

Module 1



LU 1 - Tourism Trends and Megatrends

Games Without Barriers project Co-funded by the Erasmus+ Programme of the European Union
G.A. n. 2019-1-IT01- KA202-007450 - CUP code G95G19000500006

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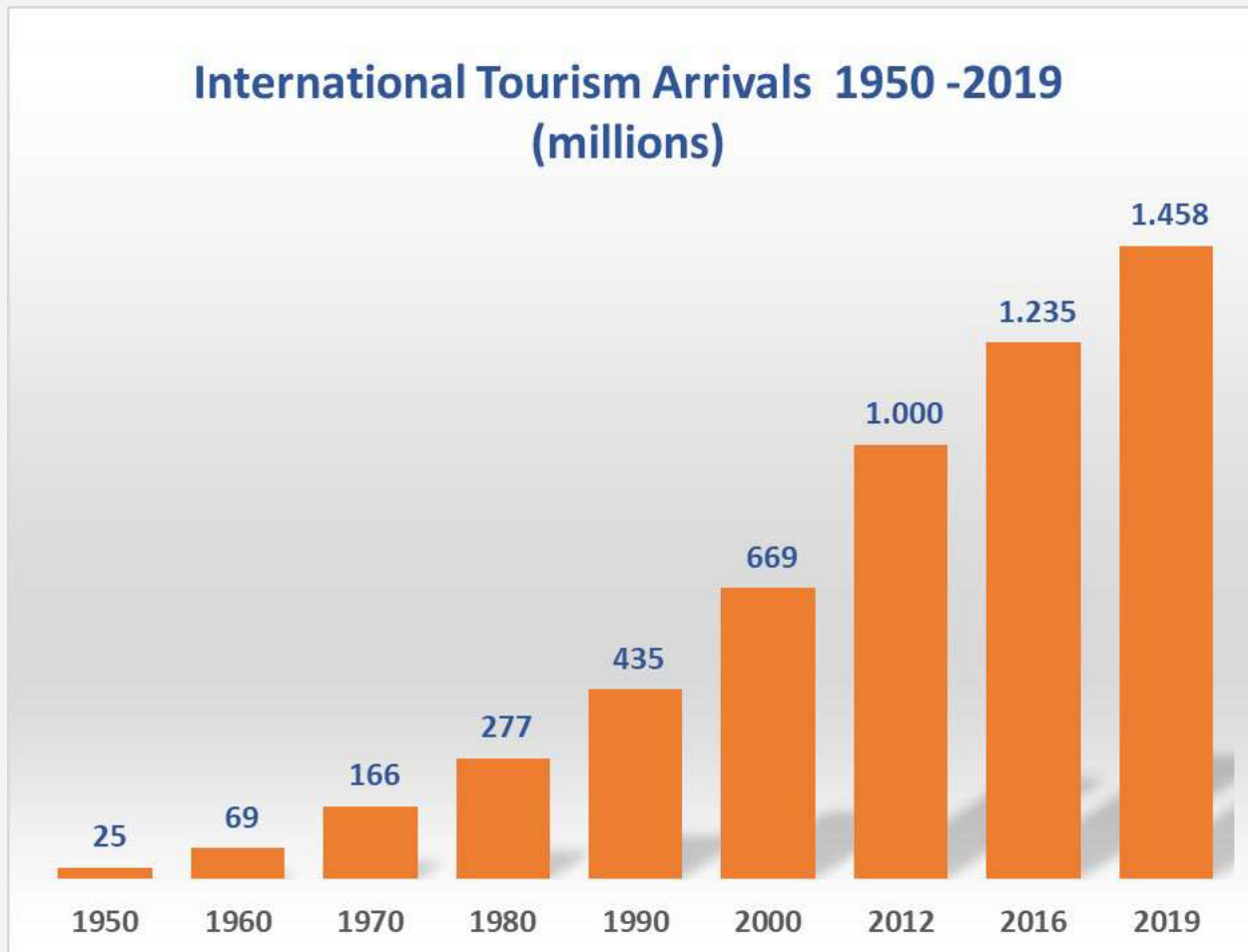
LU Objectives:

1. To present the state of art of tourism with projection for the next years
2. To introduce Accessible Tourism
3. To present megatrends affecting tourism sector in general and Accessible Tourism in particular





M1 LU1 - Tourism Trends and Megatrends



Source: UNWTO

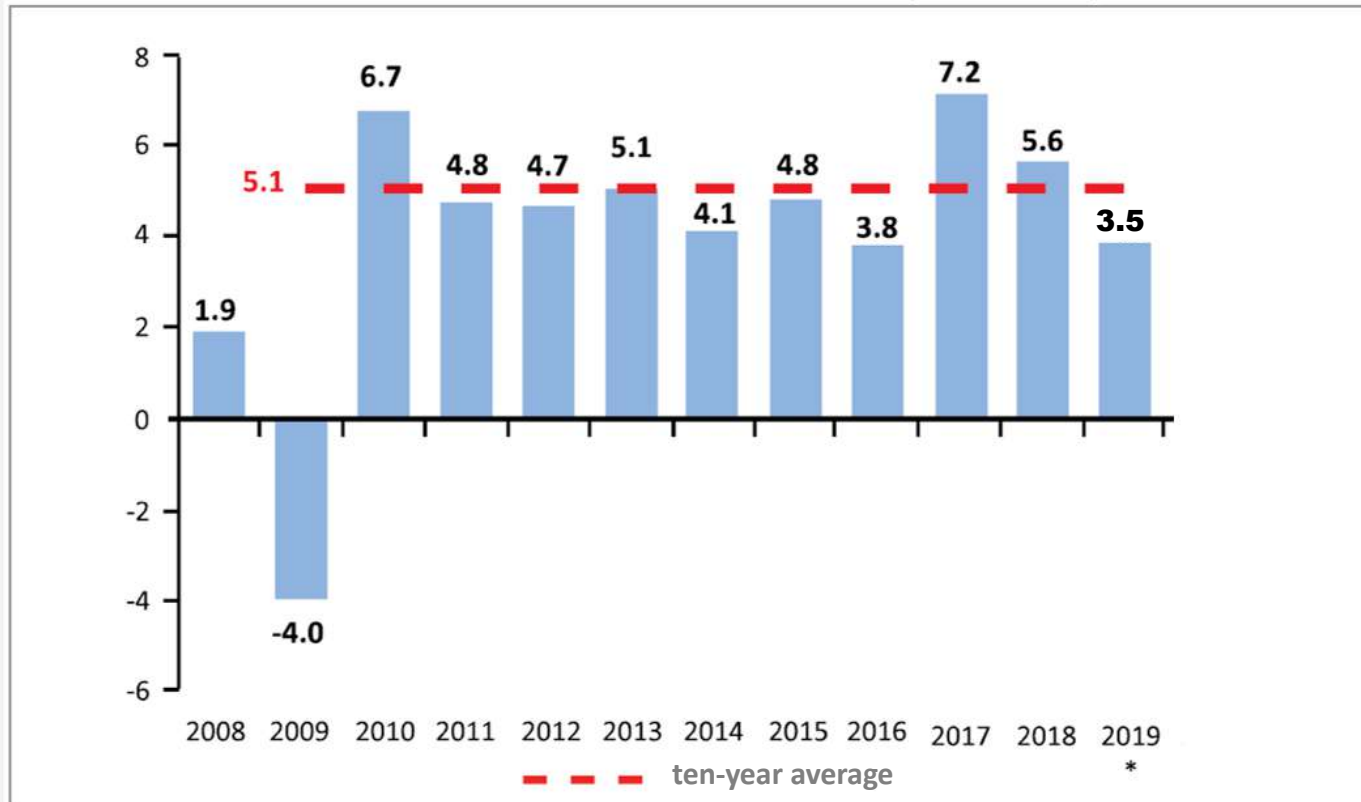


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International tourist flows

International tourist arrivals (var. %)

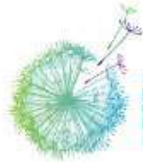


Source: UNWTO Tourism Barometer, January 2020





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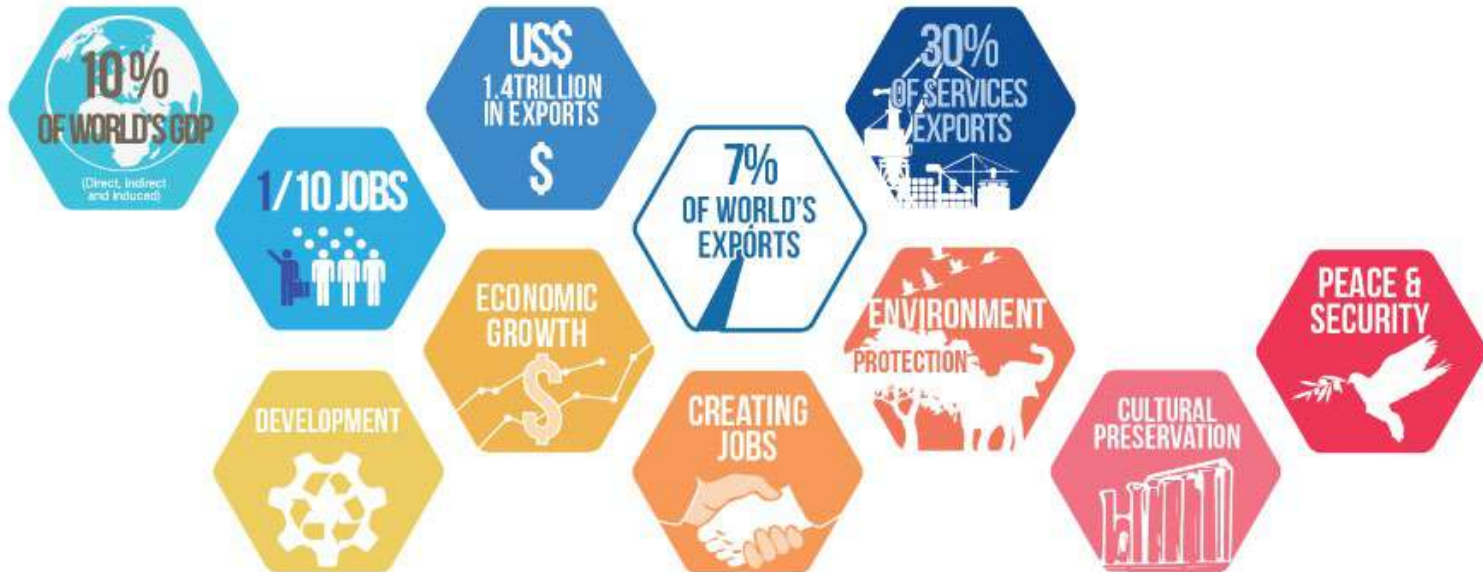
2017
INTERNATIONAL YEAR
OF SUSTAINABLE TOURISM
FOR DEVELOPMENT



UNWTO

Next

WHY TOURISM MATTERS



TOURISM IS MUCH MORE THAN YOU IMAGINE

Source: © Highlights 2017 - World Tourism Organization (UNWTO), July 2017



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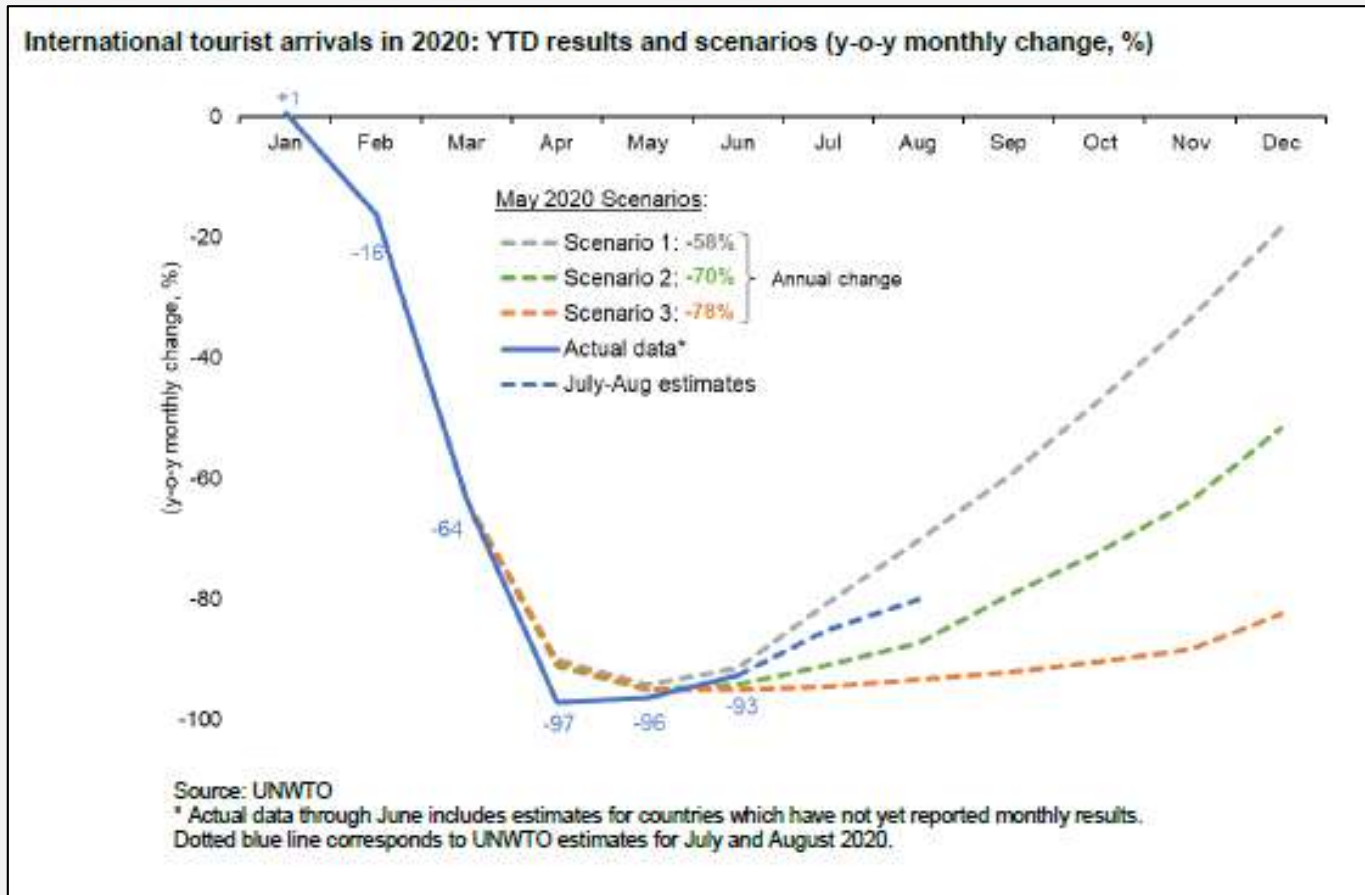
Impact of COVID-19 on tourism flows





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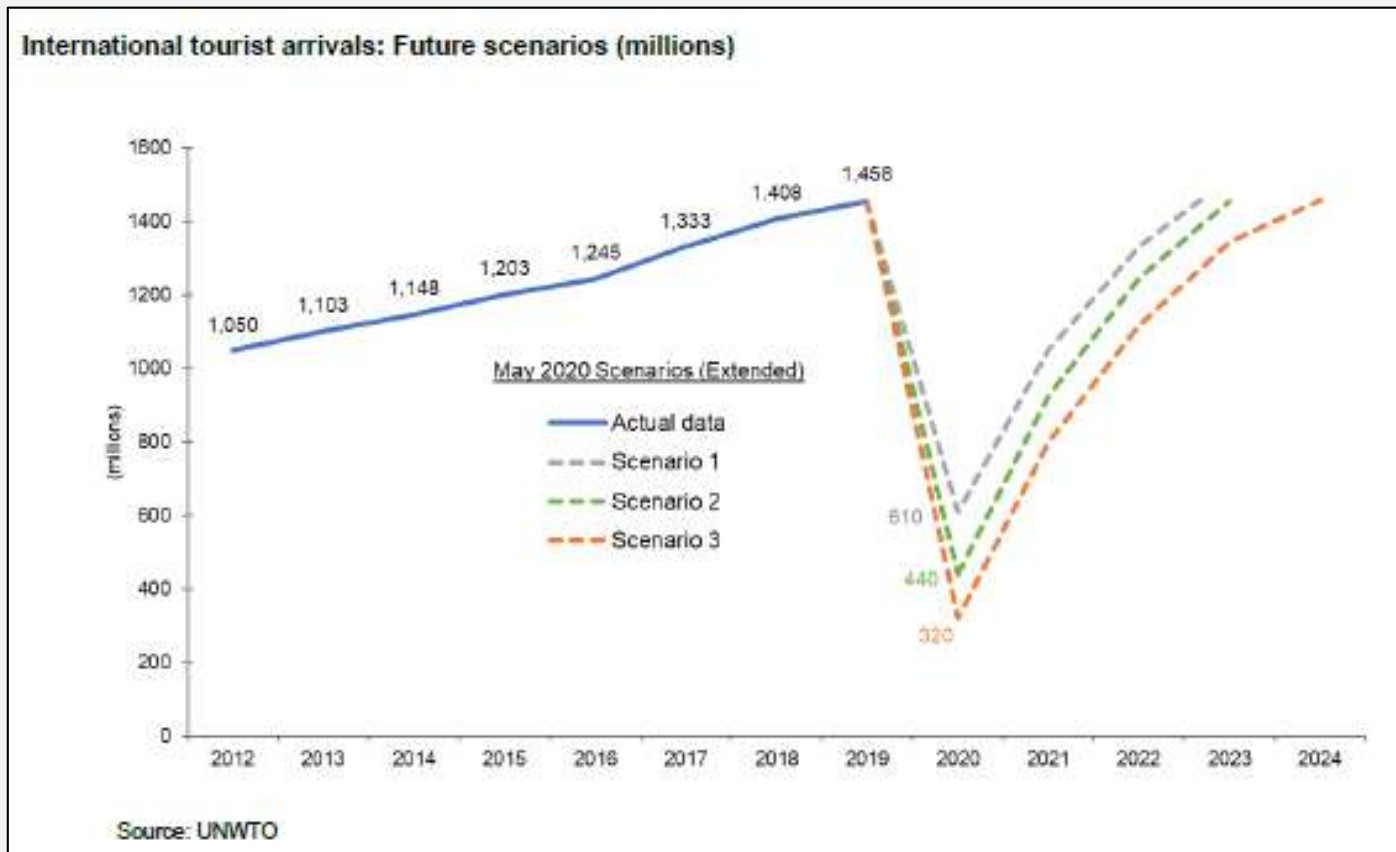
Impact of COVID-19 on tourism flows





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Impact of COVID-19 on tourism flows





Tourism still presents many **barriers**: physical and communication barriers but also cultural barriers, and in terms of access to information **COVID-19 has raised them up**



Accessible Tourism for All aims at removing these barriers





Accessible Tourism / Tourism for ALL

Tourism products and services that allow "customers with specific access requirements" to enjoy their holiday and leisure time in a satisfying way, without obstacles or difficulties and, therefore, in conditions of autonomy, safety and comfort.





Customers with specific access requirements

Who are they?

Persons with disabilities



HOW MANY?

About **1 billion** people with disabilities worldwide (15% of the world population)

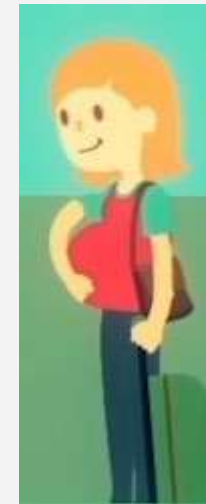
fonte: WHO, World report on disability



Older people

Around **703 million** in the world (8.5% of the world population) are expected to become nearly **1.5 billion** in 2050.

But also





Persons with disabilities

Persons with disabilities are not just those in wheelchairs

There are different types of disabilities related to different types of impairments: physical, sensory, cognitive or different mental health condition.

Each of them has different characteristics and needs.

It is necessary to know at least their main aspects and the related needs.





Seniors

Older people, although they are not people with disabilities, very often have similar difficulties in carrying out their daily activities and share their accessibility needs.





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Tourists with specific access requirements do not represent a separate group, segment or target

As any other tourist, they travel for business, cultural reasons, or to practice sports, look for relaxing and calm holidays or maybe seek fun and exciting experiences. There are those who travel in groups and those who prefer to organize the trip alone, those who can spend more and those who prefer cheaper products, and so on.



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MEGATRENDS transforming tourism

- **Demographic changes and emerging markets**
- **Sustainability**
- **Travel mobility**
- **New technologies**

Implications for tourism sector in general and for Accessible Tourism in particular

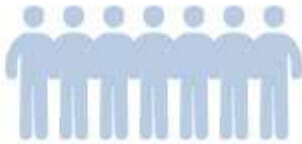




World population growth and ageing

World population¹

7.4 billion
2010



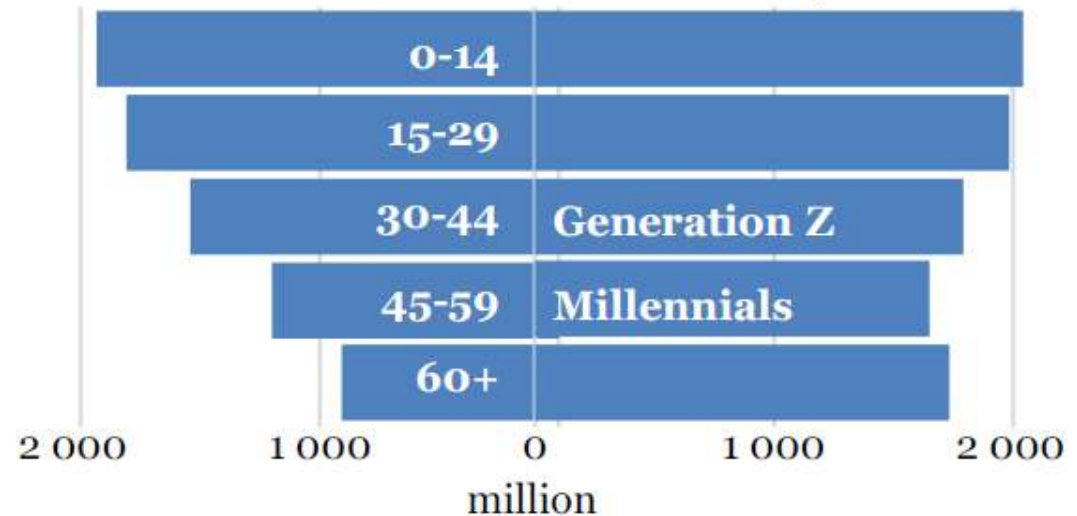
9.7 billion
2050



Population – age composition²

2015

2040

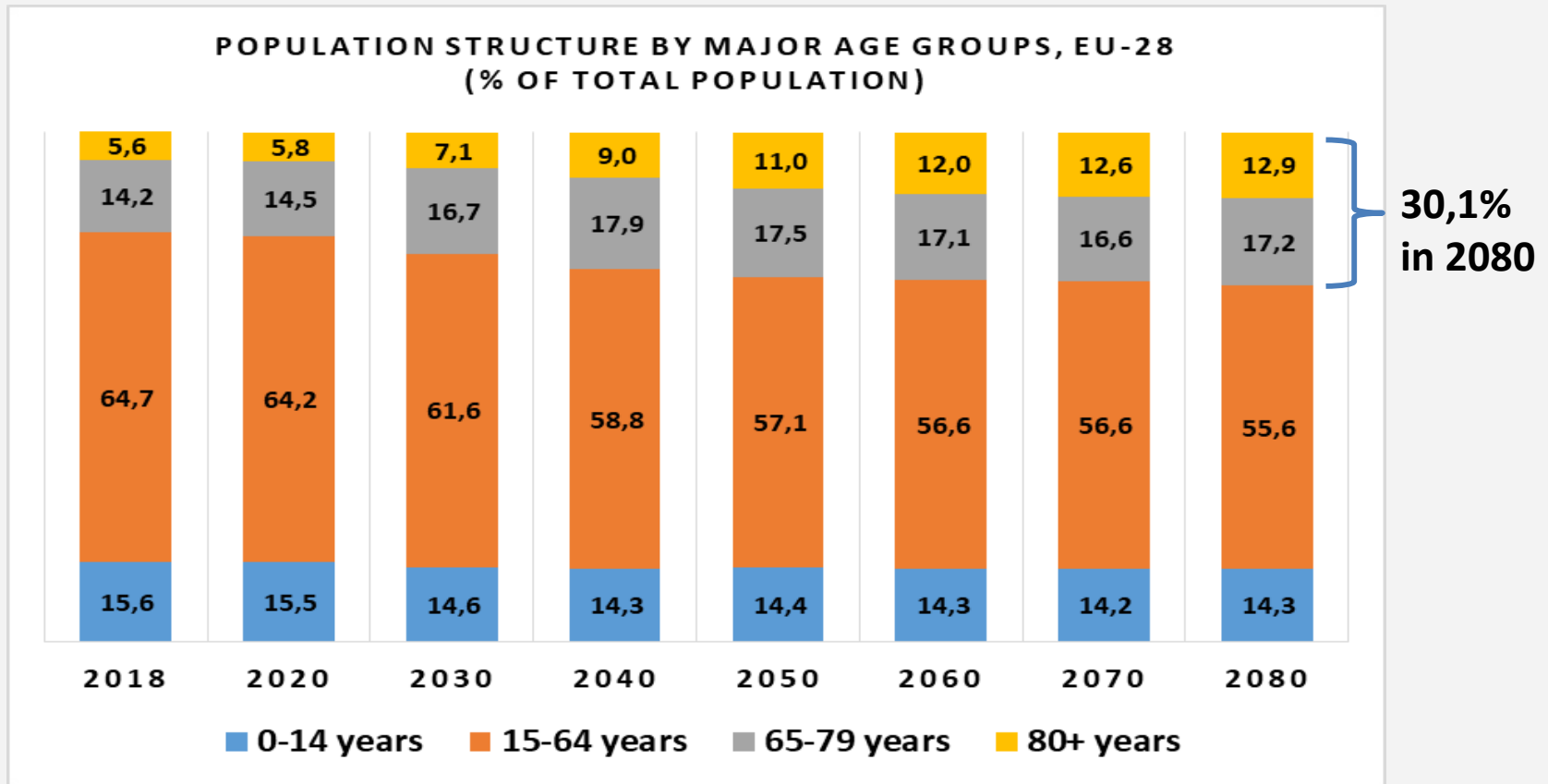


Source: OECD, Tourism Paper No. 2018/02, p. 14





Ageing population in Europe



Source: Eurostat

The proportion of older people in the EU (aged ≥ 65 years) stands at **20,3%** and is expected to increase sharply in the coming decades.





Ageing population

- The older people are increasingly more inclined to pursue leisure-oriented experiences compared to past generations
- Most of them are active, “youthful”
- They have more economic certainty, more free time and the ability to plan their trip at any time of the year.



Infrastructure and support services need to be tailored to accommodate their increasing demand, their needs and preferences. **Accessibility (both physical access and information provision) is likely to be an area of particular concern for older tourists.**





Emerging markets

An increasingly large proportion of tourist originating from emerging markets

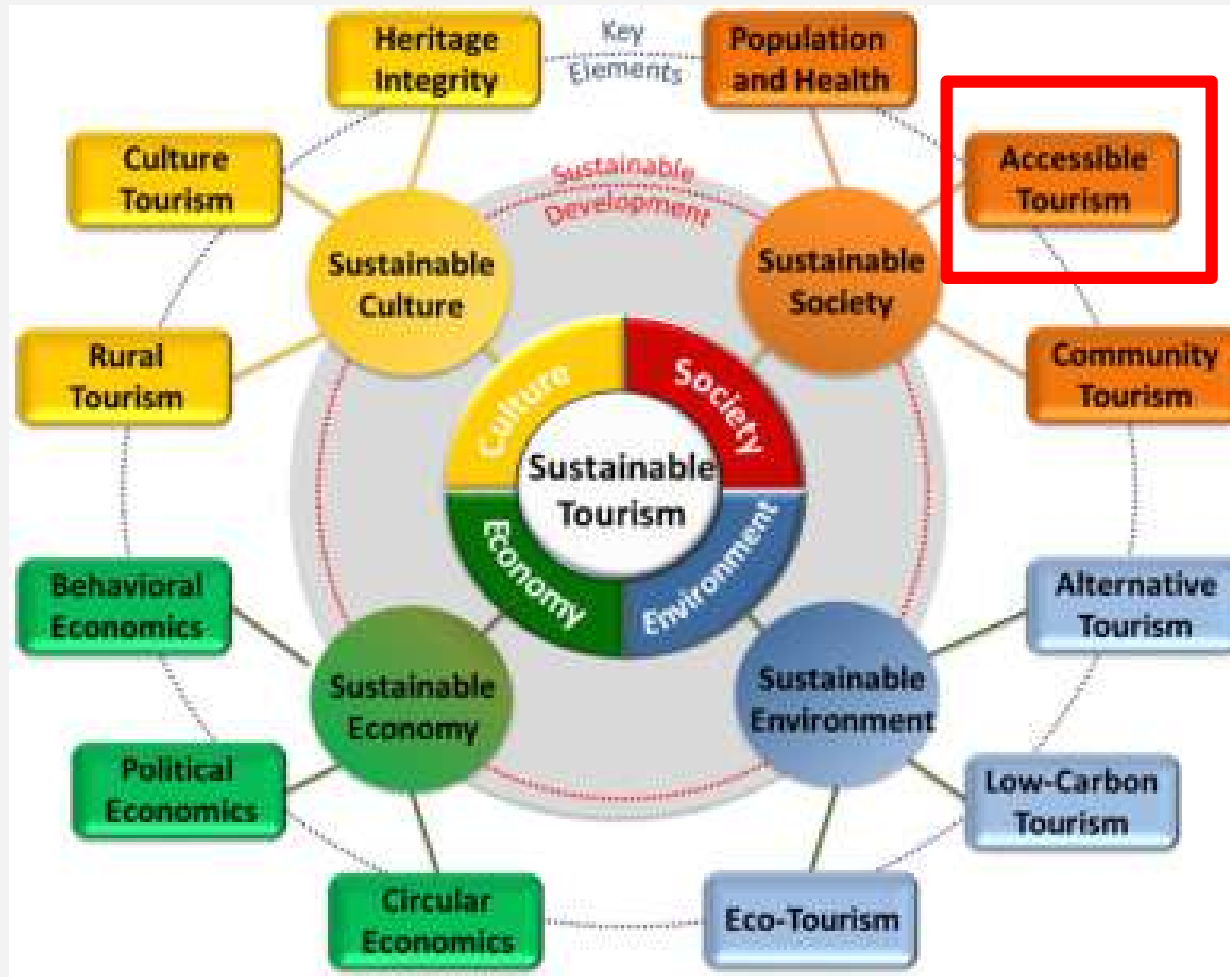


The tourism sector will need to adapt to these trends and adopt innovative approaches to accommodate new demands and specific needs and preferences of these emerging markets, according to their characteristics, behaviour and tastes.





Sustainable Tourism





Sustainable tourism growth

- ❑ Greater focus on sustainable management of tourist destinations
- ❑ Search for environmental and cultural "values" in the destination
- ❑ Growth of ecotourism and nature experiences
- ❑ **Growing demand for responsible, ethical, inclusive tourism, that looks for contacts with local cultures and contributes to the economic and socio-cultural well-being of host communities**





Sustainable tourism growth

Development of **slow tourism** focused on doing away with the stress and speed of traveling, searching for authenticity, discovery of lesser known places, relationship with local communities.



SLOW TOURISM  **ACCESSIBLE TOURISM**

Slow travel, amongst others, concerns a **slower pace** and more attention for cultural elements during activities.

Accessible tourism often requires enough time to explore a place on a slower pace and with more attention to cultural details.





Sustainable tourism growth

Search for experiential tourism

Possibility of involvement also of tourists with specific access requirements, through tactile experiences, sensory pathways, ...



Development of niche and "**one to one**" types of tourism that allow to satisfy specific needs and customized requests, also related to accessibility.





Travel mobility

The quality of travel mobility will be a key factor for the success and growth of the tourism sector.

Travel mobility has an impact on tourism in two main respects:

1. International transport and freedom to move
2. **Mobility as an element of quality and sustainability of the tourism experience**





Mobility as an element of quality and sustainability of the tourism experience

New forms of mobility at the destination

- Increasingly efficient, articulated and smart inter-modality systems
- Environmentally sustainable forms of mobility with the emergence of electric transport (car, bike ...)
- Development of digital platforms and system providing information including those about accessibility, making it easier and simpler for travellers with specific access requirements to plan their trip





Impact of new technologies on tourism consumption behaviour

Technological innovation is reshaping the way people work, communicate, choose and buy travel in the tourism sector.





Impact of new technologies on tourism consumption behaviour

Main drivers of change:

- New digital business models for enterprises and destinations with the development of specialized *peer to peer* platforms that drive the creation of new *marketplaces*
- Automation of company and intercompany production processes

The process of digital transformation of online sales opens up new opportunities for SMEs to easily reach target markets and interact directly with customers, **customizing their offer to their specific requirements**





Impact of new technologies on tourism consumption behaviour

Main drivers of change:

- **Big data and open data to elevate business intelligence capability**



Possibility for destinations and tourism companies to effectively profile the desired demand targets by understanding their needs, desires and purchasing processes

- **Artificial intelligence**



Improvement of customer care by automating operations previously performed manually: e.g. robots and chatbots based on language recognition technology that can communicate with guests and provide continuous, personalized assistance.





Impact of new technologies on tourism consumption behaviour

Main drivers of change:

- **Social media, review, web reputation as communication tools between tourists, destinations and businesses**

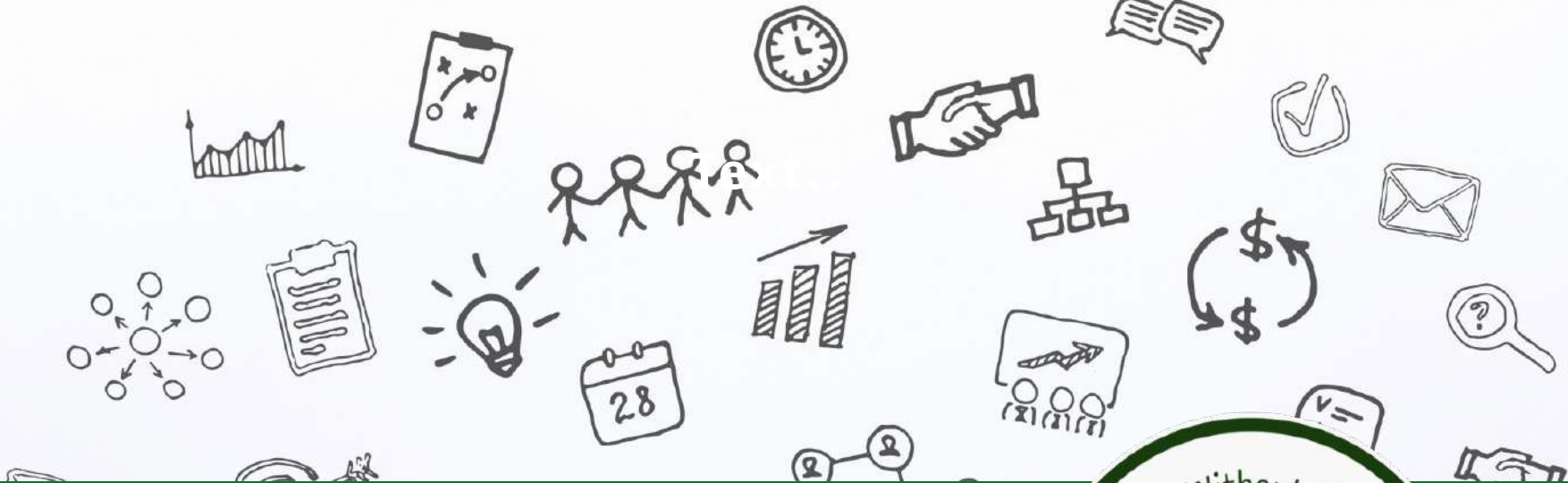


Tourists become testimonials who share their own judgements on tourism attractions and services determining the web reputation of destinations and companies and providing in-depth analysis/information useful for those who have specific needs.

- **Virtual and Augmented Reality**

New frontiers in the construction of contents for communication and the development of attraction factors. VR and AR offer the potential to create substitute experiences that may be particularly beneficial for people with access needs.





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