

Module 1



LU 2 - Accessible Tourism History and Business Case

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LU Objectives:

1. To present the birth and development of Accessible Tourism / Tourism for All in Europe
2. To show the market size of Tourism for All and its current and potential economic impact
3. To highlight the close correlation between accessibility and quality of the tourism offer

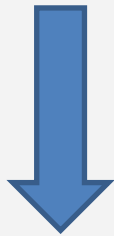
Source: UNWTO





Brief history of Accessible Tourism / Tourism for ALL

Rights of people
with disabilities



Accessible Tourism
/ Tourism for All





Brief history of Accessible Tourism / Tourism for ALL

Attention to disability issues (and to Accessible Tourism) began in the 1980s:

- 1981 “The International Year of Disabled People” proclaimed by the United Nations General Assembly
- 1983 The "Decade of the Disabled" begins (1983-1992)
- **1988 Creation, in the UK, of the *Tourism for All* working group and publication, in 1989 at the end of a conference, of the "*Tourism for All*" report aimed at tourism operators**

the DG Enterprise & Industry of the European Commission publishes two documents:

- **Accessible Europe – A guidebook for disabled tourists**
- **Making Europe more accessible to disabled tourists**





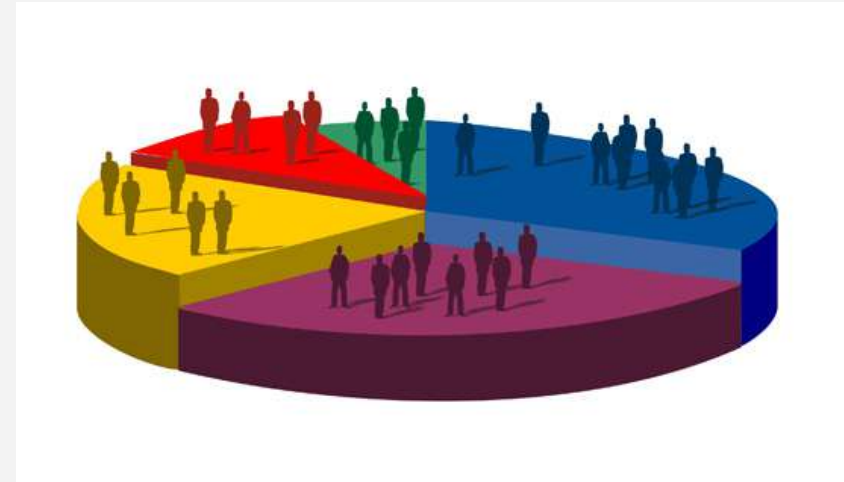
- 1992 Adoption by the United Nations General Assembly of the resolution "Standard Rules on the Equalization of Opportunities for Persons with Disabilities"
- **1993 Conference "Tourism for All in Europe – Tourism 2000" and presentation of the report produced by Touche Ross "Profiting from opportunities – a new market for tourism"**
- 1995 Declaration of Barcelona during the European Congress "The City and the Disabled"
- 2002 Madrid Declaration about Discrimination
Council of EU Resolution on the future of European tourism
- 2003 European Year of People with Disabilities "*Nothing About Us Without Us!*"
- Disability Action Plan (2004-2010)





Market size in the EU

Demand and economic impact



Results of the study “*Economic impact and travel patterns of accessible tourism in Europe*” Financed by EU (DG Enterprise & Industry) and carried out in 2014 by





Demand Main findings

138,6 millions of persons with specific access requirements in the UE in 2011 (around 1/3 of total population) of which:
35,9% people with disability aged 15 - 64
64,1% older people (aged ≥ 65)

In **2012, 783 millions trips** within EU by Europeans with specific access requirements and **17,6 millions trips** by tourists with specific access requirements coming from 11 key markets outside Europe





Economic impact

Global impact (direct, indirect and induced)





Global impact (direct, indirect and induced) Key findings



In **2012** the tourist demand of Europeans with specific access requirements generated within the EU:

786 billion Turnover (352 direct and 434 indirect and induced)

356 (150+206) billion GDP, equal to **2.6% of total EU GDP**

8.7 (4.2+4.5) million employees, equal to **4.2% of total EU employment**

To this impact, the one generated by tourism demand from non-European countries must be added. Considering the 11 key markets, in 2012 the demand of tourists with specific access requirements generated: **34 billion turnover, 17 billion GDP and 538 thousand employees.**





Accompanying persons

People with specific access requirements in Europe travel with an average of **1.9 accompanying persons**:
People with disabilities with 2.2 accompanying persons
Older people with 1.6 accompanying persons



Consequently, the assessment of the real economic contribution of accessible tourism should also take into account the multiplier effect generated by accompanying persons.





Market size in the EU

Current and potential supply

Results of the study “*Mapping and Performance Check of the Supply of Accessible Tourism Services in Europe*” financed by EU (DG Enterprise & Industry) and carried out in 2014 by :





Potential market

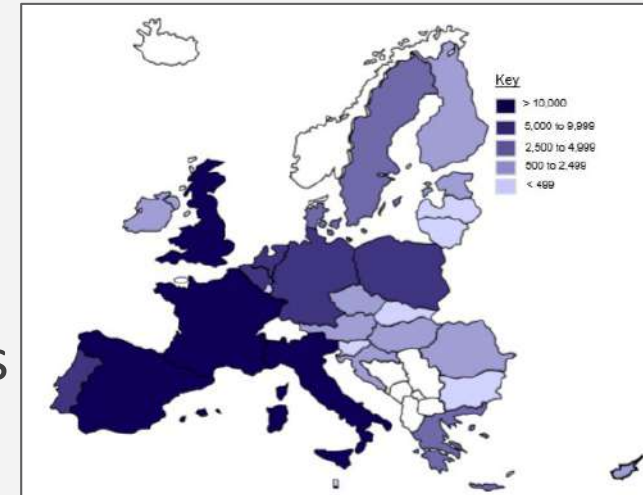
Current offer and growth potential

313,286 tour operators with accessible services in the EU in 2012 (only 9.2% of the total).

Estimated gap of 27.8% between the current offer and the demand for accessible tourist services..

More than **3 million tourism businesses** in Europe unprepared to provide adequate services for the accessible tourism market.

An additional 1.2 million capable and prepared businesses will be needed by 2020 to meet demand forecasts.

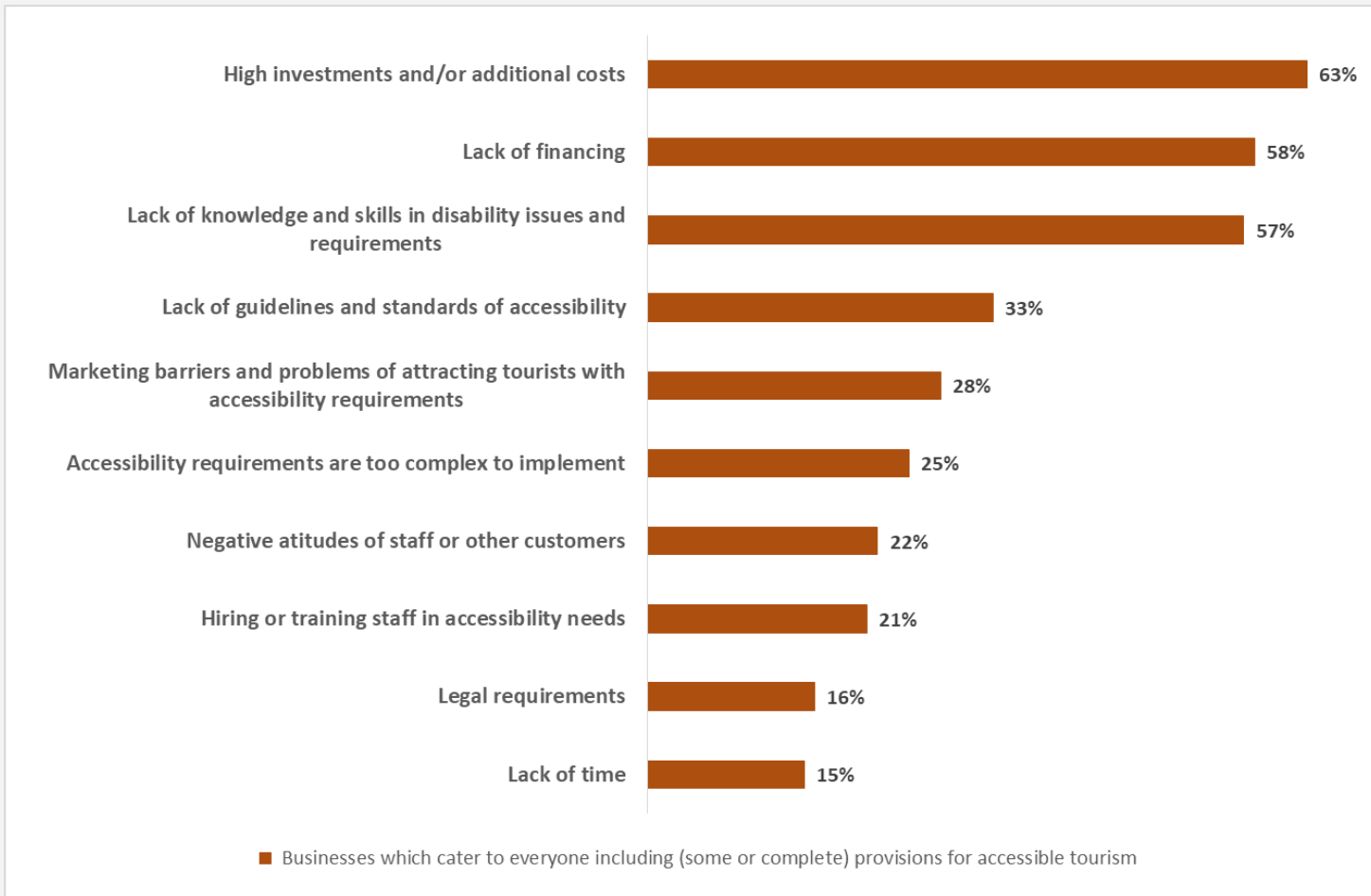


Numbers of Accessible Tourism Suppliers in EU based on AIS and Pantou





Suppliers' Perceptions of Barriers Inhibiting Accessible Tourism Services



Source: *Mapping and Performance Check of the Supply of Accessible Tourism Services in Europe*



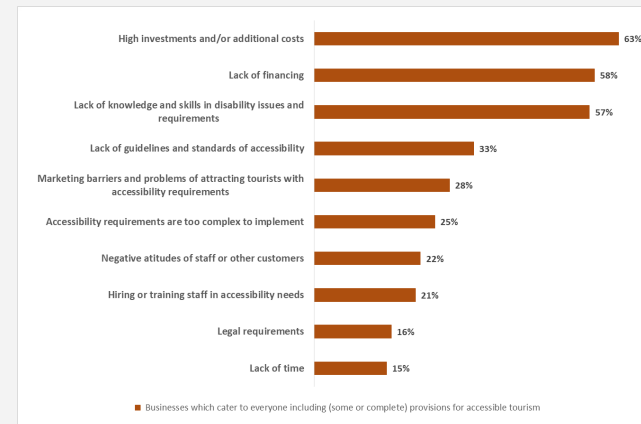


Problems

For public and private enterprises

- Customer needs are not known or often misinterpreted
- Investment costs are poorly valued and often exaggerated

Accessibility is very often seen as a "problem" rather than a "business opportunity".





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Scandic

All our hotels Weekend packages Scandic Friends Meetings and conferences Corporate travel Always at Scandic

Start > Always at Scandic > Special needs

ACCESSIBILITY FOR ALL

Always at Scandic Breakfast and mini shop Wi-Fi Check out online Gym For the family Food and beverage Special needs Security when you stay Sports

> Accessibility at the hotels

> How it all started

Did you know that

- 70% of all disabilities are invisible
- More than 2.5 million in the Nordic Countries have a disability
- More than 50 million in Europe have a disability

Smart solutions

How does a guest with a hearing disability hear the fire alarm? A vibrating fire alarm clock of course! This is just one of our clever solutions for guest with disabilities.

> Read more about other smart solutions

Tips and advice

Scandic's Accessibility Ambassador Magnus Berglund and his rehab dog Dixie have travelled the world extensively, and here share information about the availability of airports, transport and urban areas. You'll also find useful links about

Design for all is good for everyone

Everyone is welcome at Scandic! We understand that every disability is different. The same is also true of our hotels, and we have implemented smart design in our rooms available for people who have a disability. When you choose to stay with Scandic, you should enjoy the same Scandic standards for accessibility. That's why we have implemented and are continuously improving a common accessibility programme that all our hotels use.

What we do to ensure that you get good service

We are the first hotel chain in the world to offer an interactive online training in accessibility that focuses on advice, tips, tests, and instructional videos showing how to provide really good service for guests with disabilities. To ensure the same high level of service to all guests, with or without disabilities, is an important objective for us at Scandic.

SCANDIC ON CNN

Magnus Berglund has been Scandic's Accessibility Ambassador since 2003, and since then he has helped Scandic to become a more inclusive environment for all guests. Watch the story on how a company works actively with accessibility on CNN.

> See the interview

Potential market BUSINESS OPPORTUNITY

“Autumn 2003 was the first time I came to the office with my rehab dog Ada.

The aim was for Scandic to attract more guests – everyone’s money was equally valid.”

Magnus Berglund, Scandic Hotels Accessibility Ambassador

<https://www.youtube.com/watch?v=y78Yf1003es>



- **Highly positive feedback in terms of customer satisfaction**
- **15.000 more nights sold in Sweden in 2005.**
- **Substantial increases in turnover every year in all countries**
- **Much of the investment repaid in less than a year**



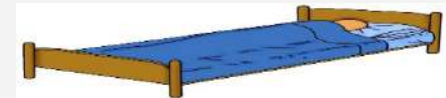
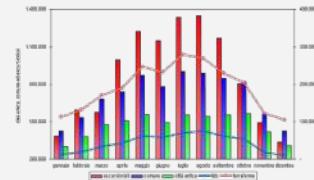


Accessibility = Business Opportunity

Seniors and people with disabilities (permanent or temporary) represent a very significant market

If supply meets demand, it happens:

- increase in tourist flows and expenditure
- possibility to deseasonalise
- average longer stays
- competitive advantage
- better overall image





Accessibility = Quality

Spreading the culture of accessibility



Improvement not only of the tourist offer aimed at people with specific access requirements but also of the offer for all other visitors



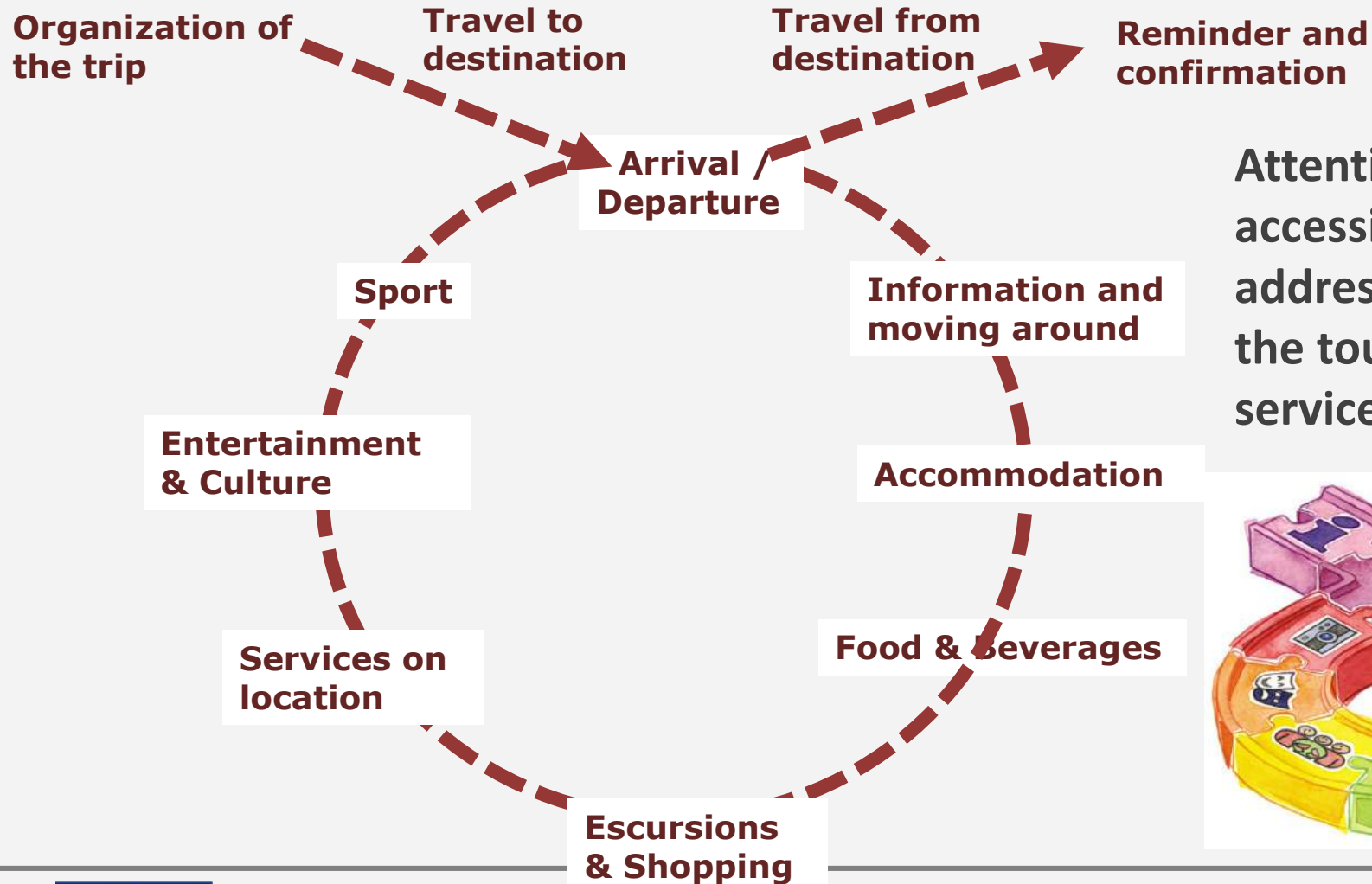
ACCESSIBILITY

Quality element of the tourist offer





Tourism service chain

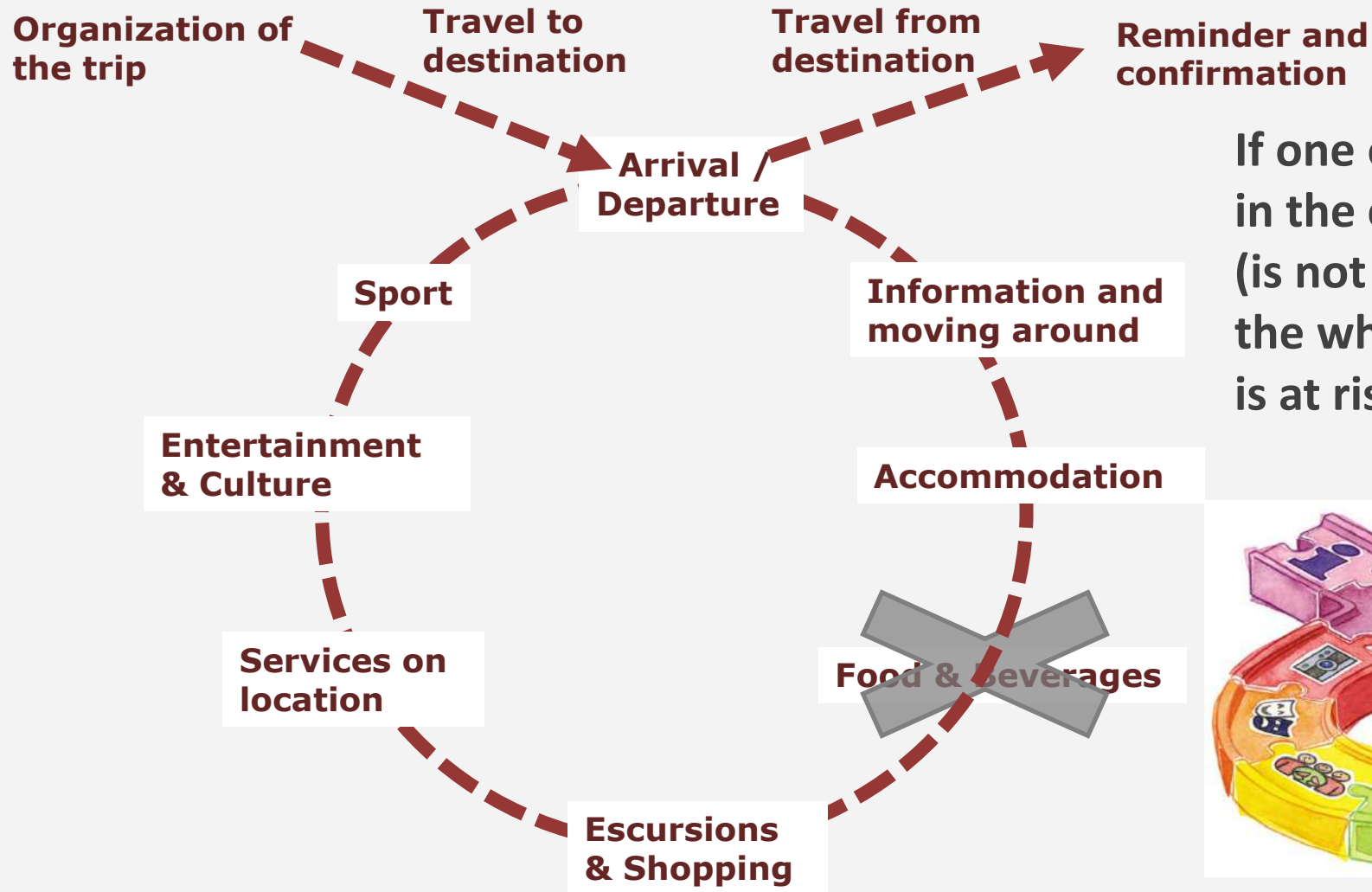


Attention to accessibility must address all links of the tourism service chain





M1 LU2 – Accessible Tourism History and Business Case



If one of the links in the chain breaks (is not accessible) the whole holiday is at risk





Quality factors of tourism for all

- ✓ Knowledge of the needs of the target customers
- ✓ Employees qualified to understand and respond to specific requests when welcoming and relate with customer with specific access requirements
- ✓ Absence of obstacles to the fruition (barriers), i.e. presence of tourism facilities complying with the accessibility requirements indicated in the legislation
- ✓ Specific, reliable, verified and updated information on the facilities characteristics



