

Economic Impacts of Accessible Tourism for All – The case of Germany



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Agenda:

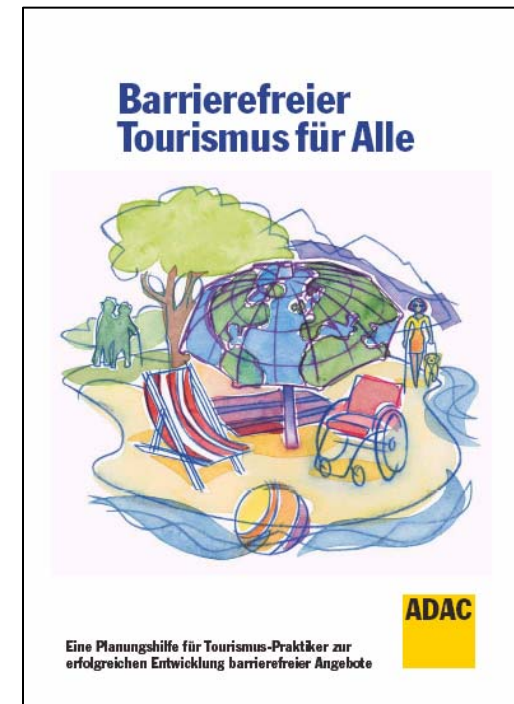
1. Basics
2. German Study „Economic Impulses of Accessible Tourism for All“
3. Analysis of supply and demand
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1. Basics

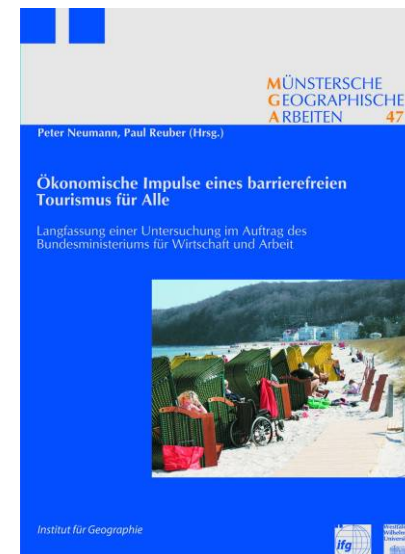
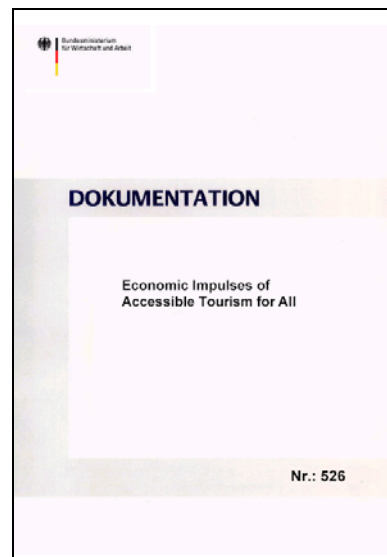
Throughout Germany:

- Federal and Regional Projects (e.g. „Accessible Nature parks“)
- ADAC-Planing Guide „Barrier-free Tourism for all“
- Study by the Federal Ministry of Economics: „Economic Impulses of Accessible Tourism for All“



2. German Study “Economic Impulses of Accessible Tourism for All“

Study by the Federal Ministry of Economics and Labour: „Economic Impulses of Accessible Tourism for All“



2. German Study “Economic Impulses of Accessible Tourism for All“

Objectives

1. To find good arguments for tourism industry to invest (more) money in accessibility
2. Procurement of reliable data and statements on:
 - a) The customer’s potential and travel behaviour
 - b) The customer’s concrete requirements and quality expectations
 - c) The current economic meaning and concrete impacts of accessible tourism
 - d) Obstacles to accessible tourism for all
3. Development of concrete recommendations for action



2. German Study “Economic Impulses of Accessible Tourism for All“

Methodology

1. Written survey among 20,000 potential users of accessible tourism facilities (rate of return = 22%)
2. Special oral survey among persons with activity limitations as part of the German Travel Analysis (7,970 persons)
3. Oral interviews with 259 tourists with activity limitations and 91 tourism practitioners in 5 different tourist destinations
4. Mystery mailings and analysis of web presences



3. Analysis of supply and demand



3. Analysis of supply and demand

Accessibility is:

- A **crucial requirement** for around **10 %** of the population
- A **necessity** for about **30 to 40 %**
- **Comfortable** for **100 %**



3. Analysis of supply and demand

- About 8.4m Germans are disabled and 6.7m are registered seriously disabled (about 8 %)
- About half of the people with disabilities are in the 65+ group
- Consequences due to the demographic change:
 - German population decreases
 - large proportion of 65+ reduplicates (future proportion of 37 percent)
 - higher proportion of people with activity limitations



3. Analysis of supply and demand

Type of holiday, motivation for travelling (of German Disabled Tourists):

- Recreational, spa and cultural holidays are very important
- „Relaxing“, „improving one’s health“, „healthy climate“ and „experiencing nature“ is above average importance
- Short breaks are typically city breaks



Bildquelle: AK Film

3. Analysis of supply and demand

Travel-Behaviour

(of German Disabled Tourists):

- Lower travel intensity in comparison to overall population (54.3 %; all Germans: 75.3 %)
- Large proportion of domestic travel (41 %; all Germans: 31 %)
- 2m journeys p.a. and 4m short and weekend trips p.a. in Germany



3. Analysis of supply and demand

Travel-Behaviour

(of German Disabled Tourists):

- Travel is largely independent of the season
- loyalty to a certain destination
- Relatively high travel spending
- 52% need a travel companion



3. Analysis of supply and demand

Travel-Behaviour

(of German Disabled Tourists):

- **37 %** have previously **decided not to travel** due to the lack of accessible facilities
- **17 %** of the travellers who undertake their vacations **outside of Germany** decided to travel abroad specifically because of the accessible facilities there



3. Analysis of supply and demand

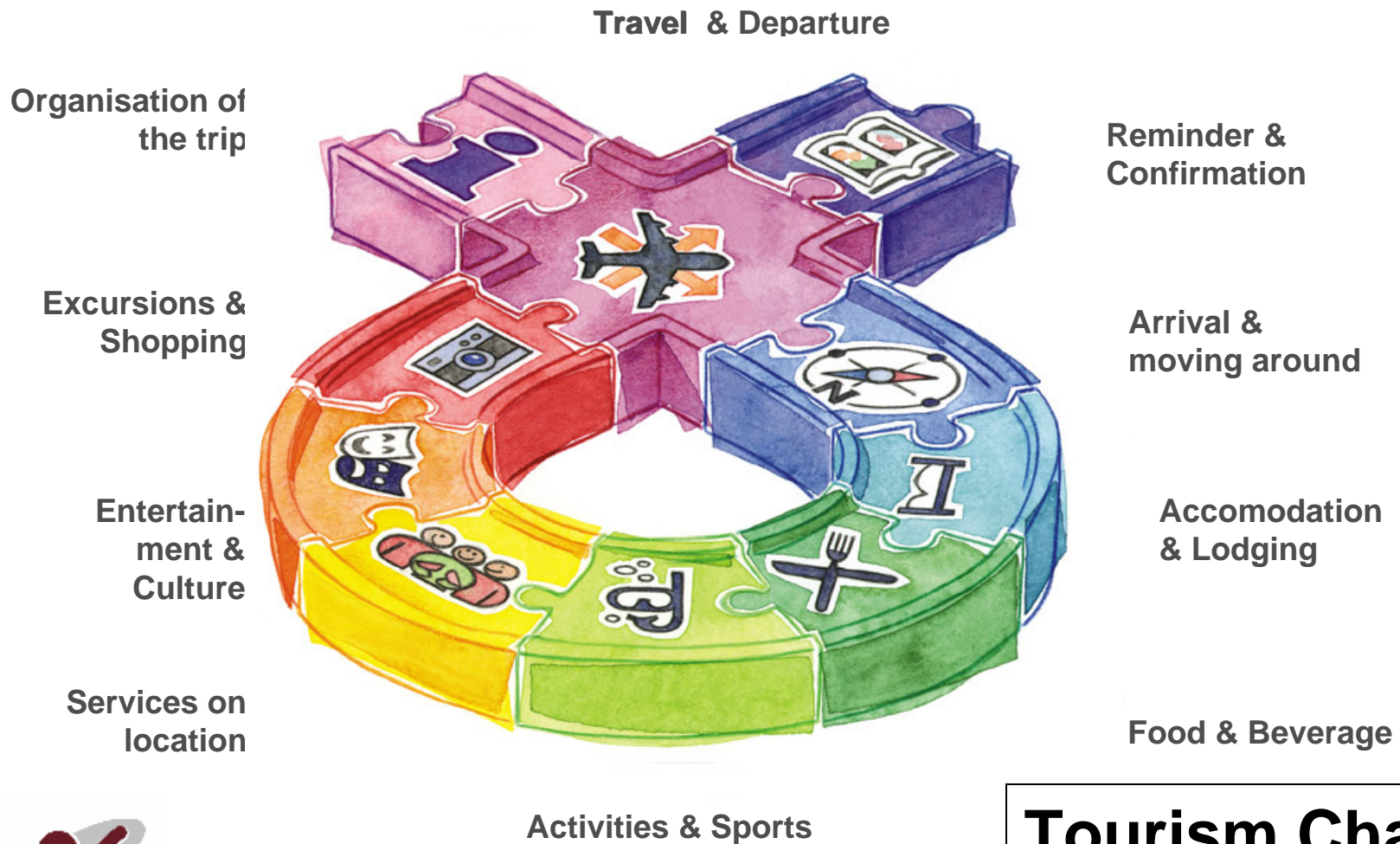
Travel-Behaviour

(of German Disabled Tourists):

- **48 %** would travel **more frequently** if more accessible services were available
- **60 %** of the surveyed persons would be willing to **pay higher travel expenses** in exchange for improved accessible facilities or services



3. Analysis of supply and demand

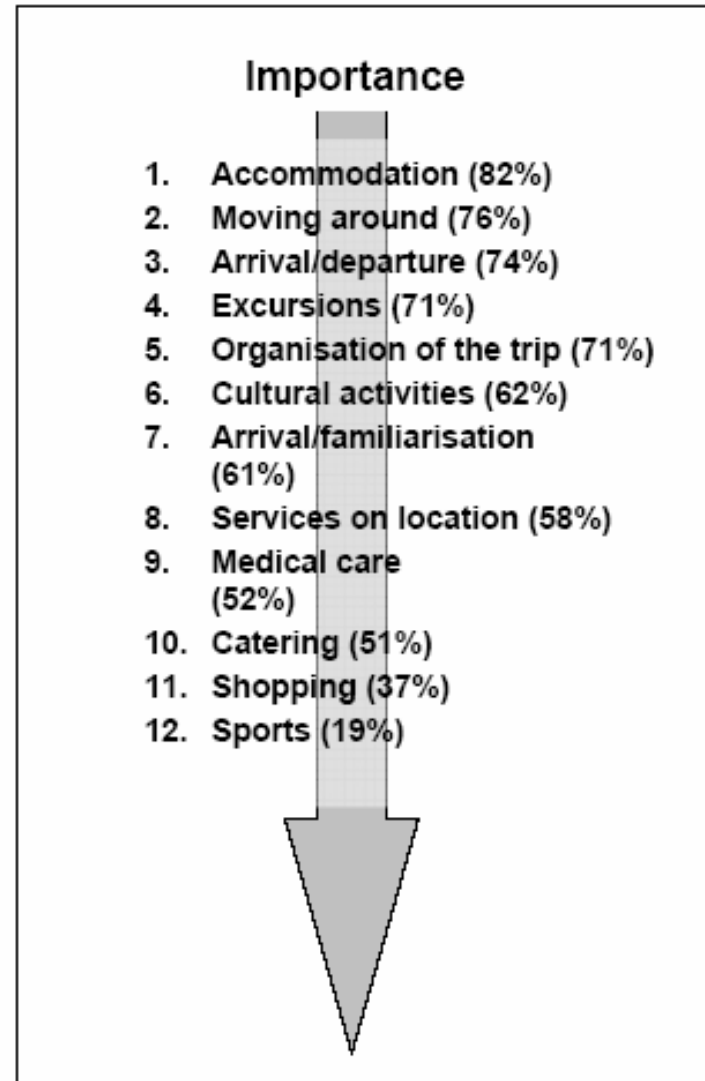


Tourism Chain

(Source ADAC 2003)

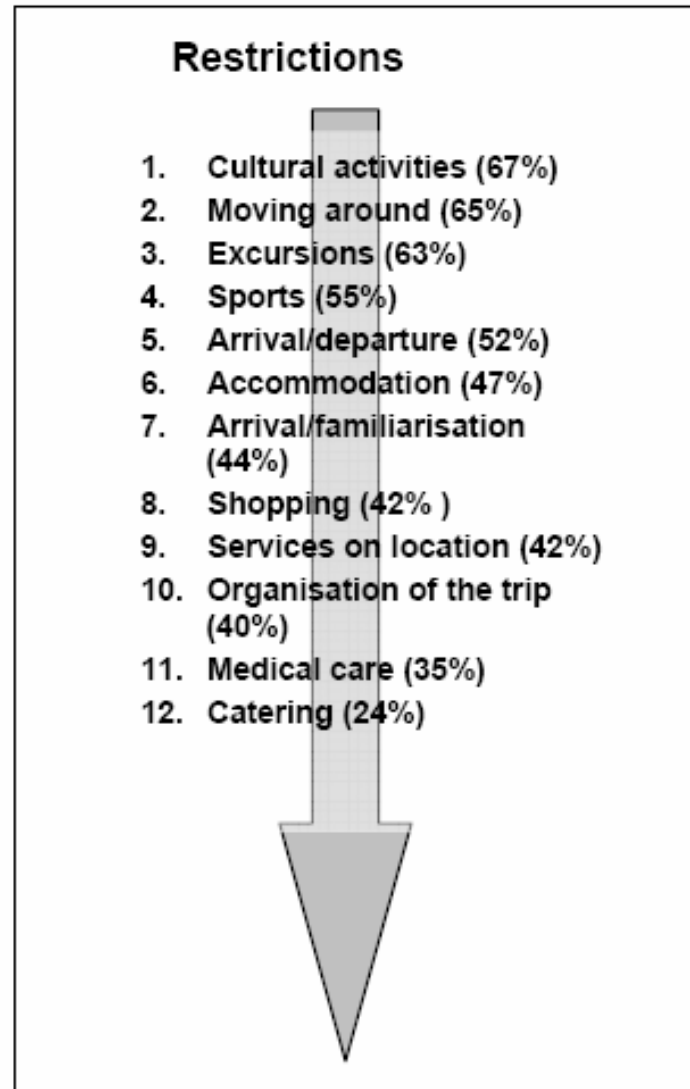
3. Analysis of supply and demand

Importance ranking



3. Analysis of supply and demand

Restriction ranking



3. Analysis of supply and demand

Particular discrepancy between importance/expectation and perceived reality emerges for:

- moving around at the touristic destination
- excursions
- arrival and departure
- cultural activities



3. Analysis of supply and demand

Summary:

- Older and disabled travellers are an attractive target group
- Customer potential growing steadily
- Travel intensity can be enhanced by providing accessible facilities



3. Analysis of supply and demand

Summary:

- There are currently hardly any accessible facilities along the entire tourism chain
- There is insufficient marketing and information in terms of existing accessible facilities
- There is a lack of transparency due to the absence of standardisation and labelling



4. Economic Impacts

Economic Impulses of Accessible Tourism for All



4. Economic Impacts

Current net turnover generated by disabled travellers

Holidays:	€ 1,570m (120 890 000 ISK)
Short breaks:	€ 930m (71 610 000 ISK)
Total:	€2,500m (192 500 000 ISK)

Economic significance of accessible tourism

Full-time jobs: **65,000**



4. Economic Impacts

Economic Impulses

Demand impulse in tourism industry:
up to **€2bn** (154 000 000 ISK)

Maximum additional economic impact:
up to **€4.8bn** (3 696 000 000 ISK)

Additional full-time jobs in all areas
of the economy: up to **90,000**



4. Economic Impacts

Further potential is available in the following areas

- Day-trip tourism
- Conference tourism
- Overnight stays with friends and relatives
- Travelling companions
- Foreign tourists



4. Economic Impacts

4. Conclusion

- With a net turnover of €2,500 million, overnight accessible tourism in Germany is already a significant economic factor
- Under certain conditions the unrealised demand could produce an economic impact of up to €4 billion, and 90,000 new jobs



4. Economic Impacts

4. Conclusion

- Tourism service providers are unaware of the economically relevant effects of Accessible Tourism for All
- Insecurity and the lack of knowledge prevent many providers from investing in accessibility
- To realise economic impacts, actual investments must be made in accessible facilities



5. Recommended Actions

Recommended actions for touristic destinations



Recommended Actions

- measures at provider and destination level -

Facility development measures:

- A detailed analysis of the degree of accessibility of a destination/ facility and identification of required action
- Development of a list of measures
- Establishment of accessibility of main tourist attractions



Recommended Actions

- measures at provider and destination level -

Marketing measures:

- The target groups must be addressed in the mainstream tourism publications
- The internet plays a key role in marketing Accessible Tourism for All
- Destinations should strive to meet defined quality criteria/ labels



Recommended Actions

- measures at provider and destination level -

Domestic marketing measures:

- Higher-level project management and coordination
- Close cooperation between all actors
- Training and enhancing the service level in the tourism industry



8. Conclusion

Investments in Accessible Tourism are worthwhile investments into the future, with the benefits available to all groups of the society:

- Primarily, to older and disabled travellers for whom travelling becomes easier and more attractive,
- to all other holiday-makers as a result of enhanced convenience and quality,



8. Conclusion

- to tourism service providers as a result of a rising number of guests and higher capacity utilisation,
- to destinations, which improve their competitive standing and gain more value added,
- and last but not least to the whole country as a tourism destination, due to new demand impulses and a stronger tourism industry.



8. Conclusion

**Tourism for All
is a social right
and makes good
business sense!**



Examples

Accommodation: Haus Rheinsberg, Germany



Examples

Accomodation: Confortel Islantilla, Spain



Examples

Activities & Sports: Water Ski at River Rhine



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Examples

Activities & Sports: Sørlandet / Kristiansand



Examples

National Training Programme „Hospitality for All“

- Result of the German Study
- Largely standardised training Programme
- Special training material and video film
- 30 model trainings in different German tourist destinations
- Commissioned by the German Hotel and Restaurant Association and the National Coordination Board Tourism for All and conducted by NeumannConsult



- Financed by the Federal Ministry of Economics and Labour

Examples

“Grenzenlos”, the travel report for people with and without disabilities”

- Since summer 1998, *Grenzenlos* has been informing viewers about travel opportunities in German broadcasts on a bimonthly basis
- *Grenzenlos* series of broadcasts seeks to inspire disabled people and their partners, family members and friends to seek individual vacation ideas
- *Grenzenlos* presents destinations in Germany and abroad, provides important tips and offers encouragement



Examples

“Grenzenlos”, the travel report for people with and without disabilities”



- Every episode of *Grenzenlos* is complemented by a wealth of information on the website www.reisemagazin-grenzenlos.de
- Basically, co-operation partners can use the movie for their own work, seminars and congresses and can also pass it on to own partners
- Together with *Grenzenlos* we produced our Training Film “Hospitality for All”



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**Thank you very much
for your attention!**



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4. Economic Impacts

The Accessibility Pyramid

