

## Abstract

### **Assessing the market attractiveness and the development of the accessible tourism industry: a focus on major travel and leisure companies.**

This study examines the accessible tourism market potential, alongside the implications of operating in the accessible tourism market and an assessment of major travel and leisure company involvement. An analysis of the accessible tourism market value potential was conducted, and a sample of major travel and leisure companies were approached in order to identify a cohort of managers with whom interviews could be carried out. The research focused on providing a market value forecast using historic data from 2005 and extrapolating this to 2025. An examination of the reasons for and against major travel and leisure company involvement in the accessible tourism market was accompanied by an analysis of managerial perceptions. Sources for the market analysis confirmed the validity of the data and revealed a number of findings.

People with disabilities have been served poorly by the tourism industry. Research on accessible tourism and spending power of disabled tourists has dispelled the myth that persons with disabilities are poor, however due to a lack of a comprehensive solution in the tourism industry, spending on barrier free tourism remains distant. With increasing disability rates and an ageing population seeking an active and adventurous post work life, the tourism industry will soon find their core customer evolving with this demographic change.

It is essential the travel and leisure industry creates and implements strategies to remove existing physical, attitudinal, and informational barriers to accessible tourism. Major travel and leisure companies will have a critical influence in delivering these initiatives.

**The study indicates that the accessible tourism market is a distinct sector, possessing the capacity for extensive future growth, and thus presents major travel providers with a potentially substantial and lucrative market.**

Keywords: Accessible tourism, Disability, Market Analysis, Market Size, Suppliers, Partnerships, Travel and Leisure, Tour operators

### 1.1. Paper Aim and Research question

Previous literature on accessible tourism has often focussed on defining terminology, analysing theoretical approaches and focusing attention on issues faced by disabled tourists. An area covered in less detail is major travel and leisure company involvement. This paper aims to provide an overview of the accessible tourism market potential, alongside the implications of operating in the accessible tourism market and an assessment of major travel and leisure company involvement. To examine this, the research is split into two parts:

1. An analysis of the accessible tourism market value potential;
2. An examination of the reasons for and against major travel and leisure company involvement in the accessible tourism market. This is accompanied with an analysis of perceptions of managers in strategic positions of these organisations.

This dissertation looks to further exemplify the value creation opportunity of opening up the accessible tourism consumer segment as well as increasing the transparency of major travel and leisure companies and their involvement in this particular market.

Within chapter two a range of literature has been reviewed, identifying current authors' work surrounding issues faced by disabled tourists and the barriers that prevent accessible tourism. Chapter three explains and outlines a series of theoretical and practical justifications of the methods employed for the use of quantitative and qualitative research methods, and offers reflections upon the benefits and drawbacks to a mixed methods approach to research. Chapter four, the analysis and discussion of findings, draws upon the market value analysis data to confirm or refute the wider literature, and interview data which aims to provide a critical evaluation on managerial perceptions and reasons behind major travel and leisure company activity. Chapter five, the conclusion, discusses the main findings from the research and highlights an area for further research.

## Research Highlights

- The general demand for accessibility in Europe alone exceeded 120 million people in 2005, more than 27% of the European population at the time. It is estimated that by the end of 2025 this demand will reach an approximated 160 million people.
- An analysis of the market size showed that 70% of the population demanding accessibility have both the financial as well as the physical capabilities to travel, generating potential revenues of €88.6 billion by 2025. This represents a 65% growth rate (2.56% CAGR) from 2005, when the last paper to conduct this type of research was published.
- With the ageing of the baby boomer population and their accompanying burden of disease, future disability rates are expected to increase. It is forecast that 35% of the population in developed countries will be at least 60 years old in 2050. This demographic containing a greater proportion of seniors, unlike past generations, is seeking an active and adventurous experience for their post work lives, and tourism is seen as an important component of their quest for life experiences.
- Research on accessible tourism and spending power of disabled tourists has dispelled the myth that people with disabilities are poor. The Federal Ministry of Economics and Labour found on average, the disabled tourist spends 1.16 times more than the able bodied tourist.
- There is a very small percentage of the market that addresses the needs for accessible tourism. 63% of major travel and leisure company representatives who took part in this research stated their company did not sell accessible products. Currently there is no comprehensive solution that provides people with disabilities with the same travelling opportunities that an able bodied person has. For this to improve, a combination of increased awareness, education, legislation, partnerships and the resolve to invest in universal design will be required in the travel and leisure industry.

**Abstract from the Dissertation Submitted in Partial Fulfillment of the Requirements for the Degree of Bachelor of Science in Sport Management.**

**School of Sport, Exercise and Health Sciences LOUGHBOROUGH UNIVERSITY, 2014.**