



Universal Tourism in the EU: *Are we there yet?*

**1st UNWTO European Conference on
Accessible Tourism**

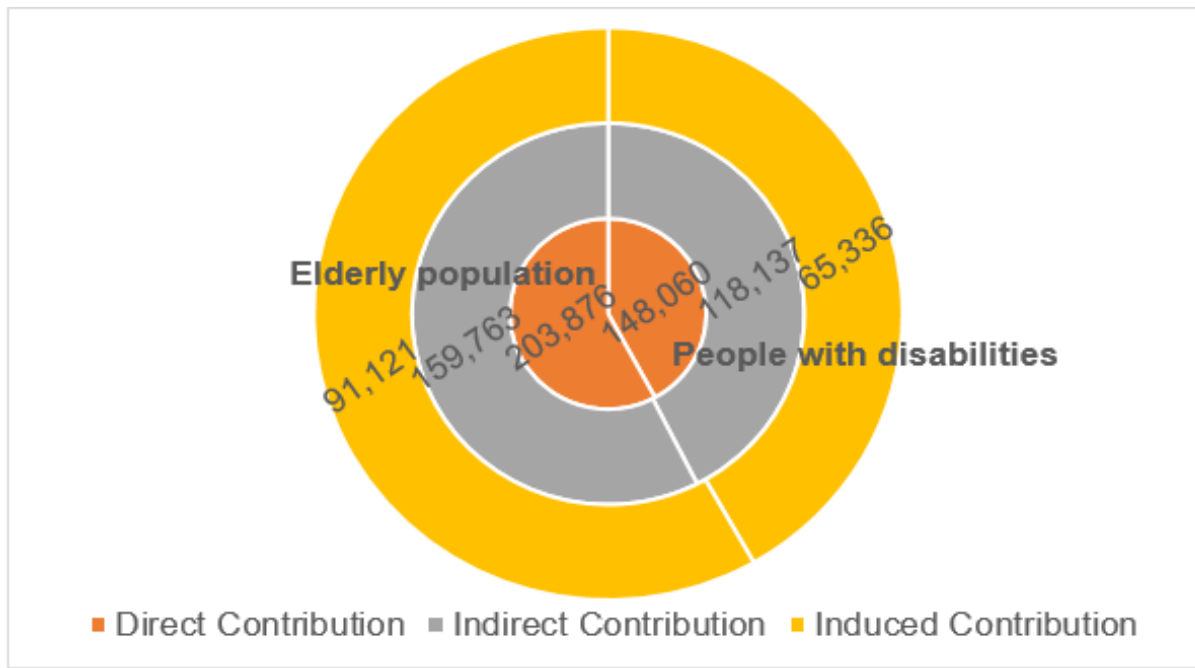
San Marino, 19 November 2014

Antonella Correra- European Commission
DG Enterprise and Industry

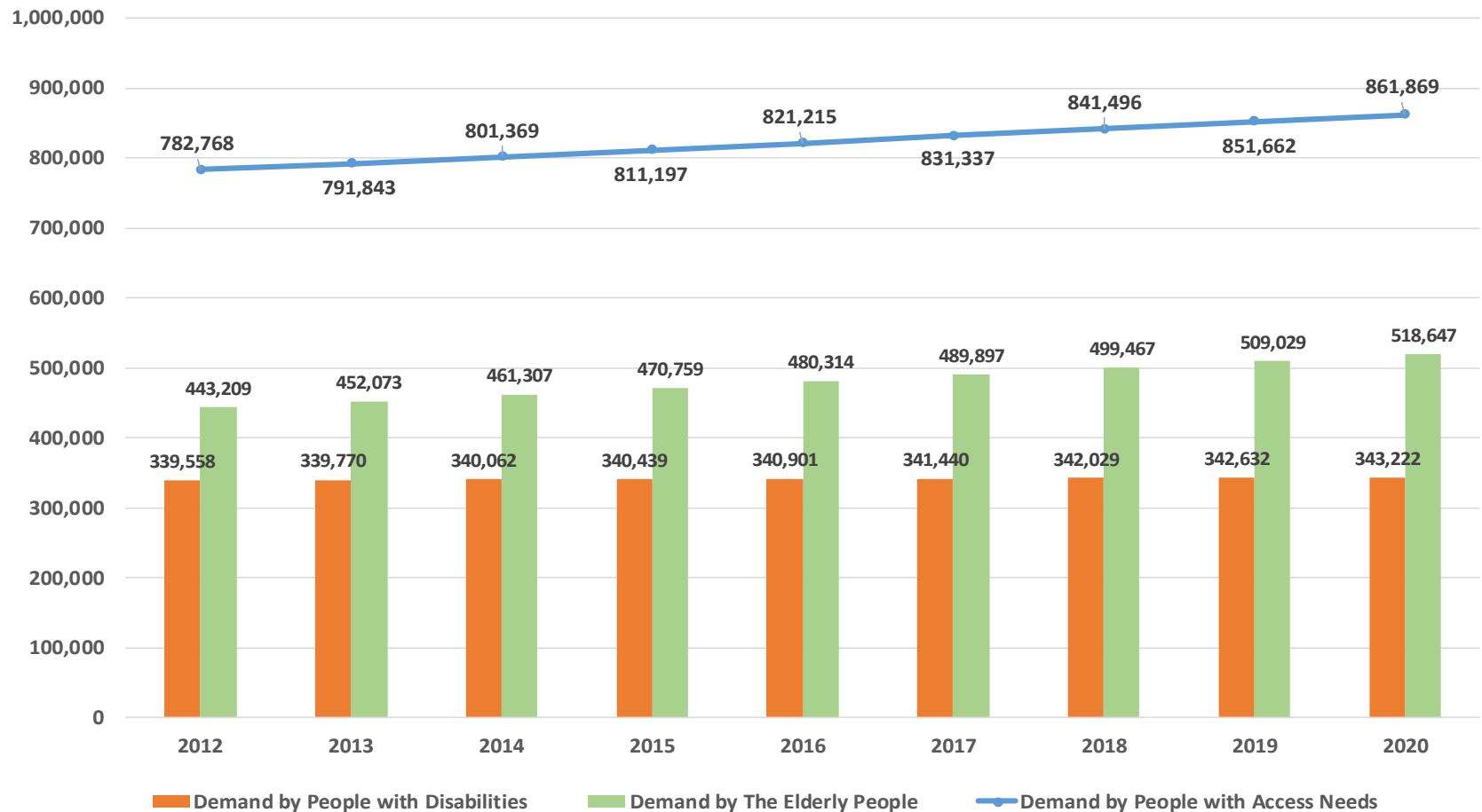
Economic impact of Accessible Tourism in the EU

Direct gross turnover (2012): +/- €352 billion

Total Gross turnover + multiplier effect (2012): +/- €786 billion.



Current demand and forecast of Accessible Tourism EU



Cost of non-accessibility of tourism

Scenario A: minimum improvement (+18%) +/- €415 billion

Scenario B: medium improvements (+25%) +/- €439 billion

Scenario C: maximum improvements (+36%) +/- €480 billion

Scenario	Scenario A		Scenario B		Scenario C	
Group	People with disabilities	The elderly population	People with disabilities	The elderly population	People with disabilities	The elderly population
Direct economic contribution (gross turnover, € million) of which, generated by	176,668	239,277	191,878	247,192	209,461	270,505
Existing travellers	85.7%	85.3%	79.9%	82.8%	77.4%	78.2%
New travellers	14.3%	14.7%	20.1%	17.2%	22.6%	21.8%

Distribution of direct economic contribution under different scenarios between existing travellers and new travellers

So, what are the benefits of Accessible Tourism for the EU economy?



+142 billion € (direct contribution to GDP)

+3.4 million jobs



The availability of medical help and health treatments and assistive devices get low satisfaction scores and are mentioned fairly frequently as barriers.



Among accessibility-related aspects, the **availability of information about accessible services and accessible locations** are also mentioned as barriers.



There is evidence of issues with the **price of accessibility**, with some people saying they had to pay more than the standard price or had to switch to a more expensive product or service at least sometimes for them to be accessible.

Small improvements can go a long way...



Improvements



Results

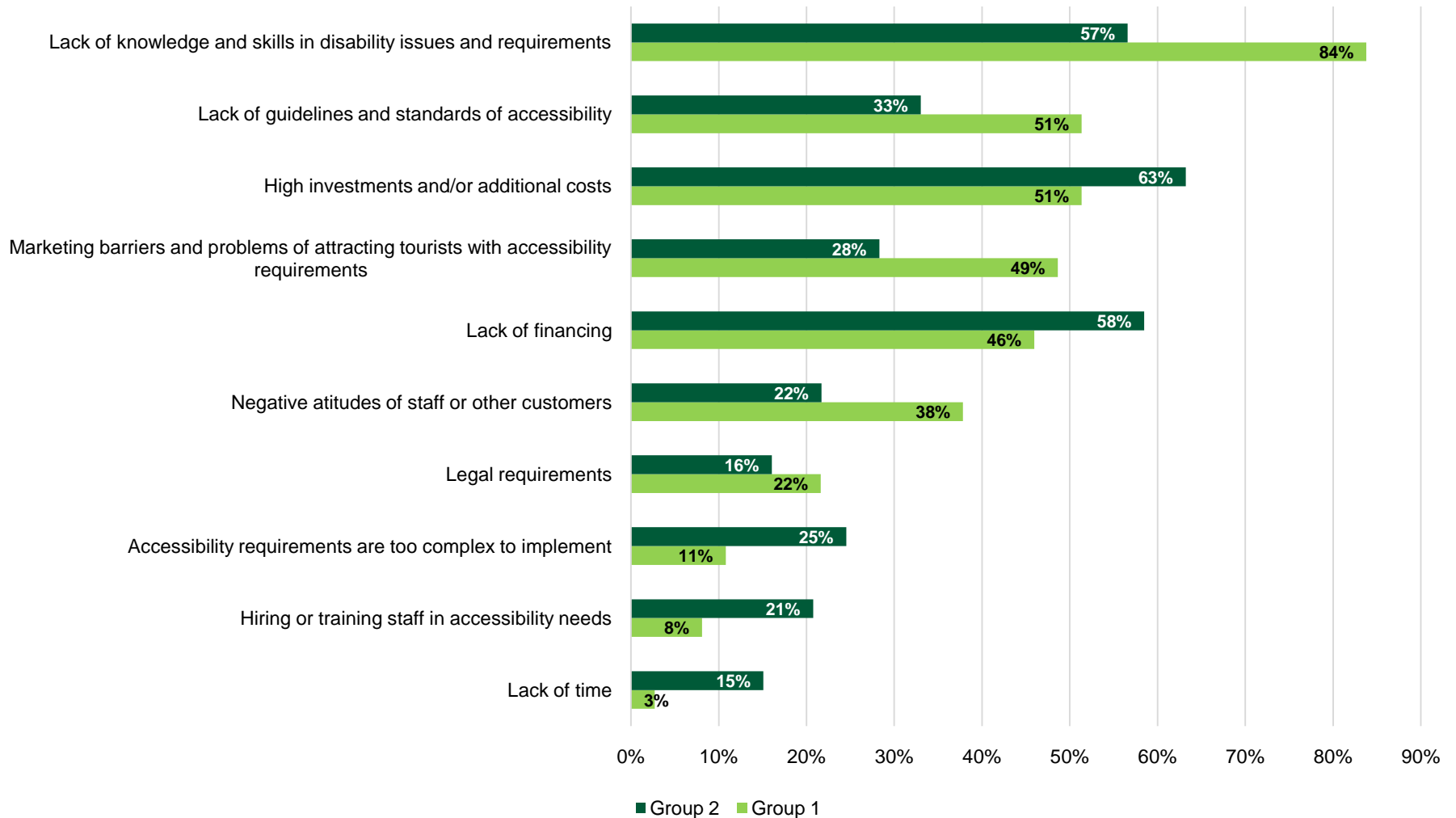


Medical help and menus for special **dietary needs**. These items are also mentioned often by people who travel with children, together with **equipment and activities for children**

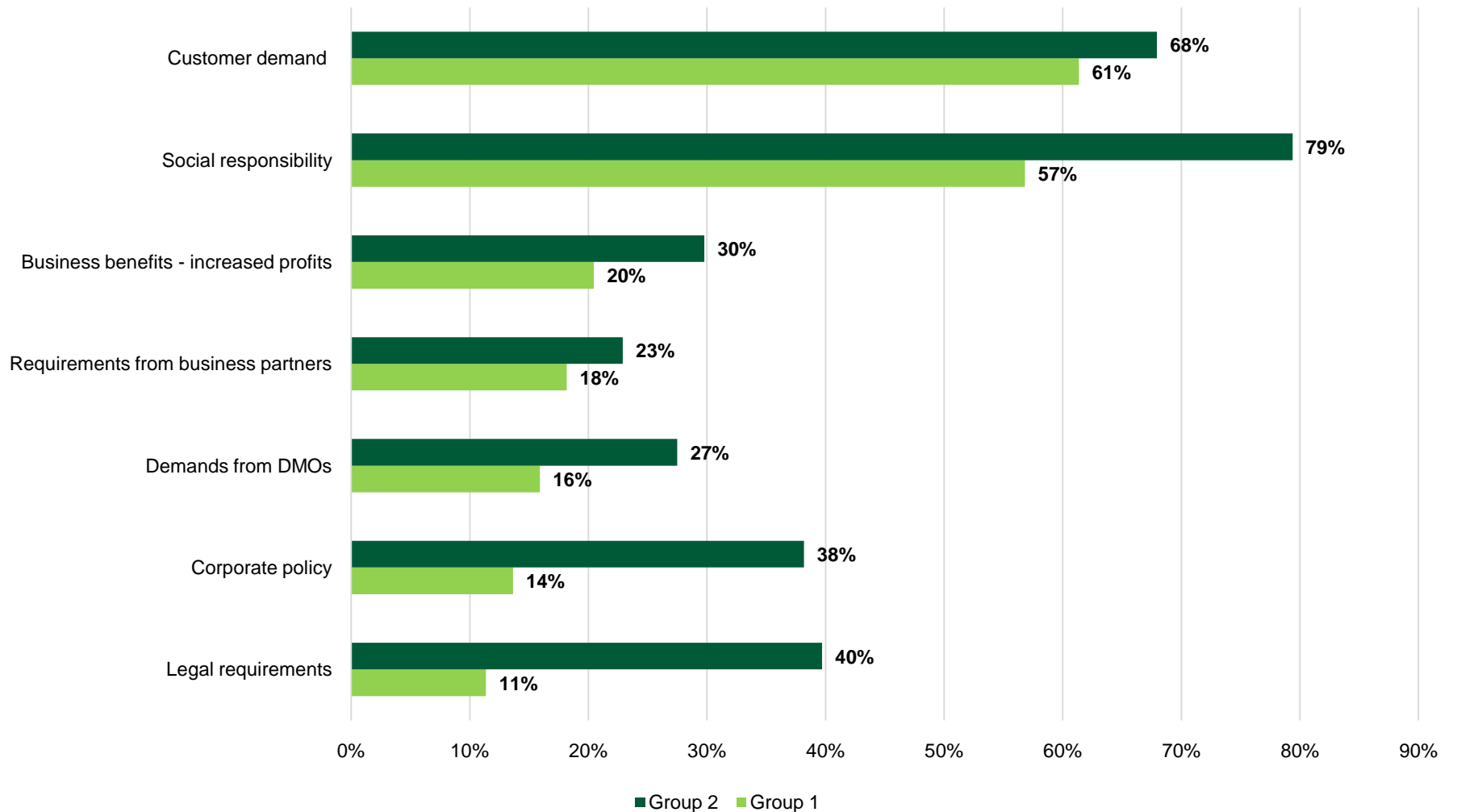
In terms of building accessibility, the aspects seen as most important by all three groups are **accessible toilets, accessible parking spaces** and the **ease of use of lifts**

Over 80% say they are likely to return to a destination when they are satisfied with accessibility and would consider **increasing their travel budget or travelling more often**

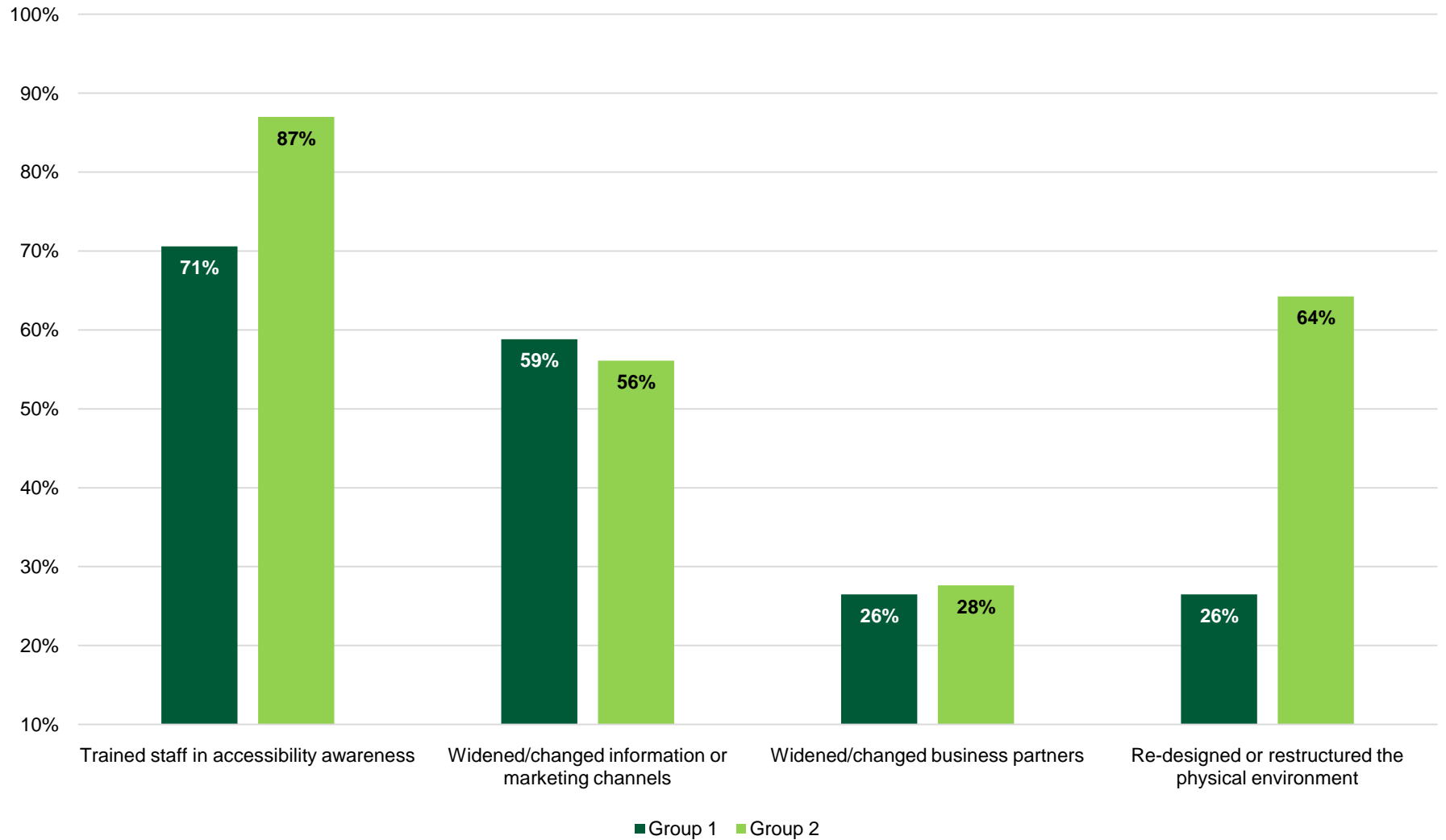
Perception of barriers inhibiting accessible tourism services



Reasons for providing accessible services



Adaptations made to increase accessible services



Are we there yet?

Less than 30% of tourism supply in EU offer some specific accessible service

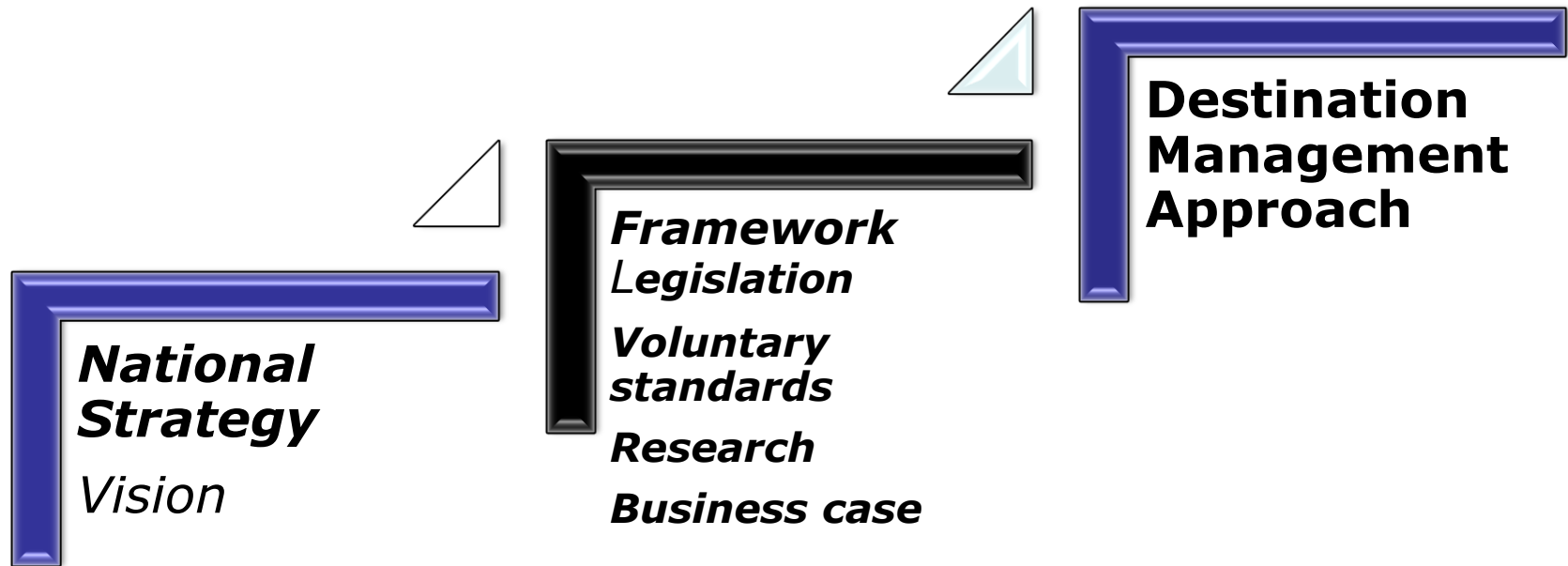
Motor impairments - speech impairments: huge gap

There is no outstanding service

Accommodation, attractions, transport abroad, booking performing better than F&B, transport at destination, information, tour operators



How to move on?





EU Tourism Policy Framework

- "3rd level" EU competence for Tourism (Arts. 6 and 195 TFEU):
Complement, support and coordinate actions of MS in the tourism sector (like for Industry, Culture, Education, Health,...)
- Harmonization of laws and regulations of MS is NOT ALLOWED
- Main objective: *make European Tourism Industry more competitive and responsibly managed, and the European destinations more attractive and sustainable*





Tourism and EU Funds

- COSME Budget (2014-2020): around 105 million € (9 million € in 2014)
 - No investments in infrastructure
 - Co-financing of projects with transnational dimension and European added-value
- Tourism investments potentially eligible within 6-7 ESIF thematic objectives for 2014-2020 and in other EU Funds (Horizon 2020, LIFE, Creative Europe,...)



Examples of co-financed projects:

- **Wine routes, sunbathing and sports** in Spain
- **Sports, archaeology, volcanism, and art** in Campania
- **Accessibility of the German part of Via Regia**
- **New accessible itineraries** in England
- **Accessible and responsible tourism models** linking Denmark, Poland, Portugal, Belgium, the Netherlands and Italy
- **Tourism itineraries and enogastronomy** for all in Tuscany and Umbria
- **Cultural heritage for all:** Unesco heritage sites in Sicily Avila, Sozopol and Piedmont



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