



Women's entrepreneurship  
of Adriatic and Ionian Area

AIC FORUM  
FORUM OF THE ADRIATIC-IONIAN CHAMBERS OF COMMERCE

CHAMBER  
OF ARTA

XI CONGRESS OF WOMEN  
ENTREPRENEURSHIP

Contribution  
of Women Entrepreneurship  
to the Development  
of Alternative Tourism

16<sup>th</sup>-18<sup>th</sup> October 2019 (Arta, Greece)

**alternative tourism in the Adriatic and Ionian Macroregion**

By Flavia Maria Coccia

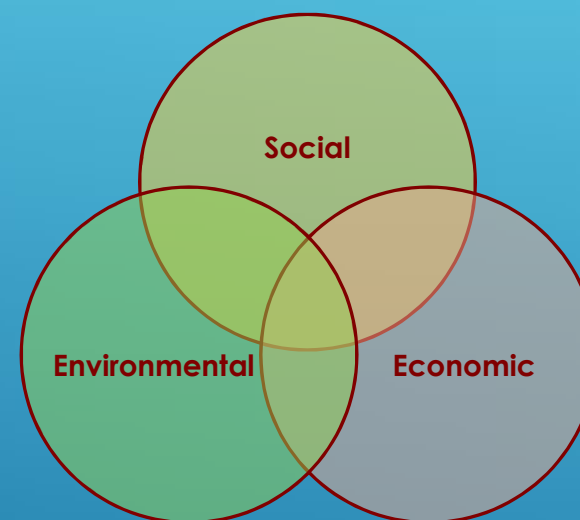
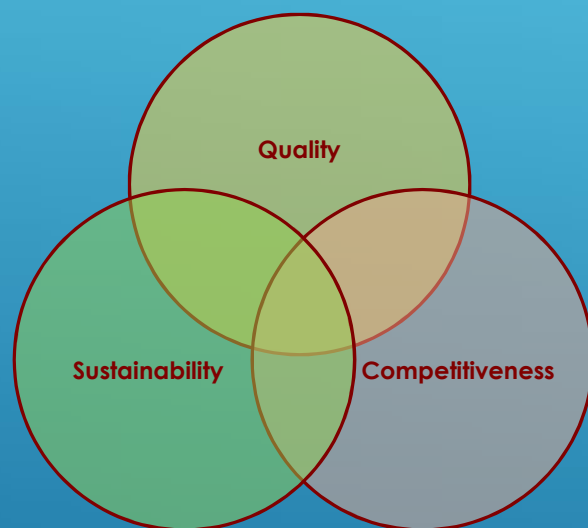
# WHY ACCESSIBILITY IS THE ENGINE OF TOURISM

It is impossible to overlook the interconnection among the 3 main gears of the tourism and socio-economic national



The “holiday for all” is the most important purpose for the development and the increase of the quality of tourism supply.

# SUSTAINABILITY IS THE BASIS OF DEVELOPMENT FOR A TOURIST DESTINATION

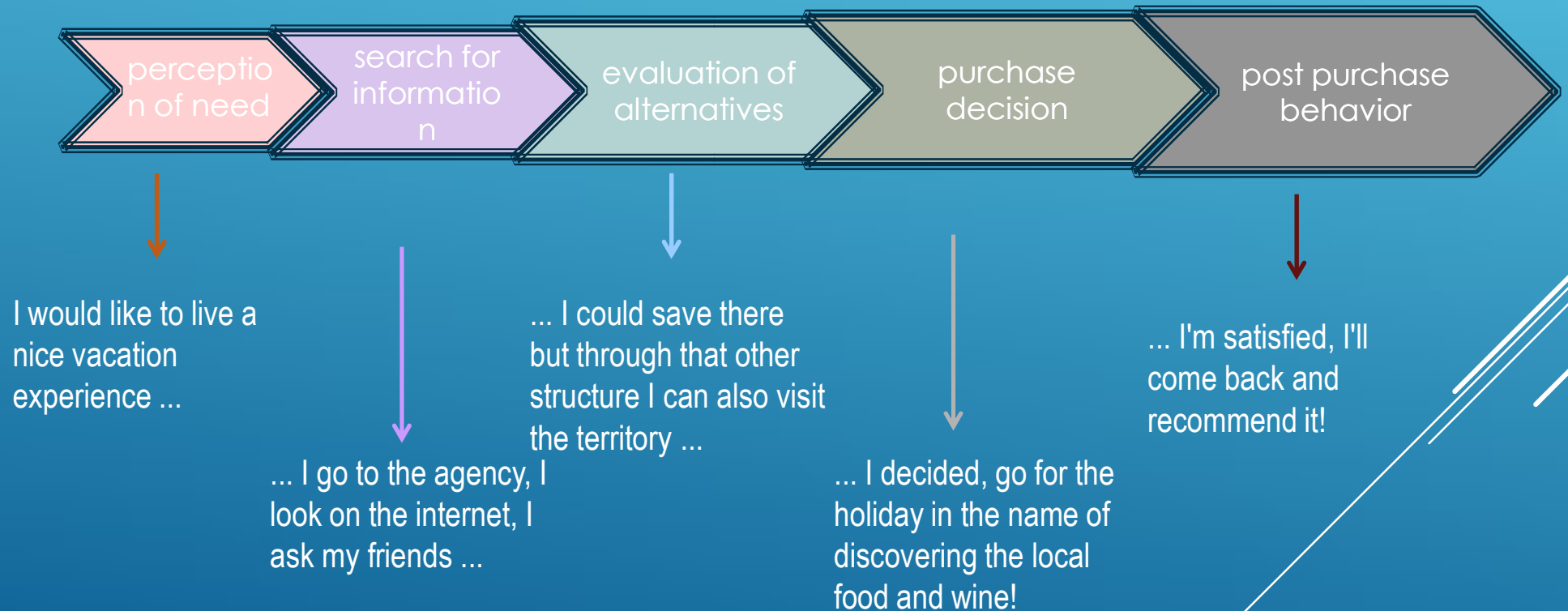


A destination that does not undertake actions aimed at preserving the environmental, cultural, landscape and human resources ceases to be "tourist".



# Know the customer, to let us choose

## Customer decision-making process



# From Accessible Tourism to Accessible Hospitality The market and its needs

## The benefits of Accessible Tourism

- An almost unexplored market (127 million people)
- Longer season (preference for low season periods)
- Increase in turnover by 15%
- Customers with medium-high spending power (up to € 120 per day over overnight stay)
- Extended holidays (at least one holiday per year over 10 days)



FATTORE MOLTIPLICATORE: X2



FREQUENZA DEI VIAGGI: >1 all'anno



DURATA MEDIA DEL VIAGGIO: 10 giorni



SPESA MEDIA PROCAPITE: 1.000€

# Accessible Hospitality - Who are these Guests

BLIND AND  
HYPOVED



PEOPLE WITH  
SPECIAL FOOD  
SCHEMES



HEARING  
IMPAIRED



SENIORES



MOTOR  
IMPAIRMENTS



FAMILIES WITH  
SMALL CHILDREN

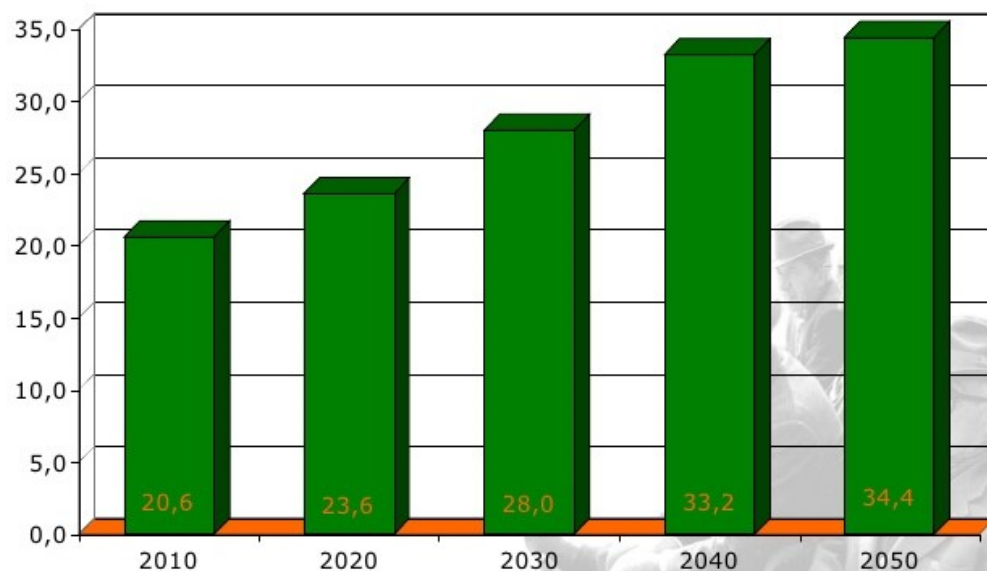


# Accessible Hospitality - Who are these Guests

Dipartimento di Sociologia - Università di Napoli "Federico II"

## Le proiezioni demografiche

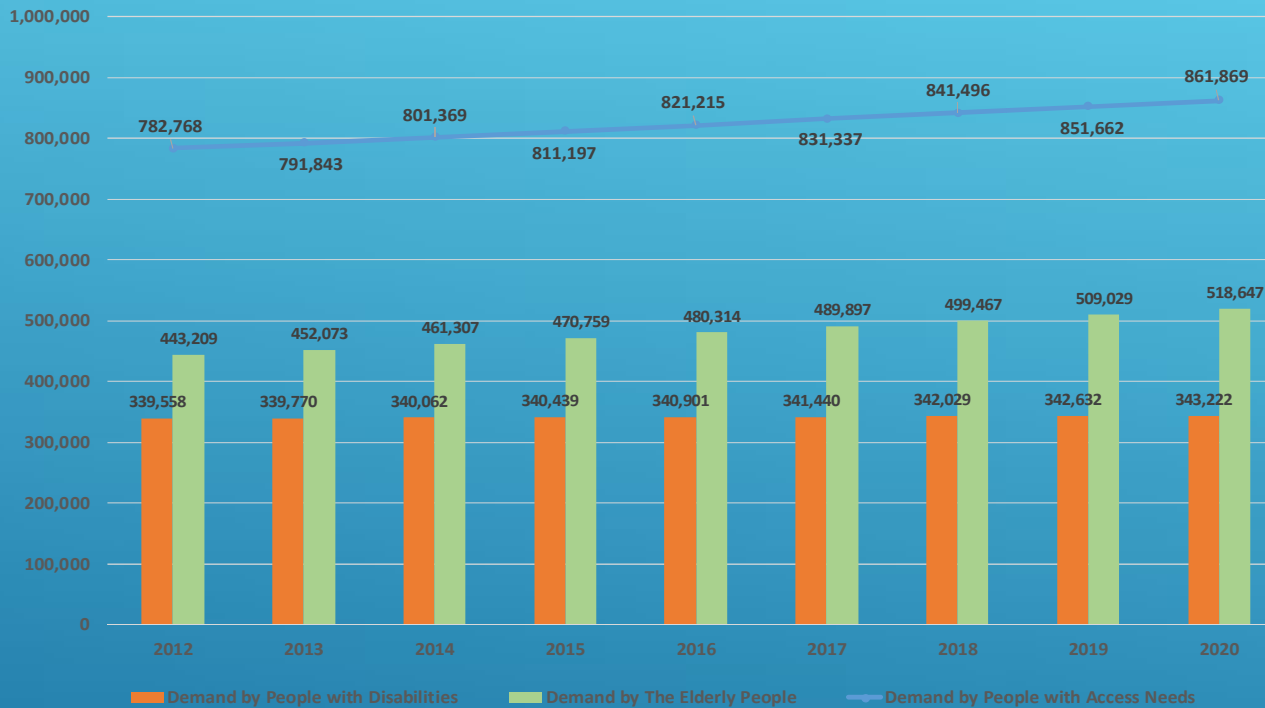
Proiezioni sull'incidenza percentuale della popolazione con oltre 65 anni  
2010-2050 (ipotesi centrale)



Fonte: Istat, GeoDemo: Demografia in cifre, [http://demo.istat.it/], nostra elaborazione.

- demographic trend
- Population aging
- Elderly with the caregiver
- People with disabilities (motor, sight, hearing, cognitive, etc.)
- Persons with temporary disabilities

# Current demand and forecast of Accessible Tourism EU



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 the elderly population aged 65 or above.

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

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.

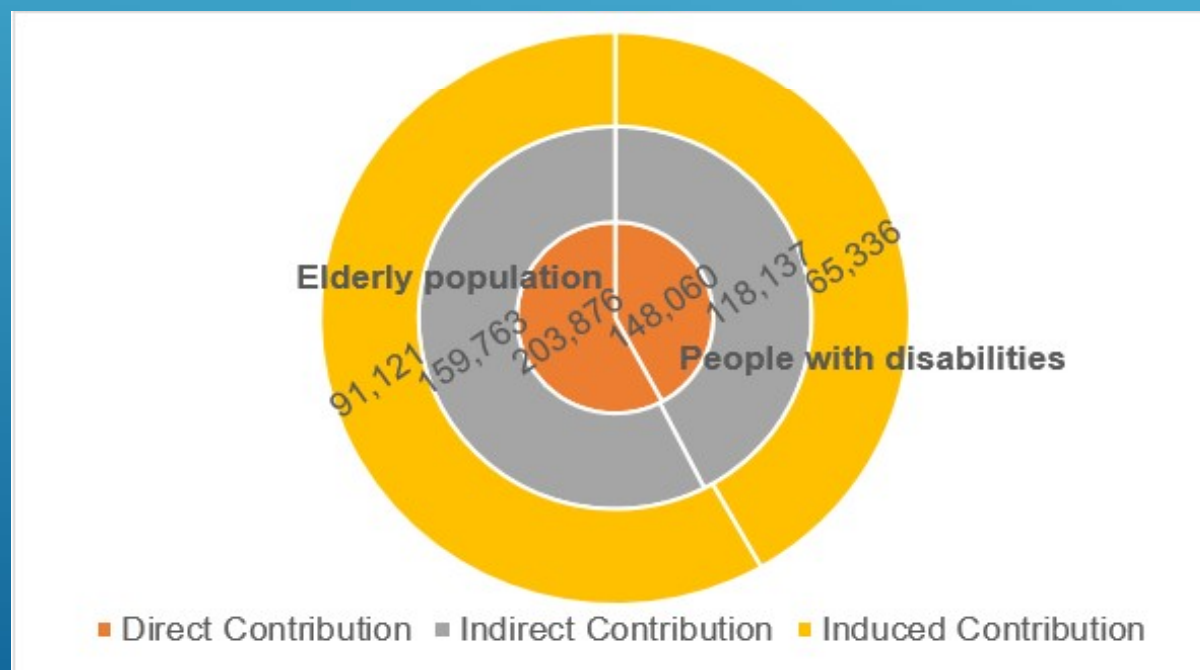


## Economic impact of Accessible Tourism in the EU

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

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

The direct employment contribution of EU's Accessible Tourism is about **4.2 million persons**; a taking the multiplier effect into account, the total employment generated is about **8.7 million persons**



## 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?

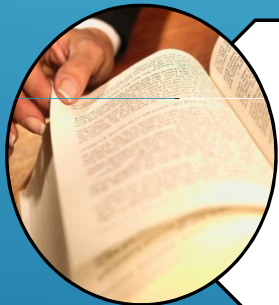
**+142 billion € (direct contribution to GDP)**



**+3.4 million jobs**



**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



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

## 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**

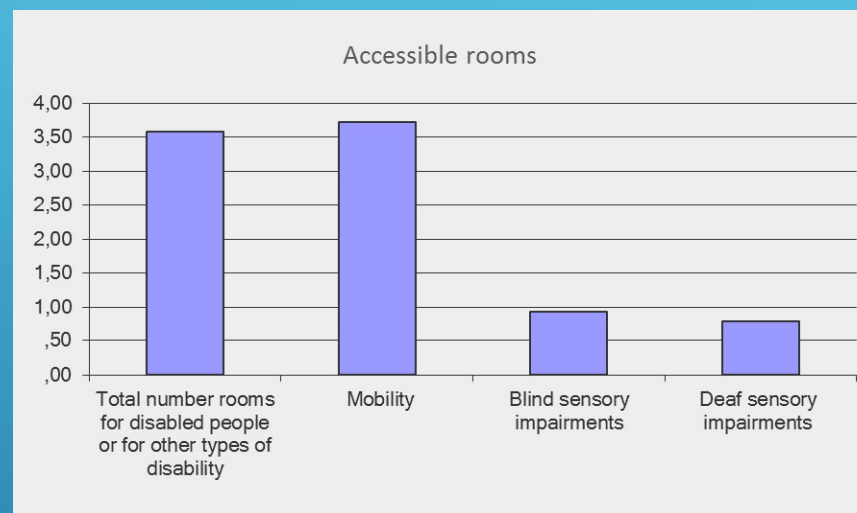
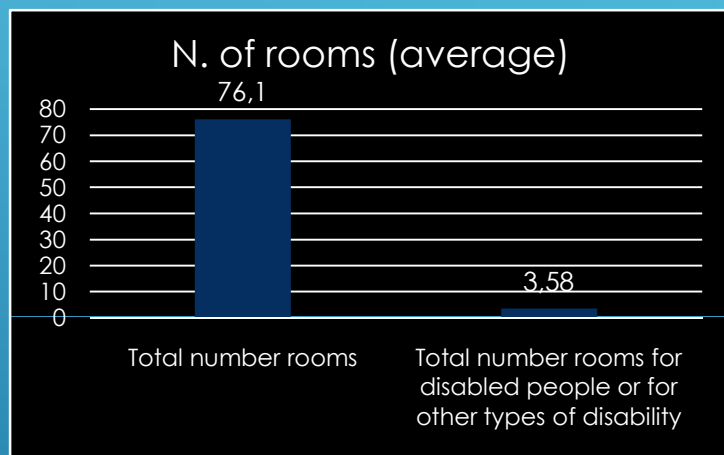


# TOURISM ACCESSIBILITY: ITALIAN SME'S COMPLIANCE

This Project has received funding from the European Union's COSME programme 2014-2020



## TOURISM ACCESSIBILITY: ITALIAN SME'S COMPLIANCE



The results about accessibility in tourism accommodation show that on an average of 76,1 total rooms pro-enterprise only 3,58 rooms (average) are accessible.

In details, 3,72 rooms are accessible for mobility disabilities, 0,94 for blind and 0,80 for deaf sensory

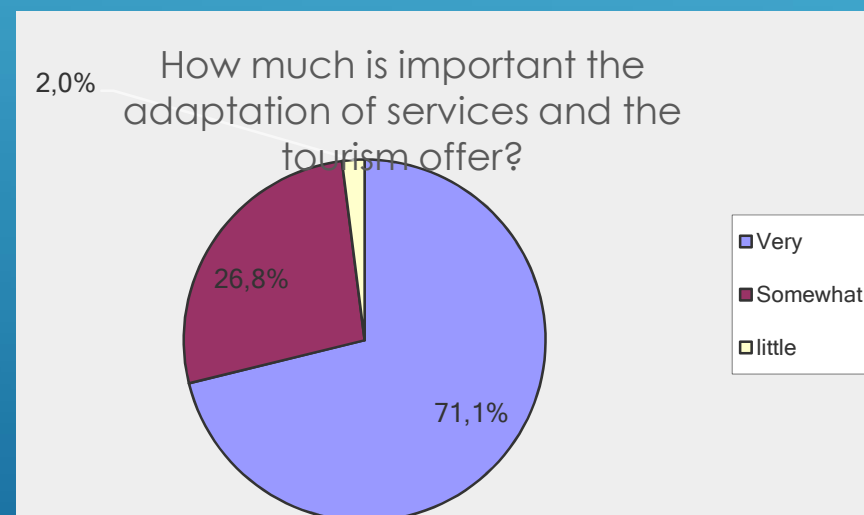
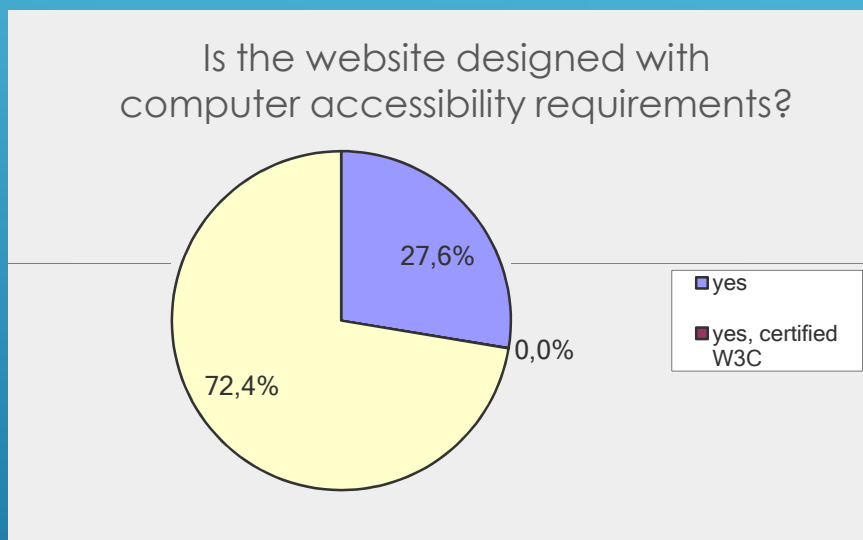
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## TOURISM ACCESSIBILITY: ITALIAN SME'S COMPLIANCE

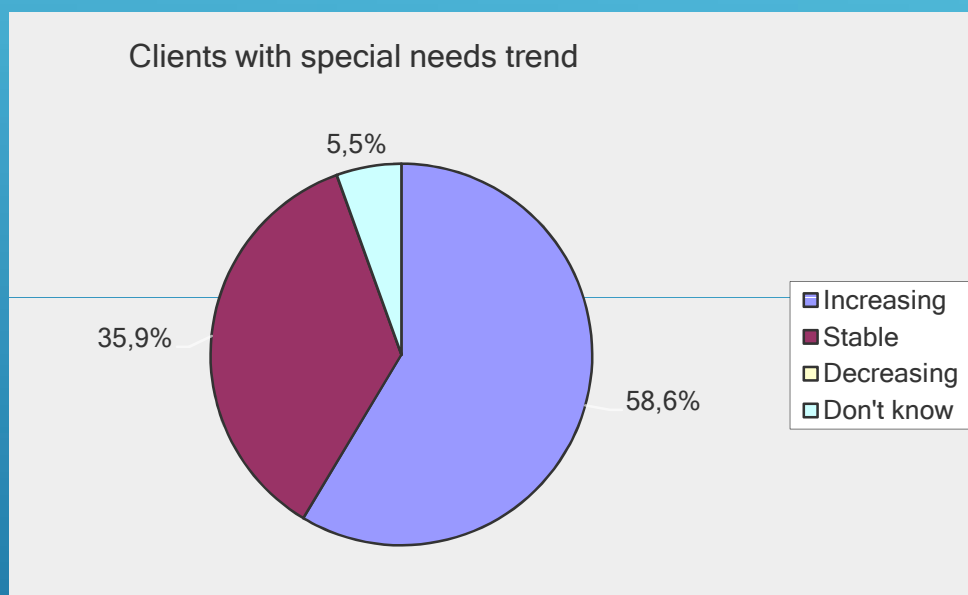


The accessibility of the website regards the 27,6% of total Italian accommodations, however 71,1% of SMEs says that it is very important the adaptation of services for all needs.



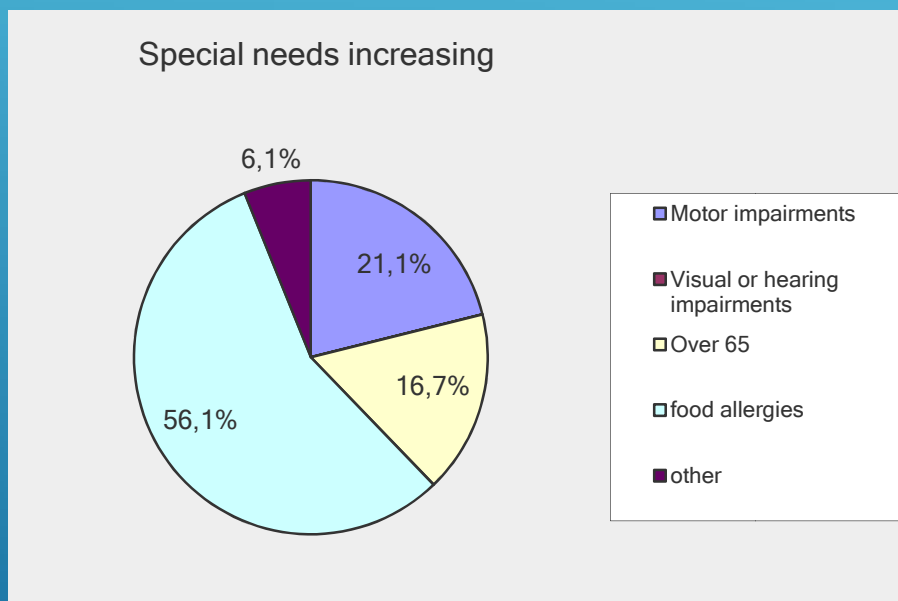


## TOURISM ACCESSIBILITY: ITALIAN SME'S COMPLIANCE



Trends of tourism demand with special needs indicated by accommodation are increasing (58,6%) or at least in stability phase (35,9%).

## TOURISM ACCESSIBILITY: ITALIAN SME'S COMPLIANCE



Increasing impairments are for 56,1% of accommodation those of food allergies, for 21,1% those of motor impairments, and for 16,7% those of over 65.

## Le opportunità in Italia del mercato del turismo balneare accessibile a tutti

EU estimates indicate that a minimum improvement in accessibility in 18% of the offer would lead to a **+ 14.7%** increase in travel in Europe for a direct turnover of **415 billion euros**.

**If Italy could intercept 10% of these tourist flows and considering that, actually**

- **cultural tourism represents 43%,**
- **bathing 37%,**
- **and mountain tourism 14%**

of total tourist presences in Italy, we can host:

- Up to 37 million trips related to Accessible Cultural tourism.
- Up to 32 million trips related Accessibel Seaside Tourism
- Up to 11 million trips related to accessibleTourism on the mountain destinations

More over, with an improvement in supply, we could have the potential to increase 11 million more trips and revenues of around 12 billion euros.

# ACCESSIBILITY IS AN OPPORTUNITY TO SELL MORE ROOMS AND AT DIFFERENT TIMES OF THE YEAR

## Occupazione camere nelle imprese turistiche italiane per area-prodotto (%)

	I trimestre	II trimestre	III trimestre	IV trimestre	Media anno
Città	33,9	45,6	57,8	40,9	44,5
Montagna	43,9	39,0	54,4	47,2	46,1
Terme	39,2	48,6	66,9	49,2	51,0
Lago	22,8	34,2	63,0	27,5	36,9
Mare	19,9	40,1	74,1	24,3	39,6
Campagna	27,4	37,3	60,8	34,0	39,9
Altre località	31,7	38,6	53,2	36,5	40,0
Italia	29,3	40,7	63,7	34,5	42,0

Fonte: Osservatorio avanguardie del turismo Isnart-Unioncamere

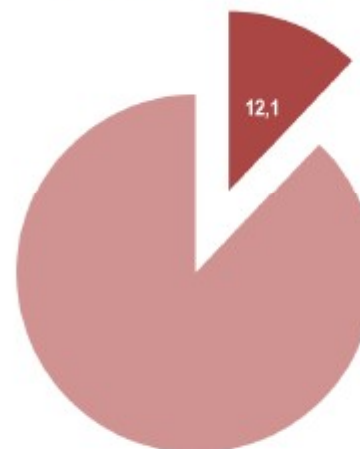
# Accessibility is an opportunity for companies that enter in the tour operating intermediation

## Il turismo organizzato

T.O. che organizzano viaggi per una clientela con necessità particolari in Italia  
(% sul totale operatori)



Quota di viaggi venduti ad una clientela con necessità particolari  
(% sul totale venduto Italia)



Fonte: Osservatorio Nazionale del Turismo- dati Unioncamere

Il 18,6% dei tour operators è specializzato nell'organizzazione di viaggi in Italia per la clientela con esigenze speciali, e complessivamente, sul totale dei pacchetti venduti verso l'Italia, questa clientela rappresenta il 12,1%.

# RECOMMENDATIONS FOR THE NEXT FUTURE

## Targets

Spreading the concept of Accessible Hospitality for All

Promote the Training of Entrepreneurs, Stake Holders, Managers and Personnel

Use consolidated schemes with an international vision based on the collection of objective data

Apply the principles of Universal Design to achieve a Transparent Accessibility

Communication that knows how to make the Guest the protagonist of the choice

**No to self-certification**

**No to accessibility statements**

**No only to respect the laws on architectural barriers**

## RECOMMENDATIONS FOR THE NEXT FUTURE

Working on the Destinations, in terms of organization, rationalization and development that involves institutions, hospitality and service tourism companies towards the construction of new tourism products that **enhance the accessibility of the offer by focusing on holiday motivation and not on the mere usability of a resource.**

Secondly, to create new imagery about destinations that can stimulate tourists to vacation desires that match the various tourism product they intend to offer.

# BLACK LIST

the most common errors in  
tourist facilities in terms of  
transparent accessibility

VS

# WHITE LIST

Transparent  
accessibility (design  
for all): giving value  
to HOSPITALITY





Mirror of my desires ...





SHOWER TO RELAX?



WAIT AND RELAX?



► grab bars, grab bars, grab bars, .....and not only!





# TRANSPARENT ACCESSIBILITY

*Grazie per l'attenzione*

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