

Accessible tourism from Europe

The European market for accessible tourism is large and continues to grow. This type of tourism is accessible to all people, regardless of physical limitations, disabilities or age. To tap into this market, you need to provide accessibility and clear information. You can attract these travellers via specialised channels. The largest markets, the United Kingdom, Germany and France, offer you especially good opportunities. Smaller countries in Northern and Western Europe are also promising.

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1. Description of the target group

Accessible tourism refers to tourism and travel that is accessible to all people, regardless of their physical limitations, disabilities or age. This includes those with mobility, hearing, sight, cognitive, or intellectual and psychosocial disabilities, as well as elderly people and people with temporary disabilities.

Traveller profile

European travellers with access needs are found in all age groups and have a wide variety of disabilities. Studies indicate that [tourists with disabilities are becoming an important part of the tourism market](#). For example, they tend to stay longer and spend more per visit than the average tourist. Especially the seniors among them. Disabled travellers who travel further from home are generally higher educated (or travel with family members who are) and from higher income groups.

There are two main groups of travellers with access needs:

People with long-term health problems and disabilities

[People with disabilities aged 15-64 account for around a third of people with access needs in Europe. Around one in seven people between 15 and 64 have some form of disability](#), most commonly mobility impairments. Others subcategories include cognitive, visual and hearing impairments.

Senior citizens

Senior citizens (aged 65 or older) make up the other two-thirds of people with disabilities in Europe. [More than a third of Europeans over 65 have some form of age-related disability](#) and this proportion is expected to increase. Although these disabilities may differ from those in the aforementioned group, the accessibility requirements are similar.

Tips:

As this niche market is not limited to high season, also offer special packages for (groups of) travellers with disabilities in low season.

For more information on tourism for seniors, see our study about [senior travel from Europe](#).

Accessibility of the destination

For travellers with disabilities, accessibility of a destination key. Unfortunately the offer of accessible destinations and products continues to be limited. Improving accessibility gives you a clear competitive advantage in this market. It enhances the overall quality of tourism and broadens your customer base.

For example, in Germany about [37% of disabled people previously decided not to travel due to a lack of accessible facilities](#). However, 48% would travel more if the facilities were available and 60% would be willing to pay more for improved accessibility.

Tips:

Adjust your product to the needs and requirements of the accessible tourism market. For example by offering accessible facilities like ground-floor rooms, ramps, shower chairs, facilities for electric wheelchairs and suitable storage for medication. Or rooms especially designed for handicapped people.

See VisitEngland's [simple, low-cost changes to benefit you and your visitors](#).

Look for your local disability organisations or resources that could provide area-specific information. Consider developing joint efforts to make your destination more accessible. For example by improving pavements, building an accessible boardwalk or placing picnic tables.

Train your staff on accessibility. They should know how to support travellers with access needs without bringing too much attention to their disabilities.

Make sure that your regional airport has access facilities for people with disabilities, including passenger-boarding bridges for entering and exiting aircrafts.

Accessibility of information

Travelling with a disability requires considerable organisation. To arrange a holiday, travellers with disabilities need clear and reliable information on the availability of accessible facilities and services. However, such information is often lacking. This poses a major barrier for travellers with access needs, because they need to know that accessible facilities and services are available. In fact, [about 50% would travel more if they had the proper information](#).

To give travellers the necessary confidence, these elements are key to [providing accessible information](#):

1. provide information on the accessibility of your local infrastructures and services, or a reference where to find this
2. include a point of contact in your communication so the reader can obtain more information
3. make sure your information is consistent across all channels
4. used trained information managers and technical staff with the required knowledge to deliver accessible services
5. keep your content up-to-date to avoid compromising the safety and comfort of your visitors

Providing quality information includes making it available to travellers with disabilities. For example, your website must be designed to accommodate for people with visual or hearing impairments. Factors to consider include text size, contrast, voice function and ease of navigation.

Tips:

Provide detailed, solid and reliable information about the availability of accessible facilities and services.

For more information on how to do so, see the [UNWTO Recommendations on Accessible Information in Tourism](#) and VisitEngland's [guide to marketing your accessibility](#).

Check Travability's [Inclusive Tourism Marketing Toolkit](#). It includes a useful checklist with the type of information accommodation providers should make available.

Good quality accommodation

The quality of the accommodation is especially important to disabled travellers. Examples of important quality requirements regarding accommodations include clean, secure and well-maintained facilities, personalised services, friendly staff, baggage service, spacious rooms, comfortable beds and quiet nights. Accessible accommodation shouldn't just be functional. It should also be designed with the relaxed atmosphere and (local) style of other tourist facilities.

Tips:

Take the quality requirements of people with disabilities into account in your product development. Such features are an added bonus for other travel groups as well.

Try to get a track-record from these accommodations, as they generally work especially with this segment of clients.

Outdoor activities

Travellers with disabilities like to engage in outdoor activities on their holidays. This can range from excursions to more intensive activities like canoeing. Group activities are especially popular. To offer these activities, you may need special equipment like adapted all-terrain vehicles, pool lifts or beach wheelchairs.

Tips:

Include outdoor activities in the range of products that you offer to people with disabilities.

Make sure you have the necessary equipment to safely provide the activities.

Availability of special menus

Travellers with disabilities are more likely to have special dietary preferences or requirements than other travellers. This makes the availability of special menus especially important to this segment.

Tips:

Make sure you can offer special menus and mention this in your marketing.

If possible, ask your guests about their dietary requirements in advance.

Medical facilities

People with disabilities tend to have greater health concerns. [A lack of medical assistance and health care can pose a considerable barrier](#) and leads to low satisfaction rates. To feel more secure about travelling away from their local health services, travellers with disabilities often inquire about the facilities at their destination in advance.

Tips:

Make information on healthcare and emergency services easily available to travellers and tour operators.

Ensure that physicians and basic medical equipment like first aid kits are available around the clock.

Use health services to promote your product amongst disabled travellers. For example, Kenya and Tanzania offer trained care-taking medical staff and have flying doctor services that are also available to tourists. These services are used in marketing to reassure tourists about the availability of good health care.

Health and safety measures

General health and safety are important to European travellers. They often inquire about the safety of their destination. Especially safe driving can be a concern. They want to know about drivers and testing of equipment. Lacking cleanliness of rooms and smoke detectors are an annoyance at the destination. This might result in bad reviews after their holiday.

Tips:

Pay attention to health and safety measures. Make sure you regularly check vehicles and equipment, place smoke detectors and fire extinguishers, have a first aid kit available and invest in good drivers.

Make sure your emergency exits and equipment are accessible for people with disabilities.

Political stability

Safety is important to European travellers, especially because some developing countries are politically unstable. Most commercial tour operators don't offer holidays to countries that their Ministry of Foreign Affairs has declared unsafe. This has led to a drop in tourism arrivals to for example Mali, Egypt and Kenya.

Tips:

Keep (potential) customers updated on changes in the safety situation in your area. For example through your website and through your staff.

Share safety experiences from customers on your website. Let them write about how safe they felt, because people value the experience of other travellers.

If your region is 'unsafe', commercial tour operators will most probably not go there. In this case, focus on volunteer organisations and individual travellers. Check your country's current safety status at the website of your target country's Ministries of Foreign Affairs like [The Netherlands](#), [Sweden](#) and the [United Kingdom](#).

2. Which European markets offer opportunities for accessible tourism?

Europe has a large and growing market for accessible tourism

In 2011 there were around 140 million people with access needs in Europe. This number is expected to reach 160 million in 2025, for example due to the aging population. [70% of Europeans with accessibility needs have both the financial and physical capacity to travel](#), amounting to more than 110 million people in 2025.

And the market share increases further when you consider that on average, [Europeans with access needs travel with 2 companions](#). This is a potential market value of more than €265 billion!

Because of their access needs, travellers with disabilities have a relatively limited choice of tourism products. This generates a high level of loyalty to accessible destinations, making them relatively likely to return and recommend. Providing accessible tourism allows you to benefit from early adopter advantages and build a loyal customer base with a strong growth potential.

Tips:

Seize the opportunity by incorporating accessibility into your product range.

For examples, see the [UNWTO's Good Practices in the Accessible Tourism Supply Chain](#) and the [European Network for Accessible Tourism's Projects and Good Practices](#).

Northern and Western Europe is the most promising source market

[The United Kingdom, Germany and France are the largest European source markets](#) for accessible tourism. They have the largest absolute population of people with access needs, all above 20 million. Smaller Northern and Western European countries like Scandinavia and the Netherlands can also be interesting source markets. People in these countries have a relatively high spending power and a strong tendency to travel to developing countries.

Tips:

Start by focusing on the United Kingdom, Germany and/or France.

Also consider smaller Northern and Western European markets.

The majority of trips are within Europe

[People with disabilities often choose holiday destinations that are closer to home](#). 58% of European people with disabilities (aged between 15-64) went on overnight trips in 2012. 60% of these trips were domestic, 27% international within Europe and 13% outside of Europe. Among the senior travellers 48% went on overnight trips, of which 70% were domestic, 23% international within Europe and 7.2% outside of Europe.

The recommended source markets in Northern and Western Europe perform especially well. In these countries, more than 71% of people with disabilities went on overnight trips. The Netherlands stands out with 86%, of which more than 18% were trips outside Europe. Senior travel in these countries also performs above average.

This confirms that the majority of Europeans with access needs are willing and able to travel. To increase the number of long-haul trips, destinations need to invest in accessibility and the marketing of their accessible products.

Tip:

Clearly communicate your accessibility, to make travellers with access needs aware that your destination is within their reach.

Most visited destinations

Many popular accessible tourism destinations for European travellers with disabilities are in non-developing countries like the United Kingdom, Spain and the United States. When they do travel to developing countries, well-known countries like Egypt, India, South Africa and Thailand are popular.

Tips:

Compare your destination and product to popular accessible tourism destinations and learn from them.

For examples, see [Lonely Planet's most accessible destinations](#) and [Wheelchairtraveling](#).

The European population is ageing

Europe is currently home to almost 100 million seniors (age 65+), which is around 19% of all inhabitants. [By 2030, the percentage of senior citizens is expected to rise to 24%](#). To travel, these people need to have their access needs met. Improving accessibility can therefore bring lasting economic and social benefits to developing countries.

Tip:

Aim your product range at seniors as well. For more specific information about this market, see our study about [senior travel from Europe](#).

For more information, see our study about [European demand for tourism in developing countries](#).

3. Which trends offer opportunities on the European market for accessible tourism?

Accessibility is becoming the norm

The rights of people with disabilities to equal participation in society are being strengthened throughout the world. Currently, 160 countries have signed the [UN Convention of the Rights of Persons with Disabilities](#) (CRPD).

The tourism sector is becoming increasingly convinced that accessibility should be standard. Rather than simply adapting a few accommodations, all facilities should be made wheelchair-friendly. This means that an increasing number of tourism companies are striving to offer products that are accessible to all tourists.

Tips:

Read up on [Universal Design](#) to learn about making your products and destination usable for everyone, regardless of their age and ability.

Identify national or local accessible tourism initiatives that you could join.

Collaborate with other providers (like restaurants, national parks or museums) to develop accessible tourism products.

Demand for wellness and light medical tourism is increasing

Wellness and light medical tourism are becoming increasingly popular. This also applies to travellers with disabilities. Due to the pressure to lower healthcare costs, many European insurance companies no longer cover light medical treatments and alternative therapies like acupuncture. As these treatments are generally less expensive in developing countries, this provides good opportunities for local tourism companies.

Tips:

Focus on health and wellness tourism for travellers with disabilities. For example, create packages that combine spa or light medical treatments with accommodation, activities and transfers. Offer partner packages as well, given that many disabled travellers bring companions.

Offer competitive prices for health and wellness tourism. The costs savings should make it worthwhile for travellers with disabilities to arrange health or wellness treatments at your destination.

For more information, see our studies on [wellness tourism](#) and [light medical tourism](#).

Authentic experiences continue to be popular

This continuing trend is clear throughout all tourism segments. European travellers are increasingly looking for unique experiences and like to interact with local people and culture. This goes for travellers with disabilities as well.

Tip:

Make the travel experience at your destination as authentic as possible, while keeping the standards and requirements of your target group in mind. For example, use your local natural assets, traditions, skills and ingredients in your product offering.

For more information, see our study about [European tourism market trends](#).

4. What requirements should your accessible tourism products comply with to be allowed on the European market?

For general tourism requirements, see our study on [what requirements your services should comply with to attract European tourists](#).

In addition, the ENAT Code of Good Conduct applies to accessible tourism specifically.

ENAT Code of Good Conduct

The [ENAT Code of Good Conduct](#) is an international certification scheme for tourism businesses and organisations, recognising their efforts to promote accessible travel and tourism. It consists of eight guiding principles that make your product accessible to all visitors with access needs.

Tips:

Use the ENAT Code of Conduct as a guideline to increase your chances of meeting the expectations of European travellers with disabilities.

For details, refer to the [ENAT Code of Good Conduct Background Information](#).

5. What competition do you face on the European market for accessible tourism?

Competition in the accessible tourism market does not differ from the tourism market in general. It mainly lies in the accessibility you can offer. For more information, see our study on [what competition you face on the European outbound tourism market](#).

6. Through what channels can you get your accessible tourism products on the European market?

Focus on smaller specialised tour operators

European tour operators specialised in accessible tourism or your destination offer the best opportunities. European travellers with disabilities often prefer the reliability of tour operators and complete packages. Especially accessible tourism specialists, as they know exactly which destinations and tourism providers meet the needs of this group. You can identify them via trade associations, events and databases.

For example:

- [Accessible Travel Netherlands](#), [Holiday Participation Centre](#) (Belgium) and [Tourism For All](#) (United Kingdom) - national accessible tourism associations
- [Destinations for All](#) - world summit on accessible tourism
- [European Network for Accessible Tourism](#) - industry network
- [International Conference on Computers Helping People with Special Needs](#) - conference with a Special Thematic Session on Accessible Tourism
- [ITB Berlin](#) - travel trade show with special attention to accessible tourism
- [Pantou](#) - the European Accessible Tourism Directory

Generating direct sales

The internet is an important source of information, especially for people with disabilities. For many, it is their primary source of information. European travellers with disabilities increasingly book their holidays directly with local tourism providers, especially those from younger generations. To increase your chances of direct sales, you can promote your product on (accessible) tourism websites/portals.

For instance:

- [Handiscover](#)
- [Lonely Planet Thorn Tree forum](#)
- [Pantou](#)

Attracting business through associations

In Europe, people with disabilities are often members of organisations aimed at specific illnesses or disabilities. They are also likely to be regular visitors of related websites. It could be valuable to approach such organisations, as they offer direct access to potential customers who are looking for accessible holidays.

Tips:

Approach organisations or associations for people with particular disabilities with specific offers for their members.

Use the magazines or websites of these organisations and associations to promote your destination through advertorials or articles. For example [Disability Horizons](#), a rapidly growing disability-lifestyle magazine in the United Kingdom.

Consider using professional bloggers to write about your local accessible tourism offer.

For a general overview of the trade structure for tourism, see our study on [the channels and segments of the European tourism market](#).

7. What are the end market prices for accessible tourism products?

Travellers have many destinations and types of holiday to choose from. This makes tourism a relatively price sensitive and competitive industry. The price of a long haul trip consists of three dimensions:

1. The exchange rate between the currencies of the country of origin and the destination country.
2. The costs of transport to and from the destination country.
3. The price of goods and services the traveller consumes in the destination country.

European tour operators are not open about the purchasing prices of their tourism products. According to industry experts, their margins vary between 10-25%. Prices of holiday packages vary widely as they depend on

a lot of factors, such as:

- accessibility
- availability
- destination
- modes of transport
- period of travel
- number of travellers
- length of stay
- type of accommodation
- included activities

Tips:


Check which countries have cheap (direct) flights to your destination, for instance at [Skyscanner](#). This gives you a competitive advantage in those countries.

You can compare prices for accessible travel products online, for example at [Responsible Travel](#).


Tourism Boost has some useful [on-line tools for pricing tours and accommodation](#). These help you determine the break-even point and ideal retail price of your tourism product.

Please review our [market information disclaimer](#).

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