CBI Product Factsheet:

Accessible tourism from Europe
**Introduction**

In Europe, people with disabilities are becoming increasingly interested in travelling around the world. In their search for accessible tourism, they are creating a new emerging market from which tourism providers in Developing Countries can benefit. People with disabilities often travel with families, friends or caregivers, thus making the market even larger. The United Kingdom, Germany and France offer good opportunities for accessible tourism providers in developing countries, as they have the highest absolute numbers of people with accessibility needs. Smaller countries in Northern and Western Europe could also be interesting markets, given the relatively high spending power of people in these countries and their strong tendency to travel to developing countries.

**Product description**

**Product definition**

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**

Travellers with disabilities from Europe are found in all age groups and have a wide variety of disabilities. In general, disabled travellers who are more likely to travel further away from home tend to have higher levels of education (or travel with family members who are highly educated) and belong to higher income groups. According to research by the World Tourism Organization (UNWTO), travellers with disabilities tend to stay longer in the locations that they visit and tend to spend more per visit than the average tourist.

Two main groups of travellers with disabilities can be distinguished:

**People with long-term health problems and disabilities**

According to a study conducted by GfK Belgium, this segment accounts for around 36% of the population of people with disabilities in Europe. Mobility impairments form the most common subcategory of disabilities. Other smaller categories include mental/intellectual impairments, hidden impairments, visual impairments and deafness.

**Senior citizens**

Senior citizens (people aged 65 or older) constitute the other 64% of the population of people with disabilities in Europe. According to research by the European Commission, around 40% of all Europeans who retire have some form of age-related disability. Although their disabilities tend to differ from those in the aforementioned group, their accessibility requirements are similar.

**Product specifications**

The following product specifications are important for travellers with disabilities from Europe:

**Accessibility of the destination**

Accessibility of a destination is the primary requirement for travellers with disabilities. The choice of destinations and products for this segment, however, continues to be severely limited. Improving accessibility is a primary strategic concern, which can enhance the overall quality of tourism and broaden the customer base. The availability of accessible facilities can also open up a destination to even more visitors and events.
Accessibility of information

Travelling with a disability requires considerable organisation. Given that travellers with disabilities rely on accessibility, they need information on the availability of accessible facilities and services before they decide to travel somewhere. Such information is often hard to find, however, and this is often mentioned as a barrier. Many travellers with disabilities use specialised information sources or book through specific institutions or groups. Around 50% of people with disabilities say that they would travel more if they could be sure of the availability of accessible facilities and services.

**Tips:**
- Adjust your product to the needs and requirements of the accessible tourism market. For example, accommodation providers should consider installing such accessible facilities as ground-floor rooms, ramps, shower chairs, facilities for electric wheelchairs and proper (e.g. cool and dark) storage places for medicines.
- Look for disability organisations or resources at your destination that could provide area-specific information, and consider developing joint efforts to make your destination more accessible (e.g. by improving sidewalks, or building an accessible boardwalk or picnic tables).
- Train your staff on accessibility so that they will understand what they should or should not do to support travellers with disabilities without focusing too much attention on their disabilities.
- Make sure that your regional airport has access facilities for people with disabilities, including passenger boarding bridges for entering and exiting aircraft.

Good quality accommodation

The quality of the accommodation is very important to 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.

**Tip:**
- Take the quality requirements of people with disabilities into account in your product development. Such features are likely to offer even greater advantages, as many are valued by other travel groups as well.

Outdoor activities

Travellers with disabilities are eager to incorporate outdoor activities into their travel plans. They are especially interested in engaging in outdoor activities in groups.

**Tip:**
- Include outdoor activities in the range of products that you offer to people with disabilities. Identify the adapted equipment that is necessary for such outdoor activities (e.g. adapted all-terrain vehicles, beach wheelchairs and pool lifts).

Availability of special menus

Travellers with disabilities are more likely than other travellers are to have special dietary preferences or requirements. The availability of special menus is therefore important to this segment.
Medical facilities

People with disabilities tend to have greater health concerns. Nevertheless, research conducted by GfK in Belgium indicates that a lack of medical assistance and health treatments leads to low satisfaction rates and these things are mentioned relatively frequently as obstacles. Many travellers with disabilities seek information regarding the availability of health facilities at their holiday destinations. This information makes them feel more secure about travelling away from their local health services.

Tips:
- Make sure that information on healthcare and emergency services is easily available for travellers with disabilities, as well as to tour operators.
- Ensure that physicians and basic medical equipment (e.g. first aid kits) are available around the clock.
- Use health concerns to promote your product amongst disabled travellers. For example, Kenya and Tanzania have flying doctor services, which are also available to tourists. These services are used in marketing to reassure tourists about the availability of good medical care.

What is the demand for accessible tourism from Europe

Potential market demand

As of 2011, there were 138.6 million people with access needs in Europe. Research by Loughborough University reveals that 70% of the population with accessibility needs (amounting to more than 97 million people) have both the financial and physical capacity to travel. The market share increases further when considering their travel companions. On average, people with access needs in Europe travel with about 1.9 companions; people with disabilities tend to travel with more companions than seniors do (2.2 and 1.6, respectively). Destinations and tourism companies that provide accessible tourism can benefit from early adopter advantages and attract more customers.

Tips:
- Seize the opportunity by integrating accessible tourism into your product range. Travellers with disabilities have a high level of loyalty, and they are more likely than other traveller segments to return and recommend.
- The website of the European Network for Accessible Tourism offers a number of good practices in accessible tourism.

Promising source markets

Within Europe, the United Kingdom, Germany and France are the largest source markets for trips to developing countries for travellers with disabilities. They are also the countries with the largest absolute population of people with access needs, all above 10 million. Smaller Northern and Western European countries (e.g. Scandinavian countries and the Netherlands) can also be interesting source markets, given the relatively high spending power of people in these countries and their strong tendency to travel to developing countries.

Tip:
- Start by focusing on the United Kingdom, Germany and/or France, as they have the largest absolute population of people with access needs.
Majority of trips within Europe

People with disabilities often choose destinations that are closer to home, as they are simply unaware of the travel possibilities further away. According to GfK Belgium, 58% of European people with disabilities (aged between 15-64) went on overnight trips in 2012. Of these trips, of which 60% involved only domestic travel, 27% remained within Europe and 13% included travel outside of Europe. Among the senior travellers, 48% went on overnight trips, with 70% involving domestic travel, 23% remaining within Europe and 7.2% including travel outside of Europe.

Tip:
- Provide clear communication about the accessibility of your destination and products in order to convince travellers with disabilities that options in your tourism range are definitely within their reach.

Most visited destinations

Many popular accessible tourism destinations for European travellers with disabilities are located in non-developing countries (e.g. the United Kingdom, Spain and the United States). When they do travel to developing countries, travellers with disabilities often visit such well-known countries as Egypt, India and Thailand.

Tips:
- Benchmark your destination/product with popular accessible tourism destinations. The website of Wheelchairtraveling offers examples of popular destinations for accessible tourism.
- Use award-winning accessible tourism providers for inspiration. Each year, various organisations and governments around the world present awards for outstanding performance in accessible tourism. Organisations that have received such awards include ENAT, The European Commission and the Ministry of Tourism and Sports of Thailand.

For information on tourism trade statistics and macro-economic indicators in the European market in general, refer to the CBI publication on Trade Statistics for Tourism.

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

Ageing population

Around 90 million senior citizens (age 65+) are currently living in Europe, and the number is rising quickly, due to the ageing European population. In 2005, 17% of all people in Europe were older than 65 years. By 2030, the percentage is expected to rise to 25%. According to a McKinsey report, 40% of all seniors will retire with some form of disability. Improving accessibility can therefore bring lasting economic and social benefits to developing countries.

Tip:
- Target your product range to seniors as well. For more specific information about the market for senior tourism from Europe, consult the PFS ‘Senior travel from Europe’.

Laws for equal participation

The rights of people with disabilities to equal participation in society are being strengthened throughout the world. Currently, 149 countries have signed the UN Convention of the Rights of Persons with Disabilities (CRPD). People and companies in the tourism sector are increasingly adopting the opinion that accessibility should be a standard. Tourism products should be designed towards universality, moving away from the practice of simply adapting a few accommodations and picnic chairs for wheelchairs towards making all facilities wheelchair-friendly. For the accessible tourism segment, this means that an increasing number of tourism companies are dedicating themselves to offering products that are accessible to all tourists.

Tips:
- Identify national or local accessible-tourism initiatives that you could join.
- Collaborate with other providers (e.g. restaurants, national parks or museums) to develop accessible tourism products/services.
Increasing demand for health and wellness tourism

Some people with disabilities are becoming increasingly interested in wellness and/or light medical treatments. In response to the continuing pressure to lower healthcare costs in Europe, insurance companies have stopped covering many light medical or ‘alternative therapies’ (e.g. acupuncture or holistic treatments). As these treatments are generally less expensive in developing countries, this provides good opportunities for tourism companies in these countries.

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

Authentic experiences

This trend can be observed throughout all tourism segments. European travellers are increasingly looking for unique experiences, and they are interested in engaging with local people and culture during their holidays. This goes for travellers with disabilities as well. One of the reasons that European travellers choose developing countries as holiday destinations has to do with the perceived authenticity of such destinations, in combination with the activities that are offered there.

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 local natural assets and local traditions, skills or ingredients/herbs, or organise activities at special scenic locations (e.g. in the forest or on the beach).

For information on tourism trends within the European market as a whole, refer to the CBI publication on Trends for Tourism.

Which requirements does accessible tourism need to comply with in order to be allowed on the European market?

Musts

No legal European requirements

There are no legal requirements for long-haul accessible tourism, as it is offered outside Europe. It is nevertheless important to ensure that your business complies with regulations in your own country.

Tip:
- Although European partners will not pass on legal requirements, you must comply with the legal requirements in your own country. Consult the relevant regulations for the type of products you provide, as well as regulations on health, sanitation and safety.

Additional requirements

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. The code consists of eight guiding principles that businesses and organisations can follow in order to make travel and tourism accessible to all visitors who experience access difficulties. These customers may need better access and services due to disabilities, long-term health problems, age-related conditions or other temporary or permanent personal conditions that restrict their access.
Tips:
- Use the ENAT Code of Conduct as a guideline for recognising your efforts for accessible tourism and increasing your chances of meeting the expectations of European travellers with disabilities.
- For additional information on the ENAT Code of Conduct, refer to http://www.accessibletourism.org.

Reliability

European tour operators are looking for reliable, professional partners. To this end, many request their partners to adhere to codes of conduct they have set for themselves. These codes generally include health and safety requirements, as well as requirements concerning business ethics and social responsibility. They are also likely to regard membership of national and international sector associations and networks as proof of reliability and professionalism.

Tips:
- Study the codes of conduct of European tour operators and see how they correspond to your business practices. Consider adapting your business practices in order to increase your chances on the European market.
- Join national and international sector associations and networks (e.g. your own country’s tourism trade association).
- Share photos and videos, and obtain testimonials and reviews in order to enhance your trustworthiness.

Liability

European tour operators are increasingly asking their current and potential partners about the presence of liability insurance to cover possible damage and accidents that customers might experience during their holidays, especially for travel outside of Europe. This is because their own liability insurance often does not cover damage caused by third parties. Tourism suppliers in developing countries that have such insurance have a major advantage over those who do not. It is difficult to obtain liability insurance in many developing countries, however, as such insurance is not yet available.

Tips:
- Communicate with your customers concerning the importance of contracting travel insurance, especially if your company does not have liability insurance.
- Contract liability insurance and communicate the fact that you have such insurance. If it is not possible to obtain liability insurance in your country, you should constantly urge the authorities and trade associations to make such insurance possible. You should also discuss this matter with any current and potential partners, as they might have some level of influence as well.

Sustainability labels

Although European tour operators do not require sustainability labels directly, they often give preference to providers who offer sustainable business options whenever they have a choice. Integrating sustainable elements into your product can therefore provide a competitive advantage. The wide variety of labels that are available for the global, European and local markets can make it difficult recognise them and to make a choice. Examples of credible global sustainable and/or green tourism certification programs include Green Globe, Rainforest Alliance and Travelife. Localised sustainability initiatives include Smartvoyager in Ecuador, CST in Costa Rica and Green Lotus in Vietnam.

Tips:
- Become familiar with the requirements of sustainability certification in order to understand what suppliers are likely to expect. Consider integrating sustainable best practices into your products (e.g. by adopting policies for efficient electricity, water consumption and waste management). In addition, be sure to mention your concern for sustainability in your promotional materials. For more information, refer to the CBI Product Factsheet on ‘European tour operators and their need for sustainable suppliers in developing countries’.
- Consider applying for sustainable certification to help you stand out from competitors. Find out whether your country has its own sustainability label and apply for it. Make sure that the logo is visible on your website and that your company is visible on the website of the certification body.
- For an overview of other relevant standards for tourism, consult the ITC Standards folder.
For information on tourism buyer requirements in the European market as a whole, refer to the CBI publication on ‘European Buyer Requirements’ for Tourism.

What competition do I face on the European market for accessible tourism?

Competition on the European market for accessible tourism is based on the same aspects as for competition on the general market for long-haul tourism. You may therefore consult the CBI publication entitled ‘Field of Competition’ for Tourism for additional insights into competition.

In addition, consult CBI’s ‘Top 10 Tips for Doing Business with European Buyers’ to learn how to prepare your first contact with European buyers or how to improve your existing relationships with European buyers and gain a competitive edge.

What do the trade channels and interesting market segments look like in the European market for accessible tourism?

The trade structure for accessible tourism from Europe does not differ significantly from the trade structure for European tourism to developing countries in general. The most important trade channels for accessible tourism providers in developing countries include local inbound tour operators, specialised accessible tour operators and direct sales. For an overview of the general trade structure for tourism, refer to Figure 1 in the CBI publication on ‘Trade Channels and Segments’ for Tourism.

Tour operators remain an important channel

Tour operators offer some of the best opportunities for entering the European market for accessible tourism. Many European travellers with disabilities still book through specialised or other tour operators or travel agencies, because they prefer the reliability of tour operators and complete packages. In addition, many developing countries are still relatively unknown. Emerging destinations and European tour operators aiming to offer trips to developing countries are therefore quite dependant on local partners. European tour operators tend to work with inbound tour operators or Destination Management Companies (DMCs) that select travel packages for them.

Tips:
- Inbound tour operators and Destination Management Companies should contact tour operators in their European target markets. Look for companies that specialise in accessible tourism or in particular countries/regions. Local accommodation and excursion providers should focus on both inbound tour operators/DMCs and European tour operators.
- Join the European Network for Accessible Tourism to find potential trade partners, and take part in specific events regarding accessible tourism. Examples include the International Conference for Facilitating Disabled Tourism or the International Congress of Tourism for All.
- Visit the websites of well-known European tour operators that offer accessible tourism, in order to obtain an idea of the needs and requirements of accessible tourism in the European market. One tour operator specialised in travel for people with disabilities is Enable Holidays in the United Kingdom.

Direct sales

The internet is an important source of information, especially for people with disabilities, who tend to spend more time online than web surfers without disabilities. For many, it is their primary source of information. European travellers with disabilities are increasingly approaching local tourism providers online, especially those from younger generations. Targeting these travellers directly through the internet therefore offers interesting opportunities.

Tips:
- Have a professional, high-quality website with high-resolution photos and videos. In addition, review the tips for making your website accessible to people with disabilities.
- When doing business online, it is essential for local companies to offer secure methods of online payment that are accepted nationally and internationally.
Business through associations

In Europe, many people with disabilities are members of organisations aimed at specific illnesses or disabilities. They are also likely to be regular visitors to these websites. For accessible tourism providers in developing countries, it could be quite valuable to approach such organisations, as they offer direct access to potential customers who are looking for accessible holidays. Many additional initiatives exist at the country level, including the Holiday Participation Centre (Belgium), Accessible Travel Netherlands and Tourism For All (United Kingdom).

Tips:
- Approach organisations or associations for people with particular disabilities with specific offers for their members.
- Use the magazines or websites of these organisations or associations to promote your destination through advertorials or articles. One example of such a publication is Disability Horizons, a rapidly growing disability-lifestyle magazine in the United Kingdom.
- Consider using professional bloggers to write about your accessible tourism in your destination/region.

For information on market channels and segments in the European tourism market as a whole, refer to the CBI publication on 'Trade Channels and Segments' for Tourism.

For tips on locating buyers in the European market, refer to the CBI publication on 'Finding Buyers'.

Useful sources

- Accessible tourism - http://www.accessibletourism.org - European Network for Accessible Tourism. This website also includes a blog on accessible tourism that links to various online resources.
- Lonely Planet Thorn Tree forum - https://www.lonelyplanet.com/thorntree/forums/travellers-with-disabilities - one of the most popular travel forums, with a section dedicated to travellers with disabilities.

For all CBI market-intelligence documents relating to tourism, visit the CBI 'Market Intelligence Platform for Tourism'.