

THE OPPORTUNITIES IN ACCESSIBLE TOURISM

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Abstract:

In recent years people with disabilities have played increasingly important role in tourism. The World Tourism Organization (UNWTO) chose themes in 2014 (Community Building) and in 2016 (Tourism for All), in connection with the World Tourism Day and several conferences focusing on people with disabilities. Nowadays, more than 1 billion people live with some kind of disabilities and their number will increase in the coming years, due to the growing average age (17). People with disabilities have to fight with a lot of things, whether it is to do their daily life or to travel to another town or country. In recent years steps have been made in the field of accessibility, development, but in this respect Hungary is still lagging behind. It will take several years to reach the level of Western European or Northern European countries in terms of being socially responsible and infrastructure-oriented. The increase in the average age of the earth's population, motorization (accidents) are also contributing to increase the number of people in this segment, so the development and existence of accessible tourism is becoming essential. In the light of the above, the study highlights the concepts and importance of accessibility, the actors of accessible tourism, its potential and beneficiaries. As we will see, apart from people with disabilities, accessibility affects more people than we would first think. It also has a greater potential, more visitors and more revenue for the economy of a given destination, so it becomes clear why we should invest in accessible tourism.

Key words: people with disabilities, trends, accessibility, accessible tourism, development

JEL classification: J11, J14, L83, Z32

INTRODUCTION

People with disabilities have come to the forefront in connection with the recent developments in Hungary, including tourism. In the case of developments and investments, it is necessary to consider the requirements which also apply to accessibility, thus making the institutions accessible to people with disabilities. As we will see, accessibility and its importance are major questions not only for people with disabilities, but for almost everyone, because any of us can rely on help, either temporarily or as a result of an accident or illness, while at the same time, accessibility makes everyday life easier for the whole society too. The aim of the study is to show accessibility and its importance, thus the feasibility and potential of accessible tourism.

1. ACCESSIBILITY

In most cases, the reason against accessibility is that it affects only a few people, so it is not worth dealing with. As we will see later, not only people with different disabilities need to be considered, but also the elderly and families with small children using the stroller, because they need the same infrastructure. Due to an illness or an accident, it may be necessary for us to use periodically for example the transport network or in the case of administration, the assistance of our assistant, so the number of indirectly affected persons in Hungary is about 1.3 million people, one-seventh of the population (2).

The concepts of physical accessibility and accessibility are interrelated, and these relate primarily to the built environment. In Hungary, the requirement of accessibility is defined in the „1997 LXXVIII. law defines the shaping and protection of the built environment“, and on this basis „Accessible: the built environment when its convenient, secure, self-contained use is provided for all people, including those who have health problems or groups of people who need special tools or technical solutions to do so.”(5) Most important from these is that people with disabilities can use the built environment comfortably, safely and independently. As the technical possibilities for accessibility have evolved, the UN Convention on the Rights of Persons with Disabilities uses the term accessibility.

Since the UN Convention does not provide a precise definition of the concept of accessibility, it only sets out a set of requirements for measures to ensure accessibility, on the basis of that „In order to enable persons with disabilities to live independently and to participate fully in all areas of life, measures should be taken to ensure that persons with disabilities are provided with the same physical environment, transport, information and communication on an equal basis with others, information and communication technologies and systems, as well as access to other publicly available or available opportunities and services, both in urban and rural areas. These measures, which include the identification and elimination of access barriers.”(5) One of the most important innovations of the UN Convention is that, in addition to physical accessibility, it also calls for the elimination of information and communication barriers. In Hungary, the term “complex accessibility” has spread, which means the accessibility of several buildings and products in several aspects, and in international practice the expression of equal access is used. Along with equal access, a new approach, a universal design approach has spread in recent years. This concept has also been introduced by the UN Convention: „By design, we mean designing products, the environment, programs and services in such a way that they are as accessible as possible to all people without the need for adaptation or special design. Universal design should not exclude the use of supportive tools and technologies for disabled people in justified cases.”(5) The big innovation of the concept is that it should not be made accessible during the planning process, but that the facilities should be designed so that everyone can use them as much as possible. In connection with this, new standards have been published, which were developed by CEN (European Committee for Standardization) and CENELEC (European Committee for Electrotechnical Standardization) in 2014. It identified three important skill groups that should be taken into consideration in standards and design, with sensory, physical, and understanding abilities (5). People with disabilities are able to live, organize, make decisions, since independent living is the right of self-determination of people with disabilities, philosophy of life, attitude and their practical implementation, as well as the possibility of equal life.

It can also be seen from the above that besides physical accessibility, the accessibility of information is also displayed, thus making communication easier. In addition, there is a need for a complete change of attitude, say – quoting one of our interviewees - "accessibility in the head" for all members of society. This is basically a sense of social sensitivity for people to know and accept, understand, and consider their disabled fellows full-fledged and worthy human beings. It is especially important to sensitize children and young people to develop this, i.e. getting to know people with disabilities from a very young age, for example, in the framework of chance classes where they can see their daily lives. While making something accessible, it is a basic requirement that not only the aspects of people with physical disabilities should be considered, because the needs of people with different disabilities are also different. For example, a blind and visually impaired person needs to have signs on the sidewalk (e.g. a guide bar), and a signal light sounds, can be read, Braille readable e.g. a menu or tactile map or attraction. In the case of deaf and hard of hearing people, visual transmission of information can draw attention to the strong, flashing lights, or transmit the necessary information with the help of an induction loop / amplifier.

Figure no. 1 shows the pyramid of accessibility, which is made for tourism and shows the correlation between the degree of accessibility, the size of investments and the relationship between supply and demand. The pyramid represents the entire market of tourist attractions available in the

region, with bottom-up tourism services increasingly tailored to the specific needs of customers, thus increasing accessibility and the size of specific investment associated with it, while service providers giving special offerings the number of people using it, on the other hand, is decreasing (8).

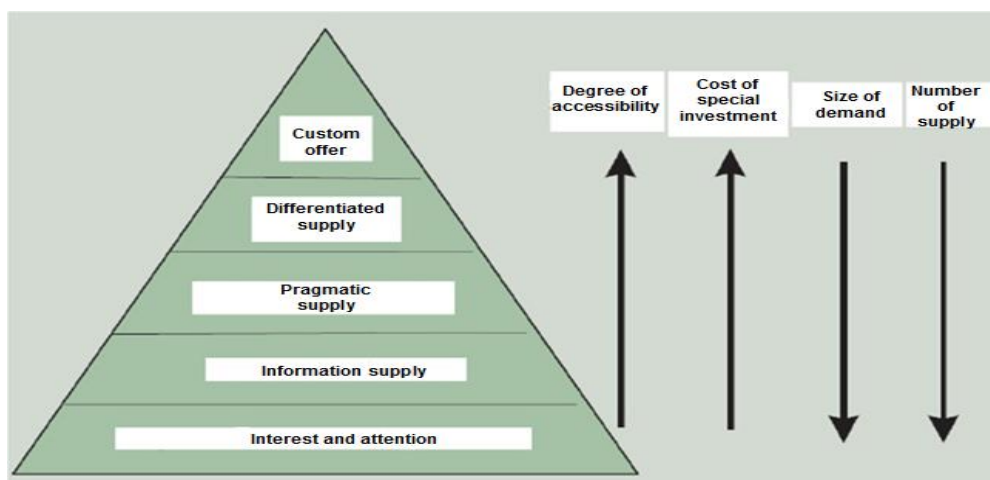


Figure 1. The pyramid of accessibility

Source: Akadálymentes turizmus... (w.n.), page 8., based on own editing

The pyramid consists of different levels, which are built on each other. On the lower level, there are many tourist services providers who spend little (or nothing) on accessibility because they focus on other segments or even have a relatively large number of handicapped tourists, even with low investment, by improving information and increasing service orientation. There are also companies in the middle of the pyramid which invest more money in accessibility, because they can expect higher revenues, these investments are still partly pragmatic and partly due to differentiated planning, with people with disabilities being a significant target group. At the top of the pyramid there are the leading tourist services providers who make great efforts to offer personalized tourism products to people with disabilities.

Considering the Pyramid of Accessibility, we can make the following basic statement: if tourism services invest only in accessible services, sales are expected to be significantly higher than investment costs by opening a new target market through accessible services. Each service provider keeps an eye on optimal investments and positions itself within a particular market segment within the pyramid. The return on investment depends on many factors, such as the location of the destination and its accessibility, the number of competitors and its offer. Tourism services are different in terms of spending and revenue, yet many examples show that investment in accessible tourism is recovering and generates additional demand.

This pyramid is applicable to all elements of the tourism service chain, the different offers. It can also be used in the area of accommodation, gastronomy, leisure and cultural activities, and the networking of these elements of the tourism service chain is particularly important (8). In order to analyze the economic effects of accessible tourism, the following models (6) have been designed to analyze different trends of development depending on the current situation of accessibility in a given region, and we can also see the intensity of the implementation of accessible tourism concepts.

In the "Inaction model", the region does nothing, does not deal with this market segment, thus it loses market share.

In the case of the "Adaptation Model", the region takes small steps towards accessibility, the investments are planned according to the supply, so some of the potential demand is met.

In the "Center of gravity model", the whole region focuses on the segment generating a supply that can lead to a significant increase in demand, as investments are made on the basis of strategic and

coordinated planning. As more and more people are dealing with the segment, higher revenue can be expected, so in the case of the first model it is about 20%, 50% for the second model and 100% for the third model. From these, it can also be seen that where this segment is properly dealt with, 50% or higher traffic growth can be expected (6).

According to the European Commission, in 2012, € 352 billion of revenue came from accessible tourism, which directly contributed to 4 million jobs, and to 9 million jobs indirectly. In the European Union in the same year, less than 30% of tourism products included accessible services (18).

It can also be seen that people with disabilities is a serious market and so is the number and spending of people who use the same infrastructure.

2. NUMBER OF PEOPLE WITH DISABILITIES - FORECASTS AND TRENDS

The reason why it is worth investing into accessible tourism is shown on the following figure, as the number of both older and disabled people is increasing. The latest UN survey shows that there are currently nearly 7.6 billion people living on Earth and this number is growing (83 million per year), will exceed 8 billion by 2030, and reach 9.8 billion by 2050. Over the next seven years, India's population is expected to exceed China, so India will be the most populous country, and half of the global population will live in 10 countries in 2050 (16).

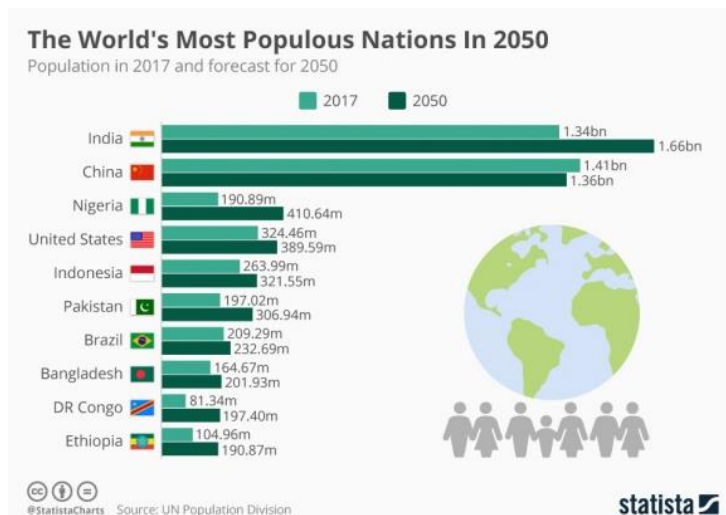


Figure 2. The World's most populous nations in 2050

Source: Statista (16)

There are 962 million people over the age of 60 in the world, which is 13 percent of the population, and this number is constantly expanding in the upcoming years (16). Worldwide, 1 billion people live with disabilities, 15% of the world's population (13). It is estimated that by 2030, that 1.4 billion people will be over 60 years of age, by 2050 there will be 2 billion people over 60 years of age (20% of the population) (13), and by 2100, it can reach 3.1 billion over 60 (16). According to the UN forecast, by 2025, 14% of the population in the Asia-Pacific region will be over 60, and in Western Australia, half of the population over 60 will be disabled, and in Canada, 46% of those over 65 will be disabled (7).

The average age of the European population will increase from 39 to 46 years in the next 40 years, the proportion of people over 60 will increase from 21% to 33%, while the proportion of those under 15 will fall from 23% to 19%, The proportion of 80-year-old and older people will increase by 300% by 2020 compared to 1960 in the European Union (Iván, 2000).

Nearly 80 million people in the European Union live with disabilities, every sixth people (1). With the aging of the population, this figure is expected to increase, as well as the rate of

disability among people over 75, which is currently one third, of which 20% are severely constrained by the disability's everyday life (4).

In the upcoming decades, there will be a significant increase in the number of affected, which will require even greater access to all areas of people with disabilities.

An important objective of the European Disability Strategy is to be fully inclusive of economic and social participation and to remove barrier in the following areas: accessibility, participation, equality, employment, education and training, social protection, health and external action (10).

Because of the special infrastructure and accessibility conditions, this also places the tourist sector in a challenging position and may provide access to special needs target groups.

The emergence of people with disabilities in tourism is becoming more common and service providers are beginning to recognize the potential of this segment. They are not traveling alone, but with at least one attendant, so it is also beneficial in terms of revenue. More and more hotels have accessible rooms, and more and more attractions make it possible for tourists with special needs to visit them, thus enabling these people to join the trips.

3. ACCESSIBLE TOURISM

There are four basic elements in the requirements for accessible tourism: information, service, mobility and experience. Information is needed to plan and implement a vacation / trip. In the case of the service, people with disabilities should be recognized as an equal tourist target group, but individual assistance may be required depending on the degree of their disability. Mobility means accessible public spaces, infrastructure and public transport, as well as accessibility to tourist attractions. Experience in each destination means the livelihood of tourist services, accessible hotel and gastronomic facilities, access to tourist and leisure facilities.

For accessible holidays, openness and the knowledge of guests' problems, access to basic information, and access to the entire tourist service chain are essential.

Before traveling, during the preparation, the right information is more important for people with disabilities than for a healthy person, because one piece of incorrect information is enough to spoil the holiday, for example, they cannot enter the room due to the width of the door. Accurate information should be available on the website of the tourism service provider, such as accessibility, opening hours, advantageous information in a separate menu item. Beyond the information materials, the attitude and information of the staff is also important in order to provide appropriate answers.

Accessible transport facilities and related transport infrastructure, information points are important for getting to and staying in the destination. For those arriving by car or bus, it is necessary to set up accessible parking spaces. Approaches, design, transport and attitude of staff and hospitality are important for accommodation and catering facilities.

It is necessary to have access to attractions and programs in order to spend our time in a good and quality way especially for people with disabilities. Appropriate infrastructure, transport, attractions, services and leisure facilities are important, personalized service such as a special guided tour. In order to look at an attraction or to participate in a program, it is necessary to have the right information and access to it, the preparedness of those working in the tourism industry, and the attitude towards the segment (6).

4. ECONOMIC IMPACTS OF ACCESSIBLE TOURISM

Several research has been carried out in the United States to survey how many people with disabilities travel, what their typical travel habits are, and what the economic impact of their travel is. It is worth highlighting the surveys of Open Doors Organization (ODO) made in 2002, 2005 and 2015, as they are detailed and contain a lot of information. Based on the results of the survey it can be concluded that in general, the results of the 2015 research show that over 26 million people with

disabilities traveled, meaning 73 million trips at that time. 17.3 billion dollars a year were spent (\$ 13.6 billion in 2002), they travelled with one or more adults generating \$ 34.6 billion in revenue. 72% of them met a difficulty when travelling by airplane, 65% had problems at the airport (in 2005, these rates were 84% and 82% showing a decrease in the percentage of complaints). The number of complaints in hotels and restaurants has also decreased (14). 31% of people with disabilities travelled by plane, spent an average \$ 500 per person on one trip. They mainly travel with their own car (79%), 43% by plane, respectively. 11 million passengers were registered in 2015, with 23 million trips, meaning \$ 9 billion in revenue (\$ 5.8 billion in 2005). 10% travelled by boat, which means 4 million travelers, 7 million trips and \$ 11 billion in revenue (ticket price), plus they spend \$ 1.5 billion on trips. 76% stayed in hotels and spent \$ 100 a day. At the same time, we can say that 46% of them encountered an obstacle when using the accommodation (e.g. inadequate location of rooms inside the hotel, hard-to-open doors, inconvenient shower facilities), which was 60% in 2005. 28% of people with disabilities travelled outside the USA, the Caribbean, Europe (Germany, England and France), Central or South America and Canada (15). In a research made in 2015 (11), the travelling habits of people with disabilities and its economic impact were studied in Europe, which revealed the following. Disabled people and seniors spend an average of € 80 a day in Europe, if they go for several days, they spend € 700 per trip in their own country and € 1100 in another EU country. This segment contributed € 352 billion to the EU economy in 2012-2013, meaning € 786 billion for the EU economy considering direct and indirect effects. Those arriving from the 11 entry markets spend an average of € 1,000 on a journey and are accompanied by an average of 1.9 people. China, USA and Brazil are the largest disabled entry markets with 31, 32, 32 million people. Most seniors live in France, Germany, Italy and the United Kingdom, so these countries are the largest markets who send disabled people to Europe. China and India will be a potential market sending seniors in the future (this is also supported by the statistics presented earlier). Malta stands out with an increase of 3.1% per year (people with access needs), the Netherlands are heading to the top in the senior market.

For the European Union, the BRICS countries and the US are the most important international entry markets for people with disabilities (11).

As we can see from the research of the USA and European markets, the segment of people with disabilities is a huge market. As they have a purchasing power and travel willingness as well, it is worth focusing on them, not only now, but based on predictions also in the future. In addition to material factors, attitudes are also important when servicing disabled people. This aspect is necessary to be recognized by the representatives of the tourism sector.

5. THE BENEFICIARIES OF THE ACCESSIBLE TOURISM

The target group of the accessible tourism is not only the disabled person, but all people with temporary or permanent disability. Let it be an age-related difficulty, such as age-restricted mobility, or the necessity of wearing strong dioptric glasses because of eye damage or even using a prism. Accessibility therefore provides several opportunities for improving the quality of life in parallel to several target groups at the same time. There are those ones who the accessibility is essential for ("Essential for 10%"), those who need it ("Necessary for 40%"), but at the same time it also provides comfort for the whole of society and make everyday life easier ("Comfortable for 100%") (Figure no. 3).

The study of UNWTO made in 2016 also deals with the benefits of accessible tourism. In the research people with disabilities are dominant but not exclusive. In the chart "The beneficiaries of accessible tourism", a number of other groups are identified. Besides the elderly who seems to be evident, those with strollers, or those with temporary injuries, the diagram also shows people who are obese, short or tall, or people carrying large items. It also includes people with allergies and / or food intolerances, which group nowadays is an increasing proportion of the population (Figure no. 4).

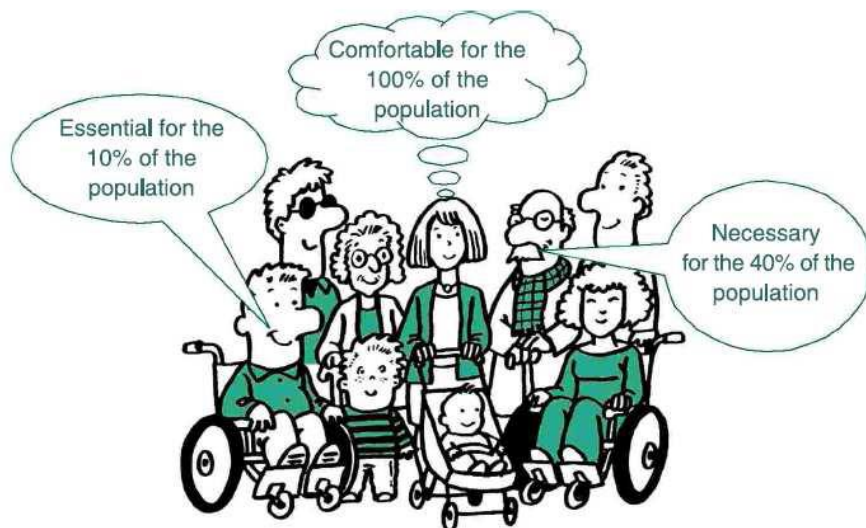


Figure 3. Benefits of accessible tourism

Source: Notes of Judit Polgár (w.n.), Manuscript

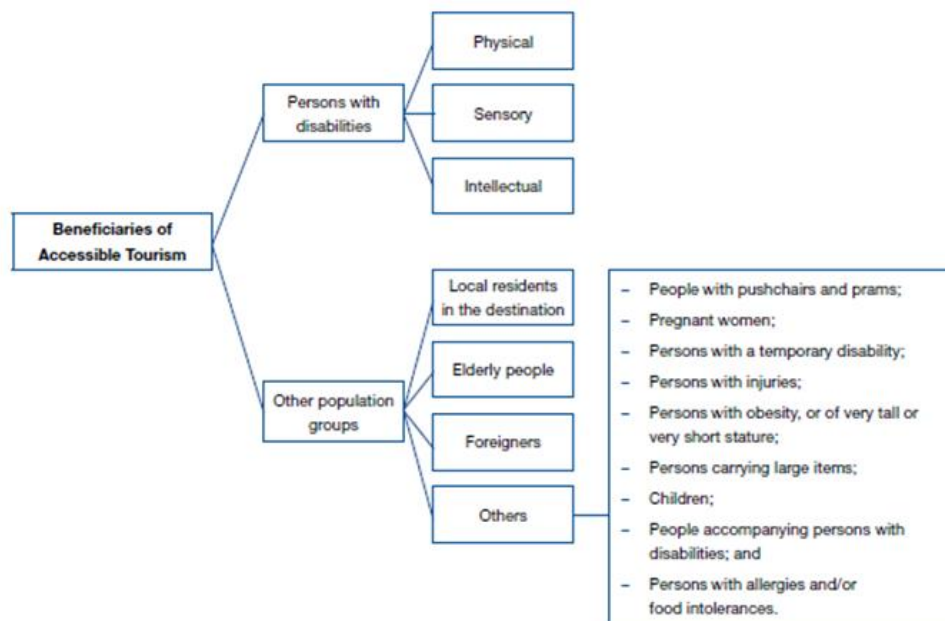


Figure 4. The beneficiaries of accessible tourism

Source: UNWTO (2016): Manual on Accessible Tourism...page 36.

In the concept of “tourism for all”, accessible tourism is closely linked to the concepts of sustainable tourism and social tourism. In the case of accessible tourism, universal planning ensures that everyone can enjoy the opportunities offered by tourism, regardless of ability or condition. In the case of sustainable tourism, the protection of the environment and cultural resources as well as the well-being of the communities come to the front. The aim of social tourism is to provide access to tourism for those with low-income, families, elderly or disabled people. Figure no. 5 illustrates their connection with Tourism for All.



Figure 5. Accessible tourism - Tourism for All

Source: UNWTO (2016): Manual on Accessible Tourism...page 22.

These two figures summarize representatively why accessible planning is important, who it concerns, and who can benefit from it. It can also be seen that actually anyone can be considered a potential target market, thus the revenue of a given country can grow by segments, and if we want sustainable tourism, everyone must be considered.

6. CONCLUSION

In the last decades, it has become evident at international level that dealing with people with disabilities is not just a social or health issue, but a human rights issue as well. The main point of the change of attitude is that people with different types of disability have the same human rights as any other citizen. It is not pity that they need but a real acceptance which is the responsibility of society and which means equal opportunities and social resources and services (such as new technologies, consumer goods, products, work, various services, including education, health, social, cultural and tourist services, transport). However, promoting a supportive and accessible environment requires proper preparedness, physical, communication and cognitive accessibility, requiring a better understanding of the social needs and rights of disabled people.

In our study, concerning accessible tourism we wanted to show how important accessibility is, which looks like a special area, but in reality it is not. Although the implementation of accessibility in the segments of transport or tourism is an indispensable necessity for the involvement of disabled people, we have shown in our study that it is a much larger segment simultaneously providing opportunities for improving the quality of life in parallel with several target groups and ultimately gives comfort for the whole society.

Accessible tourism is important to everyone, and it is in the interest of tourism service to win a market that is much larger than we can think first. However, 'accessibility in the heads' has an important role in developing services. The aim is to develop services that can be used by a wider audience, which is also reflected in the performance of economic indicators.

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