

**Interreg**



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**Universal Design and  
Sustainable Tourism**

Webinar, 21<sup>th</sup> February 2025

# Market research about the potential of Universal Design for tourism

## Key Insights

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# How much can Universal Design (UD) principles improve travel experiences?

Inclusive tourism benefit all travelers, and in particular need to understand these **four key demographic groups**:



## People with Disabilities

Meeting mobility, sensory, and cognitive needs ensures equal access for all.



## Seniors

Creating safe and comfortable travel environments meets the needs of seniors.



## Families with Children

Providing safer and more convenient experiences enhances travel for families.



## People with Food Allergies

Offering safe food options and clear information reduces risks for people with allergies.



# Disabilities: how many people need help?



## 1.3B Worldwide

People have a disability (16% of the global population)



## 27% In Europe

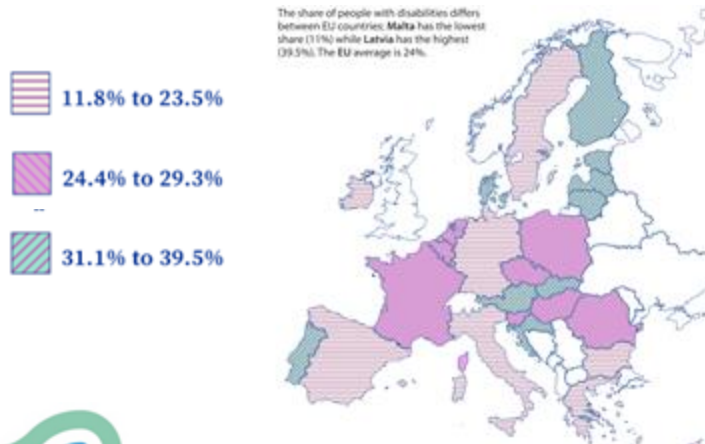
Of the adult population (over 16 years old)



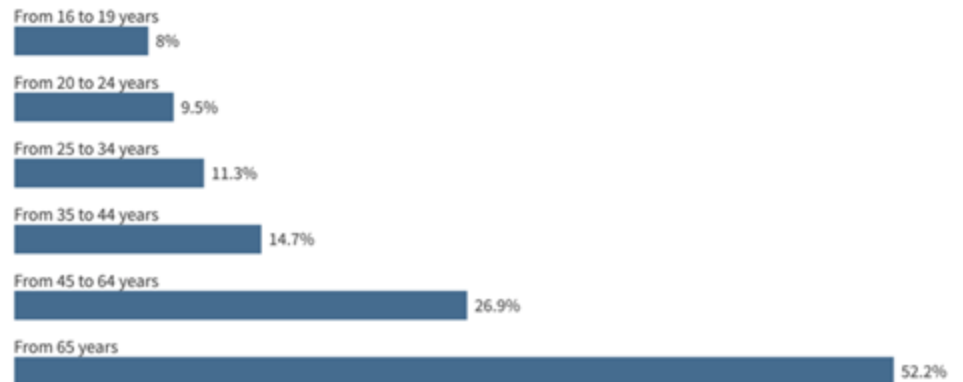
## 101M Europeans

Have a disabilities, most of them musculoskeletal.

### Percentage of people with a disability per Country (European Council, 2022)



### Share of people with disabilities by age in EU (European Council, 2022)





# Disabilities: how many people need help?

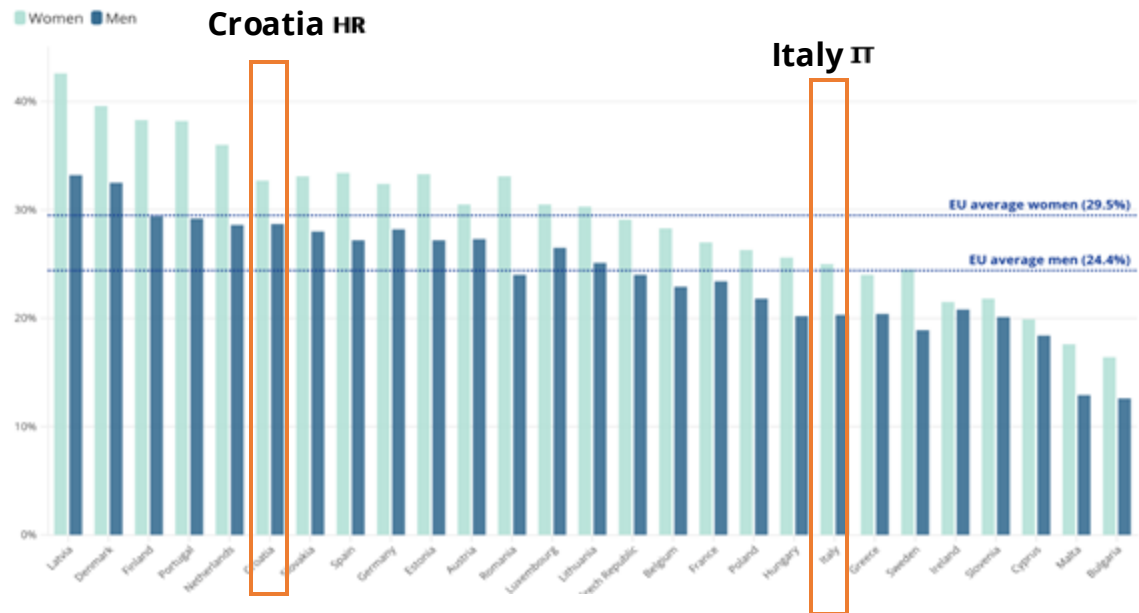
## In Italy IT

**12.6 million people more than 21% of the population** characterized by limitations in their usual activities.

## In Croatia HR

**1.1 million people nearly 30% of the population** is characterized by some form of disability in their usual activities.

Share of people with some form of disabilities by gender and Country in EU (European Council, 2022)



## Elderly people: key numbers and trends



### Global Aging

**1 in 11 people  
is senior in 2019,  
1 in 6 people  
is senior in 2025**

This demographic shift requires new services and infrastructure to support an aging population.



### Travel Increase

**Many seniors are  
active travelers  
seeking enriching  
experiences.**

In 2022, senior travel exceeded pre-pandemic levels, demonstrating a strong desire among older adults to explore the world.



### 1 out of 3

**In 2018, nearly 1/3rd  
of the seniors  
traveled, mostly to  
regional destinations.**

The percentage of senior traveling:

- 32% in Italy
- 30% in Croatia



## **Disabilities and old age: which are the consequences?**

People with disabilities and seniors have different problems:

- **25% of people with disabilities report difficulties while traveling**, compared to 10% of people without disabilities.
- **Financial difficulties:** in 2022, **54.3% of people with disabilities** in the EU struggled to cover their costs, compared to 42.9% of people without disabilities.
- **Online payments:** seniors and people with disabilities are less likely to own credit or debit cards.
- **Online navigation:** they also experience difficulties in using computers and browsing the internet.





## Families: key numbers and trends



### 376M travels

Family travel in Europe is a growing market with a 4.6% CAGR from 2017-2022.

In 2022, 376 million of travels have been performed by families



### Family Decisions

Children influence trip planning for 76% of parents.

Summer vacations are the most popular time for family holidays, with 68% of families planning their trips during this period



### Travel habits

Family prefers to stay in hotels, going to national destinations.

27% are inclined to opt for travel options closer to home, driven by convenience and possibly budget considerations.



## Food allergies: key numbers and trends



**20M Europeans** have food allergies, common allergens include peanuts, tree nuts, and shellfish.

Additionally, one in four school-age children has an allergy, making it a widespread concern.



**7M Celiac people** in Europe, 1 in 100 people suffers from celiac disease (25% with a diagnosis)

Lactose intolerance is also prevalent, affecting 65% of the global population.



**Stress in traveling**  
Difficulty finding restaurants that can prepare safe meals and provide info

Food allergies cause them anxiety when traveling, and many choose an alternative mode of transport if they do not feel safe enough to travel among other people.





## Trip phases: problems while traveling

Based on the data for global tourism in 2023, at least **257 million tourists**, or 1 in 5 tourists, have specific access requirements when traveling:

### 1 Trip Planning Challenges

- Lack of reliable accessibility information
- Booking and reservation problems
- Website without accessibility features
- Limited information on food options

### 3 Travel Experience & Physical Mobility Challenges

- Problems with local transportation
- Risk of damage to mobility aids during transit
- Accommodation not meeting accessibility

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### 2 Navigation & Orientation Issues

- Difficulties understanding departure points
- Inadequate signage and navigation difficulties
- Hard to find restrooms or elevators
- Photos online don't match the physical space

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### 4 Attitudinal & Communication Barriers

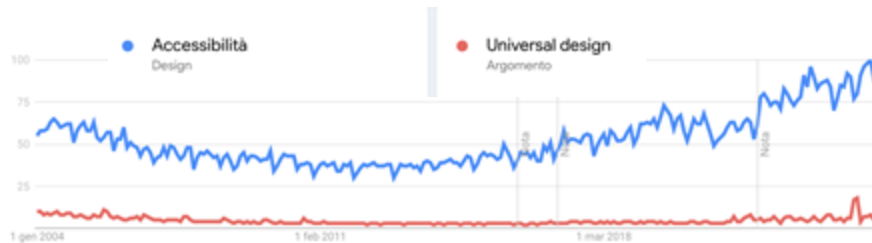
- Untrained staff and attitudinal barriers from personnel
- Negative experiences
- Poor communication on available services and assistance



# Universal Design: how many know about it?

A niche of people is searching for “Universal Design” on Google to understand what is it:

Trends of Google Searches in the world over time (2004-2024)



Volume of monthly Google Searches in Italy (2024)

Parole chiave	Volume	KD%
universal design for learning	2,4K	32
interior design università	1,9K	35
design università	1,6K	36
universal by design	1,3K	29

## Italy IT

- Low search volume, growing since 2022.
- **68,300 Google searches** per month
- Related to design planning and education.

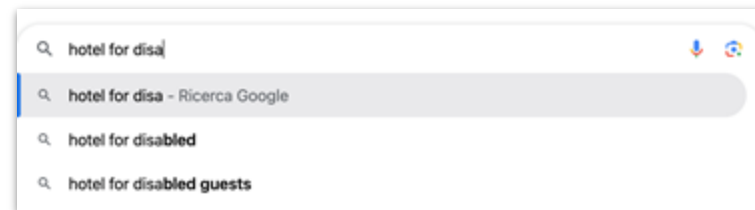
## Croatia HR

- **Zero Google searches** on Universal Design.
- Lack of awareness in the topic.
- Could reflect a language barrier.



# How many people search for accessible travels?

The average monthly searches on Google for “accessibility” terms (disable people, children, seniors, etc.) related to tourism topics are:



## Accommodations

IT **0.06%** (67K/104M)  
HR 0%\* (0/4M)



## Museums

IT **0.51%** (37K/7.3M)  
HR 0\*% (0/213K),1



## Travel

IT **0.22%** (20K/9M)  
HR 0%\* (0/90K)



## Beaches

IT **0.12%** (13K/11M)  
HR 0\*% (0/473K)



## Holidays

IT **0.73%** (47K/6.4M)  
HR 0.14% (130/90K)



## Airports

IT **0.02%** (2,3K/9,6M)  
HR 0\*% (0/1M)



# Examples of Google Searches about accessible tourism topics

## Italy IT

Parola chiave	Volume
vacanze con bambini >>	1.300
vacanze con bambini estate 2024 >>	880
vacanze per disabili in carrozzina >>	720
vacanze estate 2024 con bambini >>	590
vacanze per anziani autosufficienti >>	590
bonus vacanze disabili 2024 >>	480
vacanze in montagna con bambini >>	480
case vacanze per anziani gestite da suore >>	390
vacanze al mare con bambini >>	390

## Croatia HR

Parola chiave	Volume
odmor za obitelj s djecom >>	110
odmor za obitelj >>	10
vikend odmor za obitelj >>	10
888 rad odmor obitelj >>	0
kuća za odmor marcana obitelj banovic >>	0
kuća za odmor obitelj hrgić i granić >>	0
kuća za odmor u brestovoj dragi obitelj lukšić >>	0
obitelj aljinović žrnovnica poljička cesta 48 kuća za odmor >>	0
obitelj škropeta kuća za odmor >>	0



## UD in tourism: market potential

### Spending in Accessible Tourism 💰

- Global spending: **\$95B annually** on travel by people with disabilities.
- USA: Travelers with disabilities spent **\$34.6B in 2015**, increasing to \$58.7B in 2019 (+169%).

### Market Potential 📊

- The EU market for travelers with disabilities exceeds **100M** people.
- When including elderly & caregivers, this expands to **130M** potential travelers.
- Adding also Families and people with food allergies, the total is **more than 250M people** who travel every year.

### Potential Growth in Accessible Travel 🚀

- 70% of people with disabilities in the EU are financially & physically capable of traveling.
- 12.5M people with disabilities traveled in 2018-19, expected to grow to 33.4M by 2028.



## UD in tourism: conclusions (1/3)

### Benefits for Travelers

- **Greater Accessibility & Inclusion:** Improved travel experiences for people with disabilities, elderly travelers, families with children, and those with food allergies.
- **Enhanced Travel Comfort & Safety:** Better infrastructure, services, and clear accessibility information.
- **Increased Travel Opportunities:** More accessible accommodations, transport, and attractions lead to higher participation in tourism.





## UD in tourism: conclusions (2/3)

### Benefits for Institutions & Policymakers

- **Economic Growth & Competitiveness:** Increased tourist flow and higher revenue from inclusive tourism.
- **Stronger Destination Branding:** Recognition as an accessible, inclusive travel destination.
- **Alignment with Policies & Sustainability Goals:** Compliance with international and EU accessibility strategies, contributing to sustainable tourism development.
- **Funding & Investment Opportunities:** Access to grants, public funding, and private investment for accessibility improvements.





## UD in tourism: conclusions (3/3)

### Benefits for **Tourism Associations & SMEs**

- **Higher Customer Satisfaction & Loyalty:** More repeat visitors and positive reviews due to improved accessibility.
- **Expanded Market & Revenue Growth:** Access to a large, often underserved market of travelers needing accessible services.
- **Competitive Advantage & Regulatory Compliance:** Meeting legal requirements and standing out in the market by offering inclusive services.
- **Long-term Cost Savings:** Investing in Universal Design reduces the need for expensive modifications later.



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**THANKS!**

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