

Tourism is one of the largest and fastest growing economic sectors in the world. According to the World Tourism Organization, 1.46 billion people travelled to a foreign country in 2019 and their number is expected to reach 1.8 billion in 2030. Tourism accounts for 10% of the world GDP and generates one job out of 10: it is, therefore, a key driver of socio-economic development, creating wellbeing for communities.

From the point of view of those who practice it, tourism offers unique opportunities to escape from everyday life, socialize and discover new worlds and new cultures. Tourism is by now considered a primary need, but not all people can enjoy it in the same way and some are excluded. Among those whose demand for tourism is still largely unsatisfied there are people with specific access requirements who represent a very wide category: it includes people with disabilities – having physical, sensory or mental impairments -, older people, people with temporary impairments, families with babies, people with allergies or special dietary needs, and so on.

Tourism destinations, products and services still present many barriers that prevent their enjoyment by people with specific access requirements: not only physical and communication barriers, but also cultural barriers and barriers represented by the lack of detailed and reliable information about the accessibility conditions of the tourism premises.

Accessible tourism for all refers to policies and practices that aim to remove these barriers, guaranteeing people with specific access requirements the possibility to enjoy their holidays and their leisure time without obstacles and difficulties. It's about enhancing tourism products, services and environments in such a way that they can all be equally and easily used to grant people with specific access requirements and their families a higher degree of autonomy in enjoying their tourism experience.

Those destinations that create environments, products and services suitable for people with specific access requirements will experience positive effects in terms of increase in tourism flows, higher economic returns and enhanced competitiveness.

People with specific access requirements represent, in fact, a big and growing potential market that, if appropriate and comfortable conditions to travel are provided, can generate increase in the tourism demand of tourism destinations and in their market share.

According to the World Health Organization, there are approximately 1 billion persons with disabilities in the world. This equates to approximately 15% of the world population having a physical, sensory or mental disability.

Moreover, since older people very often have similar difficulties in carrying out daily activities, they are usually included among those who express specific access requirements, thus greatly increasing the overall number of persons who can benefit from accessible tourism services.

Older people represent a significant potential source of tourism business, if we consider that a rapid ageing of the population is under way. In 2019, there were 703 million people aged 65 or over in the world, comprising 9% of the

global population. Their number is projected to increase more than 127 percent in 30 years: by 2050, there will be 1.6 billion people aged 65 or over worldwide, representing 16.7 percent of the total world population.

Due to the ageing population, the number of people with specific access needs with the capacity to travel is increasing, boosting the demand for an accessible environment, transport and services and, potentially, bringing benefits to the tourism sector. Much of the senior population, in fact, has significant disposable income and the desire to travel and their expenditure tends to be higher than that of tourists in general. Because older people are no longer active in the workforce, they have the possibility of travelling throughout the year, which helps to reduce the seasonality of demand experienced by many destinations.

Besides the **demographic changes**, there are other megatrends, which influence tourism dynamics and have an impact on tourism in general and on accessible tourism for all in particular. These megatrends capture the most significant and globally relevant long-term changes in the social, economic, political, environmental and technological fields. These are slow changes, which have a profound and lasting influence on human activities, processes and perceptions.

Among megatrends considered most significant for tourism, the OECD (OECD, Tourism Trends and Policies, 2018) has focused attention on the following key categories, which could have a significant influence also on accessible tourism for all: development of **new emerging markets**, **sustainable tourism growth**, **travel mobility** and **technological innovation**.

The development of **new emerging markets**, such as China and India, will lead to an increase in global tourism demand and will require "new" products, able to take into account the specific preferences, tastes and requirements of these markets, by breaking down the cultural barriers that may exist towards customers with different uses and habits.

The development of **sustainable tourism** is another megatrend that increasingly characterizes the sector on a global level. The growing awareness of the positive and negative impacts of tourism on the environment implies that destinations need to adopt sustainable management models based on the three characteristic pillars of *environmental*, *economic* and *socio-cultural* sustainability.

Accessible Tourism contributes to environmental sustainability through the application of Universal Design principles, which minimises the need for subsequent adaptations and re-design, thus contributing to economic sustainability.

Accessible Tourism contributes especially to the social dimension of sustainable development, as it aims at creating an environment where all people feel welcome and included, whether they are visitors or local citizens. It leads people working in the tourism industry to have a greater sensitivity toward the quality of the tourism experience and lays the groundwork for the creation of more liveable and welcoming destinations.

In addition, new forms of sustainable tourism, such as *slow tourism and experiential tourism*, are becoming more and more widespread and are well aligned with the practice of accessible tourism for all.

Slow tourism, that is slow way of travelling and discovering the territory, searching for authenticity and relationships with local communities, fits well with accessible tourism, which requires, in general, a slower and gentler pace for the enjoyment of the territory.

The development of *experiential tourism* in recent years is a particularly interesting aspect also with a view to promoting accessible tourism, in the sense that experiences can be adapted to suit the requirements of certain groups of tourists, for example, tactile experiences and sensory pathways, etc. for those with vision impairments.

The multiple motivations underlying experiential tourism lead to the need to consider the market not as undifferentiated, but divided into "niches" of demand characterized by specific motivations, interests and needs, which require tailor-made tourism products for customers. Following this logic, product development can go so far as to configure a "one to one" type of relationship with the tourist, where the product can take into account the specific and personalized needs of the customer, including those related to accessibility.

Travel mobility is becoming more and more an element of quality and sustainability of the tourism experience with the consequent request for:

- efficient, articulated and smart inter-modality systems;
- environmentally sustainable forms of mobility with the emergence of electric transport and sharing systems for individual means of transport;
- development of digital platforms and systems providing information including those about accessibility, making it easier and simpler for travellers with specific access requirements to plan their trip.

Technological innovation is reshaping the way people work, communicate, choose and buy travel in the tourism sector, increasing the capacity of the offer systems and sales channels to customize products and purchasing processes and to make quality control systems more effective.

Main drivers of change which also have an impact on accessible tourism are:

- *new digital business models for enterprises and destinations* with the development of specialized peer to peer platforms for new marketplaces highly defined in the characteristics of customer profile;
- *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. The trend is towards greater integration, in the product design and sale phase, between accommodation services and on-site producers of experiences;
- *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 improve communication with guests and provide continuous, personalized assistance;
- *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*. The new frontiers in the construction of contents for communication and the development of attraction factors ensured by the application of these technologies appear to be infinite. VR and AR offer the potential to create substitute experiences that may be particularly beneficial for people with access needs.

