

A photograph of three children standing in a grassy field next to a pond. The child on the left is a girl with blonde hair, wearing a green jacket over a plaid shirt, holding a fish. The child in the middle is a boy with blonde hair, wearing a blue hoodie, holding a fish. The child on the right is a boy with blonde hair, wearing a grey sweater, holding a fish. In the background, there is a pond, reeds, a small wooden building, a red tractor, and a house on a hill under a blue sky with clouds.

## **INCLUSIVE TOURISM**

### **Unlocking the potential**



# VALUE OF THE PURPLE POUND



In Scotland:

- Total market value: £1.33 billion
- Day visits: £822 million
- Domestic trips: £504 million
- Travel in larger groups and stay longer
- Spend more per trip than non accessible market





# VALUE OF THE GREY POUND



In Scotland, 55+ :

- Total market value: **£1.27 billion**
- **Spend 20% more** than average consumer on leisure and hospitality
- Share of overnight trips **1/3 of all domestic trips**
- 42% of over 65 year olds have a disability (and 33% of 55 to 65 year olds)
- Between 2006 and 2015 there was a 31% increase in the number of domestic trips taken by people over of the age of 55 and this trend is set to continue.
- 

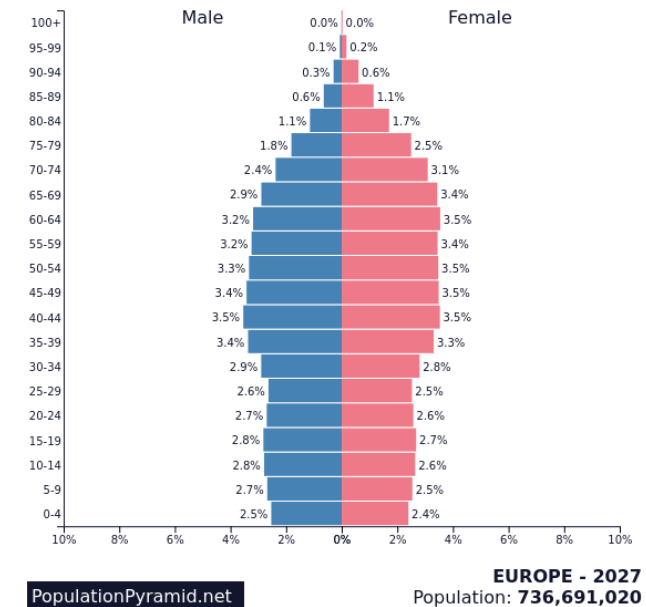
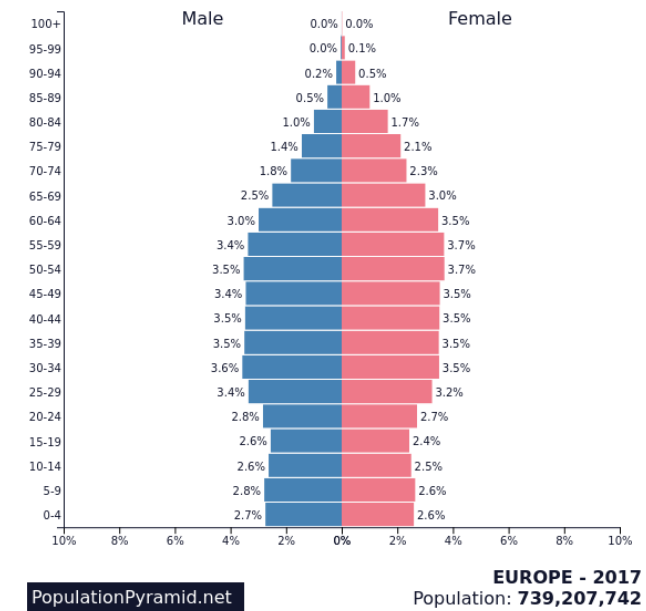


- Pension reforms & accumulated Property wealth have created an affluent older population.
- The Grey Pound is worth £320 billion a year (Source: SAGA)
- The average consumer spends £2,486 on leisure and hospitality in 2014.
- The over 65's consumer spent £3,372 in the same year. (Source: Barclays)
- Consumer Loyalty is much higher among 65+ group compared to 18-34 year olds suggesting that quality products and services will see the grey pound returning to those brands over time.



## MARKET PROFILE

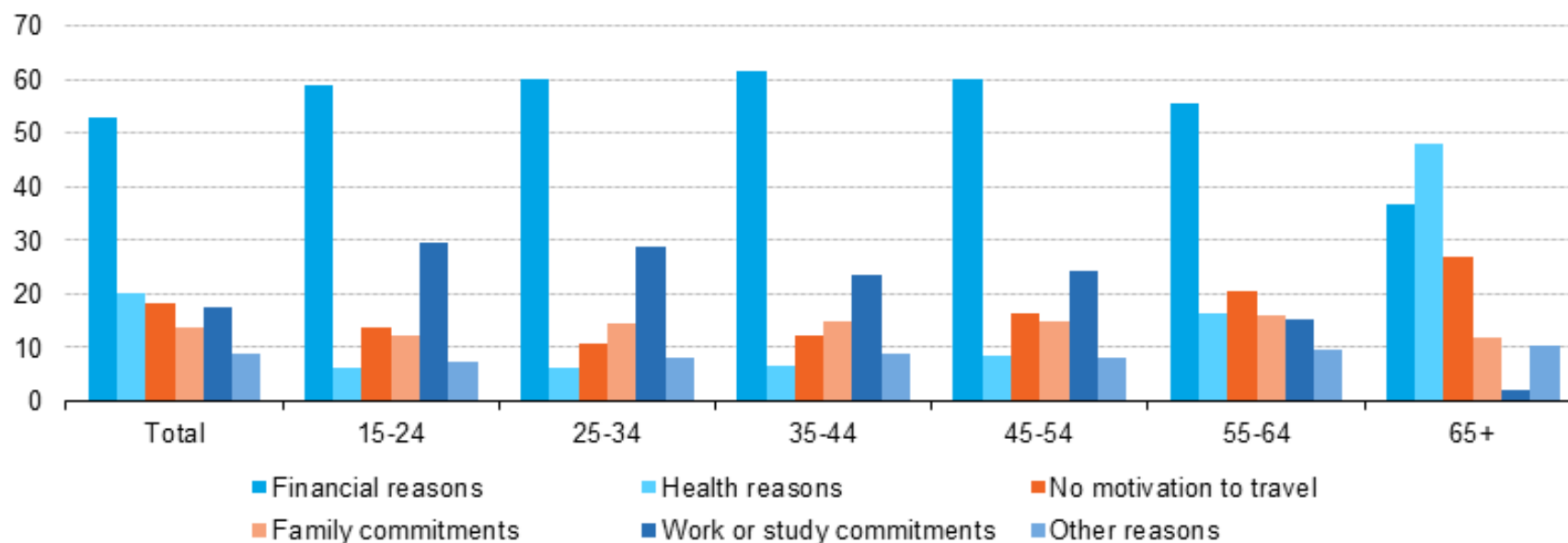
- Key Senior Markets to Scotland are UK, North America, Australia & EU15.
- These territories have aging populations...
- In Denmark, the United Kingdom & France, the elderly were almost as likely to go on holiday as the “average person” (Source: Eurostat)
- In Denmark, more than four out of every five elderly persons participated in tourism in 2013.
  - Three quarters of elderly Danes took either a foreign only or foreign / domestic trip.
- By contrast, Italy, Greece and Eastern Europe saw the proportion of elderly participating in tourism less than that for the 15-64 age group.





## BARRIERS TO TRAVEL FOR THE OVER 65'S

- Health reasons are cited as the main barrier to travel.
- This differs from every other age group who state finance as the barrier to travel.
- Family commitments as a barrier to travel for the over 65's as they are for all other groups.
- Work and study is naturally a proportionally lower barrier to travel for the 65+ group compared to 15-64 year olds.



Main reasons reported for not participating in tourism by age group, EU-28, 2013

Source: Eurostat

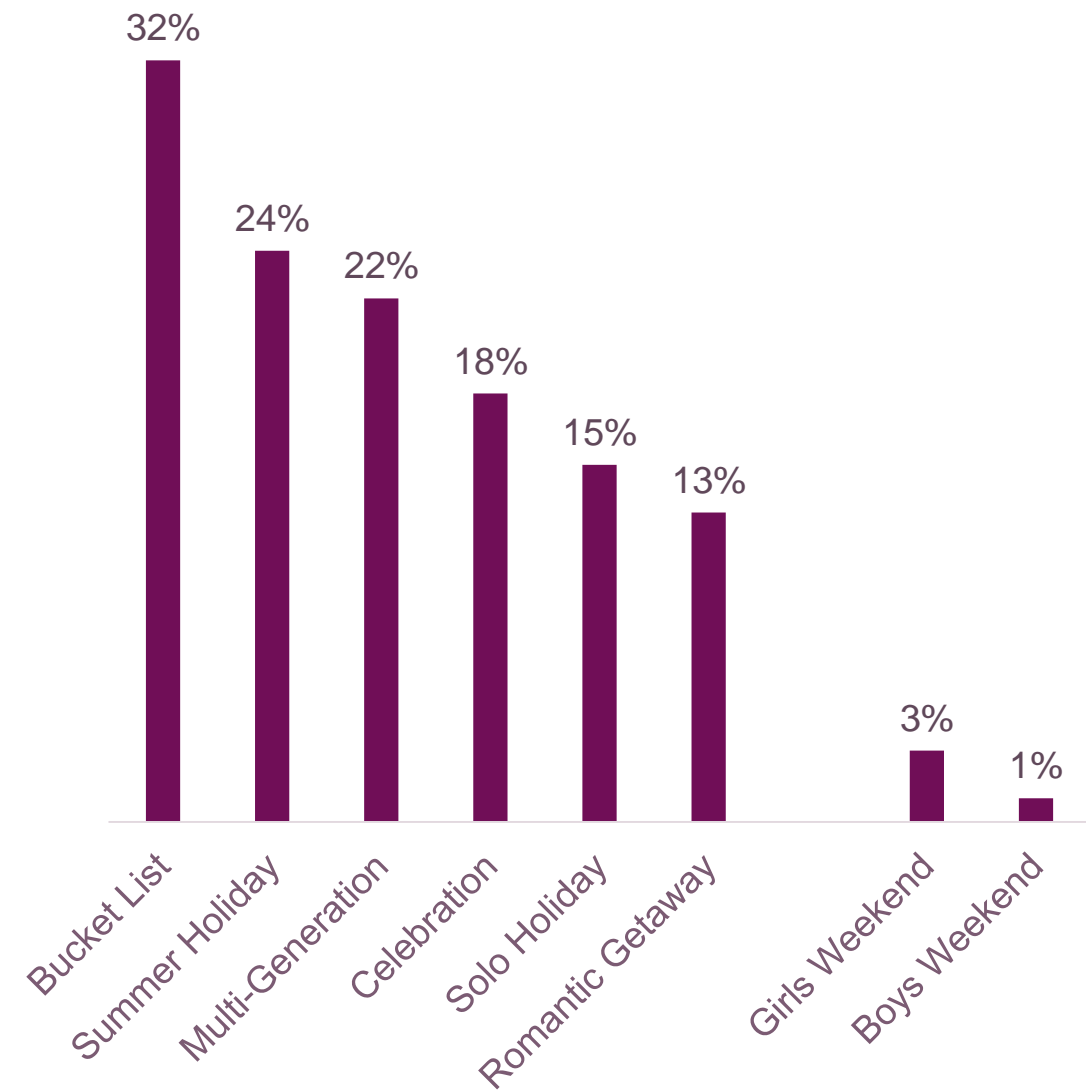
## MOTIVATORS FOR TRAVEL

The “Bucket List” becomes an increasingly more important motivator for travel with age

Improved health with age also sees adventure and activity holidays continue interests in fitness. Over-55’s go walking nine times a month compared to for 16-24 year olds (Source Go Outdoors)

Romance is also a catalyst for travel. While many in established relationships will continue to enjoy holidaying beyond the age of 65...divorce among the over-60’s has risen by a third in a decade

The over-60’s are the fastest growing demographic in online dating (Source Bowling Green State University)



Primary motivator for planned international trip for 2015  
Source: AARP Research



## **MULTI-GENERATIONAL TRAVEL**

Research by Saga Travel Insurance found:

- Almost half of over 50's have been on holiday with their children or grandchildren in the last five years.
- Self Catering is the most popular accommodation choice
- Three-Quarters just wanted to spend more time together
- Childcare commitments by grandparents with grandchildren have increased in recent years which may impact on availability of travel

FARM TOUR AT NEWTON FARM HOLIDAYS



# CURRENT VALUE OF THE MARKET VERSES POTENTIAL



## Growth potential

(31% increase in domestic trips  
by over 55s)



## Loyal, repeat customers

(86% make a return visit, more  
loyal compared with 18-34 years )



## Powerful word of mouth

(83% of disabled customers tell  
others about it & 49% share on  
social media)

*“The key to attracting boomers is appealing to their “forever young” attitude and desire for experiential travel.”*

*Deloitte Hospitality 2015*

*“.... boomers will have significant amounts of time and money at their disposal. For many, travel is a high priority and is likely to top their list of desired retirement activities.”*

*Deloitte Hospitality 2015*

*“It is extremely likely that a larger proportion of customers will need some form of assistance in the years ahead, not just ‘step free access’, but facilities and attitudes that aid independently minded older customers with mobility, eyesight or hearing difficulties to travel independently.”*

*Overseas Visitors to Britain: Understanding Trends, Attitudes and Characteristics*



# REAL IMPACT ON REAL PEOPLE

“Museums are leading the way we find,  
followed by theatres and cinemas”

“Venues that don’t include  
information about accessibility  
**make me think they’re not  
accessible**”

“Even if it’s not great, the places  
we return to are **the ones that  
listen and try to improve  
things**”

GUIDE  
EVAN’S

# STRATEGIES FOR SUCCESS



## Review your product or service offering

Consumers were less satisfied with the products and services offered for their specific age groups, particularly the over 65s. Is there potential to reposition your offering to target a greater share of the 'Grey Pound'? Small changes can increase your appeal to this audience, look to emphasise these in your product design and marketing going forward.



## Multi-channel future

Consumers are increasingly using the internet for various stages of the purchasing journey; ensuring your business makes this process as easy as possible will be of long-term benefit. But don't overlook the more traditional marketing channels. The over 65s are still inclined to be influenced by print advertising and editorials so be sure to vary your approach across age groups to achieve maximum effect.



## Don't underestimate the spending potential of the over 65 age group

The research suggests that the majority of operators are focusing their attention on the 35-44 age group, but the over 65s spend more per head. With an increasingly ageing population, there is significant potential for businesses to capitalise on the spending power of this audience.



## Capitalise on loyalty

Brand loyalty in the hospitality and leisure sector is strong, and increases with age. What are you doing to further incentivise your audience to ensure they are loyal to your brand throughout their lives?



## Now's the time to act

Don't wait to act on this information – building stronger relationships with the older demographic now will stand you in good stead for the future.

Source: Barclays report – An ageing population (2015)

## PROMOTIONAL ASSISTANCE



## FUNDING SUPPORT



ADVICELINK



## PRODUCT DEVELOPMENT/ CUSTOMER SERVICE

Easy does it

Simple, low-cost changes to benefit you and your visitors



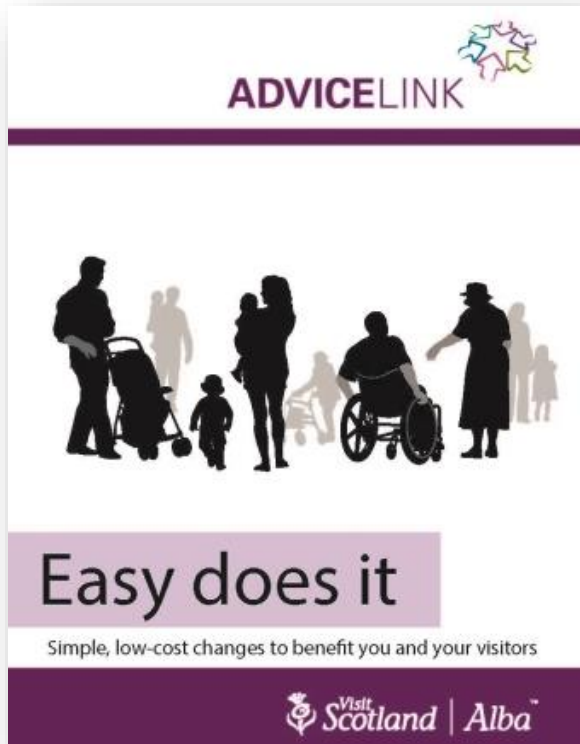
## INFORMATION PROVISION

## MAIN AREAS OF SUPPORT

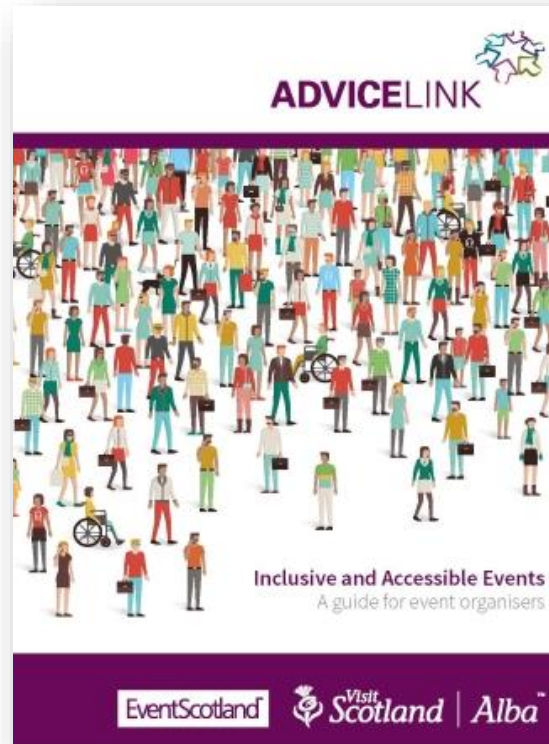
SCOTLAND | ALBA



# SUPPORTING YOU TO DO THINGS DIFFERENTLY



Understanding the market

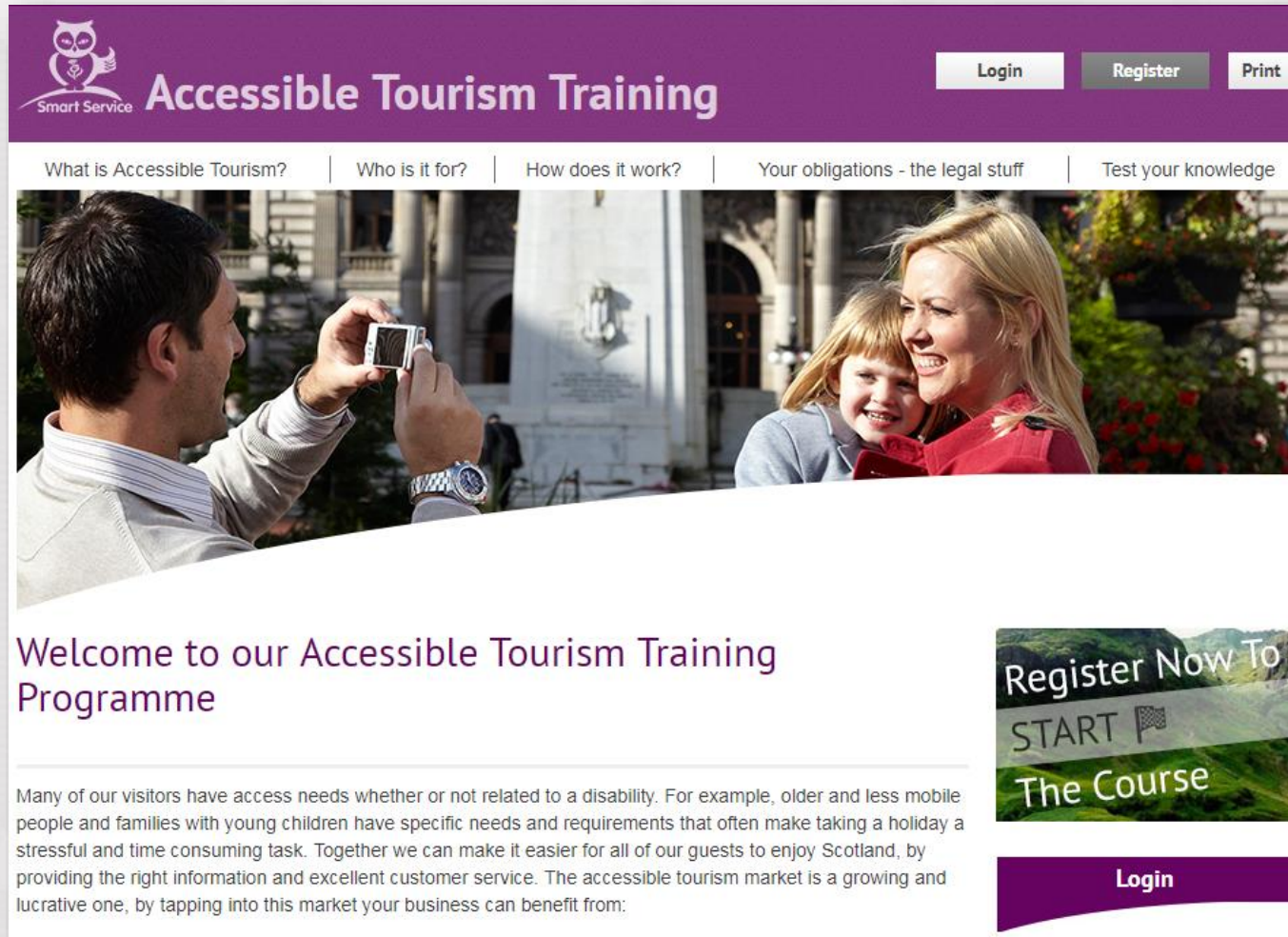


Creating Inclusive Events



Welcoming customers with assistance dogs

# HELPING TO IMPROVE CUSTOMER SERVICE



The screenshot shows the homepage of the 'Accessible Tourism Training' website. The header is purple with a white owl logo and the text 'Smart Service Accessible Tourism Training'. Navigation links include 'What is Accessible Tourism?', 'Who is it for?', 'How does it work?', 'Your obligations - the legal stuff', and 'Test your knowledge'. A large photo shows a man taking a photo of a woman and child. Below the photo, the text reads 'Welcome to our Accessible Tourism Training Programme'. A paragraph explains the program's purpose: 'Many of our visitors have access needs whether or not related to a disability. For example, older and less mobile people and families with young children have specific needs and requirements that often make taking a holiday a stressful and time consuming task. Together we can make it easier for all of our guests to enjoy Scotland, by providing the right information and excellent customer service. The accessible tourism market is a growing and lucrative one, by tapping into this market your business can benefit from:'. A 'Register Now To START The Course' button and a 'Login' button are also visible.

Smart Service **Accessible Tourism Training**

Login Register Print

What is Accessible Tourism? | Who is it for? | How does it work? | Your obligations - the legal stuff | Test your knowledge

Welcome to our Accessible Tourism Training Programme

Many of our visitors have access needs whether or not related to a disability. For example, older and less mobile people and families with young children have specific needs and requirements that often make taking a holiday a stressful and time consuming task. Together we can make it easier for all of our guests to enjoy Scotland, by providing the right information and excellent customer service. The accessible tourism market is a growing and lucrative one, by tapping into this market your business can benefit from:

Register Now To  
START  
The Course

Login

*Euan's Guide Access Survey, 2017:*

“ 77% agree: staff training increases venues' accessibility”

“72% are more likely to visit new places if they feel welcomed by staff or venues **appears to care** about accessibility”



# POWER IN INFORMATION



“Can’t fit through the door of the café!”



“I just want to know if there are steps!”



“Is there a level entry shower or wet room for Grandma!”



# APPROPRIATE INFORMATION PROVISION

## Accessibility Guide for The Example Attraction

Contact for accessibility enquiries: Joe Bloggs

✉ example-attractions@gmail.com ☎ 0141 472 2218 🌐 www.visitscotland.org



Guide last updated: 16 Oct

**At a glance** Getting here Arrival Getting around inside Customer care support



Download this guide as docx



Share this guide

### Welcome

Our visitor attraction is on Edinburgh's principal shopping area, Princes Street, where we've been inspiring visitors to Edinburgh about the joys of Scotch Whisky for over 25 years.

Whether you take a tour, visit our shop or restaurant, or enjoy an event or tasting here, we guarantee a sensational experience.

We are fully accessible for wheelchair users and can cater for anyone with other specific access requirements.

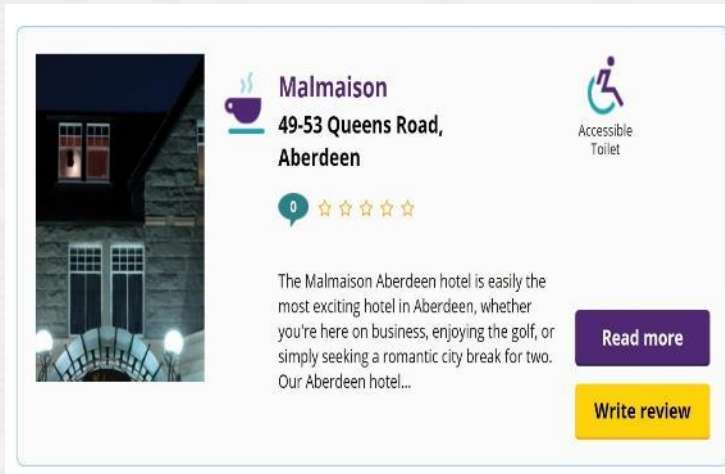
Please get in touch if you require any further information about specific access or need advice on planning your visit.



*Euan's Guide Access Survey, 2017:*

- 95% try to find accessibility information before visiting a venue
- 54% avoid going to new places if they can't find accessibility information
- 67% agree that information provision is a way of increasing accessibility

# EUANSGUIDE.COM



**Malmaison**  
49-53 Queens Road,  
Aberdeen

Accessible Toilet

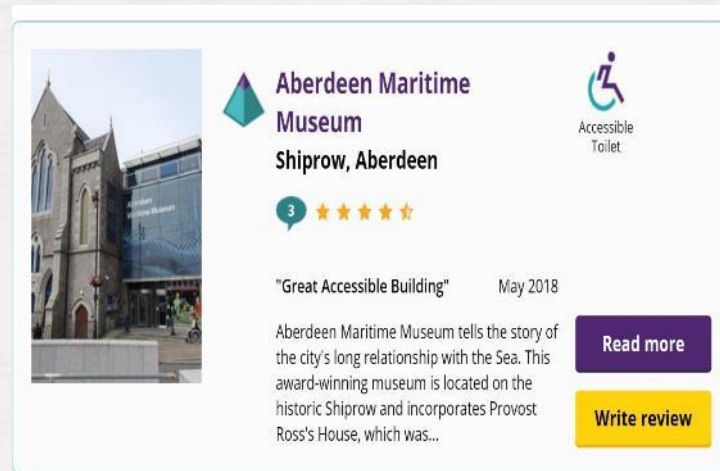
0 ★★★★★

The Malmaison Aberdeen hotel is easily the most exciting hotel in Aberdeen, whether you're here on business, enjoying the golf, or simply seeking a romantic city break for two. Our Aberdeen hotel...

[Read more](#)

[Write review](#)

Useful feedback + great endorsement



**Aberdeen Maritime Museum**  
Shiprow, Aberdeen

Accessible Toilet

3 ★★★★★

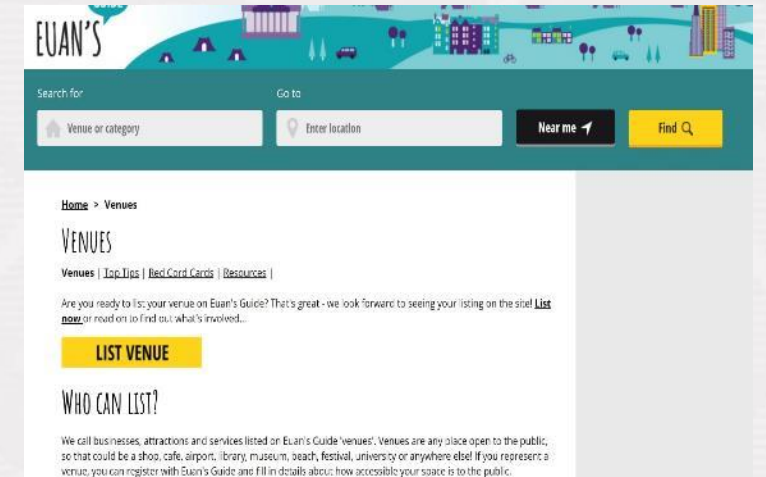
"Great Accessible Building" May 2018

Aberdeen Maritime Museum tells the story of the city's long relationship with the Sea. This award-winning museum is located on the historic Shiprow and incorporates Provost Ross's House, which was...

[Read more](#)

[Write review](#)

Add your venue details to the site for free, its quick and easy



**EUAN'S**

Search for:  Go to:

[Home](#) > [Venues](#)

## VENUES

[Venues](#) | [Top Tips](#) | [Red Card Cards](#) | [Resources](#)

Are you ready to list your venue on Euan's Guide? That's great - we look forward to seeing your listing on the site! [List now](#) or read on to find out what's involved...

[LIST VENUE](#)

### WHO CAN LIST?

We call businesses, attractions and services listed on Euan's Guide 'venues'. Venues are any place open to the public, so that could be a shop, cafe, airport, library, museum, beach, festival, university or anywhere else! If you represent a venue, you can register with Euan's Guide and fill in details about how accessible your space is to the public.

Spread the word about how accessible your venue is!



- Match fund grant award scheme for collaborative tourism marketing projects – [www.visitscotland.org/growth-fund](http://www.visitscotland.org/growth-fund)
- Match funding of 50% with 50% coming from private sector funds
- Only constituted groups can apply for funding, not an individual business
- Applications must align with the national Tourism 2020 strategy, VisitScotland's strategy and any relevant regional/sector strategies



HMS UNICORN, DUNDEE

**GROWTH FUND (£10K - £40K)**

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## DIGITAL

- **SEARCH**
- **PPC**
- **SOCIAL MEDIA**
- **DISPLAY**



## CONTENT CREATION

- **VIDEO**
- **IMAGES**
- **ITINERARIES**
- **E-BOOKS**
- **BLOG POSTS**



- **RADIO**
- **PROJECT MANAGEMENT**
- **MONITORING AND EVALUATION**



- **PR**
- **FAM TRIPS**
- **PRINTED COLLATERAL**
- **EVENT AND EXHIBITION ATTENDANCE**

**WHAT ACTIVITY CAN THE CAMPAIGN COVER?**

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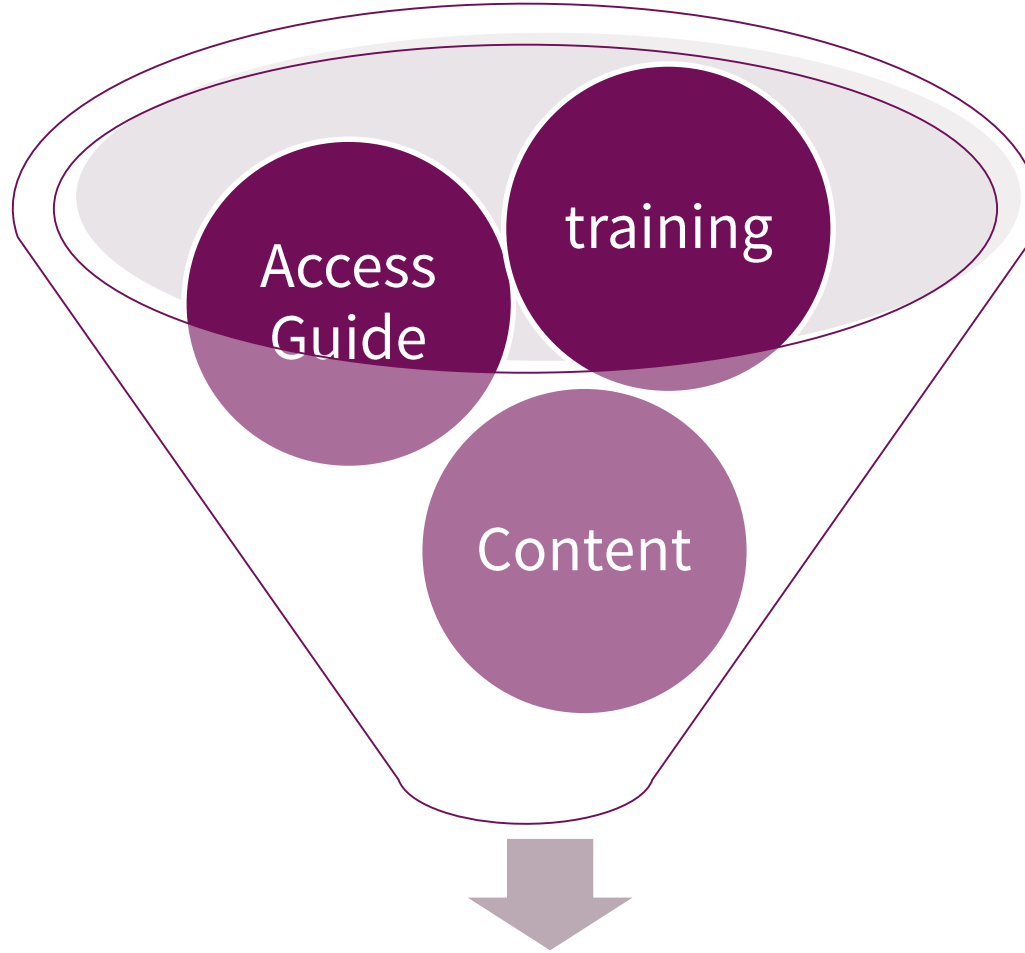


- To support public infrastructure improvements at visitor pressure points
- Applicable to rural areas “accessible and remote rural areas” excluding settlements above 3000 people
- Awards available from £50,000 - £300,000 for up to 70% of approved project activity
- Some of level of match funding or resource provision from public sector, community group or private sector e.g in-kind support such as land for development
- Sept 2018 - deadline for final applications is 27 July Mar 2019 - deadline 25 January 2019


# ACCESSIBLE TOURISM DESTINATIONS

Different models:

- Accessible Glasgow
- #AccessibleFife
- Everyone's Edinburgh







Get in touch if you want to develop your inclusive tourism offering contact:

Marina Di Duca, Inclusive Tourism Manager  
[marina.diduca@visitscotland.com](mailto:marina.diduca@visitscotland.com) or go to  
[www.visitscotland.org/accessible-tourism](http://www.visitscotland.org/accessible-tourism)