ASSESSING THE MARKET ATTRACTIVENESS AND DEVELOPMENT OF THE ACCESSIBLE TOURISM INDUSTRY IN EUROPE: A FOCUS ON MAJOR TRAVEL AND LEISURE COMPANIES.

By

JAMES BOWTELL

An extract from the Dissertation Submitted in Partial
Fulfilment of the Requirements for the
Degree of Bachelor of Science in
Sport Management

School of Sport, Exercise and Health Sciences

LOUGHBOROUGH UNIVERSITY

01/05/2014

© Loughborough University

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 value of the accessible tourism market, alongside the implications of operating in the accessible tourism market and an assessment of major travel and leisure company involvement. An analysis of the market value 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. 12 in depth interviews were completed. 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 may find their core customer evolve 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.

Table of Contents

Table of figures:

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.

1. Introduction

1.1. Paper Aim and Research question

Accessible tourism is an evolving area of academic study and industry practice (Darcy and Buhalis, 2011). The coming together of an ageing population and focus on inclusion and accessibility has led to an increase in the literature and exploration of theoretical concepts that underpin the developing accessible tourism industry. The accessible tourism market includes tourists with varying levels of accessibility requirements who have been poorly served by the tourism industry (Miller and Kirk, 2002). Previous literature on accessible tourism has often focussed on defining terminology (Darcy, 1998; Aitchison, 2003; Buhalis, Eichhorn, Michopoulou and Miller, 2005; Darcy and Buhalis, 2011), analysing theoretical approaches (Darcy, 1998; Buhalis et al. 2005; Darcy, Cameron, Dwyer, Taylor, Wong and Thomson, 2008) and focusing attention on issues faced by disabled tourists (Brouillette, Hotchkiss, and Saleh, 1995; Burnette, 2011). 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:

- An analysis of the accessible tourism market value;
- 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.

2. Literature review

2.1. Definitions of Accessible Tourism

Darcy and Dickson (2009 p.32) define accessible tourism as;

'Enabling people with access requirements including mobility, vision, hearing and cognitive dimensions of access, to function independently and with equity and dignity through the delivery of universally designed products, services and environments.'

This definition is inclusive of all people including those travelling with children in prams, people with disabilities and seniors.

2.2. Definitions of disability

The World Health Organisation (1980) defines disability as;

'A restriction or lack (resulting from an impairment) of the ability to perform an activity in the manner, or within the range, considered normal for a human being.'

The World Health Organisation's definition may have been useful in providing some degree of homogeneity to domestic legislation and clinical criteria, however from the perspective of the disabled population it is an inadequate definition of their experience (Brouillette et al. 1995). Rejecting the notions of *'normal for a human being'* results in a consensus view that some degree of impairment is normal for most human beings, at some point in their lives, and that the restrictions and deprivations experienced by disabled people actually arise from the assumption that they are outside the *'norm'* (Brouillette et al. 1995). The World Health Organisation (2012) has since altered their 1980 definition of disability to;

'Disabilities is an umbrella term, covering impairments, activity limitations, and participation restrictions. An impairment is a problem in body function or structure; an activity limitation is a difficulty encountered by an individual in executing a task or

action; while a participation restriction is a problem experienced by an individual in involvement in life situations. Thus disability is a complex phenomenon, reflecting an interaction between features of a person's body and features of the society in which he or she lives.'

2.3. Existing models of disability

A comparison of two models; the Medical and Social Models of Disability (Buhalis et al. 2005) show an evolution in perceptions towards disability. The traditional medical approach refers to disability as the problem of the individual, a model that serves as the basis for many negative and limiting attitudes, policies and outcomes (Ells, 2001; Vash, 2003). Within the social model approach, which challenges society when looking at disability, there is a focus on service providers and the removal of social and environmental barriers to enable full social, physical and leisure participation (Aitchison, 2003). Changing perceptions, alongside the realisation that only a small percentage of people are born with disabilities is extremely important and will subsequently help to remove existing barriers.

2.4. The general demand for Accessible Tourism

The general demand for accessibility in Europe alone exceeded 126 million in 2005, more than 27% of the European population at the time (Buhalis et al. 2005). Worldwide this figure exceeded 650 million and it is estimated that by the end of 2020 it will reach an approximated 1.2 billion people (Darcy et al. 2008).

Evidence suggests there is substantial volume in the accessible tourism market, however an analysis of available information demonstrates that only a very small percentage of the market addresses the needs for accessible tourism (Buhalis et al. 2005). It has been estimated that over 25% of European citizens do not take holidays due to perceived barriers to accessible travel (European Commission, 1996).

2.5. Evolution of accessible tourism – The demand side

Increasing disabled population with a focus on mobility

With the ageing of the baby boomer population and their accompanying burden of disease, future disability rates are expected to increase (Rosenberg, Bombardier, Hoffman and Belza, 2011). Indeed, recent National Health and Nutrition Examination Survey data suggests that for 60–69 year olds, the prevalence of disability in instrumental activities of daily living and mobility is increasing (Brault, Hootman, Helmick, Theis and Armour, 2009).

Travel spend and the disabled traveller as a customer

There are a number of benefits tour operators can gain from expanding what is still a relatively new market. People with disabilities have the tendency to become brand evangelists for the brand they love; for example, if a consumer would normally tell 5 people about their favourite product, people with disabilities could tell 50 (Hsu and Powers, 2002). The myths that persons with disabilities are poor have been proven wrong through research concluding that disabled tourists tend to spend more per day than able-bodied tourists (Horgan-Jones and Ringaert, 2004; Van Horn, 2002). This suggests that sizable spending power exists within the accessible market. According to statistics in a UK report produced by the Department for Culture, Media and Sport (2010) disabled tourists:

- Become regular clients after finding a tourism facility that suits their needs;
- Tend to take longer holiday breaks than the average – The average duration of travel undertaken by persons with activity limitations is 13.9 days (holidays) and 3.6 days (short breaks) (BMWA, 2004).

- Tend not to travel alone, as they are often accompanied by caregivers, family and friends: over 50% travel with a partner, 20% with a child and between 21-25% with a companion.

According to the US Census Bureau in 2005, the close to 50 million disabled consumers in the US (the largest minority group in America) have at their disposal $1 trillion, a figure which comes as a surprise to marketers (Fost, 1998). Attempting to reach this powerful consumer group certainly makes good *'handicapitalism*' (a term coined by Prager, 1999), but businesses also see that reaching out to the disabled tourist shows concern for diversity and sensitivity (Williams, 1999).

Research on accessible tourism and spending power of disabled tourists has dispelled the myth that people with disabilities are poor (Buhalis et al., 2005; Horgan-Jones and Ringaert, 2004; van Horn, 2002). Disabled citizens in Germany for example would be willing to pay between €1000 – €2000 more for suitable tourism products and services than the able bodied tourist (BMWA, 2004). In the same study produced the Federal Ministry of Economics and Labour found on average, the disabled tourist spends 1.16 times more than the able bodied tourist. A variable of disabled tourist travel spend is their disposable income, however those who have lower disposable incomes tend to save more money to spend on holidays. Although disabled tourists are willing to save more for their holidays and spend more whilst on holiday, the options of where to spend and the comprehensiveness of these choices are severely lacking. If suitable facilities were provided and marketed consistently, the additional spending generated from the disabled customer would be great. In 1993, Deloitte Touch published a study, entitled "Profiting from Opportunities" and identified a potential additional spending of nearly £17 billion by the disabled tourist in

Europe, if suitable facilities were provided and if they were marketed consistently (Disability Rights Task Force, 1999).

Travel Intensity and Frequency

Travel intensity is strongly related to existing barriers that are experienced by disabled customers in order to participate in travel and tourism activities. It refers to the percentage of the total disabled population that go on holiday. The disabled tourist represents a group that remains outside of the travel market. As a consequence, it is a group that is likely to have permanently abandoned the idea of holiday taking due to existing barriers (BMWA, 2004).

In the last few decades gradual progress has been made to remove barriers so that the transport, accommodation and attraction sectors are more accessible than they have been before. In the UK, this is partly due to the Disability Discrimination Act (DDA). Since 1995 it requires tourism suppliers to make adequate provision for disabled access. Furthermore, new buildings only gain planning permission if they provide facilities for the disabled (Stumbo and Pegg, 2005; Shaw and Coles, 2004; Shaw, Veitch and Coles, 2005). However, a disproportionately small number of people with disabilities participate fully in mainstream tourism (Darcy, 1998).

Findings about the travel intensity of German disabled travellers provide some important insights into these travel patterns. BMWA (2004) revealed that the travel intensity of people with disabilities is below that of the overall German population. German disabled customers have a travel intensity of 54.3% for taking holidays. This is considerably below the 75.3% of the overall German population. Based on these findings it can be reasoned that many disabled tourists effectively stay outside of travel experiences due to perceived or real accessibility barriers. Respondents of the sample of the BMWA (2004) survey explained their absence of holiday taking by a lack of accessible products and services available.

Travel frequency investigates how often disabled travellers undertake journeys for holiday purposes. On average, persons with disabilities take an average of 1.3 holidays and 2.3 short breaks a year (BMWA, 2004), however the travel seasonality of disabled tourists differ from the able bodied tourist. Once an appropriate destination has been selected by the disabled traveller, they tend to ensure that they make use of the low season for their holiday, subsequently avoiding crowded places.

Ageing Population

An ageing population is a world-wide phenomenon. In 1999, 10% of the World's population were aged 60 years or more, a figure which is expected to grow to 29% in 2050 (Tinker, 2002). It is forecast that 35% of the population in developed countries will be at least 60 years old in 2050 (Tinker, 2002). With an ageing population, where a large proportion has grown up travelling, tour operators may soon find their core customer evolving with this demographic change. There is a direct link between age and disability. A person is 14 times more likely to have a disability by the time they reach 65 years old than a four-year-old (Darcy, 2008). What's more, 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 (Luiza, 2010). Currently there is no comprehensive solution that provides people with disabilities with the same travelling opportunities that an able bodied person has.

2.6. Current issues preventing Accessibility – The supply side

There is a current need in the market for modification of destination facilities, reliable online information and relevant policies that allow and encourage the disabled population to travel as an able bodied tourist can.

Facility Design

The United Nations Standard Rules on the Equalisation of Opportunities (1990) states that in all societies there are still obstacles preventing persons with disabilities from exercising their rights and freedoms. These obstacles make it difficult for them to participate fully in the activities of their societies and it is the responsibility of states to take appropriate action to remove such obstacles. Facility design is considered to be the main obstacle preventing disabled tourists from taking holidays. When people with impairments travel, special requirements exist. Physical access is one of the most important and influential supply side issues facing the tourism market.

Darcy (1998) argues facility design can be split into three dimensions:

- Physical access, which involves people with physical impairments using wheelchairs or walking aids;
- Sensory access, for example tactile markings, signs and labels, hearing augmentation systems and audio cues for lifts and lights;
- Communication access, which involves people that have difficulties with written word and speech.

Research on accessible accommodation (Darcy and Pegg, 2011) concluded that the accessible rooms of the hotels met access provisions, however not all areas of the hotels were accessible. Infrastructure with easy access as well as a variety of accessible products must be provided by tourism suppliers to fulfil the criteria of accessible tourism. An existing problem in facility design is the tendency for accommodation designers to provide the minimum features for an accessible room, instead of designing the best possible disabled room. On top of this, only a fraction of the total number of rooms in a hotel are accessible.

Information

A second obstacle to accessible travel is the distribution of unreliable tourism information. Tourists with disability requirements search for information that suits their relevant needs, thus the higher the accessibility requirement the more detailed the information required is. Many mainstream travel publications, including hotel directories, use the international wheelchair symbol to indicate accommodation that claims to offer facilities for disabled guests, but more specific details of these facilities are rarely stated (European Commission, 1996). The lack of available information has forced disabled tourists to abandon the practice of taking holidays or seek alternative leisure solutions (Waschke, 2004).

Attitudes

Attitudinal issues add a third dimension to problems facing disabled tourists and the way disability is perceived. When looking to the social model (Buhalis et al. 2005) of disability for an explanation, one begins to understand disability is normal and it is actually the environment and societal systems that create accessibility barriers. If this belief was exemplified by major travel and leisure companies, holiday environments and systems would be designed in a way that reflected the social model to disability. This is a view supported by 97% of European citizens, who state that the integration of people with disabilities into society could be improved (Eurobarometer, 2001). A common complaint about tourism and travel staff is the negative, demeaning or condescending staff attitudes (Burnett and Baker, 2001), exemplifying that cultures of many major travel and leisure companies fail to support the social model of disability. Ensuring greater customer satisfaction in this regard will involve a better focus on staff training (Stumbo and Pegg, 2005).

It has been made apparent people with disabilities face a number of barriers that prevent them from going on holiday. These include environmental, interactive and intrinsic barriers (Yau, McKercher and Packer, 2004). If major travel and leisure companies break down the facility design, information and attitudinal barriers, certain intrinsic barriers such as perceived and psychological obstacles may also begin to be broken down.

2.7. Devising a comprehensive solution

Previous literature on accessible tourism has mainly focused on defining relevant terminology (Darcy, 1998; Aitchison, 2003; Buhalis et al,. 2005; Darcy and Buhalis, 2011) and assessing how the disabled population is made up, alongside how it has evolved. A subject covered in less detail is the involvement of major travel and leisure companies and how managers of these organisations perceive this new market segment

Major travel and leisure company involvement

It is essential for the travel and tourism industry to create and implement strategies to remove attitudinal, social, physical and informational barriers. Major travel and leisure companies will have a big influence in delivering these strategic initiatives, as ultimately it is the global players' distribution channels that best supply the market. Major travel and leisure companies maintain the characteristics to provide a comprehensive or 'one stop shop' solution, particularly those with a global presence and local expertise in destinations handled.

Legislation

On 24 July 2009 Barack Obama, signed the UN *Convention on the Rights of People with Disabilities* (United Nations, 2008). In doing so, the United States became one of many signatory countries to the agreement which seeks to ensure the rights of people with disabilities. Article 30 of the Convention proclaims the right to access all areas of cultural life, including that of tourism, thus putting tour operators on notice to change their operations in order to guarantee access to tourism goods and services for people with disabilities.

Certain policy implementation such as the legislation designed to make it compulsory for tourism suppliers to create an environment that is accessible to disabled people increases the economic gain for the tourism industry by increasing the purchasing power of the disabled population (Buhalis et al, 2005). However researchers have noted that despite the large numbers of people with disabilities living independently, their growing financial wealth and their desire to travel, this segment continues to be largely ignored by the tourism industry worldwide (Darcy, 1998). Increasing the economic gain by implementing legislation into the supply side of the tourism industry is one of a twofold effect of policy setting (Upchurch and Won, 1996), the second being the reference to a fundamental civil right for all citizens, and an enriched life of disabled and elderly people.

It is no new notion that there must be a reaction in the industry resulting in the gap between limited supply and high demand reducing; in 1983 Mills noted that the provisions for the disabled in any type of holiday situation can no longer be regarded as an optional extra. The tourism industry must ensure that tourism policies and initiatives are responsive to current and future trends and issues (Dwyer et al. 2009), allowing the supply side of the accessibility market to meet the needs and demands of the disabled consumer.

3. Data collection methods

Accessible tourism has received increasing attention due to a hypothetical increase in demand for this type of vacation, and subsequently suggests it is an attractive market for major travel and leisure companies to be active in. This study differs from those previously undertaken in that the population for this study is major travel and leisure companies. This was considered critical, as it is believed travel and leisure companies provide the best insight into accessible tourism provision.

3.1. Market value analysis

The accessible tourism market is an attractive segment for travel and leisure companies, however the tourism industry has made limited progress so far in providing the market with accessible products. In order to measure the value and potential of the demand side of accessible tourism, it is important to identify the general prevalence of disability. With a focus on Europe, this involved the exploration of travel patterns of disabled tourists, in particular spend per head per holiday (Puhretmair, 2004). Sources used to collect figures of disability populations, average spend per disabled tourist and GDP/Capita included international bodies such as Eurostat, Euromonitor, Eurobarometer, The World Bank and Census Bureau's, alongside National Tourism Authorities.

Absolute figures of the prevalence of disability are difficult to estimate due to a lack of standardised data and comprehensiveness (Buhalis et al, 2005) and after reviewing statistics from previous research it becomes clear that estimates for disability volume vary from source to source (Dupre and Karjaainen 2003; National Disabililty Authority 2003; Puhretmair 2004). However by focusing on three variables; a specific disability type, selected age range and average travel spend of tourists within this demographic, while using reliable sources for such data, it becomes possible to attempt to quantify the economic value potential of the accessible tourism industry.

Using the elderly (>65 Years) demographic when estimating market value, an overview of the total accessible tourism market value is proposed. The last paper to conduct a comprehensive analysis of potential accessible tourism market value was the *'One Stop Shop for Accessible Tourism in Europe*' (Buhalis et al., 2005). The data used in Buhalis et al.'s paper is used in this research as a launch pad in forecasting market value up until 2025.

Market value analysis assumptions:

A number of assumptions are made in the market value forecast:

- Deloitte estimate only 70% of the disabled population demanding accessibility can travel due to physical and economic capabilities (Van Horn, 2002).
- Deloitte also state a multiplier effect of 0.5 – 2.0 has to be taken into consideration when calculating market value (Van Horn, 2002). This is due to the fact a disabled tourist will often take a carer, family member or friend on holiday with them.
- The elderly population (>65 years) makes up 64.8% of the total disabled population requiring accessibility (Buhalis et al., 2005)
- Travel spend per head per holiday, and the growth of this from 2005 to 2025, is calculated for each European country by applying a factor of 1 to the German data (2005 to 2025), then determining the factor for each country based on its GDP per Capita to calculate the average travel spend for each of the other European countries included in this research. The proportionate change in GDP per Capita from 2005 and 2025 is then used to calculate the growth in average travel spend per head per holiday.

3.2. Semi structured interviews

Interviews were carried out with employees of major travel and leisure companies in managerial positions. The interviews assessed the activity of these companies in the accessible tourism market alongside managers' perceptions of the attractiveness of the accessible tourism industry.

Sample

In-depth semi structure interviews were undertaken with the following types of manager: 1. CEO, 1. CFO, 1. Director, 1. Non-exec, 2. Commercial Directors and 6. Strategy Managers. Each interview lasted between 30min to 1h15min.

4. Findings and discussion

This section is split into two parts:

- Part 1 presents the value forecast for the accessible tourism industry from 2005 to 2025 and;
- Part 2 documents the managerial perceptions of the accessible tourism market. A summary of the main findings and representative quotes can be seen in Table 2.

4.1. Market analysis

Focusing on the elderly population demographic allowed for an overall prediction of the accessible tourism market value, if provision of accessible products/services was sufficient (see Table.1 for an overview of this forecast, Table. 3 for the complete data and Table. 4 for a breakdown of disability type).

Based on the assumption the disabled tourist travels alone, the total market value is expected to increase by 65% (2.6% CAGR) from 2005 to 2025 from €53.5 billion to €88.6 billion. If the disabled tourist travels with a companion, Deloitte state a multiplier effect of 0.5 - 2.0 people must be taken into consideration, resulting in a market value of €80.3 billion in 2005 growing to €132.8 billion in 2025 (if using the 0.5 multiplier effect. See Table 1. for a potential market value if 2.0 people travel with the disabled tourist).

Based on these findings and according to The World Bank data (2005) the accessible tourism market in Europe (focusing on the countries included in this research and assuming the disabled tourist travels alone) would have accounted for 16.9% of total European tourism receipts in 2005 (World Bank, 2012) had a comprehensive solution been in place and allowed for barrier free tourism. (This figure is calculated using the USD/EUR exchange rate on the 31/01/2005. If the 31/01/2014 rate is used this figure equals 17.4%).

Table 1. Overview of the accessible tourism market value in Europe [2005-2025]

Year	2005		2025		% Change
Elderly population (>65 years)[i]	80,222,000		103,535,000		**29%**
Total demand for accessibility [including all disability types][2]	123,761,185		159,726,936		**29%**
70% that have the economical and physical capability to travel[3]	**86,632,829**		**111,808,855**		**29%**
Average spend/head/holiday[4]	€ 618		€ 792		**28%**
Potential tourism revenues [70% of the elderly population that have the capability to travel multiplied by Average spends/head/holiday]	**€ 53,539,088,553**		**€ 88,552,613,391**		**65%**
Deloitte's multiplier effect [PAX] for friends and family who travel with the disabled tourist[5]	**0.5**	**2**	**0.5**	**2**	
Accompanying friends and family	43,316,415	173,265,659	55,904,428	223,617,711	**29%**
Total market potential incl. 70% of disabled population who have the capability to travel, plus their accompanying friends and family	129,949,244	259,898,488	167,713,283	335,426,566	**29%**
Potential tourism revenues Total market potential incl. accompanying friends and family multiplied by Average spend/head/holiday	€ 80,308,632,829	€ 160,617,265,659	€ 132,828,920,086	€ 265,657,840,173	**65%**

1. US Census Bureau (2005) in Buhalis, D., V.Eichhorn, E.Michopoulou and G.Miller (2005), Eurostat (2006)
2. OSSATE (2005): The elderly population make up 64.82% of the total disabled population
3. OSSATE (2005)
4. BMWA (2004), Buhalis et al., (2005) and Eurobarometer (2005): This average spend per head per holiday figure is in line with other sources, such as OSSATTE (2005) who calculated €620.
5. Van Horn (2002): Deloitte state that the disabled tourist often takes a carer, friend or family member on holiday and this needs to be included in the total market value calculation.

4.2. Emergent themes and representative quotes

There are five consistent themes within the interview data. A summary of emergent themes and representative quotes can be seen in Table 2 and accompany major considerations for each of the following themes:

- Partnerships;
- Awareness;
- Cost of investment;
- Complexity;
- Legislation and compliance;

Table 2. Emergent themes and representative quotes:

Emergent theme	Representative quote
Partnerships	‘I think it is important to be early on in the process, we often come to a facility that is already built, and then of course if it is not built to the spec that we want, we cannot rebuild it to the accessibility we would like, one obstacle is different standards between different suppliers.’ ‘…we offer accessible transportation from the airport to the hotel, we’ve had some challenges in some places to find the right supplier for that.’ ‘...if the demand is there we have the ability to go to our partners and say ‘listen, there is a part of the market that you guys aren’t serving and we have access to that demand’, if we genuinely do have access to that demand, ‘so if you can develop a product that we can sell, there is an opportunity here’.
Awareness	‘...I was quite stunned when I saw the valuation of the market. Quite frankly I wouldn’t know what figure to put, I would never have anticipated it exceeding €70 billion and 10 years on it has obviously grown.’ ‘…To be honest the figure sounds very high, but it’s also a matter of definition, what do you mean by accessible tourism?’ ‘…if you create awareness then people will go there, I just don’t think [accessible tourism] has got any awareness. I haven’t seen a report from anybody on this.’ ‘…I actually think there will be a lot of people in travel companies who won’t even be thinking about this segment of the market, or even understand that there is a customer who is willing to travel but needs the relevant product.’
Cost of investment	‘...the reward, effort ratio is not as attractive as other customer segments.’ ‘...to deliver the right product, you are going to have to invest, in something that your core customer doesn’t require and you are not going to be able to charge a premium for it.’ ‘…there will probably be a thought process that this is going to cost us too much.’

Complexity	'...it is difficult if the customer does not mention that they have a disability, which makes it difficult to cater for their needs'. '…we are a pure online business so can you fulfil this type of transaction online? Or is it too bespoke for an online query or reservation?'
Legislation and compliance	'Even within the EU there is a huge disparity in what the destination country deems to be equal opportunity and many countries are culturally well behind the UK in its treatment of persons with reduced mobility.' '…there is no standard for assessing what is for example an adapted room.'

Partnerships

The predominant finding from the interviews was barriers involving traditional suppliers and inaccessible infrastructure prevent partnerships required to develop a comprehensive solution for barrier free tourism.

In a recent tourism summit, André Vallerand, Special Advisor to the Secretary of the World Tourism Organization (UNWTO), President of the World Centre of Excellence for Destinations, and co-chair of the Summit argued that;

> '*The development of universal accessibility of infrastructures, tourism services, and transport services cannot be done without a global partnership: we must share our knowledge and best practices for dissemination, and convince our partners that sustainable development must be inclusive.'* (Destinations Pour Tous, 2014).

This is a view shared by 50% of the interviewees in this research. For tour operators, the difficulty in offering accessible products to disabled tourists is increased if suppliers fail to develop accessible products themselves. This issue is exaggerated for intermediaries like accommodation wholesalers. For pure online businesses, a lack of available products force a restriction on the ability to service it online, particularly when considering the *'on request*' nature of accessible tourism products.

Until a common accessible tourism product, preferably a universally designed product (e.g. a completely accessible holiday resort) is established in the tourism industry, the majority of stakeholders will be prevented from cost effectively marketing products and services to the disabled tourist segment.

Awareness

There is still a clear lack of awareness in the tourism industry of accessible travel and the extent of the demand for accessibility, although it is well understood that there is a relevant segment of the market which is poorly served. The lack of awareness relates to the extent of demand, but to some, also to the definition of accessible tourism. 25% of interviewees stated a lack of awareness was a major obstacle when devising initiatives to sell accessible products. Up to 67% of interviewees were unaware of the potential value of the accessible tourism market, stating the forecast amount by Buhalis et al. in 2005 was higher than they expected.

It is evident the cruise industry is more aware than other travel and leisure segments, due to the fact that their core customer is slightly older, and predominantly from the US, where accessible products have been more commonplace for a longer time. For other travel and leisure companies, it is argued that the slow reaction to accessible tourism demand is due to the fact their core customer is positioned outside of the disabled demographic. The consequences of this reasoning could be severe. With the baby boomers now swelling the ranks of the 65+ population, in 2004 the UK baby boomers held 80% of the UK's wealth (Walker, 2004) and over 50% of discretionary spending is controlled by the elderly (Janger, 2011).

When discussing the reasons behind an increasing awareness and focus on accessible tourism, the majority of managers looked to Corporate Social Responsibility (CSR) and the fact that CSR is the *'flavour of the month*' or *'to be seen as socially responsible is en vogue*'. Combining this with the notion that the disabled tourist has greater buying power than before and a louder voice, the tourism industry is *'better placed than it has ever been'* in terms of offering disable tourists accessible products and services.

It is evident varying levels of awareness exist, and the majority of managers are not only unaware of accessible tourism as a concept or definition, but they are also largely unaware of what features contribute to an accessible product. Two previous studies looking at perceptions of accommodation managers concluded that many managers did not even understand the access features of their hotel rooms, let alone provide any level of detailed information beyond whether an establishment had a disabled room (Ozturk, Yayli and Yesiltas, 2008). It has also been argued tour operators are largely ignorant of the specific needs of people with disabilities, which leads to overt or subtle discrimination (McKercher, Packer, Yau and Lam, 2003).

Travel retail has proven to be an inhibitor rather than a facilitator and there is an immediate need for a stepping up of research in the field (Blichfeldt and Nicolaisen, 2011) and discussion and debate on the needs and demands of the disabled population to become active tourists (Pagan, 2009).

Cost of investment

Common amongst all the interviewees' perceptions was the prediction that companies in the travel and leisure industry were refraining from entering the accessible tourism market due to the perception that the effort to reward ratio is not as attractive as other consumer segments. A key perception is that to deliver accessible products, investment will be high and unlike other tourism segments, a premium for accessible products cannot be charged. However, as one manager suggested, while pressure on top line growth exists across the industry, and more travel and leisure companies fight for market share, an increasing amount of businesses will be looking to new areas, such as the accessible tourism market, for a first mover advantage.

An issue in the journal *'Current Issues in Tourism'* (2011) analysed topics relating to accessible tourism and found that the most important barrier to participation is affordability (Be´langer and Jolin, 2011; Diekmann and McCabe, 2011; Minnaert, Maitland, and Miller, 2011). In addition, disabled tourists incur additional costs relating directly to their disability (e.g. insurance, medical expenses, equipment, personal assistance support). All these circumstances account for the lack of participation in tourism activities and reduce the development of the accessible tourism market segment. It is suggested tourism products aimed at the disabled tourist are too bespoke or too costly, however it is also argued by authors of previous accessible tourism literature (See Buhalis et al., 2005; Darcy and Buhalis, 2011; Darcy and Dickson, 2009) that if suppliers facilitate the development of *'universal design'* tourism products, costs to travel and leisure companies and subsequently the market as a whole will be reduced.

It is vital major operators in the travel and leisure industry properly market their accessible products and services (Upchurch and Won, 1996) in order to facilitate return on investment. It is apparent operators do this for other market segments, but have not done it for the disabled tourist. BMWA (2004) concluded that many tourists have abandoned the idea of taking a holiday due to existing barriers. This conclusion would not favour one manager's belief, that accessible tourism products should not be marketed separately from 'normal' tourism products, due to discriminatory reasons. However, marketing of accessible products in the future may be vital in making customers aware of accessible products and attempting to turn unhappy and frustrated customers who require improved accessibility, into loyal customers.

By increasing awareness and marketing efforts surrounding accessible products, travel and leisure companies may answer a number of recurring questions, such as whether the demand for accessible tourism exists, how access to that demand is achieved, and whether accessible products can be marketed efficiently?

Legislation and compliance

> '*Without doubt the biggest threat faced by the hotel industry is its very ignorance of its obligations under the legislation*' (O'Neill and Ali Knight, 2000, p. 171).

Compliance with legislation in the tourism industry is often not met and a lack of understanding is apparent (Upchurch and Won, 1996).

It is argued that tour operators need to be aware that they have a social responsibility for meeting the needs of people with disabilities, as well as a legislative requirement to do so. In this sense, public policy in tourism can be linked to more general social policies of disability and exclusion in order to facilitate the full integration of disabled people into the tourism industry (Pagan, 2012).

The existence of a greater convergence of tourism policies across Europe and the definition of measures and tools that increase knowledge, competitiveness and sustainable development of the tourist industry are key factors in the near future for the accessible tourism market (European Disability Forum, 2001). There is a contrast between certain European countries and the standards they comply with. Certain countries such as the Nordics and the UK exemplify the advantages of construction legislation within these regions, whereas nations such as Turkey and Egypt appear to be less stringent when it comes to accessible facility design. As one manager stated; *'That's not something that will change overnight'*, a perception which highlights an area of concern for travel and leisure companies who are experiencing difficulty in developing accessible holidays when existing facilities in destinations are largely inaccessible.

Commenting on the inconsistency of legislation across the EU, one manager stated:

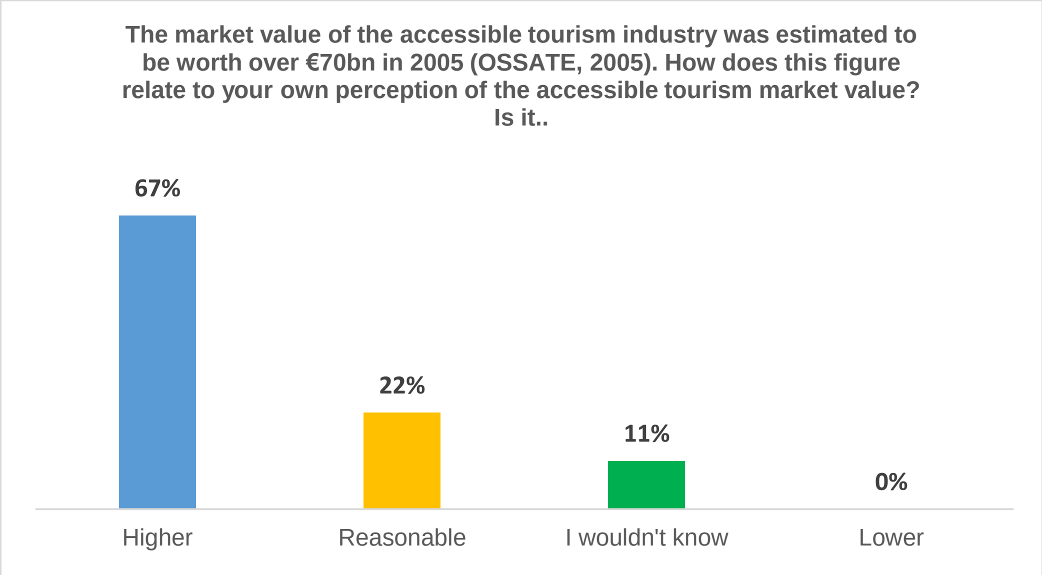
> *‘Even within the EU there is a huge disparity in what the destination country deems to be equal opportunity and many countries are culturally well behind the UK in its treatment of persons with reduced mobility, thus attitudes to accessibility may be less well advanced than in the UK. This gives us a big challenge in getting properties and hoteliers not to discriminate*. *’*

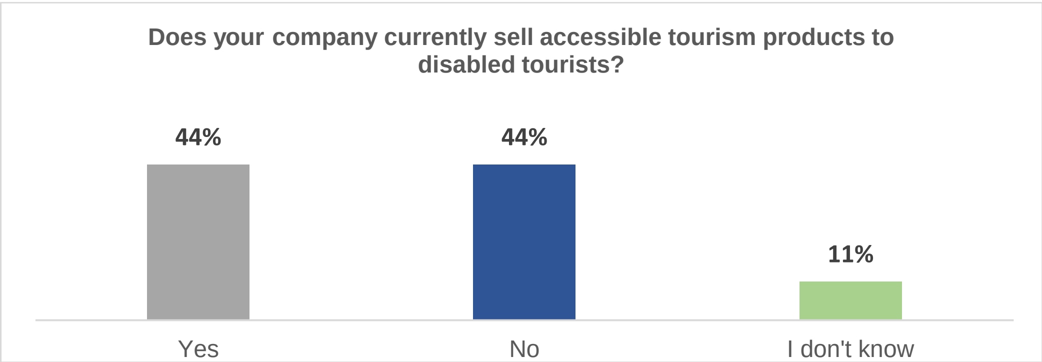
Complexity

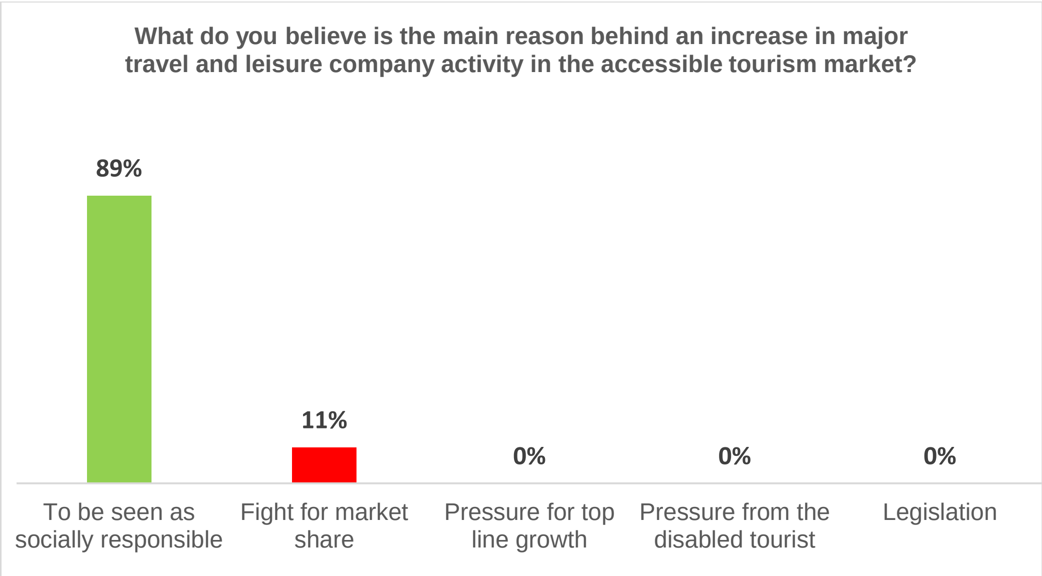
To achieve information satisfaction and fully enable access to tourism for people with disabilities, a more sophisticated understanding of different needs and appropriate sources, accessible destination experiences, and the provision of adequate accommodation is needed by tourism operators (Darcy, 2010; Darcy et al., 2010). 25% of interviewees stated that complexity of information relating to each disability type was a major obstacle in selling accessible products.

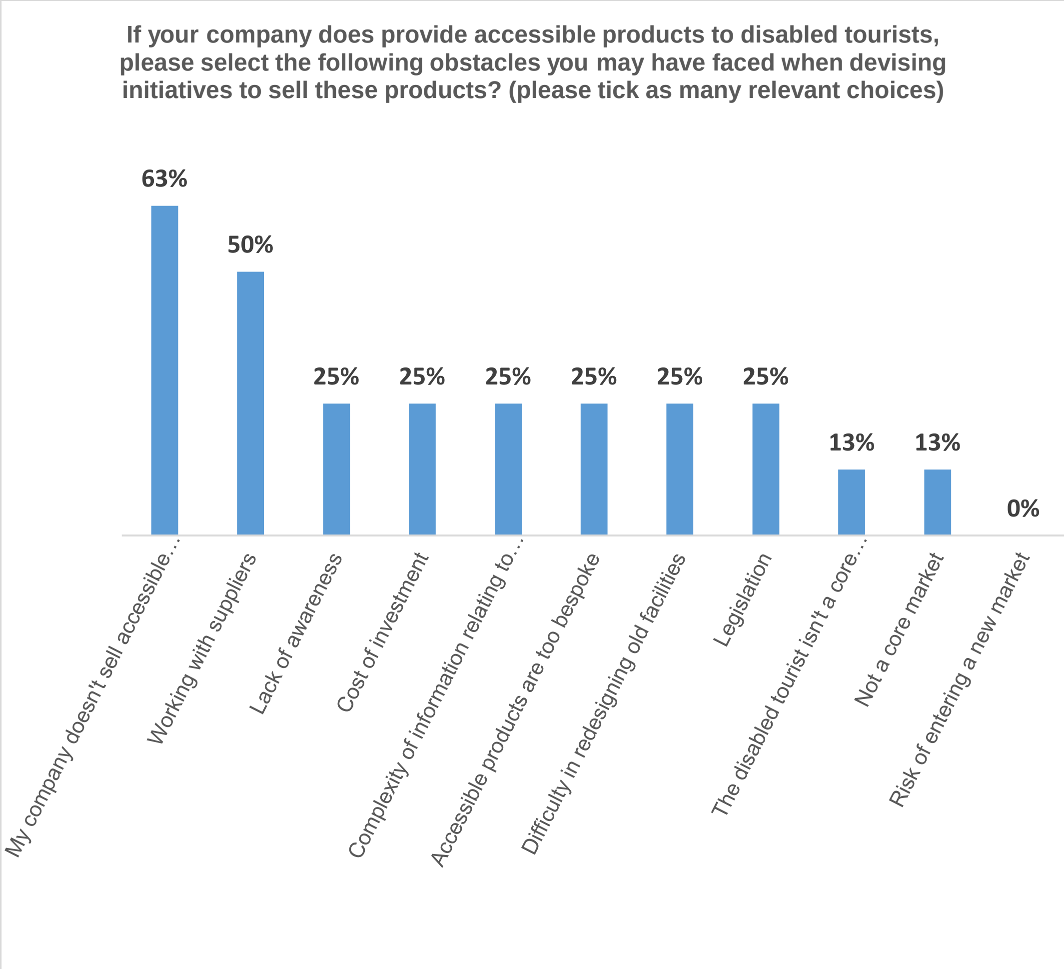
In addition, education relating to people with disabilities could change attitudes within the tourism industry, wherein short educational programs targeting employees of travel and leisure companies help correct existing negative attitudes towards people with disabilities (Blichfeldt and Nicolaisen, 2011).

4.3. Survey Results









4. Conclusion

It is clear from data in this paper and evidence in the wider literature that people with disabilities are being served poorly by the tourism industry (Darcy, 2011).

There is a need for stakeholders to work together when devising accessible tourism solutions. Yau et al. (2004) have rightly argued, travelling with a disability is more than an access issue. Rather, it involves a series of interdependent and overlapping factors, each of which need to be fully considered. For a tourism trip to occur, the organisation of all sectors of the tourism industry is critical. This involves all stages of travel, from anticipation and planning; travelling to the destination, on-site experience, to return travel.

Before accessible tourism products are offered to the market, accessibility must be conceived as a social right. The tourism industry has been reactive in responding to the need to serve an evolving core customer. With demographic changes occurring all over the world, the prevalence of disability is increasing and the demand for accessible products and services is following suit.

The tourism industry will benefit from gathering further data on accessibility, exemplified in the wider literature and in interview data conducted for this research study. Focus groups involving a variety of stakeholders in the accessible tourism industry, such as disabled tourists, accommodation suppliers, tour operators, government and airline managers, will allow for greater insight and a sharing of best practice. As the fight for market share continues, new growth opportunities in the tourism industry are constantly being analysed. As soon as major travel and leisure companies are fully aware of the sheer demand for accessible tourism and how they can access this demand, there is no doubt the industry will develop more effective solutions to serve the disabled tourist.

The herd mentality apparent in the travel and leisure industry, provides the insight that while companies are always looking for the next growth opportunity, it is becoming increasingly apparent that it will take a major player to make a distinct first move, until the accessible tourism market gains any real pace. For this to happen a combination of increased awareness, education, legislation, partnerships and the resolve to invest in universal design needs to be apparent. This will help to provide a launch pad for companies in the travel and leisure industry to take the leap and benefit from the attractive accessible tourism industry.

5.1. Critical Reflection of this research study

As one director correctly stated: '*This interview is of itself being discriminatory in attempting to define 'accessible tourism' as something different to normal tourism*.' On this basis, a high proportion of the literature surrounding accessible tourism should also be deemed inequitable. It seems until everyone has the same opportunity to travel, regardless of access requirements, this will continue to be an issue. The call for universal design (of hotel rooms, restaurants, aeroplanes, cruise ships etc..), seems to be an ambitious solution, but gives an insight into just how drastically the environment and society we live in needs to change, before disability is considered *'normal'*.

5.2. Investment return trade-off, an area for further research

Based on the emergent theme of *'cost of investment'* in this paper, an area for future research may be a more detailed assessment on the return on investment and the cost of operating in the accessible tourism market. This would assess the interchange of opening up a new market segment and the subsequent creation of demand, alongside the potentially significant investments required to offer barrier free tourism.

Table 3. Accessible tourism market value forecast 2005-2025 [in EUR] focussing on the elderly (>65) consumer segment

	2005					2025						
Country (EU27 exc. Bulgaria, Croatia & Hungary)	Elderly Population > 65 in 2005 [million PAX]	GDP/CAPITA 2005	Factor	Av.Spend /Holiday/ Head*	Market Value 2005 [in EUR million]	Elderly Population > 65 in 2025 [million PAX]	GDP/CAPITA 2025	% Change in GDP/CAPITA	Av.Spend /Holiday/ Head**	Market Value 2025 [in EUR million]	Elderly Population Change 2005-2025	Market Value Change 2005-2025
Austria	1.36	€ 29,753	1.11	€ 861	€ 1,168	1.88	€ 40,741	37%	€ 1,178	€ 2,210	38%	89%
Belgium	1.81	€ 29,182	1.09	€ 844	€ 1,525	2.39	€ 39,046	34%	€ 1,129	€ 2,699	32%	77%
Cyprus	0.09	€ 13,536	0.50	€ 391	€ 35	0.16	€ 12,797	-5%	€ 370	€ 57	74%	65%
Czech Republic	1.46	€ 9,776	0.36	€ 283	€ 412	2.25	€ 17,077	75%	€ 494	€ 1,113	55%	170%
Denmark	0.82	€ 38,131	1.42	€ 1,103	€ 901	1.21	€ 44,054	16%	€ 1,274	€ 1,538	48%	71%
Estonia	0.22	€ 8,378	0.31	€ 242	€ 54	0.26	€ 16,884	102%	€ 488	€ 127	17%	135%
Finland	0.83	€ 30,556	1.14	€ 884	€ 734	1.29	€ 41,952	37%	€ 1,213	€ 1,565	55%	113%
France	9.96	€ 27,193	1.01	€ 786	€ 7,835	13.98	€ 30,990	14%	€ 896	€ 12,530	40%	60%
Germany	15.58	€ 26,831	1.00	€ 776	€ 12,088	19.82	€ 37,582	40%	€ 1,087	€ 21,537	27%	78%
Greece	2.01	€ 18,237	0.68	€ 527	€ 1,059	2.47	€ 19,631	8%	€ 568	€ 1,404	23%	33%
Hungary	1.51	€ 8,807	0.33	€ 255	€ 384	2.01	€ 13,191	50%	€ 381	€ 766	33%	100%
Ireland	0.64	€ 38,632	1.44	€ 1,117	€ 711	0.81	€ 35,540	-8%	€ 1,028	€ 834	28%	17%
Italy	11.29	€ 24,266	0.90	€ 702	€ 7,923	13.90	€ 25,302	4%	€ 732	€ 10,169	23%	28%
Latvia	0.37	€ 5,630	0.21	€ 163	€ 60	0.41	€ 10,879	93%	€ 315	€ 130	12%	116%
Lithuania	0.55	€ 5,806	0.22	€ 168	€ 92	0.71	€ 12,411	114%	€ 359	€ 253	29%	176%
Luxembourg	0.07	€ 64,545	2.41	€ 1,867	€ 127	0.10	€ 77,287	20%	€ 2,235	€ 232	53%	83%
Malta	0.05	€ 12,020	0.45	€ 348	€ 19	0.10	€ 18,165	51%	€ 525	€ 52	83%	177%
Netherlands	2.31	€ 31,457	1.17	€ 910	€ 2,104	3.75	€ 35,480	13%	€ 1,026	€ 3,848	62%	83%
Poland	5.09	€ 6,336	0.24	€ 183	€ 933	8.05	€ 13,362	111%	€ 386	€ 3,111	58%	233%
Portugal	1.80	€ 14,591	0.54	€ 422	€ 760	2.33	€ 15,745	8%	€ 455	€ 1,061	29%	40%
Romania***	3.26	€ 3,584	0.13	€ 104	€ 337	-	€ 6,898	92%	€ 200			
Slovakia	0.64	€ 9,972	0.37	€ 288	€ 185	1.06	€ 20,377	104%	€ 589	€ 622	64%	236%
Slovenia	0.31	€ 14,288	0.53	€ 413	€ 128	0.45	€ 21,576	51%	€ 624	€ 283	47%	122%
Spain	7.10	€ 20,778	0.77	€ 601	€ 4,269	9.00	€ 20,653	-1%	€ 597	€ 5,378	27%	26%
Sweden	1.57	€ 33,091	1.23	€ 957	€ 1,501	2.16	€ 47,497	44%	€ 1,374	€ 2,964	38%	98%
UK	9.54	€ 30,301	1.13	€ 876	€ 8,357	13.00	€ 37,414	23%	€ 1,082	€ 14,063	36%	68%
	80.22			**€ 618**	**€ 53,701**	**103.54**			**€ 793**	**€ 88,549**	29%	65%

Notes

*German data used as guideline for EU total spend/person/holiday (BMWA 2004, Buhalis et al,.2005, Euromonitor)

** Assuming Average spend/person/holiday grows at the same rate as GDP/Capita between 2005 and 2025

*** Unreliable or uncertain data

Sources

Ratio of travel spend between able bodied and disabled tourists - BMWA (2004) in Buhalis, D., V.Eichhorn, E.Michopoulou & G.Miller (2005)

Population figures - US Census Bureau (2005) in Buhalis, D., V.Eichhorn, E.Michopoulou & G.Miller (2005)

German Travel Spend – BMWA 2004, Buhalis et al,.2005, Euromonitor (2013)

GDP/CAPITA 2005 - 2025 - World Bank (2013)

Table 4. Breakdown of the disabled population by disability type

Disability Type	2005 Population ('000)	Total %
Mobility impaired	16,068	13%
Visual impaired	1,911	2%
People with deafness	985	1%
Speech impaired	246	0%
Mental/intellectual impaired	4,519	4%
People with hidden impairments	20,184	16%
Elderly population (>65)	80,903	65%
	124,816	**100%**

Source: OSSATE (2005)

References:

Ahrens, T., & Chapman, C. S. (2006). ‘Doing qualitative field research in management accounting: positioning data to contribute to theory’. Accounting, Organizations and Society, p. 819-841.

Aitchison, C. (2003) ‘From Leisure and Disability to Disability Leisure: Developing Data, Definitions and Discourses.’ Disability and Society, p. 955-969

Bélanger, C. É., & Jolin, L. (2011). ‘The International Organisation of Social Tourism (ISTO) working towards a right to holidays and tourism for all’. Current Issues in Tourism, p. 475-482.

Black, T. R. (1999). ‘Doing quantitative research in the social sciences: An integrated approach to research design, measurement and statistics’. Sage.

Blichfeldt, B. S., & Nicolaisen, J. (2011). ‘Disabled travel: Not easy, but doable’.Current Issues in Tourism, p. 79-102.

BMWA (2004) ‘Federal Ministry of Economic and Labour - Economic Impulses of Accessible Tourism for All’ Report, Berlin, Bundesministerium für Wirtschaft und Arbeit

Botterill, D. and Platenkamp, V. (2012). ‘Key concepts in tourism research’. Sage.

Brault, M. W., Hootman, J., Helmick, C. G., Theis, K. A., & Armour, B. S. (2009). Prevalence and most common causes of disability among adults-United States, 2005. Morbidity and Mortality Weekly Report, p. 421-426.

Braun, V., & Clarke, V. (2006). ‘Using thematic analysis in psychology’. Qualitative research in psychology, p. 77-101.

Braun, V., and Clarke, V. (2006). Using thematic analysis in psychology.Qualitative research in psychology, p. 77-101.

Brouillette, D. C., Hotchkiss, R., & Saleh, L. (1995) ‘Overcoming obstacles to the integration of disabled people’.

Bryman, A. (2001). ‘Social research methods.’ Oxford university press.

Bryman, A. (2008). ‘Social research methods (3rd ed.).’ Oxford: Oxford University

Buhalis, D., Eichhorn, V., Michopoulou, E., & Miller, G. (2005) ‘Accessibility market and stakeholder analysis.’ OSSATE project Guildford: University of Surrey

Burnett, J.J. and Bender Baker, H. (2001) ‘Assessing the Travel-Related Behaviours of the Mobility-Disabled Consumer.’ Journal of Travel Research, p. 411

Chadwick, B. A., Bahr, H. M., and Albrecht, S. L. (1984). ‘Social science research methods.’ Englewood Cliffs, NJ: Prentice-Hall.

Corbetta, P. (2003). ‘Social research: Theory, methods and techniques’. California, Sage.

Creswell, J. W. (2003). ‘Research design: Qualitative, quantitative, and mixed methods approaches (2nd ed.).’Thousand Oaks, California, Sage.

Creswell, J. W., & Clark, V. L. P. (2007). ‘Designing and conducting mixed methods research’, Thousand Oaks, CA: Sage publications.

Crotty, M. (1998). ‘The foundations of social research: Meaning and perspective in the research process’. Sage.

Cukier, J. (2006). ‘Tourism research: policy, planning and prospects’. Canada: Department of Geography University of Waterloo.

Darcy, S. (1998) ‘People with a Disability and Tourism Bibliography’. Online Bibliography No.7. Available from: http://www.business.uts.edu.au/lst/downloads.07_Disabiliy_Tourism.pdf. Accessed: 01/11/2013.

Darcy, S. and Dickson, T. (2009). ‘A Whole-of-Life Approach to Tourism: The Case for Accessible Tourism Experiences.’ Journal of Hospitality and Tourism Management, p. 32-44.

Darcy, S., & Pegg, S. (2011). ‘Towards strategic intent: Perceptions of disability service provision amongst hotel accommodation managers. International Journal of Hospitality Management’, p. 468-476.

Darcy, S., and Buhalis, D. (2011). ‘Introduction: from disabled tourists to accessible tourism. Accessible tourism: Concepts and issues’, p.1-20.

Darcy, S., Cameron, B., Dwyer, L., Taylor, T., Wong, E., and Thomson, A. (2008). ‘Technical Report 90064: Visitor accessibility in urban centers’ Available from: http://www.crctourism.com.au/BookShop/BookDetail.aspx?d=626 Accessed: 01/112013

Darcy, S., Cameron, B., Pegg, S., and Packer, T. (2008). ‘Technical Report 90042: Developing Business Cases for Accessible Tourism’, STCRC technical report Available from: http://www.crctourism.com.au/BookShop/BookDetail.aspx?d=582. Accessed: 01/11/2013

DEO (2005) ‘Disability Definitions and Related Links’. Available from: http://www.doe.mass.edu/sped/definitions.html. Accessed: 28/04/2014

Department for Culture, Media and Sport (2010), ‘Accessible tourism: Making it work for your business.’ Available from: www.culture.gov.uk. Accessed: 24/11/2013

Destinations Pour Tous (2014) 'Tourism, culture and transportation, a common strategy at the international level', Available from: http://www.accessibletourism.org/resources/press-release-save-the-date_en-2.pdf Accessed: 10/01/20114

Diekmann, A., & McCabe, S. (2011). 'Systems of social tourism in the European Union: A critical review'. Current Issues in Tourism, p. 417-430.

Disability Rights Task Force (1999) From Exclusion to Inclusion: Final Report of the Disability Rights Task Force. Available from: http://www.disability.gov.uk/drtf/full_report/#ad_6 Accessed: 15/01/2014.

Dupré, D., & Karjalainen, A. (2003). 'Employment of disabled people in Europe in 2002'. Statistics in focus, p. 3-26.

Durkheim, E. (1983) 'Pragmatism and sociology'. CUP Archive.

Dwyer, L., Edwards, D., Mistilis, N., Roman, C., and Scott, N. (2009) 'Destination and enterprise management for a tourism future.' Tourism Management, p. 63–74

Dwyer, L., Forsyth, P. J., and Dwyer, W. (2010). 'Tourism economics and policy' Vol. 3. Channel View Publications.

Ells, C. (2001) 'Lessons about Autonomy from the Experience of Disability'. Social Theory and Practice, p. 599-615.

Ennis, C. D., & Chen, S. (2012). 'Chapter 16: Interviews and focus groups'. In K. Armour & D. Macdonald (Eds.), Research methods in physical education and youth sport. New York: Routledge. p. 217-236.

Eurobarometer (2001) 'Attitudes of Europeans to Disability. European Commission' Available from: http://europa.eu.int/comm/public_opinion/archives/eb/ebs_149_en.pdf , Accessed: 30/04/2014

Euromonitor (2013) ‘Tourism Flows Outbound in Germany’ Available from: http://www.euromonitor.com/tourism-flows-outbound-in-germany/report Accessed: 24/03/2014

European Commission Tourism Unit. (1996). ‘Making Europe accessible for tourists with disabilities: handbook for the tourism industry.’ Office for Official Publications of the European Communities.

Feilzer, M. Y. (2010). ‘Doing mixed methods research pragmatically: Implications for the rediscovery of pragmatism as a research paradigm’. Journal of mixed methods research, p. 6-16.

Fielding, N., & Fielding, J. L. (1986). ‘Linking data. Beverly Hills’, CA: Sage Publications.

Fletcher, J., and Cooper, C. (1996). ‘Tourism strategy planning: Szolnok County, Hungary’. Annals of Tourism Research, p.181–200.

Fost, D. (1998). ‘The fun factor: marketing recreation to the disabled. American demographics’, p. 54-58.

Glaser, B., and Strauss, L. (1967) ‘The Discovery of Grounded Theory: Strategies for Qualitative Research.’ London: Wiedenfeld and Nicholson.

Glover, P., and Prideaux, B. (2009). ‘Implications of population ageing for the development of tourism products and destinations.’ Journal of Vacation Marketing, p25–37.

Gray, D. (2009) ‘Doing research in the real world.’ UK: Sage Publications Ltd.

Greene, J. C., and Caracelli, V. J. (1997) ‘Defining and describing the paradigm issue in mixed-method analysis’. In J. C. Greene and V. J. Caracelli (Eds.), Advances in mixed-method evaluation: The challenges and benefits of integrating diverse paradigms. San Francisco: Jossey-Bass.

Hamel, G. (1996) ‘Strategy as revolution’ p. 69-71. Harvard Business Review.

Hempel, C. (1950) ‘Problems and Changes in the Empiricist Criterion of Meaning’, Revue Internationale de Philosophie p.41–63.

Horgan-Jones, M., and Ringaert, L. (2004) ‘Accessible Tourism in Manitoba’. Available from: http://www.ttra.com/pub/uploads/AccessibleTourismInManitoba.htm. Accessed: 30/11/2014

Hsu, C., and Powers, T. (2002) ‘Marketing hospitality’, New York. John Wiley and Sons, Inc.

International Macroeconomic Data Set (2005) Available from: http://www.ers.usda.gov/data-products/international-macroeconomic-data-set.aspx#.U2GXFvldVK0 Accessed: 03/04/2014

Janger, M. (2011). ‘Baby Boomers: The New Disability Market’. Available from: http://www.brandchannel.com/features_effect.asp?pf_id=534 Accessed: 12/12/2014

Johnson, R. B., & Onwuegbuzie, A. J. (2004). ‘Mixed methods research: A research paradigm whose time has come’. Educational researcher, p. 14-26.

Joyce, P., & Woods, A. (1997). ‘Essential strategic management: From modernism to pragmatism’. Long Range Planning, p.141.

Kemeny, J. G. (1959). ‘A philosopher looks at science’ . Princeton. Van Nostrand. p. 28

King, N., & Horrocks, C. (2010). ‘Interviews in qualitative research’. Sage.

Kuhn, T. (1970). ‘The structure of scientific revolutions’ (2nd ed., enlarged). Chicago, IL. University of Chicago Press.

LaPlante, Mitchell P. and Stephen H. Kaye. (2013). Mobility Device Use and Hearing Impairments Among Individuals and Households, 1990-2010. Available from: http://www.access-board.gov/guidelines-and-standards/transportation/passenger-vessels/about/mobility-device-use-and-hearing-impairments-among-individuals-and-households-1990-2010 Accessed: 25/04/2014

Lastrucci, C. L. (1963). ‘The scientific approach: Basic principles of the scientific method’ Schenkman Publishing Company. p. 16.

Luiza, S. (2010) Annals of the University of Oradea : Economic Science, Directory of Open Access Journals (DOAJ) p.1154,

Machery, E. (2007). ‘Concept empiricism: A methodological critique’. Cognition, p.19-46.

Maxcy, S. J. (2003). ‘Pragmatic threads in mixed methods research in the social sciences: The search for multiple modes of inquiry and the end of the philosophy of formalism’. Handbook of mixed methods in social and behavioural research, p. 51-89.

Maynard, M. (1994). ‘Methods, practice and epistemology: The debate about feminism and research. Researching women’s lives from a feminist perspective’, p.10-26.

McKercher, B., Packer, T., Yau, M. K., & Lam, P. (2003). ‘Travel agents as facilitators or inhibitors of travel: perceptions of people with disabilities’. Tourism Management, p. 465-474.

Miles, M. B., and Huberman, A. M. (1994). ‘Qualitative data analysis: A sourcebook (2nd ed.)’. Thousand Oaks, California. Sage.

Miller, G. & Kirk, E. (2002) The Disability Discrimination Act: Time for a stick? Journal of Sustainable Tourism, p. 82-88

Mills, E. D. (1983) ‘Design for Holidays and Tourism.’ London: Butterworths

Minnaert, L., Maitland, R., & Miller, G. (2011). ‘What is social tourism?’.

Modell, S. (2009). ‘In defence of triangulation: a critical realist approach to mixed methods research in management accounting’. Management Accounting Research. p. 208-221.

Morgan, D. L. (2007). ‘Paradigms lost and pragmatism regained: Methodological implications of combining qualitative and quantitative methods’. Journal of Mixed Methods Research, p. 48-76.

Neumann, P. (2002) ‘Barrierefreier Tourismus – Vom Tourismus für Menschen mit Behinderung zum Tourismus für Alle’, Universität Paderborn, Germany

Newman, I., and Benz, C. R. (1998). ‘Qualitative-quantitative research methodology: Exploring the interactive Continuum’ Carbondale: University of Illinois Press.

O’Neill, M., and Ali Knight, J. (2000) ‘Disability tourism dollars in Western Australia hotels.’ FIU Hospitality Review, p. 72–88

Ozturk, Y., Yayli, A., & Yesiltas, M. (2008). ‘Is the Turkish tourism industry ready for a disabled customer's market?: The views of hotel and travel agency managers. Tourism management, p. 382-389.

Pagán, R. (2009). ‘Self-employment among people with disabilities: evidence for Europe. Disability & Society’, p. 217-229.

Powell, T. C. (2003). ‘Strategy without ontology.’ Strategic Management Journal, p. 285-291.

Prager, J. H. (1999). People with disabilities are next consumer niche. Wall Street Journal, 15, B1.

Puhretmair, F. (2004) ‘It’s time to make eTourism accessible’. ICCHP, Paris, France,p. 272–279.

Rosenberg, D., Bombardier, C., Hoffman, J., and Belza, B. (2011) ‘Physical Activity Among Persons Ageing with Mobility Disabilities: Shaping a Research Agenda.’ Journal of Ageing Research, Vol. 2011, Article ID 708510

Ruhanen, L., Mclennan, C., and Moyle, B. (2013) ‘Strategic Issues in the Australian Tourism Industry: A 10-year Analysis of National Strategies and Plans’, Asia Pacific Journal of Tourism Research, p. 220-240

Russell, B. (1935). ‘The limits of empiricism. In Proceedings of the Aristotelian Society.’ p. 131-150. Harrison and Sons, Ltd.

Senlin, L. (2010). ‘A Theoretical Study of Dynamic Fields of Pragmatic Forces’. Foreign Language Education, p.6.

Shaw, G., & Coles, T. (2004). ‘Disability, holiday making and the tourism industry in the UK: a preliminary survey’. Tourism Management, p. 397-403.

Shaw, G., Veitch, C., and Coles, T.I.M. (2005). ‘Access, disability, and tourism: Changing responses in the United Kingdom’. Tourism Review International, p.167-176.

Singleton Jr, R., Straits, B., and Straits, M. (1993). ‘Approaches to social research.’ Oxford University Press.

Stumbo, N., and Pegg, S. (2005) 'Travellers and Tourists with Disabilities: A Matter of Priorities and Loyalties'. Tourism Review International, p. 195-209 .

Sustainable Tourism Cooperative Research Centre (2008). 'Accessible Tourism: understanding an evolving aspect of Australian tourism

Tashakkori, A., and Creswell J. (2007) Editorial: 'The new era of mixed methods' Journal of Mixed Methods Research, p. 3–7.

Tashakkori, A., and Teddlie, C. (2003). 'Handbook of mixed methods in social and behavioural research.' Thousand Oaks, California: Sage.

The World Bank (2005) 'International Tourism Receipts' Available from: http://data.worldbank.org/indicator/ST.INT.RCPT.CD Accessed 13/04/2014

Tinker, A. (2002) 'The social implications of an ageing population'. Mechanisms of Ageing and Development.

U.S. Census Bureau (2005) IDB Summary Demographic Data. International Database. Viewed on 01st of July 2005. http://www.census.gov/

United Nations (1990) 'Disability Statistics Compendium New York,

Upchurch, R., and Won, S. (1996) 'Civic responsibility and market positioning: complying with the Americans with Disabilities Act.' Facilities, p. 48-56.

Van Horn, L. (2002) 'Travellers with Disabilities: Market Size and Trends.' Available from: http://ncpedp.org/access/isu-travel.htm. Accessed: 02/12/2013.

Van Orman Quine, W. (1976) 'Two dogmas of empiricism' Springer Netherlands. p. 41-64.

Vash, C. L. (2003) 'Disability Attitudes for all Latitudes.' Journal of Rehabilitation, p. 38-42.

Walker, D. (2004) 'Live Fast, Die Old', Available from: http://news.bbc.co.uk/1/hi/magazine/3659996.stm. Accessed: 28/04/2014

Waschke, S. (2004) 'Labeling im Barrierefreien Tourismus in Deutschland – Vergleichende Analyse auf Basis Europäischer Beispiele.' Thesis. Universität Lüneburg

WHO (2012) 'Disabilities' Available from: http://www.who.int/topics/disabilities/en/ Accessed: 28/01/2014.

World Bank (2013) 'International Tourism Receipts'. Available from: http://data.worldbank.org/indicator/ST.INT.RCPT.CD?order=wbapi_data_value_2005+wbapi_data_value+wbapi_data_value-first&sort=desc&page=1. Accessed: 24/03/2013.

Williams, S. J. (1999). 'Is anybody there? Critical realism, chronic illness and the disability debate'. Sociology of Health & Illness, 797-819.

Yau, M. K. S., McKercher, B., & Packer, T. L. (2004). 'Traveling with a disability: More than an access issue'. Annals of Tourism Research, p. 946-960.