with people above 65 to discuss their travel behaviour, satisfaction and expectations.

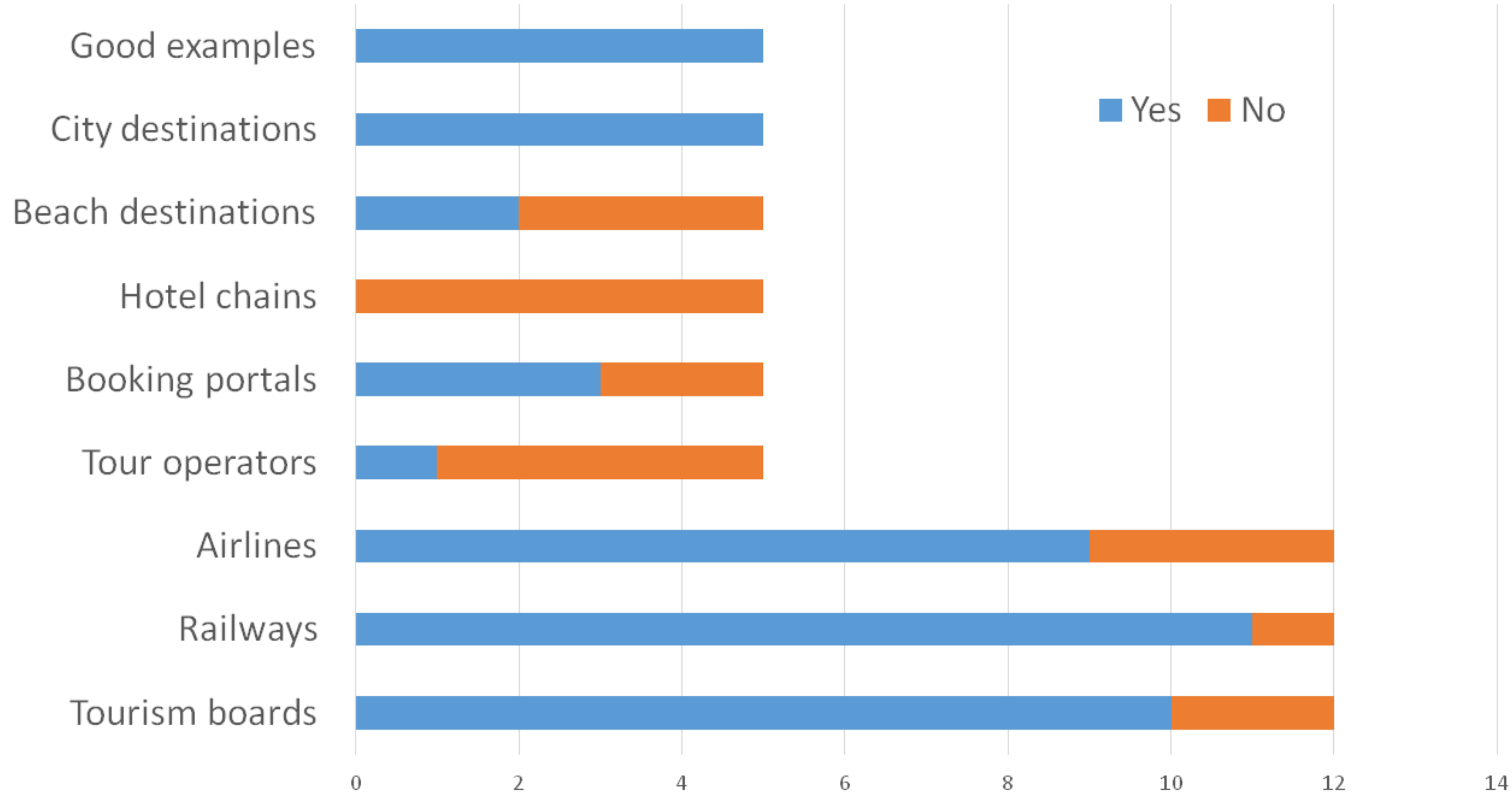
Website analysis

Websites with (yes) and without (no) information on accessible offers (n = 66)



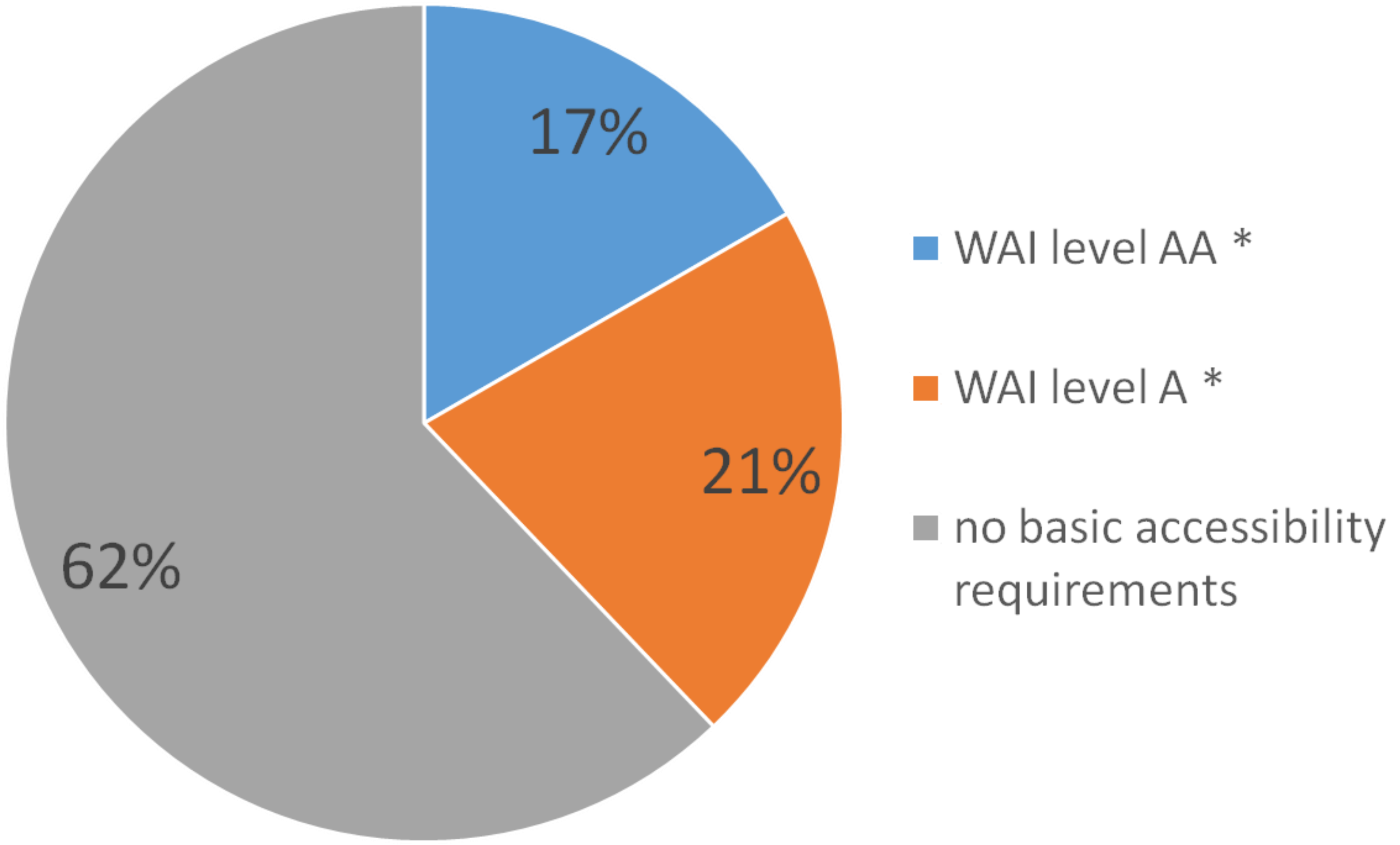
Website analysis

Websites with (yes) and without (no) information on accessible offers (n = 66)



Website analysis

Technical accessibility of analyzed websites (n = 66)



* for the aspects and sections analyzed

Website analysis - Good Practice

Visit England

1. Tries to inspire travellers with high quality pictures and attractive descriptions – a real focus on marketing
2. Recommendations for an enjoyable holiday trip
3. Information on accessibility is fully integrated in the main website
4. Good example of inclusive communication without any discrimination

http://www.visitengland.com

Brochure analysis – Key findings

1. 2 of 12 tourism boards do not send printed brochures anymore (Italy, The Netherlands)
2. None of 12 tourism board provided special interest brochures for guests with access needs
3. In 4 brochures (England, Ireland, The Netherlands and Sweden), information for guests with access needs is given in the regular brochure
4. The font size was too small in 9 out of 11 analyzed brochures
5. In all but one brochure (Poland), the contrast between text and background is sufficient
6. All brochures are dazzle-free
7. All but one brochure (England) was structured clearly and well laid out

Online survey - Overview

Online survey

EU - 12 Member States
2111 interviews

Inbound markets - US, China, Russia, Brazil
423 interviews

People who travel with children

People with limitations

People above 65

People above 65

People with limitations

Online survey and focus groups – Behavioural patterns

People with access needs share many behavioural patterns with other travellers

- Overall, people with access needs share many behavioural patterns with other travellers. They tend to use standard infrastructures, with minorities selecting answers specific to this group.

However, people with access needs have specific behavioural patterns when preparing a trip:

- Many use specialised information sources or book through an institution or group.
- A majority checks accessibility conditions and/or available help before travelling.
- Large majorities find information about accessibility at destination sufficient, reliable and accessible, although this is an issue for a minority.
- The focus groups show evidence of advance planning aiming at preventing issues and fulfilling specific needs.

Online survey and focus groups – Barriers

People with access needs experience obstacles of different kinds when travelling but may not always perceive them as barriers.

Medical help and health treatments get low satisfaction scores and are mentioned fairly frequently as barriers.

Among accessibility-related aspects, the availability of information about accessible services and accessible locations are also mentioned as barriers.

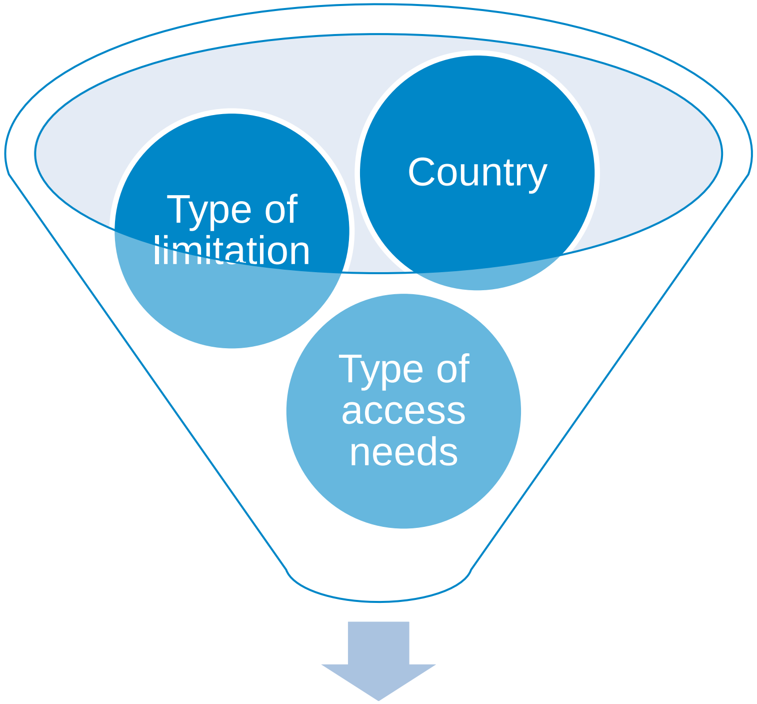
Turning to buildings, satisfaction is the lowest for alarm systems, types of access and access to services other than accommodation.

There is evidence of issues with the price of accessibility, with sizeable proportions saying they had to pay more than the standard price or had to switch to a more expensive product or service at least sometimes for them to be accessible.

Many people do not perceive barriers as such, with sizeable proportions saying they did not experience barriers with any of the trip aspects mentioned. This is consistent with the results of the focus groups, which show that many people simply adapt to issues as they arise.

Online survey and focus groups – Diversity of people with access needs

People with access needs are not a uniform group and several key characteristics have an influence on their attitudes and behaviour.



Differentiated results in terms of attitudes and behaviour

Online survey and focus groups – Improvements to accessibility and behavioural changes

Improvement to accessibility may lead to behavioural changes among sizeable proportions of people with access needs

Improvements to accessibility

- Seniors and people with limitations most often mention medical help and menus for special dietary needs.
- These items are also mentioned often by people who travel with children, together with equipment and activities for children.
- In terms of building accessibility, the aspects seen as most important by all three groups are accessible toilets, accessible parking spaces and the ease of use of lifts.

Possible behavioural changes

- Sizeable minorities would consider increasing their travel budget or travelling more often
- Over 80% say they are likely to return to a destination when they are satisfied

Senior focus groups findings

Lithuania

•Carefully select a trip organiser who takes into account specific needs
•More likely to rely on a travel agent or association.

Ireland

- Research a destination before the trip
- More likely to travel and organise their trips independently, particularly using the Internet

Overall

- Accessibility when travelling was not perceived as a major issue as participants have developed strategies to avoid experiencing barriers.
- These strategies include advance planning and the selection of trip types adapted to one's needs
- Seniors are not a uniform group: people have different motivations and preferred activities when travelling, while obstacles and barriers are more linked to specific access needs than age.

Task 3 – Evaluation of the tourist experience across different tourism sectors

Task 2 - Objectives

Task 3: The tourist experience across different sectors

3a: Supply: To examine good practice/ success stories in the supply of accessible offerings which act as enabling factors affecting the quality of the tourism experience of people with access needs

3b: Demand: To examine existing barriers faced by people with access needs which act as disabling factors affecting the quality of the tourism experience of people with access needs

Case-studies

10 Cases have been analyzed

Case-study	Type	Country
City of Erfurt	Destination	Germany
Accessible Poland Tours	Travel agency	Poland
Chateau des Ducs de Bretagne	Heritage	France
St. Martin Wine Cellar	Entertainment and shopping	Luxem-bourg
Berlin	Destination	Germany

Case-studies

10 Cases have been analyzed

Case-study	Type	Country
Barcelona Metro	Transport	Spain
Scandic Hotels	Accommodation	Sweden
GVAM Mobile Guides for All	Assistive Technologies	Spain
Restaurant Monnalisa	Food and beverage	Italy
Restaurant Girasoli	Food and beverage	Italy

Case-studies – Key findings

1. In mainstream tourism services investment in accessibility results in increased client numbers.
2. Destinations that take care for accessibility usually are focused on service quality in general.
3. The successful accessible destinations show some kind of cooperation among service providers or, at least accessible services are guaranteed along the tourism chain.
4. Some destinations succeed in including accessibility, comfort and services in their branding.
5. The importance of investment varies largely depending on the type of services provided and whether the accessibility improvements have been included since inception, have been planned or have been made in response to demand.

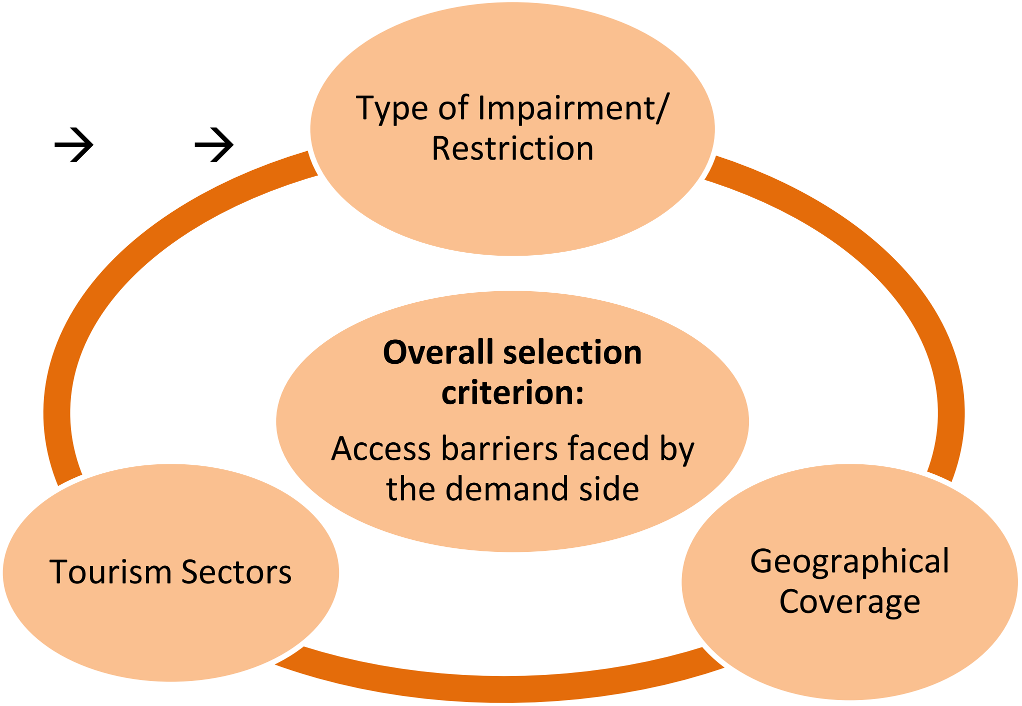
Case-studies – Key findings

6. The return of investment correlates with a correct management of the 7 IFS (Interdependent Success Factors)
7. To plan the actions and anticipate the results before starting is also a key element of success.
8. The communication style for accessible facilities is always positive and avoiding “charity or social service” style language.
9. Although social responsibility is a motivation it does not make the company deviate from its own business focus.
10. The commitment of the decision makers and training of all the staff are key issues that improves results.

Methodology – Task 3b

1. Desk research

- Systematic review of the literature on access barriers:
    - Two rounds of desk research: Identification of a total of 123 reports and articles
    - Assessment based on → → →



2. Development of 12 hypotheses

- 9 hypotheses for specific tourism sectors
- 3 hypotheses for cross-sector comparisons

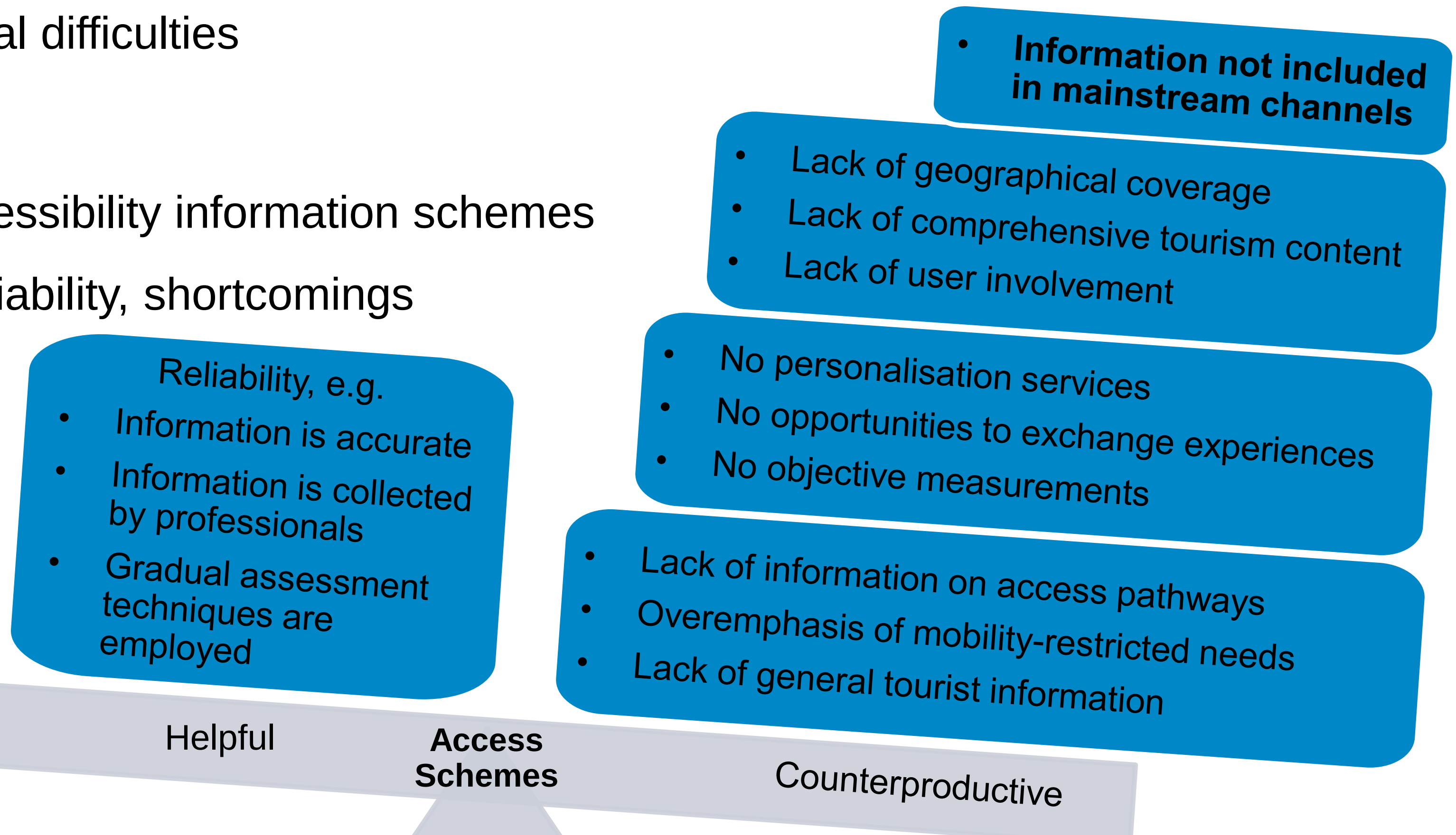
3. Comparative analysis of primary and secondary data sources

Key Findings – Task 3b

Barriers encountered in the pre-travel / information-gathering stage

- The lack or limited availability of information about accessible services represents the biggest barrier particularly for individuals with mobility, sensory and behavioural difficulties

- While accessibility information schemes ensure reliability, shortcomings exist:



Key Findings – Task 3b

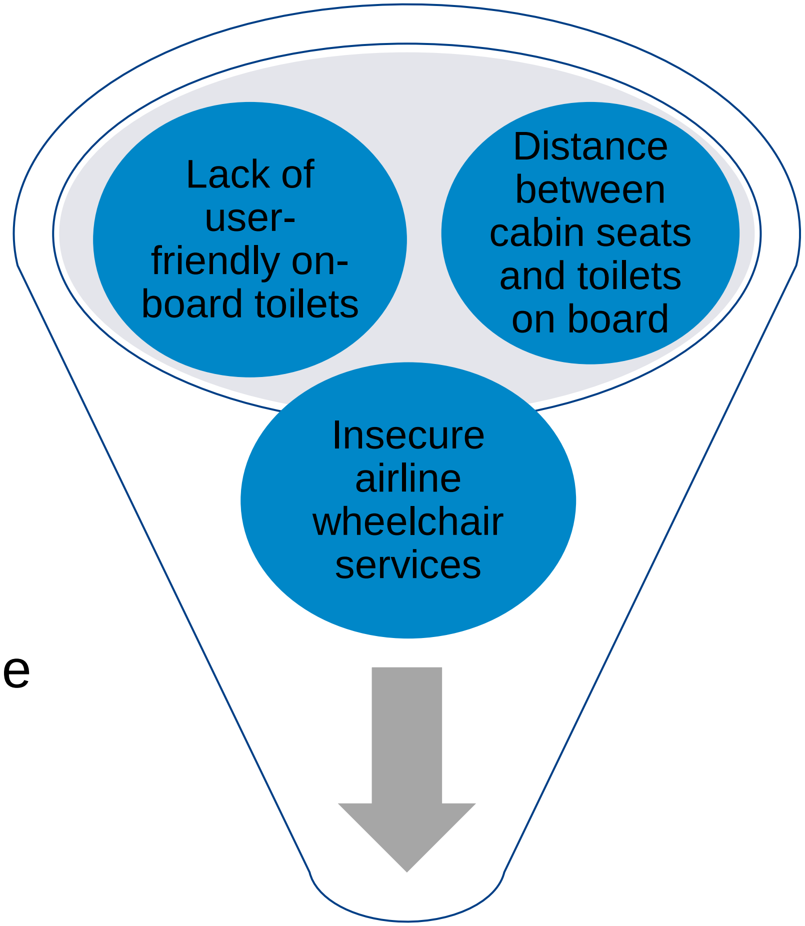
Barriers encountered in the pre-travel / information-gathering stage

- The main shortcoming of accessibility information schemes is that the information is often not included in mainstream channels
- Findings highlight that for all individuals regardless of their different access needs and country of origin, the information contained in general travel sources (mainstream channels) is more important compared to specialised sources of information
- Yet, the information provided in mainstream channels needs to be sufficient, reliable and accessible to make an informed decision

Key Findings – Task 3b

Barriers encountered in the transit/ transport stage: arrival/ departure

- Main barriers encountered largely refer to airlines not ensuring an accessible environment
- Key obstacles include → →
- While physical access barriers impede a comfortable arrival/ departure, attitudinal barriers, (e.g. how tourists are treated), are more important, particularly for people with mobility, sensory and behavioural access needs



These barriers increase when using low-cost carriers

Key Findings – Task 3b

Barriers encountered with transport at the destination and access paths

- Once at the destination, the study confirmed the importance of access paths and accessible parking for moving around at the destination, particularly for people with mobility limitations
- For individuals with sensory, communication, behavioural and hidden limitations, various aspects of transport at the destination are equally important
- Visitors to Bulgaria, France and Lithuania perceive access paths and accessible parking as more important compared to tourists holidaying in other countries
- Spain was identified as the only country where transport at the destination represents the most important aspect

Key Findings – Task 3b

Barriers encountered in the accommodation sector

Physical/ structural barriers

- Position of toilet
- No grab rails
- Long steep ramps
- Narrow paths/ narrow lifts
- Existence of steps/ no ramps/ no kerb ramps
- Height of shower hobs
- No shower recess
- Limited number of accessible rooms/ too much furniture
- Assigned rooms for people with access needs are not located close to amenities
- Table and bed heights/ single beds too narrow and low
- Clearance under beds
- Inadequate shower chair
- Washrooms not accessible and bathroom doors too narrow
- Controls too high
- Poor circulation
- Door steps and door widths/ too narrow
- Sloping bathroom floor
- Signage too small

Attitudinal/ social barriers

- Not understanding different access needs
- Not directly addressing the person with access needs
- Refusal to design rooms that corresponds to the needs of people with access needs

Key Findings – Task 3b
Barriers encountered in the accommodation sector

- Past research indicates that physical access barriers are perceived as greater obstacles when compared to attitudinal barriers in the accommodation sector
- Yet, for European travellers physical access barriers are ranked as being equally important compared to attitudinal barriers
- Sweden is the only destination country where physical access barriers are considered to be more important than attitudinal barriers
- Among the physical access barriers, toilets were singled out as the aspect where people with mobility, sensory, communication and hidden limitations were least satisfied with, particularly when visiting France

Key Findings – Task 3b

Barriers encountered in the catering/ gastronomy/ food & beverage sector

- Previous research highlights that this sector causes the greatest amount of barriers
- Yet, European travellers with mobility, sensory, behavioural and hidden restrictions felt that the transport at the destination is the most problematic sector
- For people with sensory, communication and hidden limitations, barriers encountered in the food and beverage sector are encountered significantly more often than in the accommodation sector

Blind Individuals:

- No-one to read out the menu
- Information about table set up, how food is served and location of buffet absent

People with Crutches:

- Stairs at the entrance / in the restaurant
- Doors too heavy to open
- Lack of room between tables
- Difficulties to handle crutches and plate at the same time

Wheelchair Users:

- Stairs at the entrance/ in restaurant
- Doors too heavy to open
- Tables not high enough
- Lack of room between tables

Key Findings – Task 3b
Barriers encountered with attractions/ activities

- Nature-based activities (e.g. recreation in mountainous areas or beach holidays) are in high demand by people with access needs
- Yet, these activities are accompanied by the most barriers
- Only for individuals with sensory and behavioural difficulties, both nature and shopping opportunities are equally important barriers in the attraction sector
- Nature based attractions represent the most important barriers at 10 out of 15 destinations
- Greece, Poland and Ireland are the top three destinations where people experienced most frequently barriers with nature based activities

Key Findings – Task 3b
Cross-sector analysis of barriers

- People with access needs encounter different levels of frequency of barriers across key tourism sectors
- Barriers experienced in the transport (at the destination) stage are faced more often compared to other sectors, particularly for individuals with mobility, sensory, behavioural and hidden limitations
- For people with communication difficulties, transit is the most problematic stage
- The lack of accessible toilets represents an important barrier across all sectors, yet with destination-specific differences
- **Overall, attitudinal barriers are encountered more often than physical access barriers across all sectors by individuals with different types of access needs**

Task 4 - Estimate of the current and future economic contribution of accessible tourism

Task 4 - Objectives

Task 4: Current and potential contribution to growth and employment of the demand for accessible tourism

4a: To assess the current economic contribution of accessible tourism in terms of gross and net turnover generated by this market, contribution to GDP and contribution to employment

4b: To assess the potential impact of accessible tourism given three scenarios of investments in improving accessibility, in terms of additional demand and tourist spending, contributions to gross and net turnover, GDP and employment

Methodology – Task 4

1. **Stakeholder consultation**

- A pre-focus group, focus group and in-depth interviews were conducted with stakeholders.

2. **Online survey**

- Primary data on travellers' spending figures were collected in the 12 representative countries of the 8 clusters.

3. **Desk research**

- Research was conducted on the multiplier effects of accessible tourism based on the EU Member States' input-output tables.

4. **Estimation**

- Current and potential economic impacts were estimated based on the tourist expenditure figures from the survey, the tourism demand estimated in Task 1 and the multipliers calculated from desk research.

Stakeholder consultation - Aims

1. Gathering information regarding the current impact of the demand for accessible tourism
2. Surveying means and tools of relevant service providers in product development and marketing
3. Contributing to the definition of success factors and recommendations
4. Refining the definition of the three possible future scenarios to be used in the surveys
5. Stakeholder consultation plays an important role in reaching and informing key influencers in tourism about the project itself and Accessible Tourism in general

Stakeholder consultation - Methodology

1. Pre-focus group (Grundtvig workshop: “Empower Municipalities - Enabeling the Citizens” May 12th 2013 in Luxembourg)
2. Focus group (IVth International Congress of Tourism for All, June 27th 2013 in Avila)
3. In-depth interviews: 11 IDIs were conducted with stakeholders in 10 countries:

   Austria, Belgium, Bulgaria, Czech Republic, Denmark, Germany, Italy, Romania, Spain, Sweden

Stakeholder consultation – Key findings

1. Accessible tourism is considered a business opportunity but there is a lack of coordination, particularly between the public and private sector.
2. Accessibility is mainly understood as a feature for disabled guests and almost never understood as a plus in comfort and service and, therefore, not used in marketing and advertising.
3. Product development and marketing is mainly targeted only to disabled people.
4. For the tourism business, political and financial support, awareness raising and activation of service providers are important drivers
5. For the guest, reliable information on accessible offers and services is a key factor for success
6. The focus groups were very valuable to refine the 3 scenarios of accessibility improvements, used for further calculations

Key Findings – Task 4

1. The average day trips spending amounted to about €80 for both the people with disabilities and the elderly population.

2. The average overnight trips spending is roughly €700 per trip in home country, and about €1,100 per trip in intra-EU destinations; the difference is basically due to the longer length of stay (10 days) in intra-EU destinations.

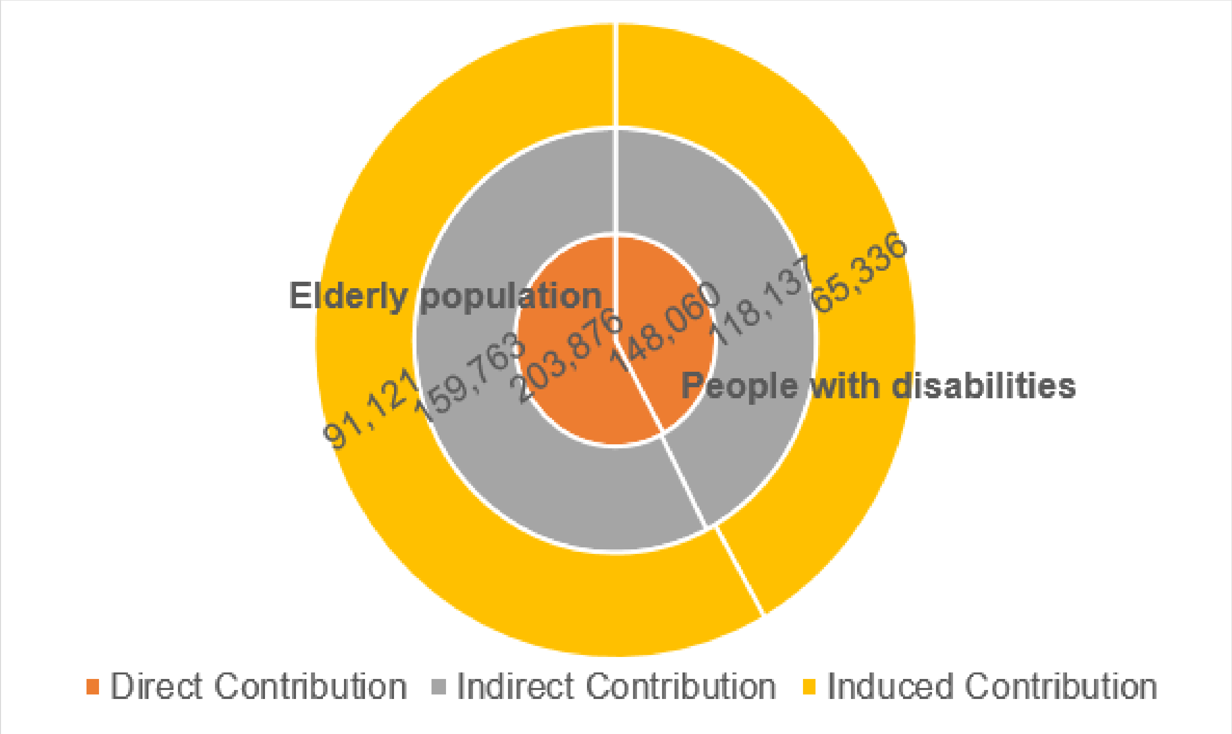
3. The elderly population tend to have higher spending power than the people with disabilities.

Group	People with Disabilities		The Elderly Population	
Travel Type	Day Trips	Overnight Trips	Day Trips	Overnight Trips
Daily Spending - Domestic (€)	74.8	101.4	82.3	109.5
Average Days - Domestic	-	6.8	-	6.8
Daily Spending - Intra-EU (€)	74.2	102.3	76.8	113.8
Average Days - Intra-EU	-	10.1	-	10.4

Travel behaviour of people with access needs: EU27 averages, 2012

Key Findings – Task 4

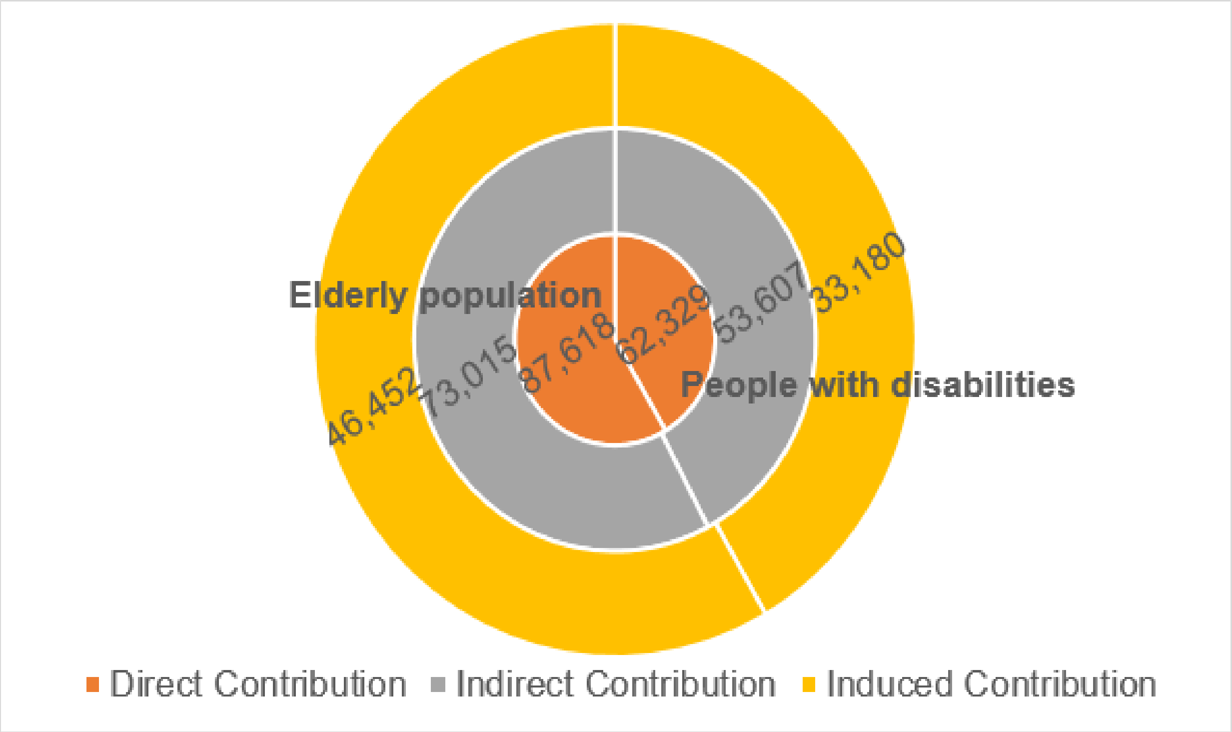
4. The direct gross turnover of EU's Accessible Tourism in 2012 was about €352 billion; after taking the multiplier effect into account, the total gross turnover contribution amounted to about €786 billion.



Current gross turnover contribution in 2012 (€ million)

Key Findings – Task 4

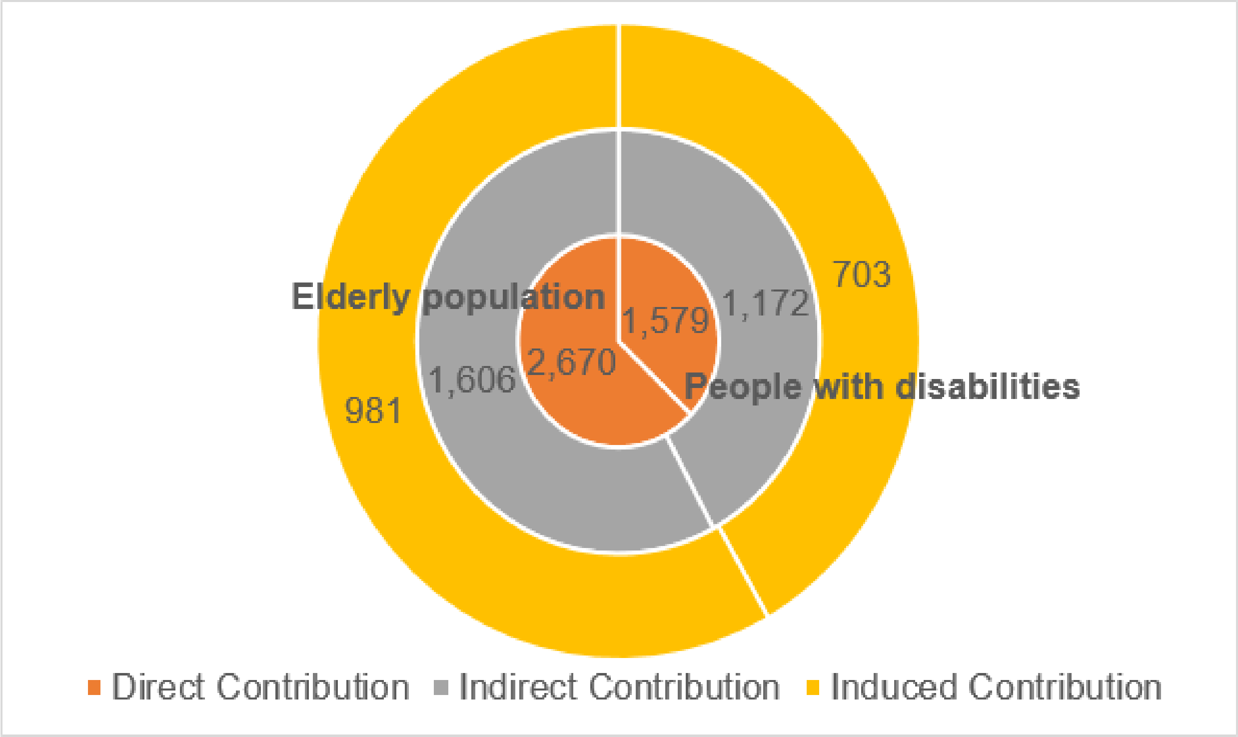
5. The direct gross value added of EU's Accessible Tourism in 2012 was about €150 billion; after taking the multiplier effect into account, the total gross value added contribution amounted to about €356 billion.



Current gross value added contribution in 2012 (€ million)

Key Findings – Task 4

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



Current employment contribution in 2012 ('000 persons)

Key Findings – Task 4

7. Roughly 60% of the current economic contribution of EU's Accessible Tourism is generated by the elderly population.

8. Although many people who **travelled over the last 12 months** (existing travellers) are willing to visit some new EU destinations if accessibility were to be improved, only a small proportion are willing to increase their budget; as a result, the total budget of all existing travellers would increase by less than 10% under all three scenarios.

Scenario	People with disabilities	The elderly population
Scenario A	2.21%	0.14%
Scenario B	3.53%	0.37%
Scenario C	9.51%	3.76%

Percentage of extra budget under different scenarios by all existing travellers with access needs in the EU

Key Findings – Task 4

9. If accessibility is improved, the total economic contribution generated by the EU tourists is expected to increase against the current contribution by roughly 18%, 25% and 36% under Scenarios A, B and C, respectively.

10. The existing travellers would be the major driving forces of Accessible Tourism under all three scenarios, although the share of contributions by the new travellers gets higher and higher with improvements of accessibility.

Scenario	Scenario A		Scenario B		Scenario C	
Group	People with disabilities	The elderly population	People with disabilities	The elderly population	People with disabilities	The elderly population
Direct economic contribution (gross turnover, € million)	176,668	239,277	191,878	247,192	209,461	270,505
of which, generated by						
Existing travellers	85.7%	85.3%	79.9%	82.8%	77.4%	78.2%
New travellers	14.3%	14.7%	20.1%	17.2%	22.6%	21.8%

Distribution of direct economic contribution under different scenarios between existing travellers and new travellers

Key Findings – Task 4

11. On average, people with access needs in the EU travel with about 1.9 companions; people with disabilities tend to travel with more companions than the elderly population (2.2 and 1.6, respectively).

12. The economic contribution of Accessible Tourism will be amplified by a similar scale, assuming the companions themselves do not have access needs.

	Total economic contribution		
	Gross turnover (€ million)	Gross value added (€ million)	Employment ('000 persons)
Baseline	2,218,773	1,004,187	24,158
Scenario A	2,623,906	1,185,096	28,923
Scenario B	2,778,083	1,254,009	30,704
Scenario C	3,036,245	1,369,889	33,784

Total economic contribution of EU's Accessible Tourism: with the companion effect

Recommendations and success factors

Task 5: Recommendations and success factors (1)

1. Commitment of the decision-makers

- Integration in mainstream offers
- Encourage service providers to invest in accessible tourism and demonstrate its economic and social benefits
- Harmonise standards and legislation to provide better guidance for providers and clearer information for users
- Strong and on-going support from politicians, administrators and decision makers in business – including education and training as well as direct financial support

2. Coordinating and continuity

- Improve the industry's coordination efforts, particularly through public-private partnerships and on local and regional levels
- Assign dedicated work unit or coordinator within the management structure of tourism organisations with appropriate resources

Task 5: Recommendations and success factors (2)

3. Networking and participation

- Encourage knowledge transfer, particularly through professional networks
- Guarantee the accessible offer across all categories of services and prices offered at the destination

4. Strategic planning

- Step 1: awareness of the diversity of access needs and patterns of travel behaviour across different groups and countries, but also across individuals within groups, to target them in the most appropriate way
- Step 2: an inventory of the current offer in terms of infrastructure, services and possibilities for improvement
- Step 3: improve the offer gradually, include accessibility in long-term planning and investments and develop feedback tools for customers to establish accessibility priorities
- Step 4: improve marketing and advertising strategies by taking into account accessibility features

Task 5: Recommendations and success factors (3)

5. Knowledge management and qualification

- Staff with a solid knowledge base on accessibility through good knowledge management
- Regular training of staff and management

6. Optimisation of resources

- Using as many resources as possible for a strategic development of accessible tourism
- Prioritising tasks along the service chain

7. Communication and marketing

- Include sufficient accessibility information in mainstream tourism information
- Take personal information and recommendations into account in marketing strategies (e.g. through social media)

THANK YOU FOR YOUR ATTENTION

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