Accessible Tourism: A Driver of Inclusive Destination Development

Dubai Inclusive Development Forum
11-12 October 2015
Ivor Ambrose, Managing Director, ENAT
Dubai: An accessible destination for all

Photo: Srin Madipalli
Accessible Tourism is:

“Tourism for All”

– making environments, venues and services suitable for the widest range of customers, including people with disabilities, seniors, families with small children… and many more.
Why Accessible Tourism?

- **Market:** Demographic ageing is happening now! Increasing demand for access.

- **Price & Quality:** Increasing global competition in terms of price and quality of tourism and travel offers. *Accessible Tourism = Quality tourism business.*

- **Rights:** The rights of persons with disabilities to equal participation in society must be respected by travel and tourism providers.
Tourists come in all shapes and sizes

Let them in!
Top 10 complaints of customers with disabilities

1. Refusing to accept customers with disabilities on the grounds of health and safety
2. Inaccurate information regarding accessibility before arrival
3. Lack of choice when visiting tourist destinations
4. Need to keep asking assistance from staff because of limited accessibility
5. Patronizing attitudes from staff
6. Staff talking to assistant or an accompanying person rather than to disabled customers directly
7. Lack of information about accessibility of venues on promotional material or websites
8. Lack of access to common facilities (e.g. pool or restaurant of a hotel)
9. Unwillingness of staff to offer extra assistance with simple commonplace tasks
10. Use of inappropriate language related to disability

7 out of 10 issues are about staff behaviour or attitudes
Visit: www.accessibletourism.org
Visit: www.accessibletourism.org
In Europe and around the world

- Private non-profit organisation. Founded Belgium, 2008
- Began as an EU Pilot project: “Mainstreaming Disability Policies in the Tourism Sector” (2006 -7)
- Founded by a multi-stakeholder consortium united in the purpose of developing and promoting better accessibility in tourism for ALL visitors
- Open to all organisations and persons who support its Statutes
The mission of the European Network for Accessible Tourism is:

- to make European tourism destinations, products and services accessible to all travellers and to promote accessible tourism around the world.
In Europe and around the world

100 members in more than 50 countries

In Europe, Middle East, Africa, North and South America, Asia, Australasia – Pacific regions
In Europe and around the world

- The ENAT “Code of Good Conduct”
- Website and Social Media (News, Articles, Events, Press…)
- Directory of ENAT Consultants:
  - in Universal Design, Web design, Customer Care, Destination Management, Smart technologies, Apps, Market Analysis, etc.
- International Project Management
- Accessibility Auditing
- Training and e-Learning Programmes
A few of ENAT’s members and partners
Why is Tourism and Travel not accessible for everyone?

- Lack of awareness
- Lack of knowledge and skills
- Lack of experience
- Misunderstanding
Seniors

...are 65% of the accessible tourism market

- 1 in 5 persons in Europe are over 60
- They want to travel and enjoy life
- Seniors from Europe take 6 to 7 trips a year
- Most discretionary income
- More active “youthful”
- Most overseas trips
The global ageing population
The global ageing population

1970  |  2010  |  2050

More developed regions

Less developed regions
Relation between Ageing and Disability

World Report on Disability, 2011
Growth potential in tomorrow’s older consumers

- New products and services
- Accessible, inclusive environments and offers
United Nations Convention on the Rights of People with Disabilities

- The UNCRPD, adopted on 13th December 2006, aims to “promote, protect and ensure the full and equal enjoyment of all human rights and fundamental freedoms by all persons with disabilities, and to promote respect for their inherent dignity”.
- 1 billion people have a disability
  
  1 000 000 000

- Article 30 requires: “Equal access to participation in cultural life, including leisure, tourism and sport”
- Convention signed by 160 States parties
- Optional Protocol Ratifications/Accessions by 88 States parties
Visitors
Current demand and forecasting – Europe

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 elderly, 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. 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, equivalent to an average growth rate of 1.2% annually.
Current demand and forecasting– Europe

4. In 2012 more than half of the individuals with disabilities in the EU travelled;

5. A slightly smaller proportion of the elderly people travelled during the same period.

6. Majority of trips, either day or overnight trips, took place within the EU, particularly in home country.

<table>
<thead>
<tr>
<th>Group</th>
<th>People with Disabilities</th>
<th>The Elderly population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel Type</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Day Trips</td>
<td>51.8%</td>
<td>36.4%</td>
</tr>
<tr>
<td>Overnight Trips</td>
<td>58.1%</td>
<td>47.5%</td>
</tr>
<tr>
<td>Travel Propensity</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Day Trips</td>
<td>6.7</td>
<td>6.9</td>
</tr>
<tr>
<td>Overnight Trips</td>
<td>6.7</td>
<td>5.5</td>
</tr>
<tr>
<td>Travel Frequency</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Of these, spent in</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Domestic (%)</td>
<td>87.1%</td>
<td>87.3%</td>
</tr>
<tr>
<td>EU (%)</td>
<td>10.4%</td>
<td>12.1%</td>
</tr>
<tr>
<td>International (%)</td>
<td>2.5%</td>
<td>0.5%</td>
</tr>
<tr>
<td></td>
<td>12.5%</td>
<td>7.2%</td>
</tr>
</tbody>
</table>
Current and future demand for EU’s accessible tourism by EU27 countries (2012-2020)
Travel companions – Key findings

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).

The economic contribution of Accessible Tourism will be amplified by a similar scale if the travel companion effect is taken into account.
Travelers with disabilities, Study 2015

$17.3 billion annually, up from $13.6 billion in 2002. Since these individuals typically travel with one or more other adults, the economic impact is actually double, or

$34.6 billion...

In the past two years alone, more than 26 million adults with disabilities traveled for pleasure and/or business, taking 73 million trips.”

Among adults with disabilities who have traveled by air, 72% said they encountered major obstacles with airlines and 65% with airports, down from 84% and 82% in 2005
The Visitor Journey

1. Travel Decision: Accessibility information crucial to decision making
2. Booking: Made easy + further information available to confirm decision
3. Travel to destination: All elements meet access requirements
4. Destination experience: Accessibility of all elements determines satisfaction
5. Travel from destination: All elements meet access requirements
6. Recollection of experience: Determines positive/negative view

Adapted from Lasa (2001)
Impact of disability on taking a holiday

**Low impact**
- Partially hearing or visually impaired
- Mobility impaired - no walking aids
- Profoundly deaf or blind
- Mobility impaired - with walking aids

**Can participate in tourist activities, but quality of experience is diminished if accessibility is not addressed**

**High impact**
- Learning difficulties / mental health and behavioural issues
- Wheelchair user

**Barriers to tourist activities involving potential loss of dignity for disabled person can be experienced if accessibility is not addressed**

Source: Adapted VisitBritain

**Useful**
Access information through the supply chain

**Essential**
Did you know...

Trip groups where a member of the party has an impairment

Trip length and spend

 Longer stay and higher spend

**AVERAGE LENGTH OF STAY**

- **OVERNIGHT TRIPS:** 3.3 NIGHTS
- **ALL:** 2.9 NIGHTS

**AVERAGE SPEND**

- **OVERNIGHT TRIPS:** £191
- **ALL:** £184

Source: GITS 2013
Trips and spend

Trip groups where a member of the party has an impairment

£12.4BN

Spent on trips where a member of the party has an impairment

£9.4BN

Day trips

Number of trips 271m

Source: LONS (2015)

£2.7BN

Domestic overnight trips

Number of trips 14m

Source: GATS (2015)

£0.3BN

Inbound trips

Number of trips 0.6m

Source: YTS (2012)

Total spend £12.4BN

Source: VisitEngland
Traveller Impairment breakdown

Types of Impairments Reported

- Long-term illness: 4.6M
- Mobility impairment: 2.42M
- Deaf or partial hearing loss: 2.3M
- Learning difficulties: 0.8M
- Blind or partially sighted: 0.75M
- Mobility impairment unknown: 0.55M

Source: VisitEngland
• Day trips, 2013 (271 Million, £Billion 9.4)
• Domestic overnight trips, 2013 (14 Million, £Billion 2.7)
• Inbound trips, 2013 (0.6 Million, £Billion 0.3)
• Total trips in 2013 - (285.6 Million)
• Total spend in 2013 (£Billion 12.4)
• Average stay: 3.3 nights against 2.9 for All
• Average spend: £191 against £184 for All
• Increase in visitor numbers since 2009 (+19%)
• Increase in value since 2009 (+33%)

Source: VisitEngland
Businesses
Tourism value chain:
…the 4 essentials

Accessible...

- Information - search, bookings, Websites, mobile...
- Transport - vehicles, terminals, transfers, assistance...
- Infrastructure - attractions, accommodation, restaurants, streets, beaches...
- Services - hospitality, packages, guiding, excursions, special menus, activities, tech-aids, assistance...

...throughout the entire delivery chain
Tourism value chain: ...the 4 essentials

Accessible...

• Information - search, bookings, Websites, mobile...
Tourism value chain: …the 4 essentials

Accessible…

• Transport - vehicles, terminals, transfers, assistance…
Tourism value chain: 
...the 4 essentials

Accessible...

- **Infrastructure** - attractions, accommodation, restaurants, streets, beaches...
Tourism value chain:
...the 4 essentials

Accessible...

- Services
  - hospitality, packages, tourist guiding, excursions, special menus, activities, technical aids, personal assistance...

...throughout the entire delivery chain
The Chain of Accessibility

From arrival to departure, the visitor must be guaranteed an unbroken “chain of accessibility”

- Arrival
- Local transport
- Eat, sleep
- Shopping
- Visit attractions
- Departure
If just one link in the chain is broken (inaccessible) the trip will be spoiled...

- arrival
- local transport
- eat, sleep
- visit attractions
- shopping
- departure
Universal Design

A pre-condition for Accessible Tourism for All is the application of Universal Design principles in environments, products and services,
Watch the YouTube Video:
Mind the Accessibility Gap, ENAT, June 2014.

https://www.youtube.com/watch?v=uNgEQvPj1N8
Actions are needed on every level

- International Destination (Continent)
- National Destination
- Regional Destination
- Local Destination
- Tourism Businesses
Benefits to Business & Destination

Accessibility

- Improve Quality
- Differentiate
- Civic Pride
- More Competitive
- A Better Welcome
- Respond to Changing Markets
- Repeat Visits & Recommendations
- Social Responsibility
- New Market Opportunities

Create a Unique Selling Proposition
- Inward Investment
- Economic, Social & Environmental Sustainability
- Reduce Seasonality
Benefits to Visitors

Accessibility

Being Included!

Feeling Welcome

Personalized Services

Travel with Family or Friends

Unique Experiences

Personal Fulfillment

Enhanced Self Esteem

Greater Independence

Enjoy Events, Culture, Arts, Sports…

Opportunities for Education, Business, Cultural Exchange
Recommendations on Accessible Tourism
Adopted by UNWTO General Assembly Resolution A/RES/637(XX) of August 2013

Recommendations developed with the support of the ONCE Foundation for social and economic inclusion of people with disabilities and the European Network for Accessible Tourism (ENAT)

http://www.accessibletourism.org/?i=enat.en.news.1476
Montreal Declaration on Accessible Tourism, October 2014

Content of the declaration:

To sign the declaration:

A World Network on Accessible Tourism

- Enabling Accessible tourism for All
- Fostering market development
- Setting Quality Standards
- Promoting accessible destinations
- Supporting the UNCRPD and Sustainable Development Goals
- Skills and training
- Supporting employment and entrepreneurship for people with disabilities
World Network for Accessible Tourism

Motivation

• A private, independent non-profit association at the global level
• UNCRPD: Enabling all people to enjoy tourism: “A World For Everyone”
• To overcome “market failure” in the tourism and travel sector
• Promoting international and national policies on AT
• Developing and promoting common standards
• Showcasing good policies and practices
• Promoting sustainable tourism in sustainable communities

Means

• Increasing global networking possibilities among stakeholders
• Creating a recognised global brand
• Encouraging and enabling innovation in the tourism sector
• Sharing knowledge, enhancing skills
• Promoting ethical standards and developing shared values
World Network for Accessible Tourism

Needs
- *Active members and partners!*
- Political support
- Financial support
- Technical support
- Communications plan
- Business Plan: Funding and development

Method
- Virtual Network – *Online Social Innovation Community*
  - *A window on the market of accessible tourism for all – dissemination!*
    - *Self-initiated Working Groups, Sections, Regions*
- Engage National Tourist Boards
- Engage with businesses (e.g. UNWTO Ethical Charter signatories)
- Engage with tourists / travellers – e.g. Lonely Planet members
- Stimulate and support Regional, National and Local Initiatives
- Organised by existing networks (ENAT, SATH, KEROUL, UNESCAP, etc.), with new regional associations joining
Some possible products

- WNAT Global News and Events service – E-Bulletin
- WNAT – Global Accessible Tourism Directory
- WNAT Observatory on Accessible Tourism
- Partner search, project design and implementation
- WNAT Guidelines and standards for AT
- WNAT Code of Good Conduct (modelled on the ENAT Code)
- WNAT Accredited Training Centres and Training Courses in AT
- WNAT Accredited Accessible Tourism consultants (database)

Next steps

- Governance framework – “Leaders’ Group”
- Inventory of resources – organisations, people, knowledge bases, possible funding models and sources
- WNAT Roadmap: Mission, objectives, branding
- Fund-raising: incentives and rewards
- Engage with stakeholders and recruit members
Accessible Tourism

Visitors  Businesses  Destinations

WIN  WIN  WIN
ENAT on Social Media, Web and Contact Address

ENAT Facebook
https://www.facebook.com/accessibletourism

Twitter https://twitter.com/euaccesstourism

ENAT LinkedIn Group
https://www.linkedin.com/grp/home?gid=4003674

ENAT Facebook Group
https://www.facebook.com/groups/accessibletourism/

Web: www.accessibletourism.org

Email: enat@accessibletourism.org