



I TUR4all CONGRESS

ACCESSIBLE CRUISE DESTINATIONS

**International Congress on Accessible
Cruise Destinations**

Valencia
2-3 December 2019



Letter from the president of **PREDIF**

The inclusion and non-discrimination of people with disabilities is a requirement of the Spanish legislation. This requirement should also be applied to tourism, given that people with disabilities are entitled to and have the right to enjoy their holiday time in the same terms and conditions as the rest of the population.

Accessible tourism is the solution that makes this right a reality. PREDIF understands that this implies the deployment of measures to facilitate access, use and enjoyment of tourism infrastructures, products, environments and services in an everyday, independent and safe way. In other words, it does not simply consist of people with disabilities requiring suitable transport and accommodation: they will also want to eat, visit museums, stroll through parks and along nature trails or take part in recreational activities.

PREDIF has worked with Spanish Public Administrations and private companies so that the tourism sector takes an interest in tourists with accessibility needs (the elderly, people with disabilities, families with babies) and does its best so that its resources, policies and employees are able to cater to this type of tourist.



Consequently, customer service staff and employees involved in managing accessibility and tourism services at the destination have undergone training about how to interact with people with disabilities and how best to attend to their needs.

Accessibility is an asset, which, in addition to what its definition encompasses, brings with it not only social values but also economic ones: deseasonalisation, new customer acquisition, such as the elderly and families, positive feedback about the destination by their users, improving the reputation with an overall increase in the quality of products and services, given that the benefits of accessibility are greater than for any other tourist profile.

For this reason, and in order to continue to assist the Regional Community of Valencia in its aim to turn it into an accessible destination, we are organising this congress, seeking an opportunity to network about accessible tourism so that as a result of this encounter, synergies can be created between key stakeholders who are involved in organising cruise tourism experiences and improving the accessibility at each stage of the journey.

PREDIF invites you to be part of this project where tourism, understood as an inclusive space for everyone, will play centre stage and we would very much like to welcome your participation.

Francisco J. Sardón Peláez
Presidente de PREDIF





The reason behind this Congress: current economic and social situation in context

More than

10 MILLION

**cruise passengers passed through
Spanish ports in 2018.**

Over the past 25 years, **the number of cruise passengers has multiplied by 18, going from just over 480,000 visitors in 1992 to 10.1 million passengers in 2018** who embarked, disembarked or were in transit at one of the Spanish ports where this type of activity occurs. This figure equates to **9.66 % more than in 2017.**

The number of **cruise passengers increased by 3.45 %** and

4.384 TOURISM SHIPS

docked at Spanish ports. (Source: Spanish Ports Authority).

The number of passengers on regular lines reached 26 million people, with a turnover of 1,255 million euros and generating 26,500 jobs, which reflects the huge commitment towards cruise tourism in Spain. These figures make us the second European power for the number of cruise passengers, with various Spanish ports leading the European rankings and even among the top

50 ports in the world, as is the case with the ports of Barcelona, those of the Balearic and Canary Islands, Malaga, Valencia, Cadiz, Cartagena and Vigo. Consequently, the Spanish Ports Authority has highlighted the significant role that cruise tourism plays in the productive economy of Spain.

According to experts, **Spain still has a huge potential for growth.** Factors such as deseasonalisation, the diversification of destinations, enhancements made to our boarding and landing ports, added to the cheaper transport, both air and maritime, has meant that **cruise ships are accessible to a large segment of the population**, with very competitive prices and a wide variety of products and services available. (Source: Spanish Ministry of Public Works / Spanish Ports Authority – January 2019).

It also reveals that each year, half a million Spaniards opt for this type of holiday: 71% of Spanish cruise passengers have already been on a cruise two or three times before, and 58 % have been on a cruise three or more times before.

The survey carried out by IRN Research on behalf of the CLIA (Cruise Lines International Association) in different European countries indicates that this type of tourism is on an upward trend due to the sustained innovation of the industry in its fleet of vessels, routes, destinations, on-board services, entertainment and connectivity.

The profile of Spanish cruise passengers is heterogeneous.

64% are over 40 years old and when on a cruise, choose to do so accompanied, either with their partner, with their family or with friends

52% went on their last cruise with their spouse or partner

19% with the family including under 18s

10% with friends

71% with family, but without children **21%** on their own

Given the experience of **PREDIF** in organising this type of trip for people with disabilities, either with reduced mobility or with accessibility needs, the facilities and services available on board are upgraded and prepared to welcome this type of traveller. Nevertheless, **not all destinations have addressed the issues with boarding and disembarking of people with reduced mobility, or the visits and recreational activities available.**

It is worth remembering that cruise passengers only have a limited time to visit a destination, which implies the need for a great deal of coordination and diligence by the recipient agencies. **The time required and the additional needs of travellers with disabilities or reduced mobility have not been taken into consideration when designing recreational activities at the destination.**

To improve the experience of cruise passengers with accessibility needs and to disclose the best practices that have been carried out at ports of call, the **Valencia Regional Tourist Board (Turisme Comunitat Valenciana)** and **PREDIF**, with the backing of the **European Network for Accessible Tourism (ENAT)**, will be organising the **International Congress on Accessible Cruise Destinations in the city of Valencia.**

But more importantly, **46% of cruise passengers** when they travelled did so with two or more generations of family members.

Aims of the Congress:

- 1** **Raise awareness among tourism sector professionals** about the need to improve customer service for people with disabilities and the elderly, providing information about **success stories** of accessible tourism products in urban destinations and accessible cruise experiences.
- 2** **Analyse and debate** the current state of tourism accessibility and inclusion in the world of cruise lines and stop-over destinations.
- 3** **Promote the economic and social benefits that accessible tourism brings** to the sector, focusing on the needs that must be covered to achieve the full inclusion of people with disabilities in the use and enjoyment of tourism infrastructures and services.
- 4** **Foster synergies and networking opportunities** between Spanish and foreign professionals who work in the cruise line industry to create experiences that are more accessible for all.
- 5** **Bring on board entities** that manage the ports and the cruise companies in creating and marketing accessible experiences at destinations in Spain.

We provide the opportunity for accessible tourism networking. Other Spanish, European and American cruise destinations are invited to contribute so that they can also share their own experiences in this area. We believe that this Congress will further the cause, both in Spain and in other countries, for accessibility in cruise experiences and facilitate the creation of synergies between different destinations.



Accessible tourism is a right that belongs to **everyone** and it represents

A HUGE MARKET...

IN SPAIN, THERE ARE

3,85

million Spaniards with a disability

= 9 %

of the present population



67 %

have reduced mobility

MOBILITY



25,8 %

are visually impaired

VISUALLY



28,1 %

are hearing impaired

HEARING



19,4 %

have communication difficulties

COMMUNICATION



16,6 %

have learning difficulties

LEARNING

...WHICH CONTINUES TO GROW



138,6

million people with accessibility needs in Europe.



35,9 %

between 15 and 64 years old



64,1 %

over 65 years old

In the EU, Germany, France, the United Kingdom, Italy and Spain are the countries with the highest number of people with accessibility needs, **numbering more than 10 million.**

AGEING IN SPAIN



2017



2066

8,76 million Spaniards over 65 years old,
18,8 % of the overall population.

More than 14 million elderly,
34,6 % of the overall population.



Baby-boomers will start reaching retirement age in about 2024.

...WHICH HAS ECONOMIC APEAL

- Figures for trips for people with accessibility needs in the EU (2012)



- Other interesting facts

In the US, **baby-boomers** born between 1945 and 1965 control

60%

OF THE NET WEALTH

and generate **40 %** of spending

In Spain, the over 55's earn

50%

MORE THAN THOSE AGED BETWEEN 25 AND 34.

Furthermore, they prioritise leisure, travel, cruises, hotels, restaurants.....

Many of these baby-boomers are

EMPTY NESTERS

MEANING A SIGNIFICANT INCREASE IN DISPOSABLE INCOME

by not travelling with children.

... AND IT'S NOT BEING DEALT WITH

Only

9,2%

OF TOURISM AMENITIES AND SERVICES

in the European Union boast some degree of accessibility

This means that more than

90,8%

ARE NOT EQUIPPED TO ADEQUATELY CATER

to clients with accessibility needs.



Sources:

Survey on Disability, Personal Independence and Dependency (EDAD), 2008. Spanish National Institute of Statistics (INE), Economic impact and travel patterns of accessible tourism in Europe – final report 2012-2013-European Commission, DG Enterprise and Industry, Research for TRAN Committee – Transport and tourism for persons with disabilities and persons with reduced mobility (DG for Internal Policies – EU. May 2018), Voyage of Discovery Survey. Working together for accessible and inclusive travel. 2017 Amadeus, Observatory on Universal Accessibility in Tourism in Spain 2016. ONCE Foundation.



Delegates:

- **Professionals from different cruise lines and shipping companies** that operate in Spain, Europe, the United States and the Caribbean.
- **National and international port authorities.**
- **Professionals from public administrations** tasked with managing tourism and employees from tourism offices.
- **Professionals from travel agencies and travel operators.**
- **Professionals from tourism accommodation.**
- **Professionals from congress and trade fair venues.**
- **Professionals from airlines and air transport companies,** railways, taxis, undergrounds and buses.
- **Professionals from car-hire companies.**
- **Professionals from the restaurant sector,** bars and night clubs, shops, companies organising sport and recreational activities and shows.
- **Professionals from museums, cultural and natural resources.**
- **Tourism inspectors.**



About PREDIF



PREDIF, the Spanish Representative Platform for People with Physical Disabilities, is a Spanish state approved non-profit organisation that represents, runs programmes and promotes activities on behalf of more than 100,000 people with physical disabilities. It boasts more than 30 years of expertise in this field through its member federations: ASPAYM, COAMIFICOA and ECOM. Reporting to it are seven PREDIF regional offices in Andalusia, Asturias, Castile-and- Leon, the Valencia Region, Galicia, the Balearic Islands and the Region of Murcia.

Since 2002, PREDIF has run an Inclusive Tourism programme through which it works to raise awareness, training, consultancy and research into accessibility and customer care for individuals with a variety of different needs in tourism and leisure activities, in collaboration with public entities, foundations and private companies from the sector.

We believe that this programme will contribute to the normalisation of tourism for people with disabilities and with accessibility needs in general. Our aim is for them to be able to use and enjoy the surroundings, products, services and cultural assets of any tourism destination, in the same conditions as everyone else.

www.predif.org

PREDIF is presently acknowledged as a benchmark for accessible tourism, chairing the Inclusive Tourism and Leisure Commission of CERMI (Spanish Committee of Representatives of People with Disabilities), and its accessibility protocols and criteria have the consensus of the entire disability sector.

OUR STRENGTHS

• 1

We are the **social entity in Spain with the greatest number of years of experience working in the field of Accessible and Inclusive Tourism** and the first to promote accessibility in the Spanish tourism sector.

• 2

We preside the **Inclusive Tourism and Leisure Commission of CERMI (the Spanish Committee of Representatives of People with Disabilities)** and we monitor the agreement between CERMI and the Spanish Secretary of State for Tourism.

• 3

Our methodology for the analysis of accessibility of tourism services and products enjoys the consensus and backing of **Spanish national social entities that represent people with disabilities in Spain**. Moreover, it is periodically updated and checked by the associative disability movement.

• 4

In 2006 we created the **first Accessible Tourism Guide in Spain for Madrid City Hall**. Up to now, we are the only entity to create "Accessible and Inclusive Tourism Guides" that take into consideration physical, visual, auditive and cognitive accessibility. We have analysed more than 5,000 tourism establishments in Spain.

• 5

With the backing of the **Vodafone España Foundation**, we created the **1st Accessible Tourism Platform and App, TUR4all** (www.tur4all.com). Currently, the application has the backing of the Spanish Secretary of State for Tourism due to its Entrepreneur R&D&I project status. Furthermore, TUR4all has extended to Portugal thanks to the close alliance between PREDIF and Accessible Portugal (<http://accessibleportugal.com/>)

• 6

We award the **TUR4all Accessible Tourism Insignia to resources analysed by PREDIF** that work to improve the accessibility of their facilities and services. To be awarded the insignia, the tourism establishment or resource must comply with the minimum set of accessibility requisites as set out by PREDIF.





• 7

We are the first entity to have drafted a Strategic Accessible Tourism Plan in Spain. It was carried out in 2015 for Galicia and the Way of Saint James (Camino de Santiago) in Galicia, in 2016 for the Valencian Region and the city of Barcelona, in 2017 for Castile-and- León and in 2018 for the Region of Madrid.

• 8

We have collaborated with SEGITTUR (State Corporation for the Management of Innovation and Tourism Technologies) in consultancy projects about smart destinations in Spain (Las Palmas, Marbella, Almeria, Badajoz, Valle de Aran, Lloret del Mar, Jaca, Arona, El Ejido, Torrox, San Sebastian, Leon, Benidorm and Monfragüe) and in the drafting of Spanish regulations UNE 178501 “Management System for smart tourism destinations (requirements)” and UNE 178502 “Indicators and tools of smart tourism destinations”.

• 9

Since 2006, we have been members of the UNE normalisation committee that prepares the Q, Quality Tourism regulations and other accessibility regulations. Furthermore, we are part of the accreditation committee of the ICTE (Institute for Quality Tourism in Spain). We received the “Q for Quality Tourism “ award for our work in the field of Accessible and Inclusive Tourism.



• 10

PREDIF was awarded the CERMI 2015 Award, in the category of Inclusive Cultural Action, for our “Art and Culture for all” project. We were also recipients of the “A” Award for best practices in Universal Accessibility 2013 awarded by Avila City Hall, and the 2016 Tourism Award by the Visit Benidorm Foundation.



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