



# Is the UK being left behind?

**Current trends in social tourism  
in Europe and beyond**

**A Laurance Paper commissioned by  
the Family Holiday Association**

Named to honour the contribution made to the charity  
by its founders Patrick and Joan Laurance

## **Social tourism: current trends**

There are many people who have never heard of social tourism, and many others who have only the vaguest idea of what it means. Perhaps this is not surprising because, although it is a well established practice in Europe and beyond, social tourism takes many forms and many names. It has also existed for many years in the UK, but in so many diverse and uncoordinated areas that it is often not recognised as social tourism even by those who are actively involved in it.

To use a definition employed by the Family Holiday Association, the aim of social tourism is “the inclusion of people living on a low income in holiday and leisure activities”. Another charity, Tourism for All, describes it as “tourism which is to some degree subsidised by the taxpayer or charitable/voluntary effort in order to achieve a social benefit”.

For nearly 40 years the charity has raised money to help disadvantaged families to take a holiday or short break away from home. Today it is also a campaigning organisation, seeking to raise awareness of social tourism, to place it on the national agenda and to research how it can best be implemented in the UK.

This report is part of that research. The charity commissioned it in 2013 from Dr Scott McCabe of Nottingham University, to investigate current trends in Europe and elsewhere. It analyses how social tourism already works in practice, with a comparative analysis of all 28 EU countries. It goes into more detail with case studies from Spain, France, Italy and Belgium, and outside the EU from Brazil, Russia and China.

It examines the various ways in which social tourism is paid for – state-funded schemes, regional ventures, charities and private foundations – and it looks at the net effects it has on national economies in terms of tax revenue and jobs created. It considers the personal benefits that social tourism brings to individuals, and the economic benefits to the state that ensue in terms of social and medical welfare savings. And it appraises the effect that the downturn in the global economy in recent years has had on social tourism provisions.

In many countries, providing funds and mechanisms to enable disadvantaged people to take part in holidays and leisure activities is well established and commonplace. Social tourism is rated as “well-developed” in 10 of the 28 EU member states, while in others its status ranges from “relatively well-developed” to virtually non-existent. Its rating in the UK is a modest “developing”, on a par with Bulgaria and Latvia. It is hoped that this report will help to advance that development by demonstrating what can be done, and the various ways in which it can be achieved.

### **About the author**

Dr Scott McCabe is Associate Professor in Tourism Management and Marketing at Nottingham University Business School. He says: “My research focuses on the benefits of participation in holidays for low-income and otherwise disadvantaged groups in society in relation to subjective well-being, optimism and resilience and personal growth, education and self-development.” He was aided in producing this report by Dr Chunxiao Li and Egle Maslauskaite.

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# Current trends in social tourism in Europe and beyond

## A comparative analysis

### Introduction

This report assesses the current trends and scope of social tourism in the EU and beyond. Based on extensive secondary research of existing materials online, together with email interviews, the report provides updated information on the current state of social tourism in Europe, focusing particularly on the last three years when provision may have been affected by the weak economic situation. Additionally, it assesses social tourism development in key countries outside of the EU.

The report outlines the range of different systems of social tourism, together with insights into the policy context where available. The main focus of the search was to identify any impacts caused by the ongoing recession and pressure on public sector finances, in changes to the numbers of people being supported through social tourism mechanisms.

The report provides a general overview of findings and outlines some case examples in detail. It provides an appendix showing a detailed country by country breakdown for Europe, together with a range of weblinks and references to source materials.

### Social tourism in Europe: definitions and origins

Social tourism is not a universally recognised concept. The term has many different meanings even within Europe. In German for example, *Sozialtourismus* refers to what in Britain has recently been referred to as “benefit tourism” in reaction to the relaxation in the rules governing the rights of Bulgarian and Romanian citizens. This, of course, has nothing to do with tourism at all and relates to economic migration. This lack of clarity has been cited as a major problem concerning the awareness and understanding of social tourism in Europe. The variety of different meanings for social tourism has led to different interpretations and consequently a wide variation in the ways social tourism has been adopted in different EU countries.

However, despite these differing interpretations, there are some common factors that are generally shared among all forms of social tourism policy and activity. In a 2012 analysis of definitions, Minneart, Diekmann and McCabe concluded that social tourism refers to: “All activities, relationships and phenomena in the field of tourism resulting from the inclusion of otherwise disadvantaged and excluded groups in participation in tourism. The inclusion of these groups in tourism is made possible through financial or other interventions of a well-defined and social nature. A primary consideration in differentiating social tourism from commercial tourism activity is thus an aim to benefit disadvantaged people, often articulated as a ‘Tourism for All’ agenda. A secondary consideration is the provision of financial or other forms of support in order to achieve the inclusionary goals.

A further differentiating factor relates to the supply side aspects. In the 1996 Montreal Declaration of the International Organisation of Social Tourism, updated in 2006, Article 13 addresses the identification criteria of social tourism, and stipulates that “Any tourist organization (association, cooperative, mutual society, foundation, federation, not-for-profit organization, company etc...)

which, by its articles of association or statement of aims clearly identifies with social objectives and the aim of making travel and tourism accessible to the greatest number – thereby differentiating itself from the sole aim of profit maximization – may claim membership of the social tourism movement.” Therefore social tourism is mostly organised within the context of social enterprises, even where national programmes are delivered by arms-length not-for-profit organisations.

Social tourism first emerged in Europe at around the same time that the tourism industry took shape in the mid-Victorian era. Rapid industrialisation led to overcrowded and squalid living conditions, and the transition to a largely urbanised economic system throughout Europe led to a huge increase in urban poverty. Thus the focus of early social tourism activities was on giving poor city children a chance to spend time in the countryside or the seaside, in healthier environments. These endeavours were often tied to religious movements. Simultaneously, the organisation of the labour force into unions often included the organisation of trips, holiday camps, or the purchase of accommodation specifically for members. This system was widely adopted in France, for example, while in the UK the Co-operative Holiday Association and the trade unions acquired properties that were turned into family holiday homes or centres. Similarly, in the early 20th century organised movements expanded from the work into the social sphere, with the Ramblers Association a good example. In the 1930s, the youth hostel movement which emerged out of Germany spread throughout Europe. These became mass movements, which mirrored the industrialisation process.

The turning point came with the adoption of the International Labour Organisation’s recommendations for holidays with pay, which was implemented in Britain in 1938. However, the extent to which the ILO principles became enshrined within national laws varied. Hence some countries required workers’ councils, unions or employers to assist workers to take a holiday, while others limited the legal requirements to a restriction of working hours and paid time off from work. This partly explains the current variety of systems in European practice, and the difficulty in developing a unified framework for social tourism across EU member states.

In recent decades, social tourism systems have faced considerable challenges and issues. A huge democratisation in tourism opportunities and a general increase in wealth and living standards have not achieved commensurate increases in the rates of participation in some countries. In the UK, participation in tourism has been fairly consistent at 60-65% of the population for 40 years. The increased level of competitiveness in the tourism industry has led to pressure on social tourism structures in some countries, and a reduction in public sector funding, brought about by the crisis in the financial system and global recession, has led to an increase in poverty in many European countries and high levels of youth unemployment.

## **The current state of social tourism in Europe**

Our analysis for this report found that despite the obvious difficulties presented by the ongoing weaknesses in the European economy, social tourism is an important component of the European tourism system. However, evidence of the scale and scope of social tourism remains difficult to obtain and fragmented. Few organisations could provide us with detailed statistics on basic information such as the overall budget and the numbers of tourists being supported, or any evidence or evaluation of the outcomes of social tourism initiatives on beneficiaries or on the economy.

**However, where evidence does exist about the effects of social tourism investment, it shows an overwhelmingly positive outcome.**

In a report on the economic impact of the IMSERSO programme in Spain, €1.53 is recovered by the state for every €1 invested in the programme. Around 13,000 direct jobs and 85,000 indirect jobs are created or maintained in the low season every year. The employment generated has a direct repercussion on the public sector in terms of reduced social security payments, savings on unemployment benefits, tax collected from income, VAT and others. Wealth and employment are

sustained in all regions of Spain, although most importantly in those areas that have a high dependency on the tourism industry.

The European Senior Programme has also been evaluated at the European level (this scheme incentivises tourism from the North European countries to Spain and Portugal). In 2012, the programme had a direct impact of €16 million on the European Union economy and generated about 340 direct jobs in the tourism sector. For every €1 the Spanish government invests, it recovers €1.58 and the other European governments gain €0.5. In 2012, just over 21,000 tourists received a subsidised package through this programme at a budget of €2.5m. In France, the *Chèques-vacances* programme has found that holiday voucher holders spend four times more than the amount of the voucher (Calypso report 2010).

One or two recent studies have tried to assess the wider benefits of tourism to society. For example, Ferri, Durá, & Garcés, J (2013) looked at functional health benefits for elderly people related to social tourism policy. This was a small pilot study based on 43 ordinary people (ie not social tourists) older than 65. They found out that elderly people who did not travel visited health professionals for diagnosis or health problems (53.9%) and for accidents (15.4%) more frequently than elderly people who travelled (20.0% and 10.0%, respectively); and elderly non-travellers visited health professionals more often for check-ups (63.3%) and prescriptions (80.0%) than non-travellers (46.2% for each). The study also asked about use of social services and this showed that elderly people who did not travel used home help service more often (62.5%) than elderly people who travelled (37.5%). Although this is a small-scale study, it does indicate the potential relationships between active ageing and tourism and health and social care costs.

This type of study connects with research in the UK undertaken by McCabe and Johnson (2013) which found positive links between holidays and improved subjective well-being among social tourists. Increases in well-being have been linked to a wide range of positive outcomes for society, including improved health and a reduction in contact with social services. McCabe and Johnson found that social tourists' levels of well-being were significantly higher after a holiday provided by the Family Holiday Association. This study was able to link to the holiday positive changes in optimism, satisfaction with family life, happiness, resilience, social life and the way leisure time is spent. The study showed that social tourists had much lower scores of well-being compared the general population, and that the people supported by the charity faced very difficult personal circumstances including mental health issues, debt and physical health and special needs.

Therefore, although the evidence is extremely limited on the wider social value of social tourism, there is clear confirmation of the positive impacts of social tourism on the domestic tourism economies. Moreover, the personal and social benefits of holidaymaking may prove, potentially at least, to far outweigh the contribution to the tourism economy, taking into account health and social services spending.

### **There is a positive engagement in social tourism across the whole of Europe, with a wide range of programmes being developed to help disadvantaged groups in society to access tourism opportunities.**

There are a number of factors that could explain this sustained commitment to social tourism in Europe. First is the importance of tourism to the European economy. In 2012, the 27 EU nations (prior to Croatia joining in 2013) recorded more than 400 million international arrivals, which represented almost 40% of the now over 1 billion international arrivals globally (UNWTO 2013). Despite recessionary pressures, international tourism grew by 2.5% in the EU 27 from 2011 to 2012. This also represents €285bn in receipts, 35% of the global total. France retains its position as the global number 1 tourism destination, with Spain (4th), Italy (5th), Germany (7th), and the UK (8th) all in the top 10.

In terms of contribution to GDP, amid continuing weaknesses in the European economy, tourism and travel contributed US\$1,736.1bn (8.2%) of European GDP in 2012 (expected to rise by 1% in

2013), and supported 31 million jobs or 8.0% of total employment (WTTC 2013). The importance of tourism to the economies of Europe is verified by its embedded-ness in the cultural life of European citizens. The freedom to travel has become a widely established norm.

A second factor is the effect of disability discrimination legislation. The effects of anti-discriminatory directives, which have sought to extend their scope beyond employment matters and towards access to goods and services, including spaces, has meant that there are measures in place in every country to encourage “Tourism for All”. While it has been difficult to gauge any changes in the level of provisions or support across the EU in this area, it seems that social tourism measures for people with disabilities are widely accepted and implemented.

Thirdly, it is clear that the EU’s Calypso programme has encouraged understanding about and uptake of social tourism initiatives in the last three years. The range of opportunities appears to be wider than before the programme was set up, there is a greater amount of information available and Calypso has encouraged some innovative trans-national partnerships.

Fourthly, the accession of former Eastern European states into the EU (particularly in the 2004 and 2007 rounds of expansion), whose systems under the socialist era incorporated a social tourism ethos, has resulted in a partial integration of social tourism into the transition to a market system.

### **However, although a number of factors show an encouraging engagement with the concept of social tourism among European nations, it is a mixed picture.**

There is a wide range of types of provision. Some countries operate a complex range of schemes. In this report, the focus has been to try to highlight the main schemes/approaches. The types identified were:

- A. State-funded subsidised packages
- B. State-backed voucher schemes
- C. Regional government schemes
- D. Charity (third sector) provision
- E. Private foundation schemes

**A. State-funded subsidised packages:** There are some countries with well-established social tourism programmes, some of which continue to be consolidated, whereas others have been subjected to severe budget cuts associated with the ongoing contraction of spending in the public sector. Spain, Portugal and Greece are examples of large-scale, state-backed established systems that have suffered significant cutbacks in programme budgets. In Portugal, the government ceased to fund the INATEL programme and, although it survives, the number of people it can support has dramatically fallen (no firm statistics were available) and the subsidy to “Seniors” (the main European term for Senior Citizens or pensioners) has decreased.

In Spain, the two main Seniors programmes have both suffered severe cuts in public funding. The IMSERSO programme has had its budget reduced by almost half, but remains substantial at €69m, with an additional €35m for the spa programme. This programme still serves around 900,000 people every year. The European Senior Tourism programme (EST), which subsidises packages to Spanish coastal resorts for seniors from a range of other member states, has had its programme budget cut entirely, and continues into 2014 with a purely marketing budget allocation. From a peak of almost 55,000 packages in 2010/11, the EST last year supported almost 20,000 tourists with a €19m budget. The Czech Republic state-funded scheme suffered a cut in budget from €6m to €2.4m in 2011/12.

**B. State-backed voucher schemes:** In contrast to directly subsidised packaged holiday schemes, voucher schemes appear to have weathered the public spending cuts much more positively. In France, the agency that distributes Chèques-vacances (the ANCV) received a budget increase of 5% in 2012. But in Greece the Government subsidy for the coupon system appears to have ceased altogether (no details or responses to request for information were forthcoming), although the Agricultural Insurance Organisation will provide coupons for 120,000 farmers in 2013/14.

In other countries where social tourism is developing rapidly, the voucher system has been adopted seemingly successfully. Good examples are former Eastern Bloc countries such as Hungary and Romania. Romania supports spa vouchers which benefited more than 217,000 people in 2009 (although updated figures could not be obtained).

A noteworthy success is the voucher scheme provided by the Hungarian National Holiday Foundation. Its budget has increased to €11.7m for 2014. In 2013, the leisure Erzsébet vouchers for events, buying tickets etc benefited 145,000 participants, including 28,000 seniors, 33,000 large families, 5,000 people with disabilities and more than 72,000 children, of whom 40,000 attended holiday camps. This is a relatively new scheme and shows the importance of day-trip opportunities, highlighting a potential low-cost opportunity.

Other countries with strong welfare systems such as Italy, Denmark and Germany have become more attuned to the rhetoric and principles of social tourism and have begun to formally incorporate systems of access, particularly for disability disadvantaged citizens. Germany for example has recently concluded a two-year 'Tourism for All' project (NatKo).

**C. Regional government schemes:** A third group of countries focus social tourism support through state or regional authorities. In this group we can include Belgium (Flanders) as the main player. Other countries that devolve social tourism in this way include Austria and Lithuania. It is also likely that those countries with national level schemes will also have regional or state-level provision. Destinations (particularly regional Destination Marketing Organisations) are active in the support of social tourism as receivers of social tourists, and may therefore enter into bilateral agreements with other regions (source markets) or coordinate social tourism offers from suppliers within their region.

The programme operated by Tourism Flanders is the best-known among these state/regional variants. The scheme supports the Holiday Participation Support Centre in Brussels which, with a small team of staff employed by the Tourism Office, coordinates supply and demand for social tourism. It is highly publicised and well-organised, with widespread take-up among the industry and the market. The promotional materials are attractive. In 2012, the scheme supported 105,000 people, mostly through day-trip opportunities, with reduced-price tickets to attractions. There are a large number of holiday stays also on offer.

**D. Charity (third sector) provision:** A further group of countries provide examples of systems in which the government does not take a direct role in the provision of social tourism. These include Ireland, Malta, Latvia, Bulgaria and the UK. In these countries the scale of social tourism is generally small. Nevertheless, the third sectors have an increasing role to play in the provision and delivery of support. The UK may be included in this group since historically the main actors in the provision of social tourism have been the charity sector, such as the Family Holiday Association, the National Benevolent Fund for the Aged, the Women's Holiday Fund, ACORNs, CHICKS, Barnardos, Age UK and many others.

A recent (2013) survey undertaken by the Universities of Exeter and Nottingham identified 655 such organisations in the local government and voluntary sector in the UK involved in activities related to social tourism. The great majority of these organisations support very small number of beneficiaries (43% supporting up to 50 beneficiaries, and 86% fewer than 500). However, these charities are finding the current economic climate challenging. The majority (69%) of respondents among these groups have experienced an increased demand for services in the past three years: 40% of social tourism providers reported an increase in demand for holidays and short breaks; 60% believed that the current economic climate has had a negative impact on funding; and 60% stated that raising funds have become increasingly difficult in the last three years.

The government does have an indirect role in social tourism provision in the UK. Family Fund is a charity that provides holidays for families with a disabled or seriously ill child. It receives an annual grant of £27.3m (2013). In 2012/13 Family Fund provided holiday grants to 21,192 families, and a

further 7,000 were supported with a day trip. The Scottish Parliament also provided £700,000 for the Take a Break Scotland scheme, helping 2,600 families.

**E. Private foundation schemes:** A final group of countries operate unusual funding schemes under private foundations. In Finland the Slot Machine Association collects the profits from slot machine gambling and distributes them to voluntary organisations. And for many years Denmark has operated a foundation called the Labour Market Holiday Fund which is financed by the interest accrued on uncollected holiday pay to casual workers. Over the years, this has built up a significant sum, which is available to a range of tourism and hospitality sector organisations to bid for each year. Denmark has a very advanced social welfare system, so much of the fund goes to the industry (supply side) into accessibility projects and similar undertakings. However, in 2012 almost a third of the annual budget (€5.4m) was used to support holidays for disadvantaged families and children.

## European case examples

### Senior Holidays Programme (IMSERSO) in Spain

During the off-peak season (October–June), the Spanish government makes cheaper holidays available to resident pensioners in Spain, whatever their nationality. During the 2009-2010 season 1,200,000 people were able to take part in this programme, 200,000 more than the previous year. IMSERSO has high demand socially – more than two million people applied for places during the 2009-2010 season – and a high level of satisfaction among those who take part. Since its creation in 1985, a total of 11,200,000 people have benefited from this type of holiday. Around 308 hotels and 9,700 travel agencies take part.

The Spanish state invested approximately €127 million in the 2009-2010 season; this financed 30% of holiday costs, with the remaining 70% provided by users. The programme is sustainable from a financial point of view as the savings (in unemployment and other benefits) and income generated (VAT, income tax, etc) allow for the recovery of the investment made. During the 2009-2010 season, a flow of €690 million is estimated.

Moreover, because it is carried out during the low season, IMSERSO has generated and/or maintained 119,000 jobs (16,000 direct and 103,000 indirect). This is a significant figure for Spain which, like other Mediterranean countries, strongly suffers the effects of tourism seasonality with a fall in employment in this sector. The latest assessment, carried out by an independent international consultant for 2007-2008, estimated the economic impact of IMSERSO at €1.53 recovered by the Spanish state for every €1 invested (Calypso study 2010).

Spain's other major initiative is Europe Senior Tourism (EST), which offers low-season holidays in Spain to citizens over 55 from Poland, Czech Republic, Slovakia, Lithuania, Romania and Bulgaria. In 2012, its fourth season, EST provided 24,200 holiday packages which included flights, transfers, four-star hotel, half board (including wine and water), a half-day excursion in the area, extra travel insurance and a daily programme of activities. The EST programme has generated around 270 jobs in the tourism sector, and brings Spain revenue of nearly €12.4m a year. For every €1 the Spanish government invests in EST, it recovers €1.58.

### ANCV in France

Social tourism in France is well-developed and supported by all kinds of stakeholders. According to estimates, social tourism activities in 2010 represented an industry worth about €1.5 billion (7% of the whole tourism industry) and generated 1,500 full-time jobs (9% of all tourism employees). The national agency for *Chèques-vacances* holiday vouchers (ANCV) aims to make holidays accessible to as many people as possible, and to contribute to the renovation of tourist facilities with a social mission. The voucher scheme it operates is available to anyone in society. However, it also directly

supports access to disadvantaged groups. In 2007, its seniors' recovery program helped 100,000 participants. The holiday vouchers scheme has been expanding in recent years. The number of voucher holidays provided in 2012 grew by more than 6.2% compared to 2011, an increase worth €43.2m. Nearly 212,000 social tourists from different social groups benefited from the voucher scheme – 5.5% more than in 2011. *Chèques-vacances* contribute to the development of tourism activity in France: a 2010 Calypso report found that voucher holders on average spend four times as much as the value of the voucher.

### **Vouchers Holidays Italy project**

Vouchers Holidays Italy project was instigated in 2001. These vouchers work similarly to food vouchers and can be spent straight away. They are granted according to a series of fixed criteria, including income and number of children. The suppliers include both public authorities and private companies. The vouchers can be redeemed with a wide range of suppliers including 3,000 holiday homes, 3,500 staff clubs, more than 10,000 local clubs, youth hostels and hundreds of travel agencies. The Italian Federation of Social Tourism gathers together 11 tourism and social development federations and represents more than three million citizens, including young and elderly people and families that travel and enjoy discovering nature, art and culture. “There is a growing interest in social tourism,” says Buoni Vacanze Italia-Fitus director (Vouchers Holidays Italy – Italian Federation of Social Tourism).

### **Calypso**

In 2009, the European Commission launched a preparatory action on social tourism under the name Calypso, and allocated a €1 million budget. A total of 21 countries took part in the project (19 EU member countries plus Croatia and Turkey). The Calypso programme gives grants to member states which are then required to spend these funds on exchange holidays for disadvantaged groups – underprivileged young adults (aged 18-30), families facing financial or other pressures, people with disabilities, over-65s and pensioners who cannot afford travel or are daunted by the challenges of organising a journey.

The Calypso exchange model promotes off-season tourism, particularly in regions where tourism is well developed but highly seasonal; gives less-known, small or emerging destinations the opportunity to promote themselves to a broader range of European tourists; encourages longer-lasting employment in the tourism industry by making it possible to extend jobs beyond the peak season.

Calypso was set up as a three-year rolling program to run from 2009 to 2011, but in 2010 the EU agreed to keep it running beyond that, with its budget of €1m each year. Its budget was increased in 2011 from €1 million to €1.5 million.

### **It can be argued that social tourism has become an established facet of the tourism system in Europe.**

There is evidence of social tourism activity in all 28 EU countries. Accessible tourism policies, funding and programmes/initiatives are a feature of every member state's tourism policy framework. However, in addition to a desire to make tourism accessible for all members of society, the great majority of EU countries also include policies/strategies for at least one other target group (seniors, youth, low-income or disadvantaged families).

It is also evident that workers alongside unemployed or poor families are important recipients of support to some major schemes. The key example here is France's ANVC which is available primarily for workers, although the scheme also supports 200,000 disadvantaged families. This point also relates to seniors, where low income is not related to employment status.

## Social tourism outside Europe

It is also clear that social tourism is being adopted beyond the EU, with many countries already engaging in accessible and social tourism schemes and projects. Of the BRIC economies, notable steps are being taken to engage in social tourism initiatives in Brazil (which hosts the FIFA World Cup in 2014 and the Olympic Games in 2016), Russia and China.

### Brazil

From 2005, the Brazilian Ministry of Tourism has been stimulating tourism destinations to become accessible. Between 2007 and 2008, the Ministry invested US\$804,000 for tourism infrastructure and professional training.

In 2010 a team of four people with varying disabilities travelled around Brazil to test the accessibility of the infrastructure, focusing on the 12 host cities of the 2014 FIFA World Cup and the city of Socorro in São Paulo, considered by the Ministry of Tourism a national example in accessible tourism.

**Good practice:** Cooperbom Turismo is an innovative cooperative in Brazil. Founded in 2007 with headquarters in Ilhéus, Bahia, it is an innovative collaborative project that links tourism to social and environmental projects. Cooperbom Turismo works in the provision of responsible and sustainable tourism, both nationally and internationally. The cooperative is young but has around 120 members and a staff of seven employees, and generates an annual estimated turnover of US\$70,000. The organisation provides holiday support in particular for the elderly, children, students and people with reduced mobility.

### Russia

A federal law *On the Fundamentals of Tourism Activity in the Russian Federation* was adopted in 1998 and outlined the support and development of domestic, incoming, social and sport tourism as the priority trends for the state control over tourism activities. Today the Social Insurance Fund plays the main role in the sphere of social tourism in Russia. In 2004 about 6 million children enjoyed free recreation in different establishments at the expense of national government. The same was provided for more than 1 million disabled people and people assigned for convalescence after hospital treatment (2005). There are social tourism conferences held regularly to discuss issues of social tourism.

**Good practice:** The RussiAble project aims to provide tourists with professional and accessible tourist services in Russia. This social project is widely supported by official departments, governmental offices and cultural authorities.

As part of an ambitious program “From the Margins to the Centre” (2009), Astrakhan City Hall launched a social campaign “Our city is getting better”. Its purpose was to provide an opportunity for older citizens of the outlying neighbourhoods to see all that has been done for the 450th anniversary of Astrakhan, and encourage day trips to the city. A special guided tour was offered to explore the city and walk along the Volga. Each trip attracted 200 elderly Astrakhan.

### China

There is no social tourism scheme at the national level in China. The government is still focusing on improving basic living standards through social allowances such as medical insurance and housing subsidies.

However, as well as a great many free spaces for elderly people within cities, there are some good social tourism practices on a small scale at local levels. For example, since 2011 five big tour operators (including travel agencies China International Travel Service and China CYTS Tours Holding Co) have offered funding for students from poor families to participate on a study trip. The activities started with 100 students. There are also local communities that support seniors to participate in day trips.

## Trends in Europe

The general situation of social tourism development within the 28 EU countries can be divided into four types: well-developed, relatively well-developed, developing countries and low-level development. In well-developed examples, social tourism has been established for a long time and there is national scheme (eg holiday vouchers) and funding for social tourism activities. These countries are characterised by a well-established network and cooperation between government, NGOs and the private sector (tourism suppliers).

Relatively well-developed status means that although there is no well-established national scheme for social tourism, the government provides funding for NGOs which deliver support for disadvantaged groups. There is some degree of cooperation between the NGOs and the private sector.

In developing type countries, social tourism is relatively new but there are some initiatives that can be found and stakeholders show interest in providing support for social tourism.

Those countries where social tourism development is rated low-level are those where social tourism is relatively unknown and no relevant information can be found, although there may be policies or initiatives in place to provide more accessible tourism opportunities.

Based on this classification, among the 28 EU countries, there are 10 well-developed countries, two relatively well-developed countries, 15 developing countries and one low-level development of social tourism. The detailed information regarding each country can be seen on the table of Social Tourism Profiles.

However, the classification mechanism is difficult since there are some (notably the Scandinavian countries of Finland, Sweden, Denmark and also Germany) that are classified as developing countries and yet have very robust systems of social support for low-income and otherwise disadvantaged groups. In these countries tourism opportunities may be available within the social welfare safety net, or are well integrated into the social systems.

Also a well-developed social tourism system does not necessarily indicate robust health of social tourism, since some of the most advanced and integrated social tourism systems are those that are heavily dependent on public sector funding – and hence often subjected to cuts.

### **The current climate has the potential to yield new innovations in the funding and delivery of social tourism.**

Necessity is the mother of invention. There are some useful examples of schemes and projects that have emerged recently that may indicate that social tourism is ripe for radical innovation in order to achieve long term sustainability.

A good example is the OFF2013 project, a bilateral agreement between Poland and Hungary designed to encourage low-season exchanges between these two countries. The scheme relies on the willingness of suppliers to provide discounted capacity, which is then made available through special promotions in the partner country through the OFF2013 intermediary.

In many ways, this scheme replicates the model provided by the Flanders Holiday Support Centre. This is also implemented across the EU through the online marketplace eCalypso or STEEP (the Social Tourism European Exchanges Platform). These projects are at a nascent stage and appear to be at a very early (ie small-scale) level of development.

In order to work effectively, a great deal of effort would need to be made to ensure providers (suppliers such as holiday parks, hotels, tour operators etc) could be brought in and engaged. The Flanders system is so successful because it has a small but dedicated team that works to match supply with demand. A platform that relies solely on an electronic interface may not yield success in the long term.

Innovative funding schemes are also possible. The Danish and Finnish systems are not new, but they do represent possible alternatives to government-subsidised schemes that have proved vulnerable

to variations in economic cycles. However, tax-efficient holiday savings schemes that benefit all in society could be used to deliver a workable voucher-based system that would support a more widespread financing of social tourism opportunities to disadvantaged groups.

Although not a finding of the current project, there is also the potential offered by technology to support the development of social tourism. Crowdsourcing of supply side offers (B2B network), dynamic packaging capabilities and social media distribution and promotion opportunities (C2C and B2C) are all examples of how current trends in the wider industry could be geared towards innovative delivery of social tourism in the future.

The research conducted by the Universities of Nottingham and Exeter showed that there are currently very weak connections between the 650 charities and organisations working in social tourism in the UK. A stronger platform of networking based on freely available internet technology and software could easily be envisaged as a starting point to coordinate supply and demand in the current UK system.

## Conclusions

- Despite the economic turbulence within the European economy over the last five years, social tourism has gained a strong foothold in the tourism policies and systems of most European countries.
- All 28 EU member states have some form of social tourism support systems in place, although it has not been possible to collate standardised and consistent data across all countries.
- Even small and new member states are actively seeking to engage with the ideals and values of social tourism, at least in the context of anti-discriminatory policies for people with disabilities, but also often including full citizenship rights for all people regardless of age, ability, social background and gender.
- Social tourism has been found to have a positive impact on the economy of the nations that have evaluated their funding programmes.
- Some evidence is emerging on the social and personal effects of social tourism, and its potential to produce savings to the public finances in reductions in health and social care spending.
- There are a number of major publicly-financed schemes that have suffered from severe funding cuts in the last three years, which has impacted on the numbers of social tourists being supported. Yet a number of major new initiatives have also become established.
- Voucher schemes appear to be more resilient than state-subsidised package offers.
- Social tourism is becoming an interest area amongst the BRIC economies and beyond, with some more systematic policies in place.
- There is a great deal of scope for the UK to become a radical innovator in the field of social tourism. The UK has one of the most highly developed and competitive travel and tourism industries in the world, and if there was greater awareness within the sector about the purpose, scope and value of social tourism, there could be many opportunities for the UK to become a leading player in the global system.

## Appendix 1

According to EU policy, people from all levels of society should be able to enjoy holidays. The EU calls this “social tourism”.

There are four main target groups included in social tourism:

- underprivileged young adults (aged 18-30)
- families facing financial or other pressures
- people with disabilities
- over-65s and pensioners who cannot afford travel or are daunted by the challenges of organising a journey.

### The general development of Europe-wide social tourism

The key stakeholders involved in developing and promoting social tourism in Europe include:

- (1) The European Commission for Social Tourism – belong to the International Social Tourism Organisation
- (2) NECSTOUR – the network of European Regions for a Sustainable and Competitive Tourism
- (3) EESC – the European Economic and Social Committee
- (4) ENAT – the European Network for Accessible Tourism.
- (5) HOTREC – the voice of Hotels, Restaurants, Cafés and similar establishments in Europe.

In view of the success of Calypso tourism exchange project (see page 8) and interest in the initiatives undertaken to date, the Commission decided to seek additional possible avenues to finance Calypso-related exchanges in 2012. A budget of €450,000 was thus secured through the Entrepreneurship and Innovation Programme (EIP) for a fresh Call for Proposals on trans-national low season exchanges, which was issued around March/April 2012. Calypso focuses on tourism exchange among different European countries. Some good practices include:

- (1) European Senior Travellers (2010) promotes senior citizen exchanges between Portugal, Spain and Poland. In 2013, The European Commission provided a €1m budget to support further good proposals of facilitating trans-national low season tourism exchanges in Europe encouraging senior citizens to travel.
- (2) The Social Tourism European Exchanges Platform (2011) project aims at creating and developing a web-based platform as a mechanism to facilitate trans-national tourism particularly during the low season, and within the different Calypso target groups.
- (3) Holiday 4all (2013) is a project that aims to enhance and promote trans-national cooperation in the Danube macro-region in social tourism development, based on the Calypso platform. The total budget available through the program is €123,000, out of which €32,000 is set aside for the activities of NTO Montenegro.
- (4) OFF2013, the Hungarian-Polish project of Calypso supported by the EU facilitates low-season transnational exchanges of seniors and families facing difficult circumstances in Hungary and Poland.

### The development of social tourism within each country of the EU

Generally, social tourism within each country can be supported through three channels: the government, the private sector and the third party (NGO, unions etc). The support mechanisms include financial support, information support and facilities support. The finance support can take different forms including:

- Membership discount
- Voucher/coupon
- Direct payment to the suppliers
- Funding for the NGO to organise the trip
- Transport support (travel reduction, discount card)

## Appendix 2

### A note on methodology

An extensive search of online material was conducted. This was complemented with requests for additional information to key individuals and organisations, including the International Social Tourism Organisation. This type of secondary data search is not an entirely robust method for a project on social tourism because of the fact that social tourism as a concept is widely interpreted, and is not used as a systematic term across all European countries. Indeed, it is likely that a much wider range of support than this report identifies does exist, but under different terms.

The desk research included the following steps.

1. Identifying the key social tourism organisations and platforms (eg the European Commission, ENAT etc) and the collection of data on their websites. Data included published information on websites, published reports, newsletters and electronic magazines.
2. Searching relevant databases (ie Eurostat) and academic journals.
3. Searching key words for each EU country and some countries outside Europe such as Canada, Russia and Brazil. The key words used for searching are listed below:
  - social tourism/holiday for all/poor/young/senior/family
  - holiday support low income/disabled/family
  - accessible tourism/travel
  - holiday subsidy/tourism subsidy
  - travel allowance/holiday/travel financial support
  - holiday/travel vouchers
  - social inclusion
  - social protection
4. Identifying the key stakeholders responsible for social tourism in each country and searching their official websites.
5. For some countries there is limited information in English (France, Germany and Russia). Social tourism was identified in the local language and useful information was translated into English.
6. Contacting key stakeholders where information was not available on the website, to ask them a structured list of questions regarding the state of social tourism in their country.

# Social tourism profiles of EU member states

Comparative analysis by Dr Scott McCabe  
Research team: Dr Chunxiao Li and Egle Maslauskaitė

Country (alphabetically)	Stage of tourism development	Support system (particularly financial support)	Support focus (target groups)	Budget allocation (where available)	Number of participants	Aspects of good practice	Key stakeholders	Changes in recent years
<b>Austria</b>	Well-developed	Government-funded, mainly at state level  Decentralised structure based on nine states level, high number stakeholders	Families	State of Wien: €2.3m annual subsidy  State of Upper Austria: €200,000 annual subsidy. max €90 per week for low-income seniors		<i>Familienpass</i> (‘chequebook’ for low- income families). <i>Urlaub am Bauernhof</i> (holidays on farms)	Economic Chamber; Ministry of Economy, Family and Youth; Ministry of Labour, Social Affairs and Consumer Protection; Family Federation	No change to budget since 2009
<b>Belgium</b> (Flanders region)	Well-developed	Government-funded	Youth and low- income families	€500,000 (2012) from Flemish tourism ministry	105,000 in 2012	European Holiday Experience project (family exchange programme)	Tourism Office of Flanders. Support Centre Holiday Participation	Participants increased by 106% 2007–2012
<b>Bulgaria</b>	Developing	Mosly supported by NGOs  Union for Disabled People	Seniors, youth and people with disabilities  People with disabilities			Lukoil Jsc. company supports more than 1,000 seniors a year in Burgas region. ‘Dosed tourism’ (excursions for disabled people)	Ministry of Education (supports the recreation and tourism of children and students)	No response to our request for updated information
<b>Croatia</b>	Developing	Tourism Without Barriers programme supports local authorities, local tourist boards and associations to facilitate access to people with disabilities.  Caritas Zagreb provides holiday accommodation	Youth and people with disabilities  Children with difficulties  Families in difficult circumstances	Around €305,000 allocated 2008–2011 for adjustment of various tourism facilities for persons with disabilities  Six projects received financial support of 571,887 Croatian kuna (€78,880) (2010)  Usually one-week holidays		Three 2012 projects: Innovative Tourism, aiming to promote accessible tourism and raise awareness; one sensory-motor learning programme; and a recreational diving scheme for people with disabilities.	Ministry of Tourism; Croatian Youth Hostel Association  Ministry of Family Affairs, War Veterans and Intergenerational Solidarity  Caritas and Zagreb Red Cross	A Step Further, a new programme focused on improving the tourism sector for people with disabilities and reduced mobility

Country	Stage of tourism development	Support system (particularly financial support)	Support focus (target groups)	Budget allocation (where available)	Number of participants	Aspects of good practice	Key stakeholders	Changes in recent years
<b>Cyprus</b>	Well-developed	Government-funded.  Trade unions provide additional subsidies for members	Seniors and people with disabilities	2009: subsidy from Ministry of Labour and Social Insurance. 2010: €10m from Ministry of Energy, Commerce, Industry and Tourism to support the tourism industry by extending the season	Around 18,000 participants in 2009	Holidays for Disabled People Benefit since 1998. In 2007, 193 individuals applied for this benefit and around €49,408 was provided	Ministry of Labour and Social Insurance; Ministry of Energy, Commerce, Industry and Tourism	No response to our request for updated information
<b>Czech Republic</b>	Relatively well-developed	State and third sector parties/private sector  Tourism for All (2010) and Sub-programme Travelling Available to All (2011/12) by Ministry of Regional Development	Families, seniors, people with disabilities	CZK152m (approx. €6m) allocated from the state budget to this programme in 2010/11	6,501 seniors from the Czech Republic took part in Spain's Europe Senior Tourism project in 2010/11	Beskydy for All (social entrepreneurship and barrier-free travelling)  Family passports	Ministry of Regional Development	Budget cut from €6m to €2.4m in 2011/12
<b>Denmark</b>	Developing	Private foundation whose budget consists of interest and other returns of capital and amounts under the Holidays Act  Partly publicly funded	Supports holiday options for employees, especially disadvantaged families and children  Accessibility Labelling Scheme helps to create improvements for disabled people	In 2012 the total support for holidays was 108.6 DKK (approx €14.6m) of which 40.3m DKK (€5.4m) was used to support holidays for disadvantaged families and children		Access for Everybody ( <i>Tilgængelighed for Alle</i> )	Labour Market Holiday Fund  Danish Accessibility Association	Holiday Act amended in 2012 so that the state pays for administration of the fund
<b>Estonia</b>	Developing	Government-funded	Increased attention on information support for disabled travellers			Some financial support for sport and culture activities (eg School Holiday with Sport and Culture project)		
<b>Finland</b>	Developing	Privately funded by a not-for-profit gambling company	All people living in Finland who do not have resources and are unable to take holidays	Supported holiday may be granted for a maximum of every two years		Solaris-lomat organises holidays sponsored by Finland's Slot Machine Association		

Country	Stage of tourism development	Support system (particularly financial support)	Support focus (target groups)	Budget allocation (where available)	Number of participants	Aspects of good practice	Key stakeholders	Changes in recent years
<b>France</b>	Well-developed. Holidays have been recognised as a national objective	<i>Chèques-vacances</i> : holiday vouchers provided by ANCV  Family Holiday Fund (VACAF) has about 100 family credit offices and 1,700 accommodation facilities with reduced rates	Undifferentiated, open to all in society	Holiday, travel and leisure vouchers worth €1.4m issued by ANCV in 2012	Benefited 212,000 participants in 2012	<i>Seniors en vacances</i> : discounted holiday for seniors (50% discount)  <i>Tourisme et handicap</i> (provision of facilities for disabled people)	Secretary of State for Tourism; Agence Nationale pour les Chèques-vacances; Ministry of Social Affairs and Family Credit Offices Department	An increase of 5.5% from 2011 to 2012
<b>Germany</b>	Relatively well-developed. Decentralised tourism structure	Government's Tourism for All project, launched in 2011, concluded December 2013	Youth, families, people with disabilities				Nationale Koordinationsstelle Tourismus für Alle e.V.; Ministry for Economy and Technology of the German Department of Tourism; Ministry for Family, Seniors, Women and Youth	No response to our request for updated information
<b>Greece</b>	Well-developed. Support of low-income domestic tourists is part of national tourism strategy	Holiday vouchers/coupons, mainly for accommodation, provided by Greek National Tourism Organisation and Workers' Social Benefits Organisation	Seniors, youth and people with disabilities	National programme Tourism for All received €15m funding for 2008–2010.  Also funding from the Agricultural Insurance Organization	750,000 vouchers distributed in 2009	TraVeL AGents (exchange programme for seniors). Therapeutic Tourism (provided by the Social Insurance Institute for pensioners). Get To Know My Country (national tourism programme for young people)	Greek National Tourism Organisation; Workers' Social Benefits Organisation; Ministry of Health and Social Security; Social Insurance Institute	Around 120,000 farmers will be subsidised for a holiday for 2013/14
<b>Hungary</b>	Well-developed	Holiday (recreation) voucher system has operated in Hungary since 1998 and is enshrined in law (Erzsébet Programme). Recreation opportunities also provided by National Association of Large Families and Association of pensioners' clubs	Youth, seniors, families	Hungarian National Holiday Foundation provides €10m annual funding (2012/13)	2013: 145,000 people in total, including 80,000 children, 28,000 pensioners, 33,000 large families and 5,000 people with disabilities	Fill Years with Life: association of pensioners' clubs provides recreation opportunity to around 120,000 members	Ministry of Social Affairs; National Holiday Foundation; Zánka Children and Youth Centre; Association of pensioners' clubs and elderly people; National Association of Large Families	2014 budget increased to €11.7m

Country	Stage of tourism development	Support system (particularly financial support)	Support focus (target groups)	Budget allocation (where available)	Number of participants	Aspects of good practice	Key stakeholders	Changes in recent years
<b>Ireland</b>	Developing	Most support from voluntary and civil society organisations (eg St Vincent de Paul)	Children and people with disabilities		Sunshine Fund supported 1,200 children for a holiday in 2009	Time For You (bedrooms for families living with disabled children or adults). Give Us a Break project (grant for disadvantaged children) since 2005	Fáilte Ireland; Department of Social and Family Affairs; Dublin Institute of Technology – Tourism Research Centre (social tourism research)	No response to our request for updated information
<b>Italy</b>	Well-developed. Make It Accessible, Italy's first White Paper on Tourism for All published 2013	Holiday vouchers issued by Italian Federation for Social Tourism (FITuS) for low-income families since 2001	Low-income families, people with disabilities	State-funded holiday grants between 20% and 45%, depending on the family's income. Thus a family of four with an annual income of up to €25,000 receives a coupon worth €1,240, of which the family pays just €682		Assistance provided for the visually impaired. The first social tourism portal (provides information and creates a social network for exchanging experiences)	Italian Federation for Social Tourism; Italian Federation for Free Time Activities, CTS (Youth Tourism Centre)	No response to our request for updated information
<b>Latvia</b>	Developing	Mainly NGOs, local authorities and some entrepreneurs	Seniors Young people Seniors and low-income families Adults with disabilities	EU-funded programmes provide free or reduced-price travel (2009)	Holidays for 350 families and a total of 800 persons (2008)	Travel packages (to Czech Republic, Slovakia and Hungary) for low-income families	NGO Baltā māja (White House); NGO Latvian Youth Council, European Youth Forum; IMPRO ceļojumi (IMPRO Travel) Ltd; Organisation for Persons with Special Needs	Not possible to obtain detailed updates for these programmes
<b>Lithuania</b>	Developing	Government funded  Local municipalities  Private and European funds	Children from disadvantaged families	Siauliai municipality allocated LT60,000 (€17,400) for summer camps in 2013. The EU reimburses 30% of the amount for the number of packages guaranteed, 10% of provided places (2013)	150 children received camp vouchers for rural areas, and 419 were given places in day camps	<i>Vaikų poilsis</i> : summer camps and holiday accommodation for children	Ministry of Education  Rights of the Child Protection Division  Education Exchanges Support Foundation	Since 2010, due to budget cuts support has been stopped

Country	Stage of tourism development	Support system (particularly financial support)	Support focus (target groups)	Budget allocation (where available)	Number of participants	Aspects of good practice	Key stakeholders	Changes in recent years
<b>Luxembourg</b>	Low-level development	There is some information on accessible tourism						
<b>Malta</b>	Developing	No specific government funding for social tourism. Some small initiatives such as the Sovereign Military Hospitaller of St John which supports pilgrimages to Lourdes. Some activities piloted through the Calypso programme	People with disabilities			Calypso project  Accessible tourism web portal with 8-10% discounts	TSDU (Tourism and Sustainable Development Unit)  Ministry of Social Policy	Not possible to obtain detailed updates for these programmes
<b>Netherlands</b>	Developing	Government-funded since the launch of Accessible Tourism NL in 2011	People with disabilities					
<b>Poland</b>	Developing	Some government funding for domestic day trips and summer camps for young people. NGOs and charities are active in social tourism	Seniors, youth, people with disabilities	No Government or EU funding for OFF2013. The exchange programme relies on supply side in both countries making discounted capacity available		OFF2013 project (senior and family exchange programme with Hungary) TraVeL AGents (support for seniors). Summer camps for children from low-income families	Ministry of Sport and Tourism  National Fund for the Rehabilitation of Disabled Persons	
<b>Portugal</b>	Well-developed	Government funding through INATEL (National Institute for Workers' Leisure Time Occupation)	Seniors, youth, people with disabilities	INATEL senior programme provides around €3m annually for senior social tourism programme (2013)	Benefits around 40,000 seniors each year	INATEL-IMSERSO off-season senior exchange between Spain and Portugal  Programa Turismo Sénior (spas for seniors)  Turismo de Portugal I.P. (network of Youth Hostels)  Praia Acessível- Accessible Beach	INATEL (National Institute for Workers' Leisure Time Occupation)  Ministry of Employment and Social Solidarity  União de Misericórdias	Government stopped the funding of the programme. INATEL continues offering support, but to a reduced number of participants, and the cost of support has risen from €50 to €150 per person.

Country	Stage of tourism development	Support system (particularly financial support)	Support focus (target groups)	Budget allocation (where available)	Number of participants	Aspects of good practice	Key stakeholders	Changes in recent years
<b>Romania</b>	Well-developed	Government funding through free holiday/ tourism vouchers for employees since 2009  Subsidised treatment vouchers for seniors and people with disabilities	Seniors, youth, disabled people, workers	Around €2.5m of vouchers distributed per year (2009)  217,231 spa tickets provided by the government (2009)	Benefits around 6,300 employees	Youth camps. Free spa treatment vouchers for seniors and disabled people	National Pension and other social insurance funds; Ministry of Regional Development and Tourism; Ministry of Education, Youth and Sports; Federation of Romanian Tourism Employers	No response to our request for updated information
<b>Slovakia</b>	Developing. Tourism for All incorporated in national tourism development strategy since 2007	Government-funded	People with disabilities, workers, seniors			State-subsidised SOREA hotels provide stays for non-working Slovak citizens (retired and disabled people). Recreation vouchers since 2010	Ministry of Economy  Ministry of Labour, Social Affairs and Family	No response to our request for updated information
<b>Slovenia</b>	Developing	Pensioners entitled to holiday bonuses. European funds for people with disabilities. Trade unions provide grants for families with difficulties	People with disabilities, seniors, workers, families			Trade unions' holiday facilities offered to young people, seniors and people with disabilities at lower-than-market prices	Ministry of Economy; Office of the Republic of Slovenia for Youth, Trade Unions	Withdrew from Calypso in 2010 citing lack of industry and NGO interest and strong budgetary constraints
<b>Spain</b>	Well-developed	Government funding through IMSERSO  Support for seniors well established at the European level through Europe Senior Tourism	Seniors, people with disabilities	€69m (+ €35m for the spa trip programme) in 2013/14. As well as the senior low-season initiative, IMSERSO also allocates over €5m annually to subsidise NGOs supporting disabled people (Calypso Spain 2010)	Supports 1 million seniors per year during the low season (Calypso Spain 2010)		SEGITTUR (state-owned company for the management of innovation and tourism technologies)	Budget nearly halved since 2010/11 (€134m + €35m for spas). Reduced funds will still support around 900,000 people
<b>Sweden</b>	Developing	Tourism for All project launched in 1995		Financial and human resources are limited				

Country	Stage of tourism development	Support system (particularly financial support)	Support focus (target groups)	Budget allocation (where available)	Number of participants	Aspects of good practice	Key stakeholders	Changes in recent years
<b>United Kingdom</b>	Developing	<p>Some indirect government funding. Local authorities may support tourism opportunities, but mostly in the form of respite opportunities for families with a disabled member</p> <p>Social tourism supported and provided by charities such as Family Holiday Association and Youth Hostel Association. Tourism For All is also active in supporting people with disabilities</p> <p>Scottish Parliament provided £700,000 for the Take a Break Scotland scheme in 2013</p> <p>Some trade unions, such as UNISON Welfare, provide discounted accommodation for workers</p>	Low-income families, youth, people with disabilities and/or terminal or life-limiting illnesses, seniors, low-income workers	Around 600 charities in the UK actively involved in social tourism and related activities (provision of respite opportunities)	In a 2013 survey, 43% of respondents were able to support up to 50 beneficiaries each year, with 86% supporting up to 500. The Family Holiday Association provided support to more than 2,000 families in 2013. Family Fund provided grants to 21,192 families in 2012/13, plus 7,000 more were supported with a day trip.	Family Fund provides an important source of social tourism financial support to families with severely disabled children	Family Fund; Family Holiday Association; Tourism For All; National Benevolent Fund for the Aged; Make a Wish; Sandrose; UNISON Welfare	2013 survey by the Universities of Exeter and Nottingham found that 69% of respondents experienced an increased demand for services in the past three years; 40% of social tourism providers reported an increase in demand for holidays and short breaks; 60% felt the current economic climate has had a negative impact on funding