tourism

Department:
Tourism
REPUBLIC OF SOUTH AFRICA

ACCESSIBLE TOURISM

MARKET STUDY

2011

RESEARCH CLARIFICATION

Following the establishment of a dedicated National Department of Tourism (NDT), efforts have been made to mobilize resources and realign the roles and responsibilities of various national tourism policy making institutions. Consequently the tourism directorate in the Department of Trade and Industry (*the dti*) was transferred to the NDT during the 2011/12 financial year.

This resulted in the tourism policy work (research documents, projects, etc) previously undertaken by the dti, through its tourism directorate, been transferred to NDT. This report was commissioned under the auspices of the dti, through a third party consortium during the transition. As part of the transfer it has now become an NDT document. As such, the document has been re - branded accordingly.

CONTENTS

EXECUTIVE SUMMARY

Niche tourism development has been identified as a key project in **the dti's Industrial**Policy Action Plan 2010/11 – 2012/13 (IPAP 2). This has been recognised as an effective strategy to improve South Africa's competitiveness in the tourism sector and it complements the National Department of Tourism's National Tourism Sector Strategy and South African Tourism's (SAT's) Marketing Strategy.

Accessible Tourism has been identified as an unexploited market segment in South Africa by **the dti's** Tourism unit[1]. This has been attributed to a variety of different factors, notably a fundamental lack of understanding about the market segment in terms of its size, socio-economic and travel related attributes and factors constraining participation in tourism and travel activities experienced by domestic and international travellers. The objective of the projectsto assess the status of Accessible Tourism so as to determine whether this segment has the potential to be developed based on the estimated size of the market. This study is aimed at providing such an exploratory understanding of this market as well as its value and significance in South Africa.

UNIVERSAL ACCESSIBILITY AND DESIGN

Adopting the principles of Universal Accessibility and Universal Design in the tourism sector represents a more inclusive or holistic approach. It ensures that a high level of accessibility within the tourism sector for all travellers is a priority, providing freedom of choice and freedom of movement to all travellers. These approaches accept the reality that the broader population comprises of people of varying ages, heights, weights, language skills, abilities, etc. Following the principles of Universal Accessibility and Universal Design results in an environment that benefits all levels of society.

ACCESSIBLE TOURISM

The definition of Accessible Tourism adopted for the purpose of this study is as follows:

Accessible Tourism refers to tourism that enables everyone, regardless of their functional limitation to participate in the tourism experience confidently, independently and with dignity, through the creation of universally accessible tourism products, services and environments, and to ensure that Universal Design is systemic throughout the tourism value chain.

MARKET SEGMENTATION

The application of Universal Accessibility and design is an all-encompassing approach that includes everyone. The user groups that have been identified include, but are not limited to the following:

- Elderly travellers;

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[1]TOR 2011

- Travellers with temporary and permanent physical, sensory and cognitive limitations;
- Pregnant and breast-feeding women;
- Obese travellers;
- Families with babies and small children;
- Travellers requiring luggage support services; and
- Travellers with language difficulties.

RESEARCH METHODOLOGY

By adopting the principles of Universal Access and UniversalDesign in defining and understanding Accessible Tourism the scope of the study became comprehensive. It necessitated extensive research and the involvement of a diverse number of stakeholders and role players on both the demand and supply sides of the value chain. This is the first research study of its kind on Accessible Tourism in South Africa. This means that stakeholders, communication lines and sources of information had to be identified and assessed in a relative short time period. Bothprimary and secondary research was initiated to collect and collate relevant information.

The primary research undertaken used three different base questionnaires to profile the market segment i.e. a domestic demand; a foreign demand and product supply questionnaire. Thesewere distributed to an extended array of user groups, their representative associations and to a variety of product and facility providers along the tourism value chain. The formal surveys were supplemented by telephone interviews and relevant internet research. However, the total number of respondents that participated in the survey was low in spite of efforts to increase the response rates. **Consequently, care should be taken when reviewing the results of this research which should be applied to those that responded and therefore the responses are not of general relevance to all travellers with access requirements. The research results should be viewed as being indicative of the Accessible Tourism market.**

DEMAND ANALYSIS

The size of the domestic economically viable Accessible Tourism market is estimated to be approximately600, 000 individuals, comprising of the user groups identified in the study. Based on the findings of the research, it would appear that there are a number of constraints that prevent travellers with functional limitation from travelling more frequently. This provides an impetus to restructure the general tourism environment in South Africa so as to address the travel requirements and enhance the travel experiences of this market segment.

In order to determine the international demand, African and overseas visitors arriving by air were considered. The estimatedsize ofthe international Accessible Tourism market is approximately150 000 visitors per annum. To determine the potential international demand the percentage of return visitors that travel back to South Africa was used as an indicator. This is based on the findings of the research survey which indicate that 58% of travellers who have travelled to South Africa for the first time, would increase their levels of travel if a number of obstacles were addressed. The research indicates that the potential size of the international market could be increased to 237 271 travellers with access requirements, should key constraints be addressed.

SUPPLY ANALYSIS

Tourism in South Africa does not enable travellers with access limitations to enjoy a trouble free holiday in an equitable, dignified and independent manner. Accessible Tourism has recently gained higher prominence and significance in the tourism industry than before. Moreover, the economic impacts of Accessible Tourism are increasingly being acknowledged. However there is still work to be done to increase the status and importance of Accessible Tourism in South Africa.

The research into the state of accessibility of the existing facilities and service found that, although there is a relatively high level of awareness of the need for universal access and design, the readiness of facilities is generally low. Owners of facilities and service providers were also generally reluctant to upgrade their services to satisfy this market segment due to the perceived additional cost that would need to be incurred. To adhere to the principles of Universal Design, both public and private tourism facilities and products require adjustments.

ECONOMIC IMPACTS

The findings of the economic impact assessment indicate that Accessible Tourism has a current impact on the South African tourism industry through its effects on business turnovers (R 12 439 million), new employment creation (29 249 persons) and gross income increased by about R5,2billion contributing approximately 0,23% to the gross domestic product of the country.

KEY RECOMMENDATIONS

The National Tourism Sector Strategy calls for the promotion of sustainable and responsible tourism. The Responsible Tourism Declaration of Cape Town explicitly requires tourism to be accessible for persons with disabilities. Consequently, the overlap between Responsible Tourism and Accessible Tourism is clear. The following recommendations are then geared towards developing the Accessible Tourism market which in turn can address the following strategic objectives of the National Tourism Sector Strategy:

- ✓ To grow the tourism sector’s absolute contribution to the economy;
- ✓ To increase domestic tourism’s contribution to the economy;
- ✓ To deliver a world-class visitor experience; and
- ✓ To position South Africa as a globally recognised tourism destination brand.

The key recommendations that flow from the research conducted in this study are grouped in the following categories:

- Create greater awareness among all stakeholders of the tourism potential of this market segment;
- Implement skills training and educating programmes for persons involved in the Accessible Tourism markets;
- Refine the development and promotion of Universal Access standards;
- Undertake the marketing of Accessible Tourism in South Africa;
- Undertake the development of Accessible Tourism stakeholder organisations; and
- Undertake further research and development of Accessible Tourism beyond the scope of this research.

It is proposed that South Africa adopts the principles of Universal Accessible and Universal Design, where tourism services and facilities are designed for the optimal use of all tourists. However, the tourism industry needs to appreciate different types and levels of accessibility requirementsand address them accordingly. Central to creating such opportunities is also the necessity of agreeing on a widely accepted common way to describe accessibility within the tourism system. The term 'Universally Accessible Tourism' is proposed which transcends the boundaries of a niche market and does not view Accessible Tourism as being marginal or extraneous to tourism in general. To explore this market further, on-going research should be conducted.

Selected quotes from interviews conducted with travellers with functional limitations

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"It breaks the spirit of travel if one has to plan extensively beforehand, explain your accessibility needs, not getting what was promised and having to pay extra for what others regard as normal."

"One is forced to use the same place as before because you know it is relatively accessible. Even if you phone beforehand, people do not always understand what real accessibility means. Many people do not understand that even taking one step is often a problem for others."

"Most people in the travel industry are ill informed about people with limitations. They even use a loud voice to speak to a paraplegic with no hearing limitation or often ignore me by addressing my wife."

ABBREVIATIONS

ACSA	Airports Company of South Africa
AT	Accessible Tourism
DEAT	Department of Environmental Affairs and Tourism
DTI	Department of Trade and Industry
EU	European Union
GDP	Gross Domestic Product
GVA	Gross Value Added
ICC	International Convention Centre
ICF	International Classification of Functioning, Health and Disease
IPAP	Industrial Policy Action Plan
I/O	Input /Output
LSM	Living Standards Measure
PRASA	Passenger Rail Agency of South Africa
NAP	National Access Portal
NDT	National Department of Tourism
SADA	South African Disability Alliance
SABS	South African Bureau of Standards
SAARP	South African Association of Retired Persons
SAT	South African Tourism
SATOUR	South African Tourism
SANS	South African National Standards
SANRAL	South African National Roads Agency Ltd
STATS SA	Statistics South Africa
TGCSA	Tourism Grading Council of South Africa
TKZN	Tourism KwaZulu-Natal
UA	Universal Access
UK	United Kingdom
UNESCAP	United Nations Economic and Social Commission for Asia and Pacific
UNWTO	United Nations World Tourism Organization
USA	United States of America
VFR	Visiting Friend and Relatives
WHO	World Health Organization
WTTC	World Travel and Tourism Council

DEFINITIONS

Accessible	With respect to buildings or parts of buildings, means that people, regardless of disability, age or gender are able to gain access. Accessibility is evaluated in terms of the safe, comfortable and convenient use of a site, building or facilities by people with functional limitations.
Accessible Tourism	This is tourism which is accessible for persons with functional limitations. Although the most obvious action of AT is the elimination of physical barriers - like stairways - this is only a small part of the picture. In fact, accessibility affects all areas of tourism: not only accommodation and attractions but also transport, electronic devices, sources of information and communication.
Domestic tourist	A South African resident visitor who is travelling to and staying in places outside his or her usual environment for one night or more but for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited.
International tourist	An international traveler who visits the country and stays at least one night in collective or private accommodation.
Holiday	A trip which is undertaken where the purpose is any kind of leisure activity. This may, for example, include golf or bird watching, cultural exploration, fun, adventure or relaxation, partaking in nonprofessional sports activities or as a spectator at a sports event and visits to health spas.
MICE	Meetings, Incentives, Conference and Exhibitions
Responsible tourism	This is a tourism or leisure activity implementing practices that are respectful of natural and cultural environment and which contribute, in an ethical manner, to local economic development.
Shopping	A trip which is undertaken to shop for goods that will be used by the tourist him/or herself.
Signage	Audio, symbolic, tactile and pictorial information.
Tactile	An object that can be perceived using the sense of touch.
Universal Design	Universal Design is the design of products and environments to be accessible to all people, to the greatest extent possible, without the need for personal adaptation or by specialized design.
Tourism	The activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not related to the exercise of an activity remunerated from within the place visited.
Tourism Gross Domestic Product	The gross domestic product generated in the economy by the tourism industry and other industries in response to tourism internal consumption.
Travel and Tourism	The term used by the World Travel and Tourism Council (WTTC) to describe tourism and defined as the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes not remunerated from within the place visited. The phrase “usual environment” is introduced to exclude from the concept of “visitor” persons commuting every day between their home and place of work or study, or other places frequently visited.
Visiting friends and relatives (VFR)	A trip which is undertaken to see, socialize with, or to spend time with relatives and/or friends. The person need not have stayed at the relative’s house. The purpose of these visits includes weddings and funerals or other family event.

1. INTRODUCTION

1.1 BACKGROUND AND PURPOSE OF THE PROJECT

Tourists that require accessibility, such as those with mobility, vision, hearing and cognitive limitations, along with their relatives and caregivers constitute an important part of the travel market. However, access requirements can also be extended to include the elderly, families with babies and small children, pregnant and breast-feeding women, in other words people who encounter access constraints of varying natures.

Accessible Tourism is based on the fundamental principles of Universal Accessibility and Universal Design. These are essential for inclusive development to occur which is a core component of the achievement of Millennium Development Goals.[2] Inclusive development recognises diversity and aims at involving everyone in the development process. Universal Accessibility and Design accommodates all forms of diversity among people whilst simultaneously promoting social inclusion of particularly those who have been traditionally marginalised due to their functional limitations, by enhancing access to essential services and economic opportunities.

The purpose of this project is to assess the status of Accessible Tourism in South Africa. This is in line with **the dti's** Industrial Policy Action Plan 2010/11 – 2012/13 (IPAP 2) which, as part of its mandate, is to investigate potential niche tourism segments. The Tourism Directorate of **the dti's** Industrial Development Division (IDD) has recognised the important role that Accessible Tourism can play and has included it as a key tourism project in **the dti's**IPAP 2. It is envisaged that Accessible Tourism could contribute towards improving South Africa's competitiveness in the tourism sector. It also forms part of government's broader delivery efforts and complements the National Department of Tourism's NationalTourism Sector Strategy and South African Tourism's (SAT's) Marketing Strategy.

1.2 OBJECTIVES OF THE PROJECT

Accessible Tourism has been identified as a relatively untapped tourism market segment that has not been capitalised on in South Africa.[3]This has been attributed to a variety of different factors, notably a fundamental lack of understanding about the market segment in terms of its size, socio-economic and travel-related attributes and factors constraining participation in tourism and travel activities experienced by domestic and international travellers. Consequently, the objectives of the project, as per the Terms of Reference, are as follows:

- To provide an overview of the status of Accessible Tourism in South Africa;
- To determine the dimensions of the economic impact of Accessible Tourism; and

[2]The Millennium Development Goals (MDGs) – agreed on by the international community in 2000 and endorsed by 189 countries – are a unified set of development objectives addressing the needs of the world's poorest and most marginalized people, and are supposed to be achieved by 2015.
[3]Terms of Reference, 2011.

- To formulate recommendations regarding interventions to support the growth and development of this market.

This study provides an exploratory and initial understanding of this market, its value and its significance in South Africa. This in turn allows forthe profiling of both demand and supply factors incorporating accessible products and services. **Due to the relative small sample sizes achieved, the research is indicative of the extent and profile of the Accessible Tourism market in South Africa.**

1.3 RESEARCH METHODOLOGY

This research is the first of its kind conducted in South Africa and specifically aims at scoping Accessible Tourism at national level. There is little historical data and information available about the overall size, nature, extent and trends of this market segment. It has also been found that few of the national established data sources contain reliable information about the segment. Consequently, considerable primary and secondary research was initiated to collect and collate relevant information.

1.3.1 PRIMARY RESEARCH

The primary research undertaken used three different base questionnaires to profile the segment i.e. a domestic demand, a foreign demand and product supply questionnaires. These were distributed to a number of user groups and their representative associations as well as a variety of service providers represented by all the specialist products and facility providers along the tourism value chain.

To supplement the survey of domestic travellers, disability organisations and service providers were interviewed. This allowed for a comprehensive understanding of issues that emerged from the questionnaire responses.

SAMPLING METHODOLOGY

The definition of Accessible Tourism adopted for this study is based on the principles of Universal Accessibility and Design. This requires a description of the range of services, facilities, products and destinations that provide access to all potential and current users, allowing persons regardless of their functional limitations to enjoy holidays and their leisure time without difficulty. Given this definition it is difficult to apportion the share of the Accessible Tourism market from common tourism statistics.

Since the identified users are varied by nature, it was difficult to locate and recruit them all to participate extensively in the research. A purposive sampling technique was consequently used to target specific users. The purposive sample is a non-probability sampling technique in which the elements to be included in the sample are selected by the investigator on the basis of special characteristics of the respondents. Participants in the sample were therefore selected on an individual basis because they have special characteristics and could provide the necessary information. This method does not allow for statistical validation of findings. The participants in this research were selected with a specific purpose in mind, which reflects the particular qualities of the users and their relevance to the topic of investigation. The users groups chosen were elderly travellers and travellers with functional limitations. International research has revealed that the access requirements of these user groups also reflect those required by families with babies and small children, obese persons and pregnant women.

SAMPLING CHALLENGES

At present, there is no complete sampling frame available for travellers with specific access requirements. Consequently, purposive sampling had to be undertaken. Although the ideal way of sampling is by random selection of targets from a defined sampling frame, as in probability sampling, the reality of research often means that this is not always possible. The opposite of probability sampling is non-probability sampling, and simply means sampling without using random selection methods, thus not being able to test the validity of results statistically.

Purposive sampling was adopted for this study which means that the sample was specifically selected to include people of interest (elderly travellers and persons with functional limitations) and exclude those who do not suit the purpose.

While the objective with purposive sample is to achieve a balanced representation of the target population, one is likely to overweight subgroups in the sampling population that are more readily accessible. In this study, a sampling bias in favour of the following groups occurred:

- Elderly travellers and those with functional limitations with access to email because they were easily accessible.
- Persons with mobility limitations.
- Persons in high income groups.

It must also be noted that, given the extended nature of the study, an accurate depiction of the demand for Accessible Tourism was not possible since access requirements differ across the various user groups. The sample population that responded nevertheless provides an indication of some of the contemporary access challenges confronting travellers. However, it will also be necessary to conduct further research on the demand for Accessible Tourism that is fully representative of all user groups.

THE RESEARCH QUESTIONNAIRES

Three questionnaires were used as the main instruments of primary data collection, adopted with due consideration to the nature of the market segments in terms of its size and dispersion. The questionnaires were designed taking cognisance of the thematic aspects of the study and were aimed at capturing the following respondents:[4]

[4]See Annexure C for the questionnaires used.

- International and domestic travellers to South Africa;
- Tourism service providers; and
- Associations representing persons with functional limitations and the elderly in South Africa (an option of doing a telephone interview was also provided).

The purpose of the questionnaires was to address all major attributes that could probably explain the evolving Accessible Tourism demand in South Africa. Draft questionnaires were circulated for comment to the panel of experts and the client representative. Questionnaires were then pre-tested and, once finalised, were distributed.

The questionnaires were distributed through the following channels:[5]

- International and national associations for persons with functional limitations;
- International and national specialist tour operators;
- International and national specialist travel companies;
- International and national travel information service providers; and
- National service provider representative associations.

These associations and service providers were contacted through e-mail, with a letter of introduction attached. They were requested to distribute the questionnaire to individual members and, where possible, fax the questionnaire to members who did not have access to e-mail and the Internet. The questionnaires to international and domestic travellers and tourism service providers were also captured through an online web-based host i.e. Survey Monkey.

RESPONSE RATES

In order to increase the response rate of the survey, the following steps were taken:

- Questionnaires were sent to the representative associations of service providers, persons with functional limitations and the elderly using both the actual questionnaire as well as an online link to the questionnaire, with a request to distributetheseto their members;
- Follow-up email and telephone calls were made to ensure that the questionnaires were distributed and thereafter to request that they be resent due to the poor first-round response rates from their respective members; and
- Where no responses were received from specific service providers (e.g. car rental companies; World Heritage Site attractions; private rail and bus companies andfive-star hotels), they were contacted telephonically.

[5] See Annexure A and B for a list of associations and organisations that received the respective questionnaires.

A poor response was received from the members of the associations for persons with functional limitations which led to a request for telephone interviews to be conducted. Despite the above efforts to increase the response rates, the total number of respondents was low. **Consequently, care should be taken when reviewing the results of this research as responses are not fully representative of all travellers with access requirements. The research results should be viewed as being indicative of the Accessible Tourism market.**

1.3.2 SECONDARY RESEARCH SOURCES

The methodological approach consisted of a multi-disciplinary method, which was based on an extensive literature review and internet research. Sources that were used to assist in the quantification of the sub-segments were:

- Statistics SA Census 2001 and Urban-Econ projections 2011;
- Mid-Year Household Survey 2010;
- Medical Research Council;
- World Health Organisation; and
- Detailed literature review of international studies that have attempted to quantify the Accessible Tourism market.

Travel related propensities of the user groups were estimated based on the following sources of information:

- Primary research (surveys);
- SAT Research;
- South African Advertising and Research Foundation's (SAARF) Living Standards Measure Classifications; and
- The compilation of a database of specialist national and international Accessible Tourism service providers, disability organisations and institutions relevant to the promotion of this market in South Africa through extensive internet research.[6]

1.3.3 METHODOLOGICAL CHALLENGES AND IMPLICATIONS

A number of challenges were experienced during the course of conducting the surveys and research. Although low levels of participation and response are normal for this type of primary research, exceptional difficulty was experienced in achieving the results given the relatively short time frames within which the research had to be conducted. The methodological challenges that were experienced for each survey are listed below, along with the implications these have on the findings of the study.

TOURISM SERVICE PROVIDERS

[6] Annexure A

The questionnaire was sent to the associations representing the various service providers. These associations were requested to distribute the questionnaire link to their members and reveal the total sent. Over 4000 service providers received the questionnaire. However not all of the associations agreed to distribute the link to their members and for those that did, the number of members that received them could not be confirmed. The total number of responses received was 324. Additional methodologies were applied to augment the responses including an extensive internet search, which was found to be an unreliable source of information. Consequently, follow-ups were done telephonically. Due to the different degrees of accessible services and facilities that are provided, quantifying the number of accessible service providers is not possible given the lack of defining criteria.

The majority of responses were received from the accommodation sector (236), followed by the meetings, incentives, conference and events (MICE) service providers (35), tour operators and travel agents (25), attractions (9) and transport service providers (6). Thelow responserate from service providers makes firm interpretation of the data difficult.The primary research findings of the product and service providers relied on a self-assessment by the service providers. Consequently, the levels of accessibility that are reported by respondents may be biased and not necessarily reflect the true situation.

DOMESTIC TRAVELLERS

Questionnaires were distributed to the main associations representing persons with functional limitations in South Africa (South African Disability Alliance members), who were requested to distribute the link to their members. For members who did not have access to a computer, the questionnaire was faxed or if they preferred, telephone interviews were conducted. However, only some associations were willing to distribute the questionnaire to their members or to reveal the total number distributed. Some associations could not identify the total number of their membership since they also included a number of associate organisations that were not linked directly to persons with functional limitations. Persons with sight difficulties were able to complete the questionnaire through an on-line questionnaire that was equipped with screen readers.

The findings of the survey were also augmented with telephone interviews. The request for interviews with persons with functional limitations elicited a number of responses. A total of 65 telephone interviews were conducted. However these largely represented persons with mobility access requirements. This is due to the high number of requests for interviews, and hence responses, received from the members of the Quad Para Association of South Africa.

A total of 232 responses were received from domestic travellers in South Africa. Of these206 respondents identified themselves as travellers with functional limitation and 26 respondents identified themselves as being elderly (65+years). The poor response from elderly travellers was augmented with secondary research on the travel patterns of elderly people in South Africa.[7] Where

[7]SAT, 2010.*The Marketing Tourism Growth Strategy* 2011-2013
SAT, 2009.*Marketing Mzansi to South Africans.*
Seymour, J. 2010. *Towards an Effective Segmentation Approach for the KZN Domestic Tourism Market*. (6th ed)

applicable, the findings were compared with those of the SAT research of the mainstream domestic tourism market. [8]

The aim of the survey was to profile the existing market and this was achieved as the responses were mainly from people who currently travel, thereby reflecting actual market trends.

INTERNATIONAL TRAVELLERS

The questionnaire link to an on-line server i.e. Survey Monkey, was sent to Accessible Tourism service providers in Europe, North America, Africa and Asia. The questionnaire provided a basis from which to extrapolate trends and describe the nature of the demand for Accessible Tourism by international travellers. The total number of responses received was 183, which were from Europe (118), the United States (42), Australia (20), India (2) and the Democratic Republic of Congo (1). The international research was augmented further through secondary research accessing international best case studies and reports. The European Network for Accessible Tourism or ENAT also published the link to the questionnaire on their international website. This is indicated below.

[8]SAT, 2010 *Annual Tourism Report*

DISABILITY AND ELDERLY ASSOCIATIONS

Questionnaires were distributed to the member associations of the South African Disability Alliance (SADA) and associations representing retired and elderly persons. They were requested to send the questionnaire to the various social clubs in the nine provinces. Only 150 members belonging to elderly associations and social clubs in South Africa received the questionnaire and 15 associations representing persons with functional limitations responded to the request for interviews. Twenty six elderly people responded to the questionnaire. The poor response rate meant that firm interpretations could not be made and additional secondary research had to be undertaken.

1.4 STRUCTURE OF THE REPORT

The report is structured in the following manner:

SECTION 2: UNIVERSAL ACCESSIBILITY AND DESIGN

The conceptual framework is developed in this section by defining the concepts of functional limitation and Universal Accessibility as understood within the context of Universal Design. A definition of Accessible Tourism is proposed, user groups identified and the Accessible Tourism value chain is described.

SECTION 3: CONTEXTUAL ANALYSIS OF ACCESSIBLE TOURISMIN SOUTH AFRICA

The purpose of this section is to describe the overall tourism context in South Africa as well as the relevant national and international tourism trends and relevant institutions and policies in South Africa. The section also examines the relevant policy environment which will impact on the development of the Accessible Tourism market in South Africa.

SECTION 4: PROFILE OF THE ACCESSIBLE TOURISM MARKET

This section provides a profile of the Accessible Tourism market in terms of an estimation of the market size and a descriptive profile of the domestic and international markets in South Africa. The findings are derived from a combination of both the primary and secondary sources of information.

SECTION 5: ECONOMIC IMPACT ASSESSMENT

This section describes the economic impacts of the Accessible Tourism market in terms of new Gross Value Added, employment creation and revenue generation. This is based on the economic multipliers of the National Input/Output model.

SECTION 6: SWOT ANALYSIS AND RECOMMENDATIONS

This section lists the strengths; weaknesses, opportunities and threats (SWOT) of the Accessible Tourism market segment. Then key recommendations for the growth and development of this market are proposed.

SECTION 7: CONCLUSION

This section concludes by summarising the key issues of the report and the way forward.

2. UNIVERSAL ACCESSIBILITY AND DESIGN

2.1 INTRODUCTION

Accessible Tourism is based on the principles of Universal Accessibility and Design, which is an approach geared at designing an environment, products and services in such a way that all people are enabled to participate equitably. This section examines the concept of Universal Accessibility and Design and its relevance to the tourism sector. Accessible Tourism is thereafter defined followed by the identification of relevant user groups.

2.2 THE CONCEPTS OF UNIVERSALACCESSIBILITYAND DESIGN

BACKGROUND AND HISTORY OF UNIVERSAL ACCESSIBILITY AND DESIGN

The 1950s saw the first movement towards designing for persons with disabilities. No real articulation of this movement was seen, however, until the 1960s which saw the birth of the civil rights movement in the US, which in turn helped to inspire the Disability Rights Movement. This movement in turn gave rise to an impetus in design, leading to the formulation of 'barrier-free design' which aimed at removing obstacles in the built environment for persons with severe to moderate forms of disability.

In 1964, the Civil Rights Act for Racial Minorities was passed. Design was increasingly seen as a necessary (though not sufficient) condition for achieving civil rights. This understanding was crystallized in 1968 with the passing of the Architectural Barriers Act, which required all buildings constructed, altered or leased with federal funds to be "barrier-free".

PERSONS WITH FUNCTIONAL LIMITATIONS

Persons with functional limitations are defined by using 'The International Classification of Functioning Disability and Health' (ICF) by the World Health Organisation (WHO). This is a classification of health and health-related domains. The ICF puts the notions of 'health' and 'disability' in a new light. It acknowledges that every human being can experience a decrease in health and as a consequence, experience some degree of disability. Disability is not something that only happens to a minority of humanity. The ICF thus 'mainstreams' the experience of disability and recognises it as a universal human experience. By shifting the focus from cause to impact it places all health conditions on an equal footing allowing them to be compared using a common measurement – the ruler of health and disability. Furthermore ICF takes into account the social aspects of disability and does not see disability only as a 'medical' or 'biological' dysfunction. By including contextual factors, in which environmental factors are listed ICF allows the recording of the impact of the environment on the person's functioning.

Source: World Health Organisation, 2011

A decade later, it was acknowledged that barrier-free design was insufficient, and still did not embrace the notion of civil rights and non-discrimination (viewed as a form of segregation which provided "special" treatment for people with serious physical limitations). A more individualised approach was then sought and in the 1970s this became known as accessible design. Accessible design spread to most of the United States and Europe, emphasising solutions tailored to the individual, and creating situations whereby individuals could be “normalised and integrated” into society.

The 1970s also opened the door for a universal understanding of accessibility and pointed the way towards a theory of Universal Accessible Design. The 1980s saw the creation of the so-called “disability community”, a group concerned with the dichotomy of us vs. them, and the perceived status of disability as rare and static. They also identified the essential problems of laws providing accessibility, but in so doing, creating feelings and narratives of marginalisation and “special treatment”. Consequently, “Universal Access”[9]was proposed as a means forward.This constituted an awareness of market-related needs and an approach to making everything that is designed and produced usable to the greatest extent possible by the greatest number of the population.

The Americans with Disabilities Act (ADA) of 1990 broadened the scope of parties responsible for creating accessible environments to include both public and private entities regardless of whether or not they received federal funding.

The Universal Accessibility approach places the responsibility on society to adjust the environment to accommodate individuals rather than individuals working around the environment. In other words, the key lies in the integration of Universal Access into the design and planning process. Thus the concept of Universal Accessibility must be understood in relation to Universal Design, which strives to incorporate features that make all facilities universally available to all people and does not tailor those facilities to the needs of specific groups.

Applying the concept of Universal Design to the travel and tourism sector means that the design of tourism products, services and the environment should be functional in that the products, services and the environment could be used by all travellers, to the greatest extent possible(Centre for Universal Design, 1997). It aims to exceed minimum standards to meet the needs of the greatest number of people. This is an approach to tourism that serves all travellers in a manner that does not further stigmatise and isolate travellers that require accessibility.

PRINCIPLES OF UNIVERSAL DESIGN

Universal Design is defined by seven principles. These can be used by the tourism industry to provide policy makers, service providers and drafters of design standards and specifications with a platform from which to address accessibility issues in a holistic, integrated, cost-effective and positive way. These principles are illustrated below by providing examples of their general application.

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[9]The term was coined in the 1980s by the late Ronald Mace, who founded the Centre for Universal Design in North Carolina, after observing that features designed for persons with functional limitations often benefit everyone.

PRINCIPLE 1.[10]Equitable use: The design does not disadvantage or stigmatize any group of users.

PRINCIPLE 2. Flexibility in use: The design accommodates a wide range of individual preferences and abilities.

PRINCIPLE 3.[11]Simple, intuitive use: Use of the design is easy to understand, regardless of the user's experience, knowledge, language skills, or current concentration level.

PRINCIPLE 4. Perceptible information: The design communicates necessary information effectively to the user, regardless of ambient conditions or the user's sensory abilities.

[10]Photo source of Principles 1, 2, 4,5 and 6: Centre for Universal Design, 2011
[11] Photo source: BBC New Magazine. 2010. Http://bbc.co.uk/news/magazine.

PRINCIPLE 5. Tolerance for error: The design minimizes hazards and the adverse consequences of accidental or unintended actions.

PRINCIPLE 6. Low physical effort: The design can be used efficiently and comfortably, and with a minimum of fatigue.

PRINCIPLE 7.[12]Size and space for approach and use: Appropriate size and space is provided for approach, reach, manipulation, and use, regardless of the user's body size, posture, or mobility.

[12]Photo Source: ENAT, 2011. *New Haneda Airport Terminals, Tokyo, Based on Universal Design Principles.*Http://www.accessibletourism.org

The above examples illustrate that everyone is affected by Universal Design. However as a design concept, it has a greater effect on specific groups of people such as wheelchair users, pregnant women, the elderly, and people with babies in prams. This synergy of diverse groups makes the design universal.

According to Sneider and Takeda (2008), Universal Design is cost-effective because itrequires additional costs of approximately 1% if incorporated from the outset of a project. However, the cost of making adaptations after a building is completed is far greater andcan rise up to 5% or more of total cost depending on the modification of the features of the building. The "International Convention Centre Durban" (ICC) (see box below) illustrates the cost effectiveness of accessibility.

The costs of not incorporating Universal Accessibility and Design in the tourism sector can be significant particularly with regard to the high opportunity costs by excluding all travellers with specific access requirements (along with their families), who may otherwise visit a destination. Inaccessible transportation, hotel accommodations, and other facilities will prevent destinations from capturing a share of the growing international tourism market. It is also estimated that by not adapting its inaccessible infrastructures the tourism industry fails to capture approximately 15-20% of the global market share.[13] Simple low-cost examples of Universal Design that can be adopted by tourism service providers include:

- ✓ Lower first steps into facilities;
- ✓ Improved lighting;
- ✓ The removal of turnstiles;
- ✓ Clear and large signage;
- ✓ Access ramps; and
- ✓ Lowered counters.

The Basis for the lack of Universal Design

- **Misunderstood concept**
- **Limited education for professionals**
- **Confusion with ill defined standards**
- **Perceived aesthetic impact**
- **Lack of integration within the regulatory framework**

(Source: Thompson, P. 2010)

[13]Sakkas, N. 2004.*Decision support tools and policy initiatives in support of Universal Design in buildings – The POLIS project*. Conference Proceedings.Designing for the 21st century III.International Conference on Universal Design. 7-12 December, Rio de Janeiro, Brazil.

2.3 DEFINITION OF ACCESSIBLE TOURISM

Accessible Tourism incorporates the notions of Universal Accessibility and Universal Design to describe the range of services, facilities, products and destinations that provide access to all potential and current users, allowing any person, regardless of functional limitation, to enjoy a travel holiday and their leisure time confidently, independently and with no particular constraints. Accessible Tourism broadly encapsulates a paradigm in the tourism sector which embraces the needs of all travellers, and provides particular benefits for some user groups such travellers with functional limitations.

The United Nations World Tourism Organisation (UNWTO) created the first major public linkages between the concept of accessibility and tourism in the 1980s. Through the Manila Declaration (1980), tourism access was recognised as a fundamental right and member states were mandated to legislate tourism services. From the 1990s onward, there was growing impetus and momentum in the development of Accessible Tourism internationally.

The accessibility movement was given significant impetus in its inclusion in the Cape Town Declaration on Responsible Tourism (2000), which explicitly demanded that Responsible Tourism had to include accessibility for "physically challenged people" and set as a guiding principle the "endeavour to make tourism an inclusive social experience and to ensure that there is access for all".

THE INTERNATIONAL CONFERENCE CENTRE DURBAN

The International Conference Centre (ICC) in Durban, South Africa illustrates the cost effectiveness of incorporating accessibility into a world class public facility. At an early stage in its construction, it became apparent that the complex did not meet international accessibility standards. After intervention by accessibility advocates, the design consortium responsible for the project was given a directive to change the design to conform to the ADA Guidelines, ISO TR 9527 and the British Fire Evacuation Code BS 5588. The decision to utilize a combination of international codes was based on various perceived shortcomings in the ADA Guidelines. In addition, communication systems, orientation aids and signage were to be made accessible using Universal Design principles. Accessibility was to be incorporated into the design of the complex using Universal Design principles with minimal, if any, special features exclusively designed for people with disabilities.

The total construction cost for the centre, completed in September 1997, was R280, 000,000. The estimated total cost of accessibility provision, including the upgrading to international accessibility standards was R1, 670,000. Expressed as a percentage of the total capital cost, the provision of accessibility was 0.59%. Despite the fact that accessibility issues were not addressed until after initial construction had commenced, thus creating a partial retrofit situation, the proportional cost of accessibility provision was extremely low. Had accessibility been integrated into the original design, the cost may well have been lower.

Extracted from '**Disability issues, trends and recommendations for the World Bank'** Robert Metts, 2000.

The Astana Declaration (UN, 2009) and the United Nations '*Declaration on the Facilitation of Tourism Travel*' connected Accessible Tourism to any "responsible tourism policy". The *Declaration on the Facilitation of Tourist Travel* drew attention to the need and importance of creating accessible travel opportunities for persons with disabilities, adding that "the facilitation of tourist travel by persons with disabilities is a major element of any responsible development policy".

Accessible Tourism then is required in all the elements of a traveller's journey. This includes:

- Accessible information;
- Accessible transport;
- Accessible accommodation;
- Accessible facilities (swimming pools, shops, restaurants and other facilities);
- Accessible health and other services;
- Accessible entertainment and leisure activities;
- Accessible communication (including sign language); and
- Appropriate attitude, understanding and service levels of all service providers.

Based on the preceding discussion, the following definition for Accessible Tourism is suggested for the purpose of this research:

> Accessible Tourism refers to tourism that enables everyone, regardless of their functional limitation, to participate in the tourism experience confidently, independently and with dignity, through the creation of universally Accessible Tourism products, services and environments, and to ensure that Universal Design is systemic throughout the tourism value chain.

This definition includes all travellers. The creation of universally Accessible Tourism products and services and the systemic adoption of Universal Design throughout the tourism value chain will increase the capacity of tourism facilities and services to accommodate all tourist markets.

2.4 RATIONALE FOR ACCESSIBLE TOURISM

HUMAN RIGHTS

Equitable participation in the life of the community, without any restrictions or disadvantages is a human right that extends to all areas of society and social life, including tourism. The Constitution of the Republic of South Africa (1996) entrenches in section 9(1) the right of

THE PROMOTION OF EQUALITY AND PREVENTION OF UNFAIR DISCRIMINATION ACT 2000

"Disability discrimination" includes—
(a) Any act, practice or conduct which has the effect of unfairly hindering or precluding any person or persons who have or who are perceived to have disabilities from conducting their activities freely, and which undermines their sense of human dignity and self-worth, and prevents their full and equal participation in society;
(b) Any systemic, societal or individual act, conductor practice which has the direct or indirect effect of unfairly defining persons with disabilities by-
(i) Denying or removing from any person who has a visual or hearing impairment or any other disability from their supporting or enabling facility necessary for their function in society, such as a hearing aid, a guide dog, Braille, sign language or appropriate information technology;
(ii) Contravening the code of practice or regulations of the South African Bureau of Standards that govern environmental accessibility:
(iii) Failing to take reasonable steps to accommodate the needs of a person or persons with disabilities:
(iv) Failing to identify or eliminate obstacles that unjustly limit or restrict persons with disabilities from enjoying equal opportunities.

equality. This section states "Everyone is equal before the law and has the right to equal protection of the law". Implicit in this right is the understanding that neither the State nor any person may discriminate, directly or indirectly against anyone on various arbitrary grounds such as race, gender, religion, language, disability etc.

The introduction of human rights legislation has important implications for improving the tourism environment for persons with functional limitations. Such persons have a right to travel and failure to acknowledge this right may contribute to their marginalisation. Consequently, it is important that Accessible Tourism is treated as an issue of justice. South Africa is also a signatory to a number of international human rights treaties and conventions such as the United Nations Convention on the Rights of Persons with Disabilities (2006). The purpose of the Convention is to promote, protect and ensure the full and equal enjoyment of all human rights and fundamental freedoms by all persons with functional limitations.

ECONOMIC BENEFITS

The significance of Accessible Tourism will be enhanced as the number of older citizens in the population increases. Elderly travellers and those with functional limitations therefore represent strong demand and economic potential. In addition to the potential size of the market, the economic rationale for Accessible Tourism is supported by the following factors:[14]

- The changing demographic structure and social pattern of the population in developed countries means that more elderly people have the time, inclination and income to travel.
- Additional demand potential results from the fact that persons with functional limitations frequently travel with relatives and friends.
- This market has been found to be less seasonal, thus easing the economic effects associated with the low season.
- Increasingly, conference organisers and those hosting international events will not book venues unless there is sufficient accessibility.
- Tourist facilities compete with each other on the basis of quality, price and the provision of services and attractions. An accessible infrastructure improves their competitive edge which may lead to increased demand.
- By offering accessible services and facilities, service providers can gain new guests who may otherwise have decided to travel elsewhere.
- The majority of people have some manifestations of accessibility needs. Accessible Tourism therefore makes an important contribution towards improving the quality of tourism and raising the level of satisfaction among all guests.

[14]Buj, C. (2010). *Paving the Way for Accessible Tourism.International Centre for Responsible Tourism.* Leeds Metropolitan University.http://tourismo-sostensible.net/
Neumann, P. and Reuber, P. 2004. *Economic Impulses of Accessible Tourism for All*. Berlin: Study commissioned by the Federal Ministry of Economics and Technology & Federal Ministry of Economic and Labour (BMWA).

TRIPLE BOTTOM LINE

The Triple Bottom Line (TBL) is a system of aligning services and products with businesses activities that are considered socially, economically and environmentally sustainable, and furthermore, provides the necessary mechanism to provide the critical linkage between sector-orientated key performance indicators and operations(Buj, 2010 and Darcy, 2006, 2009, 2010). Dwyer (2005) considers that the tourism sector should embrace TBL and emphasises that "individual businesses should consider their environmental and social performance rather than their financial bottom line, or indeed, the role that individual businesses can play in achieving sustainable tourism development". TBL offers a useful linkage between accessibility and sustainability in the tourism industry, and provides a useful mechanism and basis from which to build universal accessibility into tourism practices and the tourism sector in general.

2.5 MARKET SEGMENTATION

Universal Accessibility and Universal Design is an all-encompassing approach that includes everyone in the design of tourism products, services and the environment. Functional user groups include, but are by no means limited to:

> **_Recognising Human Diversity_**
>
> ***The diversity of our species reinforces the need for Universal Design and Universal Access. Designers traditionally have been trained to design for the mythical average person. It is possible to design products and systems to suit a broader range of users; children, older adults, people with disabilities, people of differing size or shape, people who are ill or injured and people who are inconvenienced by circumstance.***
>
> *(Source: Thompson, 2010)*

- Elderly travellers;
- Travellers with temporary and permanent physical, sensory and cognitive disabilities;
- Pregnant and breast-feeding women;
- Obese travellers;
- Families with babies and small children;
- Travellers requiring luggage support services; and
- Travellers with language difficulties.

Given the diversity of the user groups, it is important to replace traditional accessibility principles throughout the tourism industry with design standards that increase access for everyone.

2.5.1 TRAVELLERS WITH FUNCTIONAL LIMITATIONS

Many organisations today use the WHO'sICF system which is in line with those defined by the "social model". This system is used to describe the health status of an individual taking into account factors such as limited ability or physical impairment, as well as the situational parameters when defining the disability of an individual. Furthermore, the ICF system seeks to describe the "health status" and ability to perform in a given context rather than defining disability as an all-encompassing label. The move to using ICF classifications represents a shift from describing a person's disabilities (as defined by the "medical model") to describing their level of health. Historically Accessible Tourism has been used to describe the travel and tourism needs and desires of travellers with disabilities. This concept has however changed over the years to include all persons with functional limitations. Today, the market potential for Accessible Tourism, based on the principles of Universal design, does not only include travellers with functional limitations but also people in all stages of life with access requirements.

MEDICAL MODEL

The medical approach to disability refers to disability as being the "problem" of the individual. This approach focuses on dysfunction and assumes that it is both permanent and encompass every aspect of the individual life. It positions individuals with disabilities as less able than those who are non-disabled. In this view, the individual, who cannot be modified or changed by professional intervention, remains deficient.

SOCIAL MODEL

The social model looks at human health from a broad perspective and challenges society and service providers to look not only at the indications of disease, illness and impairment, but also examines the individual's overall level of well-being and quality of life. Within this approach the focus is placed on providing necessary services in order to remove or minimise social and environmental barriers to full social, physical and leisure participation. The social model stresses that disability should not be regarded as a deviance but as a normal aspect of life.

The cultural habit of regarding the condition of the person, not the built environment or the social organisation of activities, as the source of the problem, is the most prevailing issue within the discussion of the social model of disability.

Source: Buhalis, D and Darcy, S. 2010. Accessible Tourism: Concepts and Issues.

Detailed statistics on the number of persons with functional limitations that travel are unavailable. What is known is that there are an estimated 650 million persons living with some form of disability in the world. If one includes their families, then this increases to approximately 2 billion persons who are directly affected by this, making up almost a third of the world's population (United Nations Convention of the Rights of Persons with Disabilities, 2008). According to the World Health Organisation, [15] it is expected that by 2050, almost 1.2 billion people will be living with a disability. In addition, older persons (over 60 years) in the world are reportedly 749.36 million (UNESCAP16-2006) and their number is expected to be doubled by 2025 (UNESCAP, 2005). Given that an increasing proportion of this group is gaining the ability to travel through their socio-economic status, it is important to understand the needs of these travellers.

[15]W.H.O, Source: International Classification of Impairments, Disabilities, and Handicaps (Geneva, World Health Organization, 1980 and 1993).

16UNESCAP, (2000), Barrier-free Tourism for People with Disabilities in the ESCAP Region, Executive Summary, Asia-Pacific Conference on Tourism for People With Disability, 24-28 September 2000, Grand Bali Beach Hotel Bali – Indonesia. http/www.unescap.orgttdwPublicationsTPTS_pubspub_2316pub_2316_Annex1.pdf

Research by Darcy [17] reveals that in the United States and in Australia, the Accessible tourism market is worth $13 billion and $4.8 billion respectively. Despite the potential of this market, persons with disabilities travel less than the general population. This is not attributed to their impairment but due to the structural constraints they face, which are a product of the disabling environments, practices and attitudes that they are subjected too. Some of the major constraints faced include:

- Lack of detailed information in the planning phase;
- A wholesale and retail travel agent sector that do not service the group;
- ICT environments that are not accessible;
- Transport systems that disadvantage people with mobility disabilities;
- Inaccessibility of destination environments;
- Lack of trust regarding the accuracy of Accessible Tourism information presented; and
- Accommodation/lodging facilities that do not offer an equality of experience.

Thus, the tourism industry haslargely ignored the inclusion of persons with disabilities. AccessibleTourism products and servicesremain within mainstream standards unless they are required to be compliant through human rights and building code provisions. Where the industry does provide access to products and services, it often does so without a consideration of the equality of experience and treating all persons with disabilities as a homogenous group.

ELDERLY TRAVELLERS WITH FUNCTIONAL LIMITATIONS

In South Africa the proportion of elderly people is projected to increase over the next two decades and it is estimated that by 2025 more than one person in ten will be 60 years or older.[18] According to the population policy white paper, South Africa's population growth has slowed considerably.[19]The annual growth rate of 2.1 percent between 1996 and 2001, and 1.3 percent between 2001 and 2007, is projected to decline to 0.9percent by 2014. This has led to changes in the country's population age structure. According to the review the population is slowly "maturing" with the proportion of elderly people (over 60 years of age), showing noticeable growth. The travel potential of the elderly in South Africa, however, might be offset by an increase in HIV and Aids-related mortality of the younger age groups resulting in the elderly having to fulfil the roles traditionally associated with primary caregivers and parents.

Internationally, senior citizens' in Europe account for 27% of tourist trips abroad and with high levels of disposable income, this market promises substantial growth.[20]This is important for South Africa since the key source markets of overseas (long haul destinations) tourists in 2009 were the UK, USA and Germany which accounted for around 51% of all the overseas foreign arrivals to South Africa in 2009.

[17]Darcy, S. 2010. 'Accessible tourism: a question of Trust, strategic knowledge Management and a commitment to Sustainability,' Institute of Transport Studies, Monash University. Social Research in Transport
[18]Medical Research Council.*Chronic Diseases of Lifestyle in South Africa since 1995 – 2000*.
[19]Scalise, F. 2011. *SA population growth slowing*. September 22 2011. South African Press Association.
[20]All World/European Travel Monitor data.*Outbound and Inbound Travel Market Reports*, 2009.

OVER 50'S AN EXPANDING TOURISM TARGET GROUP IN EUROPE

Source: World Travel monitor, 2011

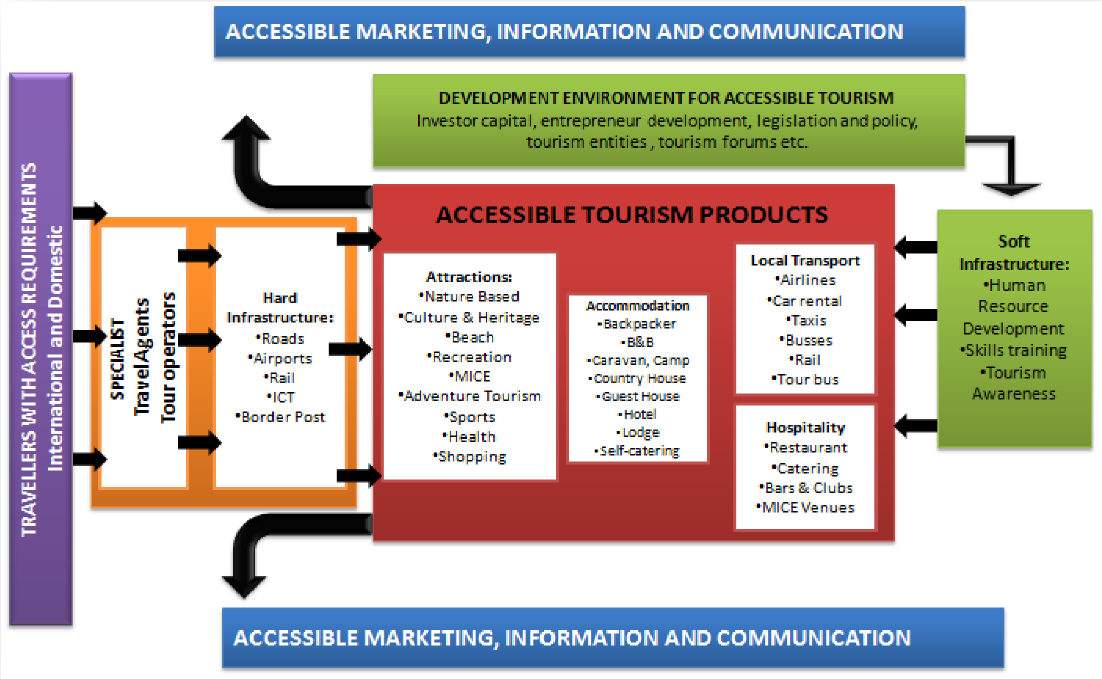
The over fifties are more mobile and more active than ever before. Between 2005 and 2010 vacation travel by Europeans aged 55 and over expanded by 17 per cent. This age group as a whole accounted for 27% of all trips abroad, or 78 million holiday trips. As far as holiday preferences are concerned, the over fifties are increasingly distancing themselves from the clichés associated with traditional travel by senior citizens. While beach holidays outstrip any other type of vacation in Europe, and are even gaining in popularity, individual countries have their own preferences. At the same time, city tours, cruises and excursions have experienced a significant boost among the over fifty-fives.

The implications for the South African travel and tourism sector are that the industry can expect to face changing demands, needs and opportunities as the population ages. Therefore, the impacts of the mature market throughout the world, in particular on world tourism patterns, should be closely monitored and tourism products need to be adjusted to address the demographics and special needs of the elderly traveller.

2.6 THE ACCESSIBLE TOURISM VALUE CHAIN

All travel and tourism experiences require a number of facilities and services that are provided by different entities at various points during the tourist's travel experience. A value chain is a useful analytical mechanism for understanding the goods and services themselves and provides a relational understanding of how the goods and services and entities providing these are interlinked and at what point in a traveller's experience they can be found. According to the World Report on Disability (2011), the "travel chain" refers to all value-adding elements that make up a journey, from starting point to destination – including pedestrian access, vehicles, and transfer points. If any link is inaccessible, the entire trip becomes difficult. The following figure illustrates a typical travel chain. A number of components have been identified and their relevance to Accessible Tourism is discussed below.

FIGURE 2.1: TOURISM VALUE CHAIN



Source: Urban-Econ Tourism, 2011

ACCESSIBLE MARKETING, INFORMATION AND COMMUNICATION

Marketing encapsulates all forms of communication and information transfer on Accessible Tourism products and services that are available in South Africa. It is also a ubiquitous part of the Accessible Tourism value chain and is becoming increasingly more important as new tourism products and services are developed. The marketing of Accessible Tourism is highly customer driven and differs from conventional marketing practices since it is more about satisfying the needs of the various user groups by creating and selling a product that meets these needs. The means by which this information is conveyed is another significant factor that should consider the various forms of functional limitations. For example, audio broadcasts, Braille catalogues and brochures are required for travellers with sight limitations. Elderly travellers with poor sight require large and bold text. Travellers with mobility limitations can be targeted though conventional media (TV, radio, internet, brochures). Variants of electronic communication also provide an option, such as cell phone marketing for persons with hearing limitations. Marketing activities for the Accessible Tourism market should thus be approached from a consumer needs basis and aligned with general marketing activities. The rapid development of internet-based tourism marketing channels such as websites, video and audio-links, social media, mobile technologies and e-commerce provides new opportunities for promoting to tourists with access needs.

SPECIALIST TRAVEL AGENTS AND TOUR OPERATORS

"Specialist" travel agents and tour operators facilitate the movement of tourists with specific access requirements and constitute one of the first links encounteredby travellersin the value chain. Specialist travel agencies and tour operators are two significant components that act as liaison channels between travellers with functional limitations and Accessible Tourism service providers. They provide advice and professional guidance on the choice of holiday, based on the particular access requirements. The difference between specialist and traditional travel agencies and operators is that the former must understand the specific travel requirements of their client and provide high quality information on not only accessible accommodation but on the status of accessibility throughout the journey. For travel agents and tour operators, having correct and detailed information is thus a basic requirement, which may also provide them witha competitive advantage.

ACCESSIBLE TOURISM PRODUCTS

These are the products and services that are used by travellers with access requirements during their stay. Travellers with specific access requirements require transportation to and from their accommodation establishmentduring their stay. This encapsulates all the time they spend in the destination visitingattractions, restaurants and engaging in other tourism activities. The extent to which this occurs depends on the degree of accessibility provided by the service providers. Places of accommodation and restaurants are frequently ill equipped to meet the needs of tourists with disabilities. The lack of suitable accommodation may often limit persons to more expensive hotels, which are often the only establishments that follow the principles of Universal Design e.g. very few hotels offer accessible rooms with wide entrances or low switches, hand dryers, towel racks and beds. Of the rooms available, very few are on the ground floor. Access into and out of hotels is also often problematic. Few hotels have elevators to all floors, access to reception, pool or bar areas, clear signage, visual alarms, and complete access through the entire building. Major constraints for travellers with functional limitations involve physical obstacles that limit access to tourism sites and attractions, the very elements that underlie, or enhance a journey. Such attractions may include leisure-based activities (e.g. visiting a theme park or participating in sports events); nature or historical-based activities (e.g. visiting museums or a patrimonial site), and socio-cultural activities (e.g. festivals or exhibitions). Most of the constraints encountered by tourists with disabilities when visiting these attractions involve site inaccessibility e.g. beaches are often not equipped to accommodate wheelchair users and poor access to museums, historical monuments or shopping areas restrict persons with functional limitations from participation in these activities.

HARD INFRASTRUCTURE

The hard infrastructure for the Accessible Tourism market includes telecommunications, rail and road networks, signage, information centres, convention and conference facilities, etc. Much of the hard infrastructure in South Africa has limited accessibility. The successful development of any Accessible Tourism destination is dependent on the reliability, accessibility and affordability of all the components of hard infrastructure. For travellers with functional limitations hard infrastructure access requirements vary, however the underlying prerequisite is that tourism hard infrastructure should either be designed or modified to allow persons with any form of accessibility requirements full participation and access.

SOFT INFRASTRUCTURE

Soft infrastructure largely refers to the human resources involved in rendering services to the Accessible Tourism sector. Specifically, soft infrastructure consists of the following:

- Accessible Tourism awareness and attitudes;
- Human resource management; and
- Skills training and preparation of staff.

The provision of quality human resources is a critical success factor of the Accessible Tourism market. Knowledge and attitudes are important environmental factors, affecting all areas of service provision and social life. Raising awareness regarding accessibility requirements and challenging negative attitudes are often first steps towards creating more accessible environments particularly for persons with disabilities. However, appropriate skills development, training, and awareness of accessibility relates not only to the persons working within the tourism industry such as tour guides and receptionists at hotels but also to the skills, awareness and attitude of planning officials, developers, the business community etc.

DEVELOPMENT ENVIRONMENT FOR ACCESSIBLE TOURISM

A conducivedevelopment environment within the tourism sector encompasses all aspects that would enable, facilitate and coordinate Accessible Tourism development. According to the White Paper on the Development and Promotion of Tourism in South Africa (1996), the role of government is to facilitate, enable and coordinate national, provincial and local tourism development. The White Paper includes a number of strategies for tourism development in South Africa, however, few of these relate to Accessible Tourism. Those interventions that are relevant to Accessible Tourism relate mainly to product development and little focus is given to other issues such as infrastructure provision, training etc. National, regional and local government authorities can also play an important role in creating an enabling environment for the development of Accessible Tourism by setting and enforcing appropriate standards.

2.7 CONCLUSION

Accessible Tourism incorporates the principles of Universal Accessibility to describe the range of services, facilities, products and destinations that provide access to all potential and current users, allowing any person, regardless of functional limitation, to enjoy a holiday and their leisure time confidently, independently and with no particular barriers or problems. Accessible Tourism, broadly, encapsulates a paradigm in the tourism sector which embraces the needs of all tourists.

The users groups that benefit from the application of the Universal Accessibility and Universal Design approach include elderly travellers, those with temporary and permanent physical, sensory and cognitive disabilities, pregnant woman, obese persons, families with babies and small children. This approach extends to encapsulate all travellers with luggage or those that experience language difficulties when travelling. These users groups also represent the demand side of the Accessible Tourism market.

The supply side of the Accessible Tourism market is represented in the value chain. The main components of the Accessible Tourism value chain do not differ from mainstream tourism but often require specialist knowledge, services or facilities. These may include specialist travel agents and tour operators, transportation services and tourism products comprising of accommodation, attractions and activities. The ease of accessibility experienced also relates to the marketing, informationand communication components of the value chain which are fundamental to the functioning of the entire value chain. Thecreation of universally designed tourism products and services and the systemic adoption of Universal Design throughout the tourism value chain, will increase the capacity of the tourism to accommodate all tourists.

"Over the past 20 years the advocacy concentration has been on breaking down the physical barriers that prevented People with Disabilities from accessing holiday destinations. Now the problem lies in the fact that the travel industry has failed to move beyond a compliance model. Facilities are built but are poorly understood if they are understood at all, and even where facilities are excellent the accessible tourism sector is not regarded as a valuable market segment, or not understood as a market segment at all".

"The result is that those facilities are never disclosed, never advertised and never published in a way that the travellers who need those facilities ever get a chance to know where they are." Now, it is recognized that progress will result if the mainstream industry understands the economic benefit AT can bring the tourism sector."

Source: Forrester, B. Tradability Australia. October 2010

3. CONTEXTUAL ANALYSIS OF ACCESSIBLE TOURISM IN SOUTH AFRICA

3.1 INTRODUCTION

The purpose of this section is to provide an overview of the context in which the market analysis of Accessible Tourism in South Africa will be evaluated. In particular, the section examines the global and South African Accessible Tourism contexts with a view to understanding general trends and profiles. Finally, the section examines the policy environment which can impact on the development of the Accessible Tourism market in South Africa.

3.2 THE GLOBAL TOURISM CONTEXT

As there are direct linkages between Accessible Tourism in the domestic and foreign markets, it is necessary to examine the global tourism context of this study. Following on from the decline in tourism during the global financial crisis and the world recession, the tourism sector recoveredwell in 2010, [21] with most countries reporting growth in international arrivals. Worldwide, international tourist arrivals increased by 6.7% over 2009, with 935 million arrivals recorded. This growth was greater in developing countries (+8%) than in developed countries (+5%). However, Europe still holds most of the market share at 51%. France remained the top international destination with an impressive 77 million visitor's in2010 (74 million in 2009). Together with France the USA, China, Spain and Italy remain the top 5 destinations.

Africa received 49 million tourist arrivals in 2010, an increase of 6% over 2009, which accounted for 5% of global arrivals, the smallest share among the continents. Egypt held 1st position in Africa with 12 million tourists arriving in 2010, a 6.6% growth over 2009. South Africa occupied second place in the region with increases of 15.1% in 2010. The good growth was largely due to the country hosting the FIFA 2010 World Cup.

The primary drivers of the worldwide international tourist arrivals are the emerging markets. Events such as the FIFA World Cup in South Africa, the Commonwealth Games in India and the World Expo in Shanghai have contributed to the BRICS (Brazil, Russia, India, China and South Africa) achieving excellent growth in international arrivals. This bodes well for South Africa, which is due to host the 7th Conference of the Parties (COP 17) of the United Nations Framework Convention on Climate

[21] Overall tourist arrival figures have been published for 2010 by the UNWTO. However breakdown by regions and country are only available for 2009.

Change in November 2011 and the Disabled People's International 8th World Assembly in October 2011. According to Euromonitor Africa is one of the regions that are likely to attract an increasing number of arrivals from all over the world. This is attributed to people seeking new experiences at lower costs. South Africa is forecast to be in the top five leading growth destinations by 2014(IMIS for Travel and Tourism, 2010).

Emerging economies Brazil, Russia, India and China (BRIC), despite representing only a fraction of world travel, are also tourism source markets with high growth potential due to their strong economic growth and a growing middle class with greater spending power and money for travel. Consequently, South Africa should market itself and adapt tourism products and services to attract these f potential new customers.

3.2.1 ACCESSIBLE TOURISM GLOBAL TRENDS

The global Accessible Tourism trends that have been identified are set out below. However, it is important to note that some of these trends are occurring within the contextof developed nations and therefore may not be fully comparable to South Africa. Given the fact that developed countries comprise an important source market of tourists to South Africa, it is nevertheless important to consider these trends.

TRAVELLING WITH A COMPANION/FAMILY[22]

Travellers with functional limitations are more likely to be accompanied by travel companions who are usuallya partner or friends. Research conducted in India revealed that persons with "reduced mobility" usually travel in-groups. The size is normally 03-06 persons.[23]This has an important economic impact in terms of the multiplier effect on the overall travel expenditure. Consequently, destinations that cannot accommodate the needs of travellers with functional limitations will also loose the business of their friends and family members.

ELDERLY TRAVELLERS[24]

Elderly travellers are on average nowadays better educated, more affluent and form a large and growing influential market sector. They demand and expect quality in all aspects of their travel. They tend to use intermediaries such as travel agents and tour operators. Many elderly people also have more free time than younger travellers and are more flexible with their time. This may contribute to a longer tourism season as they are able to travel during "off-peak" periods. Elderly travellersalso tend to stay longer than younger travellers whose work commitments often influence the length of holidays. Given the fact that elderly people will spend a greater percentage of this discretionary

[22]Buj, C. 2010. *Paving the Way to Accessible tourism*.International Centre for Responsible Tourism, Leeds Metropolitan University.
[23]Problems and Prospects of Accessible Tourism in India. 2010. Commissioned by the Ministry of Tourism (Govt. of India). Indian Institute of Tourism and Travel Management. Http:\\www.iittm.org
[24]Avcikurt, C. *The mature age market in Europe and its influence on tourism*.

income on travel than any other market segment, public and private tourism suppliers should deliver services reflecting the needs associated with these changing demographics as presented in the adjacent text box. . This is also crucial since elderly travellers and those with functional limitations usually return again to the same destination, once it was established as accessible and welcoming (Buj, 2010).

POWERFUL WORLDWIDE TRAVEL SURGE LED BY BABY BOOMERS

According to the Preferred Hotel Group (PHG), the first wave of America's Baby Boomers turn 65 on January 1, 2011 and unlike their parents' generation, baby boomers don't consider themselves 'old' at 65. The Boomer generation is more physically active than any in history. They are veteran travellers. And now, with more time available as they reach traditional retirement age, they say they are going to intensify their pursuit of travel, new experiences and adventure. USA Boomers constitute almost half (47%) of active American leisure travellers. Two-thirds have taken a leisure trip to celebrate a life event like an anniversary or birthday, and they are more likely to travel as a couple. Since 40% are grandparents, they are more likely to travel on multi-generational trips. The study findings by the PHG on this generation include:

- Boomers want it all – former luxuries are now considered necessities.
- Family legacy is key – concerned about legacy, boomers will amp up their pursuit of multi-generational travel. Four in 10 of all boomers are now grandparents. Spending time with loved ones matters.
- Online rules – this is a group that researches everything in-depth on the Internet and makes buying decisions online – including booking travel.
- They want to take their travel experiences to the next level – collectively, baby boomers are already world travellers. They backpacked through Europe as teens and have trotted the globe since.
- Aspirational, experiential, sustainable, interactive, thematic – these are the types of travel that appeal to this group. No bus tours for this crowd. Instead, boomers seek self-fulfilment, a connection to nature, authentic world cultures and active involvement with every travel experience.
- They are all foodies –culinary tourism scores off the charts.
- Comfort meets adventure – they want both. Zip lining over a forest canopy and trekking by day; fine dining and a comfortable bed by night is the formula that works for them

Source: Preferred Hotel Group, 2010

Recently, business attitudes towards elderly travellers in developed countries have begun to change. For example, airlines and hotel chains, being conscious of the fact that the elderly are a potentially huge market, have designed special discount programmes. Moreover, a number of tour operators specialise in the market for elderly travellers, with packages meeting their requirements particularly to destinations such as Southern Europe, Mexico and the Bahamas during the winter off-season[25].

3.3 THE SOUTH AFRICAN CONTEXT OF ACCESSIBLE TOURISM

3.3.1 FOREIGN TOURISM CONTEXT[26]

Total arrivals to South Africa have increased since 2005, although the incremental increases in arrivals have been declining over time. In 2009, South Africa was one of the few countries to experience a growth in international tourist arrivals when global movements declined, recording its highest number of foreign arrivals which grew by 3.6% over2008 to 9,933,966 million arrivals. This surpassed the 2008 global average which saw a decline of -4.3%. Arrivals to South Africa were

[25] Jan V Hassel, *The senior travel market: distinct, diverse, demanding*, (in: William F. Theobald, Global Tourism, The Next Decade), Oxford: Butterworth-Heinemann.
[26]SAT 2011.*Highlights of tourism's performance in 2010*

boosted by the sports events that South Africa hosted in 2009, namely the FIFA Confederations Cup, the British and Irish Lions tour and the Indian Premier League. This resulted in South Africa's global tourism destination ranking moving from 29th position in 2008 to 26th position in 2009.South Africa retained its global ranking in 2010 (SAT, 2011).

Foreign tourist arrivals in 2010 were 8, 07 million, over a million more than in 2009 (7, 01 million). This increase reflects a growth of 15.1%, which has been attributed to South Africa hosting the 2010 FIFA World Cup in June and July 2010.The Africanland market is the largest source of tourist arrivals (5, 4 million) followed by Europe (1, 3 million) and the Americas (457 981) (SAT, 2011). The SADC region land markets represent an important foreign source market for South Africa.

UK, USA, Germany, Netherlands and France remain the top five overseas source markets. This has important implications for the development of Accessible Tourism in South Africa. According to Buhalis et al (2005), there are 127 million of Europeans who require accessibility, 70% of which "have both the financial as well as the physical capabilities to travel". Furthermore, the demographic trends in Europe[27] indicate that the share of people older than 64 years in the total population is expected to nearly double, reaching 30% by the year 2060. Many people who belong to the younger age groups actively participate in tourism as most of them have gone on holidays since childhood. They will most likely keep on travelling when they are older which will also increase the share of older tourists. A similar trend is evident in the USA, where "mature travellers", "older boomers" and "late bloomers"[28] comprise almost 60% of leisure travellers.[29] The purpose of travel of the overseas source markets is also primarily for leisure purposes.

Leisure, comprising of Visiting Friends and Relatives (VFR), holiday and shopping for personal use, remains the primary purpose of visit of tourists to South Africa, but this has declined from 59.6% in 2009 to 57.1% in 2010. The number of VFR tourists decreased from 22.9% in 2009 to 22.1% in 2010. Business tourists on the other hand increased from 29.6% in 2009 to 30.8% in 2010.

The total foreign direct spend excluding capital expenditure is estimated to have been R72.6 billion in 2010.[30] The average spend per foreign tourist in South Africa is estimated to be R9 300. The highest spend is recorded for travellers from Asia and Australasia at R13 400, followed by visitors from the Americas at R12 800. In terms of spend per category, shopping for personal use as well as for goods for resale was the largest spend category.

Given that leisure travellers constitute a significant percentage of the market (57.1%), it is necessary to ensure that there are more accessible facilities and services to facilitate travelling and increase the comfort experienced of leisure travellers. This includes accessible retail facilities to meet the access requirements of shoppers, accessible accommodation, transportation, attractions and

[27]Urhausen, J. 2008. *Tourism in Europe. Does Age really matter*? Eurostats.Statistics in focus.
[28] Mature travellers (those born before1946); older boomers (those born from 1946 through 1954) and young boomers (those born from 1955 through 1964).
[29]US Travel Association. 2009. *Travel Facts and Statistics*.
[30]In 2009, Statistics SA distinguished between tourists and day visitors and this started a new data series. As a result of this change, these findings cannot be compared to previous reports.

activities. This also necessitates the involvement of a number of stakeholders, such as developers, retail companies, local authorities and their development agencies.

3.3.2 DOMESTIC TOURISM CONTEXT[31]

During the past few years, the total number of domestic trips taken by South Africans has been decreasing, from 35.9 million in 2007 to 32.9 million in 2008, 30.2 million in 2009 and 29.7 in 2010 (SAT, 2008, 2009, 2010 and 2011). In 2010, approximately 43% of the South African adult population travelled, translating to approximately 13.4 million adults. The average number of trips taken per traveller in 2010 was 2.2 compared with 2.1 in 2009 and 2.4 in 2008. Visiting friends and relatives (VFR) continues to be the major reason for domestic travel accounting for 74% of all domestic trips taken in 2010 (76.2% in 2009). Holiday trips accounted for 13% of all domestic trips in 2010, business trips 5%, religious trips 6% and medical trips 1%. While there was an overall decline in the number of domestic trips in 2010, the share of holiday trips increased from 12% in 2009 to 13.4% in 2010, while the share of VFR and business travel decreased. Domestic tourism expenditure also reduced in 2010 as total revenue declined by 6% to R21.1 billion, from R22.4 billion in 2009. The average spend per trip has decreased since 2008 from R780 to R730 in 2009 and R710 in 2010. The average spent per day decreased by approximately R10 from R170 per day in 2009 to R160 per day in 2010, while the average length of trips increased from 4.2 nights to 4.4 nights.

The increase in length of stay resulted in an increase in total tourist bed nights of 2% from 128 million in 2009 to 131 million in 2010. Economic constraints remain the biggest barrier to domestic travel with 31% mentioning that they cannot afford to travel. This has important implications for elderly people who are dependent on state pensions, persons with disabilities who have to travel with an assistant or caregiver and families travelling together, increasing the overall cost of travel.

In order to address the diversity of the domestic market in South Africa, SAT segmented the market by grouping people in terms of their travel behaviour, media consumption habits and lifestyle. The benefit of this approach is that people with similar characteristics can be targeted with products and communication tailored specifically for their needs. However, the disadvantages of this approach are that it fails to consider the structural imbalances that arose through apartheid policies, the consequences of which are still evident today. For example, there still remains limited integration of previously neglected groups inthe tourism sector.

One of the seven different consumer segments that have been identified is the Golden Active Couple (Age 65+ years old). Research by SAT reveals that this group is a high spend market (the second largest after Independent Young Couples and Families), staylonger and travel throughout the year. However, the accessibility requirements of these travellers have not been identified by SAT. This can result in situations where facilities and services are unusable for this market segment. It means that a number of travellers with access requirements, such as obese persons, pregnant woman and

[31] SAT 2011. *Highlights of tourism's performance in 2010.*

persons with disabilities, would also be disadvantaged since they share a number of access requirements with the elderly.

The opportunity exists to grow the domestic market, increase the value of the market and address issues of seasonality, geographic spread and limited trip expenditure through promoting Accessible Tourism. This reduces the exposure of the tourism industry to fluctuations in international demand, which is extremely sensitive to global, political and economic trends.

3.4 THE ACCESSIBLE TOURISM POLICY CONTEXT

3.4.1 NATIONAL POLICY CONTEXT

3.4.1.1 TOURISM CONTEXT

- **THE TOURISM ACT OF 1993 (AMENDMENTS 1996, 1998, 2000)**

The Tourism Act formalises the policy direction of the White Paper on Tourism Development and Promotion in South Africa (1996). The Act makes provision for the establishment of a grading and classification scheme in respect of accommodation establishments. However, the accessibility of facilities and services has not received priority at policy level. This Act is currently being reviewed and a new Tourism Bill is expected to be tabled by 2012.

- **SOUTH AFRICAN NATIONAL RESPONSIBLE TOURISM GUIDELINES (2001) AND THE NATIONAL MINIMUM STANDARD FOR RESPONSIBLE TOURISM (2011)**

The National Responsible Tourism Guidelines were designed in 2001 to provide national guidance and indicators for enabling the tourism sector to demonstrate progress towards the principles of responsible tourism. These guidelines merely mention that provision should be made for the access requirements of “physically challenged people”. Access provisions for other functional limitations are not stipulated in the guidelines.

In order to address the lack of harmonisation of accreditation, certification and labelling in the tourism industry, the National Minimum Standard for Responsible Tourism[32] was developed in 2011. The National Minimum Standard for Responsible Tourism establishes a common understanding of the minimum criteria for Responsible Tourism. The standard mentions that access must be provided for “people with disabilities and special needs”, thus recognising that persons other than those with disabilities may have special needs.[33] However, this approach is not based on the ICF’s conceptualisation of disability, which is regarded as being universal because it covers all human functioning and treats disability as a continuum rather than categorising people with disabilities as a separate group.

[32] SANS 1162:2010. *Responsible Tourism Requirements.*
[33] As defined by the Employment Equity Act 55 of 1998

- **NATIONAL TOURISMSECTOR STRATEGY (NTSS),2011**

The National Tourism Sector Strategy is geared towards creating the necessary conditions for the sustainable growth and development of tourism. The strategy is also aligned with the New Economic Growth Path, a national policy founded on the restructuring of the South African economy to improve its performance in terms of labour absorption and rate of growth. It is therefore essential that the promotion and development of Accessible Tourism takes into consideration the national tourism agenda and is aligned to the strategic objectives and targets identified within the NTSS. These strategic objectives and targets have been prioritised and clustered in order to identify specific areas of focus requiring immediate attention before they can be implemented.

The main objective of the NTSS, in line with the New Economic Growth Path, is to create employment in the sector and increase its percentage contribution to GDP. In order to achieve this objective, there must be increased investments in tourism, which should have the reciprocal effect of increasing the number of foreign and domestic tourists in South Africa. However, this central objective cannot be achieved without transforming the industry, providing adequate education, training and awareness opportunities for people employed in the sector, entrenching a culture of travel, delivering world class services and addressing the geographic, seasonal and rural spread of tourism.

Accessible Tourism provides an opportunity to address the strategic objectives and targets that have been prioritised through the development of products and facilities that can be accessed by all tourists. The inculcation of Universal Accessibility and Universal Design principles throughout the tourism industry has the potential to increase the total number of domestic and foreign tourists, resulting in the positive benefits that the NTSS aims to generate. The overall implications are a transformation of the industry towards recognising and addressing the travel requirements of groups that have previously beenignored.

- **THE TOURISM GROWTH STRATEGY 2011-2013**

The Strategy focuses on building and growing a sustainable international tourism market based on demand but does not specifically refer to the special considerations of Accessible Tourism. Accessible Tourism provides the opportunity to address universal demand and simultaneously creates new markets for South Africa's product offering. It is therefore crucial to understand the nature of the demand.

3.4.1.2 UNIVERSAL ACCESS POLICY CONTEXT

- **NATIONAL BUILDING REGULATIONS**

All new hotels and visitor accommodation being built must comply with the requirements of the Building Regulations. Over and above this, the South Africa Bureau of Standards has devised two codes of design practice - S.A.B.S. 0246:1993, and S.A.N.S. 10400. These codes establish the minimum design requirements for access to and circulation in buildings and related facilities, to permit general use by persons with disabilities. However, these codes do not and cannot purport to include all the specialised requirements that are needed to ensure Universal Accessibility in the built environment. The Code 10400 Part S regulation states that *"any building classified as H1 in terms of regulation A20 where such building has less than 25 bedrooms and it can be reasonably proven that it is not possible to include wheelchair access in certain aspects of the design."* Buildings classified as H1 include hotels and all accommodation establishments. This means that due to the ambiguity of the "*reasonably proven"* provision the majority of establishments that have less than 25 rooms are not required to provide any level of Universal Access.

- **TOURISM GRADING COUNCIL -UNIVERSAL ACCESS GRADING SCHEME**

The Tourism Grading Council of South Africa (TGCSA) was established in September of 2000 by the Department of Environmental Affairs and Tourism (DEAT) and is mandated to establish a structural framework for grading and quality assurance of all tourism products. The incorporation of a Universal Access Grading Scheme into TGCSA's framework is an indication of their commitment to embrace the principles inherent in the Constitution and in the Bill of Rights, as well as ensuring South Africa's place as a leading quality-driven tourism destination.

Currently, TGCSA has mainstreamed the Universal Access (UA) Grading Scheme into all of its star-grading systems, and all newly graded establishments will be graded taking into account UA. Although many older buildings, which account for a high proportion of tourist accommodation in South Africa, are difficult to adapt to be completely accessible for tourists with functional limitations there are a significant number that require little if any modifications to achieve relatively high levels of Universal Accessibility. To address this problem, TGCSA have established a set of standards, which, using TGCSA's grading system, hopes to ensure a wide range of accessible accommodation. The use of such a system is in keeping with International Standards and will allow accommodation vendors to market themselves as accessible.

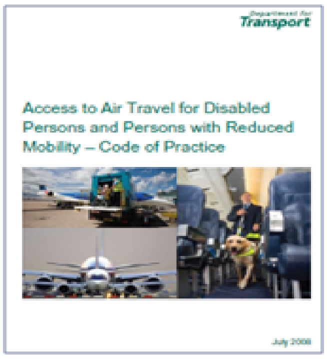
The incorporation of a UA Grading Scheme into TGCSA's framework and other policies means that the tourism industry should offer quality-driven products and services that can compete on an international level. The eventual aim of the current UA grading criteria is to ensure that certain levels of accessibility will be present at facilities and places graded. The implications of this are that travellers with access requirements will be guaranteed reliable information regarding Universal Access of tourism facilities and services in South Africa.

- **TRANSPORTATION**

The National Tourism Sector Strategy (2011) recognises that a strategic gap exists in the provision of public and tourism transport. The limited public and tourism transport makes it difficult for independent travellers to move around and also prevents South Africans without access to private transport from travelling. The Public Transport Strategy (2007–2020) aims to accelerate the improvement in public transport by establishing integrated rapid public transport networks (IRPTNs), which will introduce priority rail corridors and bus rapid transit (BRT) systems in cities. The essential feature of the Public Transport Strategy is the phased extension of mode-based vehicle recapitalisation into IRPTNs. These networks comprise an integrated package of rapid rail, BRT and taxi and metered taxi priority networks, especially in major cities. The strategy is expected to improve public-transport services for all users.

In South Africa, there is no Code of Good Practice or national Standard that regulates access to air travel. Consequently, the Airports Company of South Africa subscribes to the United Nations Convention on the Rights of Persons with Disabilities and its Operational Protocol. This means that facilities at all airports in South Africa should be compliant with minimum standards required by the Protocol. Airports Company of South Africa (ASA) states that it has in place policies and procedures for 'Passengers and Persons with Reduced Mobility'. Interview findings indicate that despite major international airports upgrading their capacity prior to the 2010 World Cup, accessibility in these airports still do not meet a number of international standards.

BEST PRACTICE: CODE OF PRACTICE - ACCESS TO AIR TRAVEL FOR DISABLED PERSONS AND PERSONS WITH REDUCED MOBILITY – UNITED KINGDOM



The Code of Practice has been produced by the Department for Transport (DfT), supported by various working groups. The purpose of this Code of Practice is to improve the accessibility of air travel to disabled people and people with reduced mobility. It covers the whole journey experience, from accessing information at the booking stage through to arriving at the final destination.

It is aimed at all those involved in providing services related to air travel, including travel agents, tour operators, UK airlines (scheduled carriers – both full service and no-frills – and charter carriers), aircraft designers, UK airports, ground handling companies and retailers. It is not intended as a guide for passengers, for whom separate information has been issued. The terminology used follows aviation convention. Since the Code was first published in 2003, there have been a number of legal and policy developments in this field which have made it necessary to update the Code. In addition, the Department for Transport commissioned a study into compliance with the Code.

The Code sets out both legal requirements and recommendations supported by explanatory text. The Government expects the air travel industry to adopt these recommendations wherever possible and unless there are practical reasons which make it unreasonable to do so. In some cases it may be necessary to do so to comply with the Disability Discrimination Act. Those involved are encouraged to exceed these standards wherever it is practical to do so. To ensure the Code remains as current as possible, detailed guidance documents will be linked to the web version of this document and updated as necessary.

3.5. ACCESSIBLE TOURISM RELATED INSTITUTIONS AND STAKEHOLDERS

There are a number of public and private institutions and stakeholders in South Africa that play a strategic role in the development of Accessible Tourism. A number of institutions have a strong advocacy influence that can promote the implementation of strategies and policies. However, despite their presence, many stakeholders believe that these institutions are driven by their own sectarian agendas with limited integration between them.[34] For example, disability association's focus on awareness creation is generally related to the specific needs that they represent. Consequently, the concept of Universal Access has not yet been fully embraced by all these representative organisations in a unified manner. The following institutions and stakeholders have been identified based on their ability to directly engage in the development of Accessible Tourism.

3.5.1 PUBLIC SECTOR INSTITUTIONS

NATIONAL DEPARTMENT OF TOURISM (NDT)

This is a key institution for the regulation of tourism in South Africa, which aims to fulfil the national government's role of creating the conditions for responsible tourism growth and development. The National Department of Tourism's mandate is largely one of policy-making, planning and facilitation andit can implement policies and strategies in relation to Accessible Tourism.

SOUTH AFRICAN TOURISM (SAT)

South African Tourism is an important institutional resource for raising the profile of Accessible Tourism by marketing and promoting Accessible Tourism both internationally and domestically. However, SAT may play a more proactive and developmental role in future by undertaking research, product development, training and other functions in addition to the marketing and promotion of Accessible Tourism.

TOURISM GRADING COUNCIL OF SOUTH AFRICA (TGCSA)

The TGCSA uses internationally recognised star insignia to rate accommodation establishments and its mandate has been extended to include other relevant businesses in the tourism industry. The TGCSA is central to the promotion of reliable and consistent information regarding the quality and standards of tourism facilities that are suitable for the needs of persons with functional limitations and the elderly.

DEPARTMENT FOR WOMEN, CHILDREN AND PERSONS WITH DISABILITIES

The Department was established to emphasise the need for equity and access to development opportunities for persons with disabilities in South African society. It now falls within the Presidency and as such, it draws on presidential authority to facilitate its work and the integration of disability into the work of all publicly funded agencies. The Department now incorporates the former "Office on the Status of Disabled Persons (OSDP) in the Presidency."

[34] Selected interviews with South African Disability Association members (2011).

DEPARTMENT OF PUBLIC WORKS

The Department is responsible for the effective implementation and administration ofthe relevant legislation and monitoring the implementation thereof. It is also responsible for ensuring that facilities are compliant with National Building Regulations.

DEPARTMENT OF TRANSPORT

The Department of Transport includesa number of key stakeholders such as South African National Roads Agency Limited (SANRAL), Passenger Rail Agency of South Africa (PRASA) and Airports Company South Africa (ACSA) andis responsible for the adoption and implementation of measures to enhance the accessibility of public transportation and to ensure that public transportation is sustainable, reliable and safe.

PROVINCIAL AND LOCAL GOVERNMENT

Whereas the role of national government is mainly associated with providing strategic direction on accessibility tothe tourism industry, the role of provincial and local government relates to the actual implementation of the national policies and legislationon Accessible Tourism. The specific roles of provincial and local government in relation to the development of Accessible Tourism are listed below.

Provincial government, working in conjunction with district and local municipalities should:

- Implement national policy guidelines on Accessible Tourism;
- Develop provincial tourism policies and support municipalities in developing local tourism policies on Accessible Tourism;
- Coordinate the activities of the public sector to ensure an integrated Accessible Tourism development approach; and
- Facilitate the development of the Accessible Tourism services and products.

Local government should:

- Integrate provincial Accessible Tourism objectives into district plans and priorities;
- Drive the development and implementation of local Accessible Tourism policies;
- Provide accessible local infrastructure;
- Develop Accessible Tourism products and services;
- Allocate Institutional capacity and dedicated and skilled human resources towards the development of Accessible Tourism;
- Ensure compliance or development of health,safety,licensing and local by-laws; and
- Provide Accessible Tourism support to entrepreneurs and investors.

3.5.2 DISABILITY AND ELDERLY ASSOCIATIONS

SOUTH AFRICAN DISABILITY ALLIANCE (SADA)

SADA is a body consisting of 12 national organisations representing persons with Disabilities in South Africa. This body, which was formerly known as the South African Federal Council on Disability, has been reconstituted to be a body of consensus, and the voice of the disability sector in South Africa. SADA and its affiliated associations also have the potential to raise the awareness of accessibility that relates to the functional limitations that they represent. The 12 member organisations are:

- Quad Para Association of South Africa (QASA);
- National Association for Persons with Cerebral Palsy (NAPCP);
- Down Syndrome South Africa (DSSA);
- National Council for Persons with Physical Disabilities in South Africa (NCPPDSA);
- South African Federation for Mental Health (SAFMH);
- Epilepsy South Africa (ESA);
- South African National Council for the Blind (SANCB);
- Deaf Federation of South Africa (DeafSA);
- Disabled Children's Action Group (DICAG);
- Autism South Africa (ASA);
- DeafBlind South Africa (DBSA); and
- Cheshire Homes South Africa.

The role of these member associations with respect to Accessible Tourism can be significant. Given the necessary funding and expertise, they can contribute towards public and private sector awareness, promote travel opportunities for persons with functional limitations, perform an advisory role in development of skills training in the tourism sector, provide representation on government structures and publiccommissions and provide expert knowledge on different Accessible Tourism projects.

SOUTH AFRICAN ASSOCIATION OF RETIRED PERSONS (SAARP)

SAARP is a service organisation for persons 50 years and older. The primary objective is to promote the interests of senior citizens by assisting them collectively. Assistance can be in the form of acquiring preferential services for senior citizens at discounted rates. SAARP also interacts with national government and local authorities and can play an instrumental role in creating an awareness of the accessibility requirements of the aged among services and facilities.

The lack of capacity, funding and expertise of these member associationsmeans that they are unable to fulfil a number of the above listed roles. Interviews with a number of associations indicate that a large amount of time is spent on raising funds on behalf of members for assistive equipment. Their lack of capacity also means that they are unable to fulfil a number of their existing functions. Consequently, while the participation of these representative associations in the promotion of

Accessible Tourism is necessary, unless a number of challenges confronting these associations are addressed, their contribution towards developing Accessible Tourism will remain limited.

3.5.3 PRIVATE SECTOR

TOURISM BUSINESS COUNCIL OF SOUTH AFRICA (TBCSA)

TBCSA is the umbrella organisation for the private tourism and travel sector in South Africa. Their mandate is to represent the industry and to lobby and positively influence government policies and decisions that affect the sector. Presently, TBCSA has taken very little responsibility for the promotion of Accessible Tourism whereas they should be at the forefront of awareness raising and promotion. It is only once the private sector fully embraces Accessible Tourism that the market will expand. To maximise industry support, Accessible Tourism should become a permanent part of all agendas. TBCSA member associations include the following:

- Airline Association of Southern Africa (AASA);
- AfrikaanseHandelsInstituut (AHI);
- Association of South African Travel Agents (ASATA);
- Federated Hospitality Association of South Africa (FEDHASA);
- Medical Tourism Association (MTA);
- National Accommodation Association of South Africa (NAA-SA);
- Restaurant Association of South Africa (RASA);
- South African Youth Travel Confederation (SAYTC);
- Southern African Association of the Conference Industry (SAACI);
- Southern African Vehicle Rental and Leasing Association (SAVRALA);
- South African Leisure, Tourism and Hospitality Association (SALTHA);
- Southern African Travel Services Association (SATSA);
- Southern African Bus Operators Association (SABOA); and
- Vocation Ownership Association of South Africa (VOASA).

The private sector does not only consist of these large member associations, but also includes large, medium, small and micro service providers. The wide ranging role of the private sector includes:

- Directly investing in Accessible Tourism service provision;
- Development of Accessible Tourism products; and
- Packaging and marketing of the Accessible Tourism experiences.

3.6 CONCLUSION

The purpose of this section was to provide an overview of the context in which Accessible Tourism in South Africa operates. The section examined the global and South African Accessible Tourism context with a view to understanding general trends and profiles. The implications of these findings are that globally Europe has the largest market share of the world's inbound tourism international arrivals (51%) and Africa the smallest (5%). Europe is the largest overseas source markets for South Africa. This is significant given that the proportion of people over 65 years of age in Europe is expected to grow from 17.1% to 30% by 2060 (Eurostat, 2009).

With regards to domestic tourism, a number of strategies have been devised to increase the domestic contribution to tourism in an effort to reduce the country's dependence on foreign tourists. Accessible Tourism provides an opportunity to increase domestic tourism by offering world-class accessible services and facilities, without the inconvenience of international travel. However, in order to do so, aclear institutional and legislativeenvironment is required which ensures that travellers with access requirements have the right to access to tourism facilities andservices and to encourage tourism service providers to adopt related measures.

4. PROFILE OF THE ACCESSIBLE TOURISM MARKET

4.1 INTRODUCTION

The purpose of this section is to provide a profile of the Accessible Tourism market. It provides an estimate of the market size and a descriptive profile of the domestic and international markets in South Africa. The findings of this section are based on a combination of both primary and secondary sources of information. These were used to determine the size of the domestic and international markets while the market profiles are based on the primary questionnaire responses received. Subsection 4.2 reports on the domestic market demand in terms of its size and profile while Subsection 4.3 provides an analysis of the international market. Finally, Subsection 4.4 describes the status of Accessible Tourism products and services in South Africa.

4.2 DOMESTIC ACCESSIBLE TOURISM MARKET

4.2.1 SEGMENTATION AND SIZE OF THE EXISTING DOMESTIC MARKET

The segmentation and size of the domestic Accessible Tourism market is derived for the purpose of this research through the application of a number of primary and secondary based research criteria and assumptions, as presented below. The results of the assessment are shown in Table 4.1.

DEFINING THE USER GROUPS (see Columns 1 and 2 of Table 4.1)

The size and structure of the Accessible Tourism market is determined for the purpose of this research by the following user groups:

The elderly
According to the WHO ICF classification, elderly persons fall within the category of persons with functional limitations. However, due to the size and special characteristics of the elderly, for purposes of this research they are regarded as a separate user group. The standard classification of the elderly in South Africa is persons aged 60 +. According to Stats SA (Mid-year Population Estimates by Population Group, Age and Sex Report, 2010), this amounts to 3 795100 persons.

Persons with Disabilities
Persons with disabilities are distinguished in terms of sight, hearing, physical, and communications, intellectual and emotional disabilities. This distinction is based on Stats SA census data. It is important to note that according to census data “disability” is defined by using the concept of “impairment”, which refers to a problem in body function or alterations in body structure.The population of the various disability groups are derived from StatsSA(Prevalence of Disability in South Africa, 2005). These figures are extrapolated to 2010 using an average annual population growth rate of 1.1%.

Pregnant women, obese persons and families with babies and small children

These have also been identified as user groups since they share a number of access requirements of the elderly and persons with disabilities. The total population of pregnant women is based on the total number of births in the country in one year according to the Stats SA Mid-year Population Estimates by Population Group, Age and Sex Report (2010). The total number of births in 2010 was 1 066 401.

Obese persons are defined in terms of the National Prevalence of Obesity Report, 2005 as persons with a body mass index (BMI) of 30+. The total number of obese persons in 2010 was estimated at 8 605 185.

The total estimated population of families with babies and small children in South Africa was 16 200 392 in 2010. The size of the market was calculated using the population of children aged 0-4 years old, divided by the average family size in South Africa of 3.1. This figure represents the total number of families with children below the age of 4 at any one time (Stats SA Mid-year Population Estimates by Population Group, Age and Sex Report, 2010).

APPLICATION OF LIFE CYCLE AND LIFESTYLE CRITERIA (AGE & BMI) (See Column 3 of Table 4.1)

The focus of this research is on Accessible Tourism and therefore relates specificallyto persons with access limitations in a tourism context. The standard population classifications as applied in the preceding section are accordingly adjusted using criteria that refine the numbers of persons per user group for the purpose of this study. There are currently no universally agreed parameters by which such an adjustment can take place. However, based on an interpretation of the best case studies and available research the following criteria are applied to refine the Accessible Tourism market estimates.

The elderly

For the purposes of refining the demand for Accessible Tourism for this user groupthe averageretirement age in South Africa is applied i.e. person's age 65+ years. This amounts to 2 475400 people.

Persons with Disabilities

It has been pointed out previously in the report that there is a strong correlation between aging and disability. In order to avoid double counting of the elderly population, persons with disabilities between the age of 19 and 65 years were included.

Obese persons

In order to determine the number of obese persons in the context of this study a BMI of 35+ is used. This classification is inclusive of morbid, severe and super obese persons. In South Africa there has been no systematic surveillance of BMI 35+ obesity. Research findings in Canada indicate that approximately 8% of a developed nation's population is estimated to have a BMI of 35+.[35]In the absence of relevant statistics on BMI 35+, the figure of 8% is also applied to the South African population. In order to avoid double counting the elderly, obese persons between the ages of 19 and 65 were included.

PROFILING USER GROUPS IN TERMS OF CONSUMER MARKETS (see Column 4 in Table 4.1)

The Living Standards Measure (LSM)[36] is used as a means of segmenting the South African tourism market into consumer market categories. The LSM applies wealth, access and geographical criteria to segment the market. In South Africa 67% of all households fall within the lower LSM 1-4 groups and the remaining 33% of households fall into the upper LSM 5-10 groups. However, according to Stats SA (Prevalence of Disability in South Africa Report, 2005), persons with disabilities generally experience a disadvantaged position with regard to employment and income opportunities. According to the World Health Organisation, [37] persons with disabilities experienceless economic participation; higher poverty rates and lower education levels. The report indicates that persons with disabilities are more likely to be unemployed and generally earn less even when employed. Both employment and income outcomes appear to worsen with the severity of the limitation. Based on the findings of this research the Accessible Tourism market profile is refined by applying 75% to the LSM 1-4 category and 25% to the LSM 5-10 category. Due to the lack of differentiating research these criteria are applied to all user groups.

PROPENSITY TO TRAVEL (see Column 5 in Table 4.1)

The percentage of the Accessible Tourism population that travels regularly is based on the findings of the primary research. Forty five percent (45%) of travellers with disabilities and 44% of the elderly user group have a propensity to travel. This relates closely to the 43% of the overall South African adult population that travelled in 2010 (SAT, 2011). Differentiated information on the travel propensities of the LSM 1-4 and LSM 5-10 groups is not reliable. However, there are indications that reveal that the propensity to travel of the LSM 1-4 group is lower than that of the LSM 5-10. For the purpose of this research, the propensity to travel of the LSM 1-4 group used is 20%and LSM 5-10 is 45%.

While the prevalence data in this report draws on the best available global data sets, they are not definitive estimates. There is an urgent need for more robust, comparable, and complete data collection. Generally, a better knowledge base is required on the prevalence, nature, and extent of disability - both at a national level where policies are designed and implemented, but also in a globally comparable manner, with changes monitored over time.

Table 4.1 below indicates the size and structure of the Accessible Tourism market.

[35]Raine, K.D. 2004.*Overweight and Obesity in Canada: A Population Health Perspective*. Centre for Health Promotion Studies, University of Alberta. www.cihi.ca.
[36]SAARFLSM (Living Standards Measure); http://www.saarf.co.za/LSM/lsms.htm
[37]World Health Organisation, *World report on disability* 2011.

UNIVERSAL ACCESSIBILITY: MAXIMISATION OF EQUALITY AND CAPABILITY

It must be noted that the identified user groups do not require the same level of accessibility. Consequently the direct benefits of Accessible Tourism will not be the same for all users.

Universal Accessibility is based on two paradigms, that is, the maximisation of equality and the maximisation of capability. The former means maximising equality of access while travelling. Maximisation of capabilities refers to access and opportunity to access the mechanisms for maximizing equality. It refers to the underlying structure that underpins the equalisation of opportunity and access. In South Africa, poverty can be understood to be capability-deprivation. Historically, Black South Africans were deprived of such capabilities in many ways, most notable, through apartheid policies. Similarly, persons with disabilities have also been disadvantaged. Consequently, efforts to address these imbalances do not have the same effects.

TABLE 4.1: ACCESSIBLE TOURISM CURRENT DOMESTIC DEMAND EXCLUDING PARTNERS AND ASSISTANTS (refer to the preceding text for the parameters applied)

1	2	3	4		5	
USER GROUPS	**UNIVERSAL POPULATION OF PERSONS WITH LIMITATIONS**	**APPLICATION OF AGE & BMI CRITERIA Age >19 AND < 65 + years; BMI 35+**	**CONSUMER MARKETS PER LSM CATEGORIES**		**PROPENSITY TO TRAVEL 44% TO 45%**	
			1-4 LSM 75%	**5-10 LSM 25%**	**1 TO 4 LSM**	**5-10 LSM**
Elderly	3,795,100	2,475,400	1,856,550	618,850	371,310	272 294
Sight disabilities	760,377	425,185	318,889	106,296	63,778	47 833
Hearing disabilities	453,104	235,775	176,831	58,944	35,366	26 525
Physical disabilities	701,486	463,030	347,273	115,758	69,455	52 091
Communication disabilities	153,472	84,060	63,045	21,015	12,609	9 457
Intellectual disabilities	293,048	165,191	123,893	41,298	24,779	18 584
Emotional disabilities	372,219	256,746	192,560	64,187	38,512	28 884
Pregnant women	1,066,401	1,066,401	799,801	266,600	159,960	117 304
Obese persons	8,605,185	294,828	221,121	97 293	44,224	32 431
Families with babies and small children	1,651,838	1,651,838	1,106,731	486 962	221,346	545,107

Source: Estimates by Urban-Econ, 2011

4.2.2 PROFILE OF THE EXISTING DOMESTIC ACCESSIBLE TOURISM MARKET

The profile of the existing Accessible Tourism market presented in this section is drawn from the primary research survey results. The total number of responses was 235. The poor response rates are a major weakness of the study that has the following consequences:

- The research findingsonly reflect the travel attributes of those that responded to the survey, therefore the full spectrum of access difficulties have not been captured;
- Findings of the survey are not indicative of all travellers with access requirements; and
- Given the limitations of survey research to produce in-depth information, interviews were conducted with travellers that responded to the request for interviews and the sample may be biased. These findings are highlighted in this section.

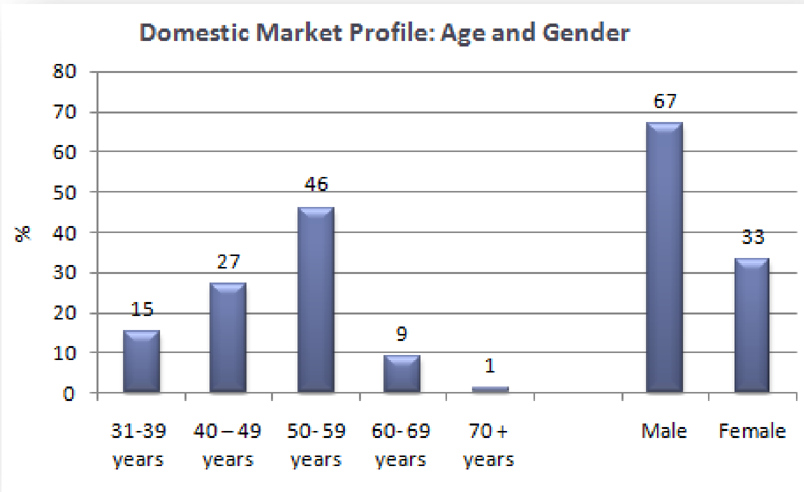
According to the ICF classification, elderly persons fall with the definition of persons with functional limitations. However for the purposes of this analysis, the responses from elderly travellers was analysed and recorded separately.

The profile of the market is presented in the follow sequence:

- Demographic composition of the market;
- The nature of access difficulties;
- Travel information, arrangements and booking characteristics;
- Travel attributes of the market;
- Group travel characteristics;
- Accommodation characteristics;
- Activities and spend profiles, and
- Levels of satisfaction of the market.

4.2.3 DEMOGRAPHIC PROFILE

FIGURE 4.1: DOMESTIC MARKET PROFILE: AGE AND GENDER (%)

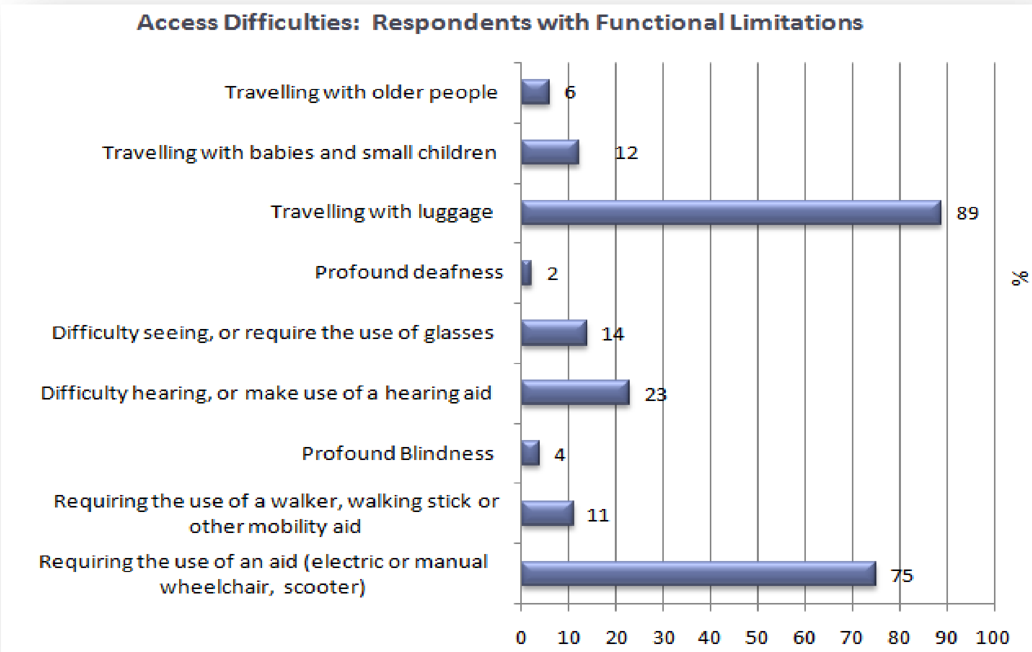


The research found that the demographic attributes of travellers with access difficulties are notstrong determinants of travel behaviour. The adjacent figure indicates that the median age group of respondents is 50-59 years, with males comprising the predominant group of respondents. This differs from the characteristics of the mainstream domestic tourism market where more than half of the domestic tourists in 2009 were between the ages of 18 and 34 years, with most being between 25 and 34 years. This shows a high rate of travel within the younger adult population of South Africa, whereas the Accessible Tourism research findings indicate a mature travel population. The life cycle patterns of respondents indicate that34% of the respondents are parents with a youngest child aged 15+ still living at home,22% are young/midlifecouple with no kids, 20%are older working couples and14% are midlife single persons. The overall educational level is highwith42% of the total sample having some form of university or other tertiary institution qualification, 11%havingpost-graduate qualifications and17% have secondary education. The employment status indicates that 76% of respondents are in full-time occupations, 11%are in some form of part-time occupation, 4% are on full pensions and 2% are self-employed. Income groups are also relatively high with an average income between R200 000 and R300 000 per annum.

4.2.3.2 THE NATURE OF THE ACCESS DIFFICULTY

The question on the nature of the travel difficulties being experienced allowed for more than one choice in order to identify the widestrange of difficulties experienced. Figure 4.2 reveals that 75% of respondents indicated that they are wheelchair users (electric powered or manual), followed by 23% who have difficulty hearing, 14% who have difficulty seeing or requiring the use of glasses and 11% who require the use of a walker, walking stick, or other mobility aid. Only 4% are profoundly blind and 2% are profoundly deaf. The majority identified travelling with luggage and 12% travelling with babies and small children as an access difficulty.

FIGURE 4.2: ACCESS DIFFICULTIES OF RESPONDENTS WITH FUNCTIONAL LIMITATIONS (% of respondents)



Source: Accessible Tourism Survey, 2011

According to StatsSA, [38]the prevalence of functional limitations in South Africa is as follows: sight disability is the highest (32%), followed by physical disability (30%), hearing (20%), emotional disability (16%), intellectual disability (12%) and lastly communication disability (7%) (StatsSA, 2005). However, a higher percentage of disabled males (31%) suffer from physical disabilities while 36% of disabled females suffer from problems related to sight (StatsSA, 2005).

The sample profile differs from the national prevalence in that a higher number of persons with mobility limitations were recorded for both persons with functional limitations and the elderly. This apparent sample imbalance is a major limitation of the study.

Since mobility limitations are the most prevalent type of functional limitation in the sample, it has direct implications for the design of tourism facilities and products and services offered. This will also affect other user groups such as families with babies using prams, elderly persons who use walking aids and pregnant women requiring even pathways. However, due to the higher national prevalence of persons with sight limitations, it is necessary to include features designed to assist the partially sighted and blind travellers. These include clear and large print signage using contrasting colours, the use of audio announcements, screen readers and Braille brochures, menus, elevator buttons and maps. For travellers with hearing limitations, the use of modern technological assistive devices can significantly increase the accessibility of an environment. This includes the use of videophones, electronic moving display signs and closed-captioning and cell phone messaging. These have universally benefits.

FIGURE 4.3: ACCESS DIFFICULTIES EXPERIENCED BY ELDERLY RESPONDENTS (% of respondents)

Source: Accessible Tourism Survey, 2011

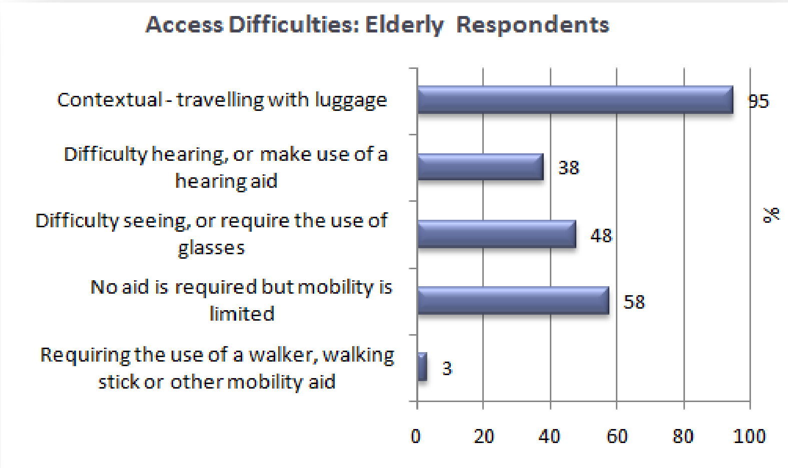


Figure 4.3 illustrates the access difficulties identified by elderly respondents. For the elderly, 58% require no aid but their mobility is limited, 48% experience difficulty seeing or require the use of glasses and 38% experience hearing difficulties. Only 3% require the use of a mobility aid. These access difficulties have similar implications to those identified above in terms of the design of an environment and the use of assistive devices. However, the implications also go

[38]Stats SA, 2005.*The Prevalence of Disability in South Africa.*

beyond the design of the physical environment to include willing and trained staff to offer assistance where such barriers are encountered.

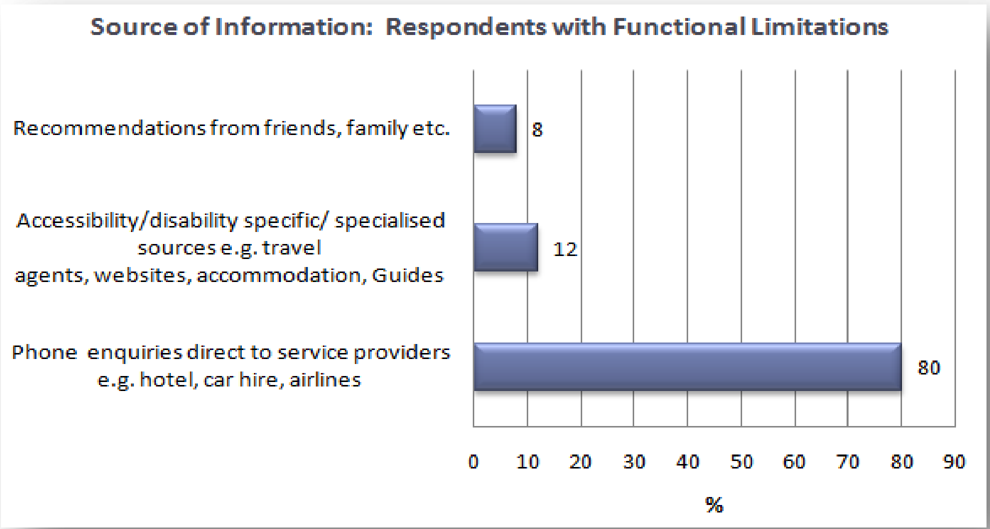
The introduction of accessible products or services often involves raising standards of quality, which benefits the overall market and not only travellers with functional limitations. For example, both user groups identify travelling with luggage as an access limitation. Given the nature of travel, the transportation of luggage is essential for all travellers. Creating an accessible and integrated luggage transfer system will result in a convenient product and service that is easily used by all travellers.

4.2.3.3 SOURCE OF TRAVEL INFORMATION AND BOOKING ARRANGEMENTS

Respondents were requested to identify all the sources of information that they consult during the travel planning stage. This revealed a variety of information sources for both respondents with functional limitations and the elderly. For respondents with functional limitations, 80% prefer to contact a service provider directly. Only 12% refer to accessibility/disability specific sources and 8% refer to recommendations from friends and family. Where accommodation establishments do not publish photos of accessible rooms with floor plans and textual informationwheelchairusers often find it necessary to phone such establishments to establish the nature of accessible facilities. It is therefore important that service providers have competent staff available that is able to provide accurate and honest information about the layout of a room and the facilities available.

> "It's extremely irritating to speak to people who are unprofessional and ignorant..... Most of the time you are passed from one person to the other until eventually some brave person decides to take the time to help you."
>
> Urban-Econ Interview Findings, 2011

FIGURE 4.4: SOURCE OF INFORMATION FORRESPONDENTS WITH FUNCTIONAL LIMITATIONS (%)



Source: Accessible Tourism Survey, 2011

Most of the elderly respondents (44%) source their information from travel Intermediaries such as travel agents, tour operators and 36% make direct phone enquiries to the service providers. Recommendations from friends and family were indicated by only 10% of elderly respondents as a source of decision making and a further 10% looked at advertisements in newspapers, magazines, on TV or radio. In terms of travel arrangements, 53% of elderly respondents prefer to contact a travel intermediary to arrange their travel. Travel intermediaries may be more equipped to prepare elderly respondents for their journey, are able to negotiate good price deals and are also capable of identifying suitable experiences for them. However 48% of these respondents prefer to organise their own travel. Theymay also have low access requirements and may not consider themselves in need of special services that may stigmatise them, leading them to make their own travel arrangements. This reinforces the importance of providing mainstream tourism service providers with information and training on the various kinds of access requirements.

4.2.3.4 TRAVEL ATTRIBUTES

Of the total number of respondents with functional limitations, 43% travel by plane, 22% use their own car and 21% travel in someone else's car which can be that of a friend or relative but not a rented car. Other forms of transportation such as trains, tour buses, and mini-buses taxis were not selected, indicating a potential missed opportunity. For the mainstream domestic tourism market, mini-bus taxis and private vehicles are the most popular forms of transportation used (SAT, 2011).

Travel times for respondents with functional limitations indicate that 67% travel between February and May, outside of the peak domestic holiday periods) followed by 58% that travel anytime of the year. Since mainstream domestic tourism in South Africa is very seasonal with most of the travel occurring during school holidays, the Disabled Tourism market could contribute to alleviating seasonality in the industry. With regards to frequency of travel, 45% of respondents with functional limitations indicated that they travel only once a year, 35% travel two to three times a year and 5% travel more than six times a year.

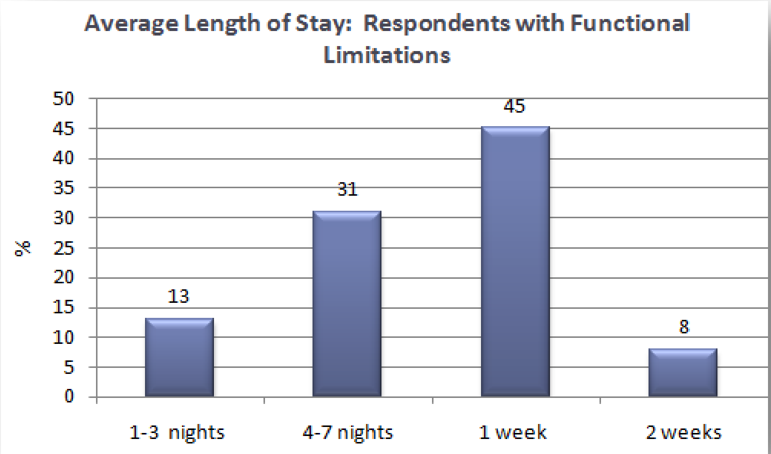
> "Every year I go on holiday... to Mauritius. My family and I always enjoy the service there even though some of the places are not accessible. They are just happy to assist you."
>
> Urban-Econ Interview Findings, 2011

Interview findings indicate that this relative infrequency of travel can be attributed to a number of reasons, such as previous negative experiences, the inability to access correct information orthe effort to travel domestically where the infrastructure is not conducive to travel. When persons with functional limitations do travel, the primary purpose indicated by 67% of respondents is for holiday purposes and 63%for visiting friends and family. The proportion of holiday trips is high compared to the mainstream domestic tourism market in South Africa, where visiting friends and relatives account for 74% of all domestic trips, followed by holiday (13.4%) and business travel (18%).

> "I never used to feel comfortable and confident to travel. When I finally did go on holiday, my electric wheelchair was damaged by a baggage handler at the airport."
>
> Urban-Econ Interview Findings, 2011

The average length of stay indicated by 45% of respondents with functional limitations is one week, 31% stay between four and seven nights, 13% stay betweenone and three nights and 8% stay up to two weeks.

FIGURE 4.5: AVERAGE LENGTH OF STAY FOR TRAVELLERS WITH FUNCTIONAL LIMITATIONS (%)



> "I don't like too long holidays especially when the holiday turns into a struggle. However I suppose we have to adjust our attitude as well."
>
> Urban-Econ Interview Findings, 2011

Source: Accessible Tourism Survey, 2011

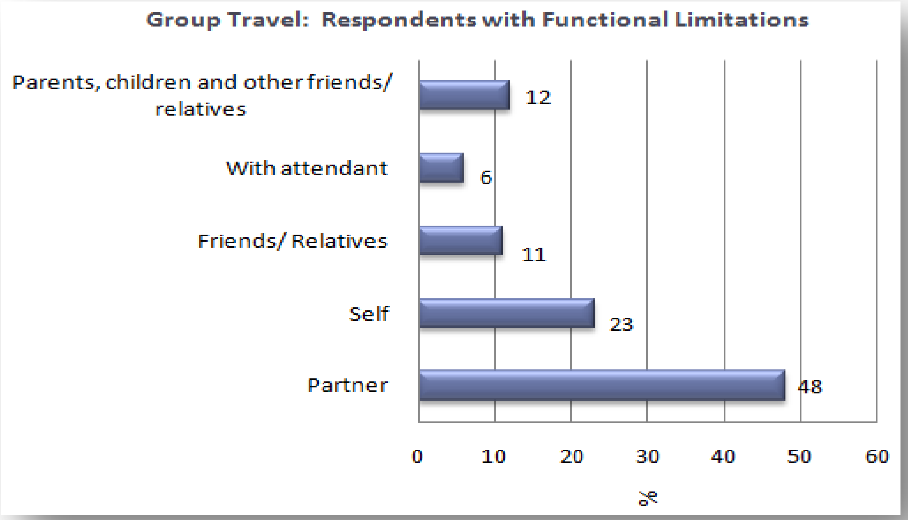
The majority of the elderly respondents (59%)use theirown car when travelling, 39% use planes and 36% indicated that they travel in a friend, attendant or relative's car. Fifty eight percent (58%) prefer to travel at any time of the year, 38% travel during the December/January peak holiday season, and 24% travel during the June/July school holidays. For most of the elderly respondents, the primary purpose of travel is to visit friends and family which was indicated by 64% of respondents and 55% indicated going on holiday as the primary purpose of travel. With regards to frequency of travel, 44% indicated that they travel at least once a year, 42% travel less than once a year and only 11% travel two to three times a year. When they do travel, the length of stay indicated by 64% of elderly respondents is one week, 21% stay between four and seven nights and 12% stay for two weeks. The combination of flexible travel periods, high frequency of travel and relatively long stays of elderly travellers holds significant economic potential compared to the mainstream tourists.

4.2.3.5GROUP TRAVEL

Figure 4.6 indicates that 48% of the total number of respondents with functional limitations travel with a partner, 23% travel by themselves, 12% with parents, children and other friends and 11% with friends/relatives. In comparison, just over half of the mainstream domestic trips were undertaken by people travelling alone. For the elderly, 45%travel with a partner, 23% travel as a couple with other adults and 21% travel with friends/relatives. The fact that these groups tend to be accompanied also increases the potential economic benefits. In both user groups at least one other person experienced access difficulties.

> "When I travel for business this is usually by myself. I manage quite well. Things are getting better but there are no consistent standards in this country."
>
> Urban-Econ Interview Findings, 2011

FIGURE 4.6: GROUP TRAVEL FOR RESPONDENTSWITH FUNCTIONAL LIMITATIONS (%)



Source: Accessible Tourism Survey, 2011

These findings directly impact on the market potential of Accessible Tourism since travellers are likely to be accompanied. This will have an important economic impact in terms of the multiplier effect on the overall travel expenditure.

4.2.3.6 ACCOMMODATION

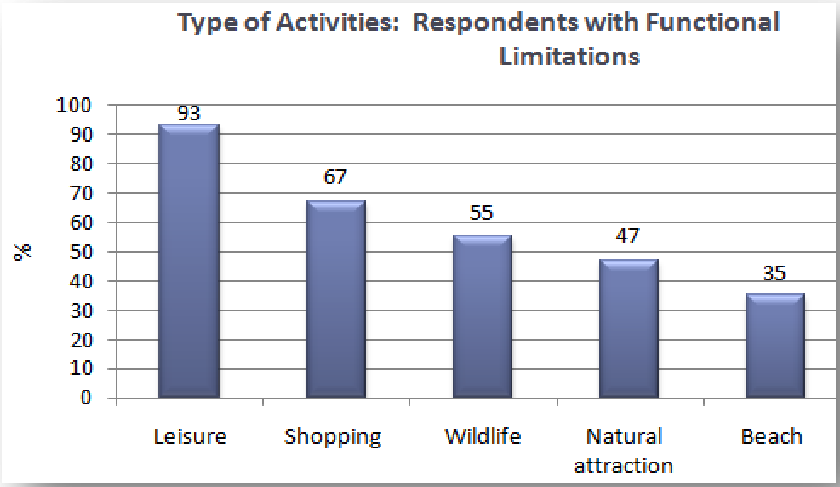
> "I am tired of complaining about high beds, narrow toilets, showers without a seating area, narrow entrances..."
>
> Urban-Econ Interview Findings, 2011

With regard to the type of accommodation facility domestic respondents stay in, the majority (64%) indicated that they stay in formal accommodation establishments such as graded hotels or lodges, followed by 39% who stay in guest accommodation and 23% with family and friends. Interview findings indicate that choosing a formal guest accommodation can also be out of necessity since the larger hotel chains are more likely to have larger rooms that have been adapted and, most importantly, offer adapted bathrooms. They may also provide more reliable information on the assistive devices on hand. Where adapted rooms have been booked out, this may result in guests having to book larger rooms which significantly increase the costs of travel. In contrast, most of the elderly travellers(67%) indicated a preference for guest houseaccommodation, followed by 45% who use formal accommodation and 39% who staywith family and friends. Other types of accommodation such as self-catering, Bed and Breakfasts, caravans and camping were not major categories selected. With regards to mainstream domestic tourism market, due to the prevalence of visiting friends and relatives, most bed nights are spent in unpaid accommodation while paid accommodation is mainly in Bed and Breakfasts and self-catering establishments.

4.2.3.7 TRAVEL ACTIVITIES AND SPEND PER TRIP

The figure below indicates the types of activities that are mostly engaged in by respondents with functional limitations. Social activities such as visiting friends and family were identified by 93% of respondents, 67% engage in shopping and 55% in wildlife viewing. Most of the elderly respondents (90%) engage in social activities, 89% go shopping and 78% visit natural attractions. The activities engaged in by both groups during their stay do not differ significantly from those of mainstream domestic tourists. Domestic tourists also engage mostly in unpaid activities, such as social activities associated with visiting friends and relatives and going to the beach.

FIGURE 4.7: TYPE OF ACTIVITIES FOR RESPONDENTS WITH FUNCTIONAL LIMITATIONS (% of respondents)



Source: Accessible Tourism Survey, 2011

On average, mainstream domestic tourists spent R710 per trip in 2010. This relatively low spend has been attributed tothe higher incidence of tourists visiting friend and relatives, which has contributed to the decline in total spend in 2010. In comparison the average spending per trip is R2 600for respondents with functional limitations and the elderly within the higher LSM 5 -10 user group. This relatively high average expenditure of persons with functional limitations may be attributed to additional expenses such as equipment rental, transportation hire, and caregiver / attendant services, particularly for persons with mobility limitations.

Expenditure of the elderly was recorded at R1 800 per trip and is substantially lower than that of the functional limitation group. This may be mainly due to the higher incidence of VFR trips and the ability of this group to access mainstream tourism facilities and services.

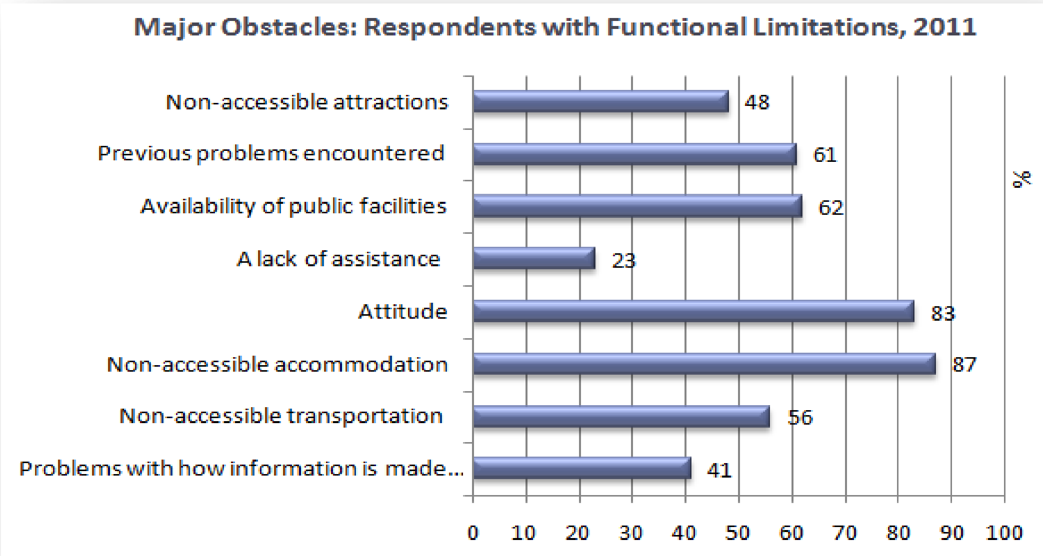
4.2.3.8LEVEL OF SATISFACTION

Survey findings indicate that 69% of respondents with functional limitations express high levels of dissatisfaction with their travel experiences, 29% are neutral and only 2% express satisfaction. For elderly respondents, 7% are not satisfied, 49% are neutral, 22% are satisfied and 8% are very satisfied. Mainstream domestic tourists, in comparison, are on average satisfied with their holiday and the overall affordability of their trip. They arehowevernot as satisfied with the general infrastructure, which includes roads and rail (SAT, 2011).

4.2.3.9 MAJOR OBSTACLES TO TRAVEL

Domestic respondents were asked to identify what they considered to be major obstacles to travel in South Africa. The findings are indicated in Figure 4.8. A major obstacle identified by 87% of respondents with functional limitations is the lack of non-accessible accommodation, 87% also indicated prevailing attitudes, 62% indicated the limited availability of public facilities, 61% indicated previous problems encountered, 56% identifiednon-accessible transportation, 48% identified non-accessible attractions, 41% indicated problems with how information is made available, and 23% indicated a lack of assistance. For the elderly respondents, obstacles included non-accessible attractions (78%), health problems (55%), lack of assistance (23%) and poorattitudes (16%).

FIGURE 4.8: MAJOR OBSTACLES IDENTIFIED BY RESPONDENTS WITH FUNCTIONAL LIMITATIONS (% of respondents)



Source: Accessible Tourism Survey, 2011

Interview findings reveal that even if an accommodation establishment advertises that it is "disable friendly" or has "wheelchair access", it may still have certain features that make it non-accessible. Presently, accessibility standards vary in South Africa and sometimes are dependent on the location and the size of the property. To add to the confusion, service providers assume that the term "accessible" entails a one-size-fits-all solution for every person's situation.

> "It's the attitude of people. They don't want to change. Even when they provide us with a ramp, do it properly. People must be willing to become accessible."
>
> Urban-Econ Interview Findings, 2011

Negative attitudes and behaviour of staff were also identified as limiting factors. A positive and helpful attitude is fundamental to addressing some of the challenges in this market. It is therefore necessary to train staff, to increase their awareness of persons with access requirements,and to provide appropriate services to travellers by taking into account the different kinds of functional limitation requirements.

> "Some people are just not professional. I don't think they have a clue about disability. They also think that people in wheelchairs can walk."
>
> Urban-Econ Interview Findings, 2011

The high levels of dissatisfaction and the obstacles that have been identified indicate that there is substantial scope to increase the contribution of this market if more facilities are made accessible.

4.3 INTERNATIONAL ACCESSIBLE TOURISM MARKET

4.3.1 SIZE OF THE INTERNATIONAL MARKET DEMAND

There are no statistics available on the number of people with access requirements who travel to South Africa. Interviews conducted with inbound tour operators that cater specifically to the needs of persons with functional limitations indicate that the level of demand from international travellers is currently relatively low, particularly from Europe. This could partly be attributed to the economic turmoil in a number of countries in Europe, which has resulted in a decrease in international travel.

In order to determine the current and potential demand from international tourists, research undertaken by long-haul destinations such as Australia and the United States on the number of travellers with access requirements was used as a benchmark. Studies conducted by the US Open Doors Organisation[39] and Tourism Australia[40] on the Accessible Tourism markets in these countries reveal that approximately 7% to 8% of international travellers have functional limitations. Based on secondary data sources and primary research on travel patterns, it is estimated that 6% of global inbound travellers have some form of access requirement.

In order to determine the international demand, the following considerations were taken into account.

- Total international tourists arrivals include all arrivals by air from Africa, Indian Ocean Islands, the Americas, Asia, Australasia and Europe, [41]which amounts to 2 502 870 people.
- African land markets (primarily neighbouring countries)are an important source market for South Africa. However statistical information on the access requirements of this market is unknown and is considered to fall in the LSM 1 to 4 category. Due to the limited impact of the accessible market component, it is not considered further in this research.

[39] HarrisInteractive Market Research 2005.*Research among Adults with Disabilities: Travel and hospitality*. Chicago: Open Doors Organisation

[40] TourismAustralia. 2005. *Markets –Australia experiences – niche experiences*. Available at: http://www.tourismaustralia.com/markets.

[41] Base figures are extracted from the 2010 *Annual Tourism Report* by SAT.

- The number of elderly travellers, defined as age 65 + years is3.5% of the identified markets.[42]

Based on the above, the current annual demand for the international Accessible Tourism market arrived at is 150 172. Of this, 30 034 are elderly travellers and 120 138 include the other travellers with disabilities, pregnant women, obese persons, families travelling with babies and small children and all other persons requiring some form of access requirement.

TABLE 4.3: CURRENT ANNUAL INTERNATIONAL ACCESSIBLE TOURISM DEMAND

INTERNATIONAL TOURISM MARKET SIZE	
	CURRENT ANNUAL DEMAND
AFRICAN AIR MARKETS	335,155
AMERICAS	457,981
ASIA	388,110
EUROPE	1,321,624
TOTAL	**2,502,870**
ESTIMATED MARKET OF TRAVELLERS WITH ACCESS REQUIREMENTS	**150,172**
ELDERLY	30,034
OTHER **TRAVELLERS**	120,138

Source: SAT (2011) and Accessible Tourism Survey, 2011

To determine the potential international demand the percentage of return visitors who wish to travel back to South Africa is used. This is based on the findings of the research survey which indicate that 58% of travellers who have travelled to South Africa for the first time would increase their levels of travel if a number of obstacles were addressed. This indicates that the potential size of the international market could potentially increase to 237 271 travellers with access requirements.

4.3.2 PROFILE OF THE INTERNATIONAL ACCESSIBLE TOURISM MARKET

The total number of responses from international respondents was 183. The poor response rate once again means that the findings are only indicative of the international Accessible Tourism market segment. The profile of the respondents is presented in this section in the following sequence:

- Source markets;
- Demographic characteristics;
- Nature of the access difficulties;
- Travel information, arrangement and booking requirements;
- Travel attributes; and

[42]SAT, 2010. .*Annual Tourism Report*

- Levels of satisfaction.

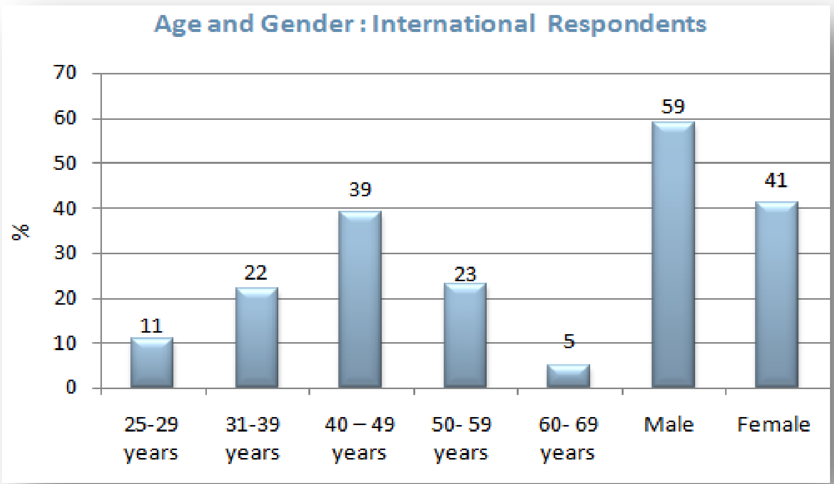
4.3.2.1 SOURCE MARKETS

The main source regions of the international respondents were Europe (65%), the United States (23%), Australia (11%) and India (1%). With regard to the mainstream foreign tourist source markets, neighbouring SADC continued to be a major source of tourist arrivals to South Africa in 2010, with Zimbabwe being the largest source market (shopping is the primary purpose of visit). The UK, USA, Germany, Netherlands and France remain the top five overseas source markets.

4.3.2.2DEMOGRAPHIC PROFILE

The profile of international respondents reveals many similarities to the domestic respondents, with 39% of respondents falling into the age group 40 to 49 years, 23% between the ages of 50 and-59 years and 22% between the ages of 31 and 39 years. In terms of occupational status, 82% of respondents are in full-time occupations, followed by 11% in part-time occupations and 7% in self-employment. Like the domestic respondents, 65% have some form of post-graduate qualification and 35% have a secondary education. The majority of respondents (88%)fallinto the higher income group of R300 000 and over, followed by 12% earning between R200 000 and R300 000 per annum.In terms of life cycle, 53% of respondents areparents with a youngest child aged 15+ still living at home, 34% are midlife singles, 7% are older working couplesand 6% are older working single persons.

FIGURE 4.9: AGE AND GENDER PROFILE OF THE INTERNATIONAL RESPONDENTS (%)



Source: Accessible Tourism Survey, 2011

4.3.2.3 THE NATURE OF ACCESS DIFFICULTIES

Figure 4.10 indicates the nature of access difficulties identified by internationalrespondents. The majority of respondents indicated travelling with luggage (82%) and sight difficulties, requiring the use of glasses (75%) as key difficulties; 65% require the use of an aid (electric powered or manually operatedwheelchair or scooter), while 54% do not understand local languages anddialects. Forty eight percent (48%) indicated that they travel with older persons; 45% indicated that no aid is required but mobility is limited and 6% indicated that they are profoundlydeaf. This once again indicates the need for accessible services that can intrinsically improve the travel experience for everyone.

A major weakness of the international survey is that the full spectrum of access difficulties has not been captured. This includes profoundly blind persons, persons with cognitive and psychological difficulties and persons travelling with babies and small children.

FIGURE 4.10: ACCESS DIFFICULTIES OF INTERNATIONAL RESPONDENTS (% of respondents)

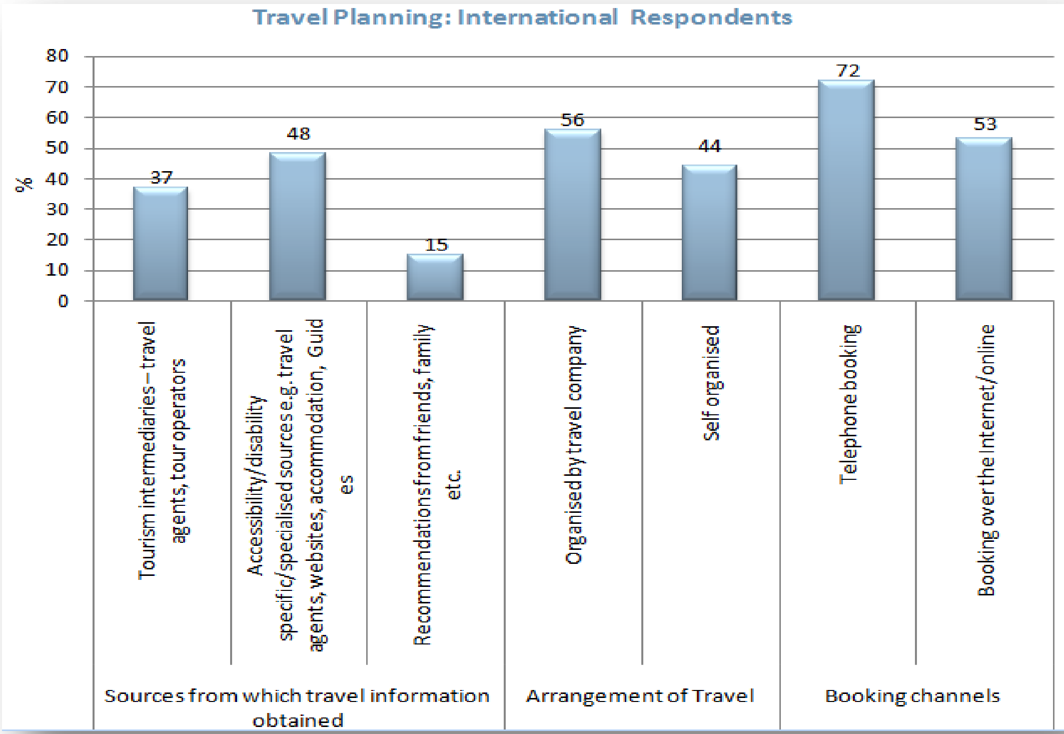
Source: Accessible Tourism Survey, 2011

4.3.2.4TRAVEL PLANNING ATTRIBUTES

With regard to sourcing of travel information, Figure 4.11 indicates that 48% of respondents indicated that the primary source of their information is from specialised disability sources, 37% get their information from tourism intermediaries such as travel agents and tour operators and 15% rely on friends and family. The majority of respondents (56%) indicated that their travel arrangements are made by a travel company and 44% indicated that they arrange their own travel. Seventy two percent (72%) of respondents arrange their booking telephonically while 53% do their booking online. This corresponds with booking channels utilised by domestic respondents with functional limitations. Direct contact with the travel agencies is often necessary to ensure that there are no misunderstandings.

These findings emphasise the importance of educating specialised foreign tour operators regarding South Africa's products and services aimed at persons with access requirements and regularly promoting such products and services through travel intermediaries and online.SAT should consider including the Accessible Tourism segment in their target marketing efforts.

FIGURE4.11: TRAVEL PLANNING OF INTERNATIONAL RESPONDENTS (% of respondents)



Source: Accessible Tourism Survey, 2011

With regard to the time of travel, 49% indicated that travel occurs at anytime of the year. This contributes to a more even demand throughout the year compared to the mainstream international market. Forty three percent (43%)of respondentstravel between August to November, followed by 15% who travel between December to January, 13% between February to Marchand 4% between June and July. Similar to mainstream foreign tourists to South Africa the primary purpose of travel of respondents is to go on holiday/vacation(89%) and 28% indicated visiting friends and family as their main travel purpose. The definition of leisure includes holiday travel, visiting friends and relatives (VFR) and shopping. The analysis of purpose of visit by region of the mainstream market shows that most holiday tourists come from overseas markets (the Americas,Asia, Australasia and Europe) while shoppers and tourists visiting friends and relative come from Africa and the Middle East.

With regards to frequency of travel, international respondents indicated that 40% travel once a year and40% travel two to three times a year. Only 22% indicated that they travel less than once a year.

For 78% of international respondents to South Africa, this was the first visit, followed by 12% of respondents who have been to South Africa twice. The number of first-time mainstream tourists increased in 2010 as a result of the 2010 FIFA World Cup.

The average length of stay for international respondents was two weeks, indicated by 52% of the respondents, with 44% staying for one week. This compares favourably to the average length of stay of all mainstream foreign tourists, which was fivenights in 2010.The increased length of stay of the Accessible tourism market, and the fact that 57% of the respondents are accompanied by a partner result in a higher than average yield per traveller.

All respondents (100%) indicated that they travelled by plane; 56% travelled in a friend, relative or attendant's'car.While travelling in the country 54% indicated that they used an adapted vehicle and 34% a tour bus. Formal serviced accommodation was used by 90%of travellers; 5% stayed with friends and family and 5% in guest house accommodation.

Fifty five percent (55%) of international respondents travelled with a partner; 18% travelled alone; 17% travelled with a specific disability group and 10% travelled with friend(s)/relatives. When asked if other people in the group they travelled with had an access requirement, 81% of respondents indicated that at least one other person did. With regard to activities engaged in during the trip, 89% enjoyed shopping, 67% visited natural attractions, 59% engaged in wildlife viewing, 56% indicated going to the beach and 49% engaged in social activities such as visiting friends and family. Apart from shopping, nightlife and social activities (activities normally undertaken by most mainstream foreign tourists globally), visiting natural attractions, cultural and historic sites, business and the beach were popular activities undertaken by mainstream foreign tourists in 2010. Given the focused range of activities enjoyed by tourists with access requirements it should be possible to address access requirements in a focused and achievable manner.

Average spend was between R1000 per day andR1500 and R13 000per trip in 2010.The average total foreign direct spend of the mainstream air market i.e. the total amount spent in South Africa by foreign tourists travelling by air was R11 800 per person in 2010. This means that, compared to the average foreign traveller costs of travelling to South Africa are significantly higher per trip for respondents with functional limitations. The need for accessible accommodation, the rental of adapted vehicles, andgoing on special tours increase the cost of travelling and taking a vacation.

4.3.2.5 LEVEL OF SATISFACTION

Like the domestic respondents, the majority of international respondents (58%) indicated that they were dissatisfied with their travel in South Africawith only22% indicating that they were satisfied and 20% were undecided. This markedly differs from mainstream tourists who visited South Africa in 2010, who were most satisfied with South Africa's natural attractions, domestic flights, accommodation and hospitable and friendly people. The high percentage of respondents with functional limitations who are dissatisfied should be a concern to the tourism industry which faces increasing competition from new destinations in Asia, Africa, the Middle East and South America. International studies found that tourists with functional limitations respond often to word-of-mouth recommendations, more so than other market segments. The use of multiple social networks means that bad experiences are easily shared with other tourists with immediate negative implications for the country.

Internationalrespondents were also asked to identify major obstacles to travel. These are indicated in Figure 4.12. This reveals that 89% of respondents indicated the availability of public facilities (or lack thereof) as a major obstacle, followed by 72% who indicated non-accessible accommodation as such. "Problems with how information is made available" was identified as an obstacle by 68% of respondents, difficulties in obtaining accurate information by 56% of respondentsand "on-accessible attractions" by 53% of respondents.

FIGURE 4.12: LEVELS OF SATISFACTION (% of respondents)

Source: Accessible Tourism Survey, 2011

These findings reveal a combination of lack of supply of tourism products and inadequate, inaccurate or missing information as key constraints to growth of the Accessible Tourism market. The former reinforces the important role of the public sector in addressing accessibility throughout the tourism value chain. Travel planning of people with functional limitations, such as wheelchair users may be characterised by a more detailed information enquiry relating to their individual special requirements. Thus the lack of reliable information is regarded as one of the major causes preventing persons with functional limitations from travelling.

4.4 STATUS OF ACCESSIBLE TOURISM PRODUCTS AND SERVICES

4.4.1 PROFILE OF SERVICE PROVIDERS

The market supply assessment that is presented in this section is based on the findings of the quantitative and qualitative surveys conducted among selected service providers in the tourism value chain. The information received from the service providers is based on a self-assessment and may not necessarily be accurate. It is important to view these findings as being indicative only until further in-depth research can be carried out.

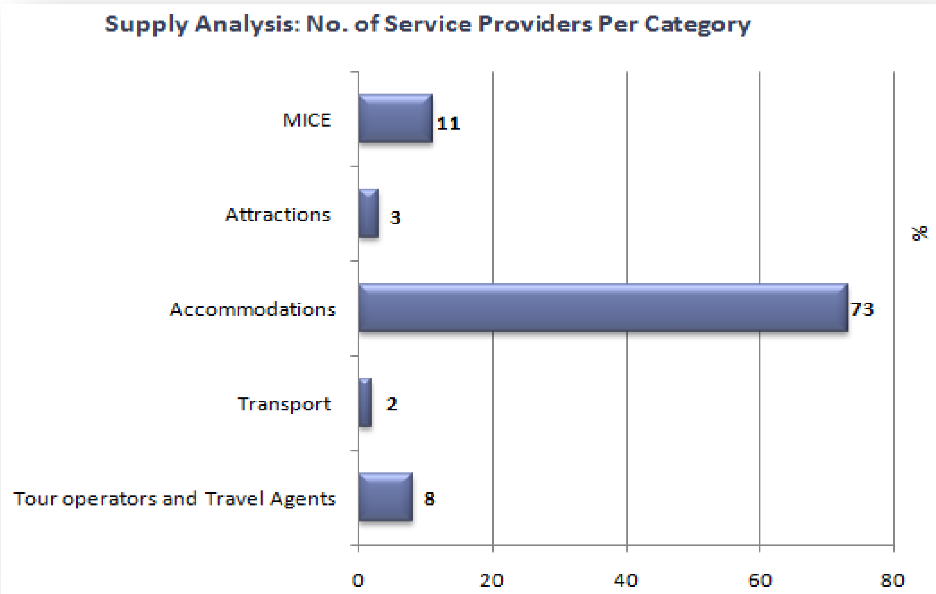
The key supply categories used to undertake this analysis are:

- Communication, marketing and information;
- Accommodation;
- Transport;
- Attractions and activities;
- Tour operators and travel agents; and
- Meetings, incentives, conferences and exhibitions (MICE).

4.4.1.1 BREAKDOWN OF SERVICE PROVIDERS

The total number of responses received was 324. The breakdown of the responses is indicated in Figure 4.13. The majority of responses were received from the accommodation sector which accounted for 73% of the total sample. This was followed by Meetings, Incentives, Conferences and Exhibitions (MICE) sector at 11%, tour operators and travel agents at 8%, attractions and activities at 3% and transport service providers at 2% of the total sample. The poor response rate from service providers makes firm interpretation of the data difficult. However, the findings do provide a general indication of the awareness and levels of accessibility among service providers.

FIGURE 4.13: SERVICE PROVIDERS PER CATEGORY THAT RESPONDED TO THE SURVEY (%)



Source: Accessible Tourism Survey, 2011

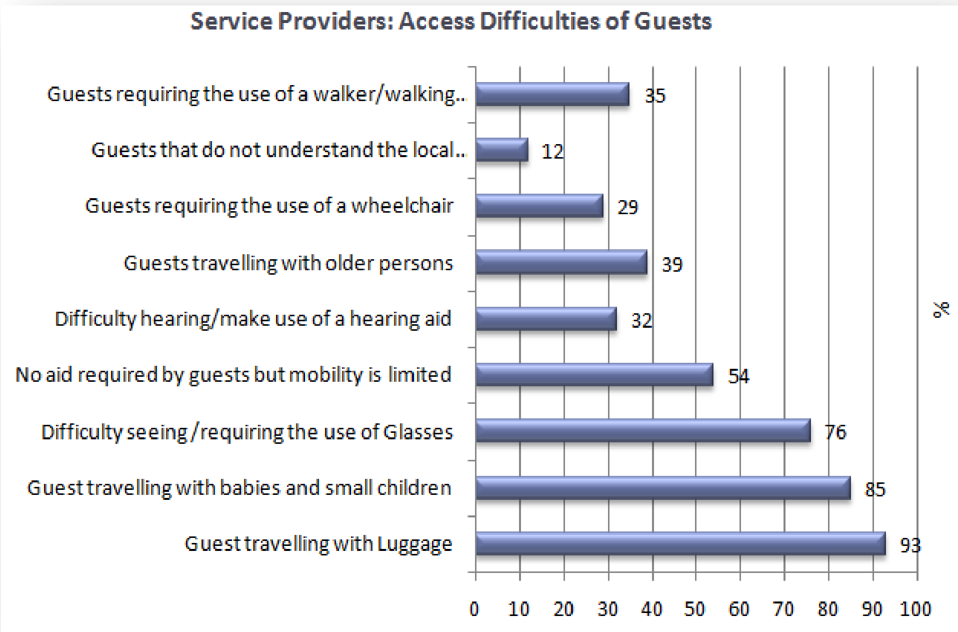
With the exception of specialist accessible tour operators, the domestic market constitutes the primary market of respondents. Accessible Tourism thus provides a means of addressing one of the strategic objectives of the NTSS, which is to increase domestic tourism's contribution to the tourism economy.

4.4.1.2 ACCESS DIFFICULTIES OF CUSTOMERS

Service providers were requested to identify the most common access difficulties that they encounter among their customers. Respondents could identify as many access difficulties as they chose. The most common access difficulties are indicated in Figure 4.14.Ninety three percent (93%) of the respondents indicated travelling with luggage, followed by travelling with babies and small children (85%) as key access difficulties. For travellers without any form of functional limitations, the carrying of luggage would not be considered a difficulty. The difficulties arise though when one has a limitation that restricts this ability, such as an injury, illness, pregnancy, disability ortravelling with babies and small children.

The third most common access difficulty identified by service providers were sight difficulties (though not blindness), mentioned by 76% of respondents. Limited mobility without requiring an aid such as a walking stick was identifiedas a difficulty encountered by 54% of respondents. Thirty nine percent (39%) of respondents identified travelling with older persons as an access difficulty encountered; followed by 35% indicating guests that require a walker/walking stick or other mobility aid. Thirty two (32%) of respondents identified hearing difficulties (though not deaf), followed by the use of a wheelchair (29%) and not understand the local language and dialect (12%) as difficulties.

FIGURE 4.14: ACCESS DIFFICULTIES EXPERIENCED BY GUESTS (% of respondents)



Source: Accessible Tourism Survey, 2011

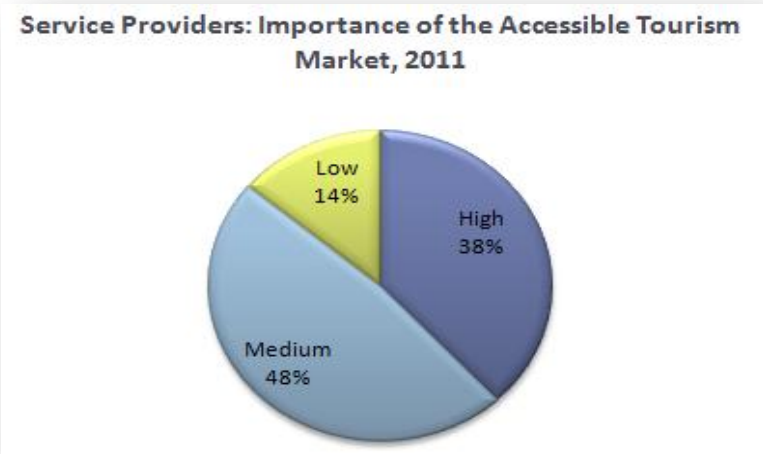
It is clear that the main access difficulties encountered by respondents relate to the access requirements of the general population and difficulties associated with old age. The most common functional limitation is associated with sight limitations, followed by mobility. The principles of

Universal Design are therefore essential in developing tourism products and services that can be used and enjoyed by all people of all ages and abilities. Thus, accessible features should be an expected part of every place, and should form part of every facility, enhancing opportunities for the full range of users.

4.4.1.3 IMPORTANCE OF THE ACCESSIBLE TOURISM MARKET

The importance attached to the Accessible Tourism market by the respondents is indicated in Figure 4.15. This reveals that 48% of respondentsconsider the market to be of medium importance, followed by 38% that regard it as being of high importance. The importance attached to the Accessible Tourism market suggests that respondents in general have some form of awareness of accessibility. This is encouraging and reveals a growing sensitisation towards this market segment. Only 14% of the respondents considered it to be of low importance. In terms of their familiarity with any accessibility standards for tourists, 79% of the respondents indicated some form of awareness. However, awareness of such standards does not necessary entail an awareness of their legal obligations.

FIGURE 4.15: IMPORTANCE OF THE ACCESSIBLETOURISM MARKET (%)



Source: Accessible Tourism Survey, 2011

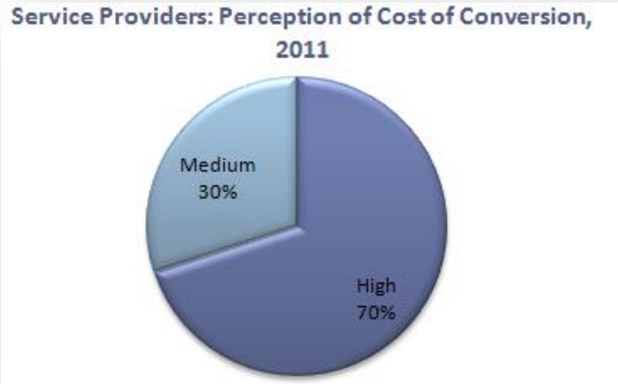
The importance attached to this market will also have a direct impact on the types of accessible products and facilities available to this market segment. Only 33% of respondent's stated that they provide services and facilities to this market however, the extent of this provision varies according to the type of service being provided.

4.4.1.4 COSTS OF CONVERSION FACILITIES OF AND WILLINGNESS TO CONVERT

The importance attached to the Accessible Tourism market by respondents does not translate into a willingness to convert or remodel existing facilities. The perception of the cost of conversion isindicated in the figure below. Thisreveals that 70% of respondents perceive the cost of conversion to be high, which impacts on their willingness to convert. This is borne out by the findings relating to accessibility planning, where only 35%of respondents have plans to increase their levels of accessibility and 65%have no plans to do so, despite the Promotion of Equality and Prevention of Discrimination Act 2000 that makes conversion mandatory.

FIGURE 4.16: PERCEPTION OF THE COST OF CONVERSION (%)

Source: Accessible Tourism Survey, 2011



Among the transport service providers, the cost of conversion was regarded as being very high. In the private sector, local transport service providers are exposed to escalating fuel costs, insurance expenses, high maintenance charges and competition from other service providers. All these factors contribute to fluctuations in revenue. Despite these considerations, 64% of responding transport service providers a re willing to convert or adapt their facilities and have plans to increase their levels of accessibility, recognising the growing importance of the market.

The perception of the costs of conversion can be attributed to a lack of knowledge and experience and inaccurate estimates of the actual cost of construction and/or conversion. The assumptions about costs of becoming accessible by adopting Universal Design often exaggerate the actual cost and disregard potential savings and revenue increases.

The perception of the costs of conversion of guest accommodation was regarded as being high by 61% of these respondents. Unlike the large hotel chains, the ownership of smaller establishments is vested in individuals or small and medium enterprises that have limited financial and management capability. In some cases, the service providers are individual owner-operators who deliver a basic service at minimum cost to meet the demand of mainstream tourists. Generally, their willingness to convert their facilities is thus very low and plans to increase their levels of accessibility only entail becoming "wheelchair friendly".

BEST PRACTICE: INDIANA UNIVERSITY COURSE OF INTEREST TO TOURISM: RETROFITTING FOR ACCESSIBILITY

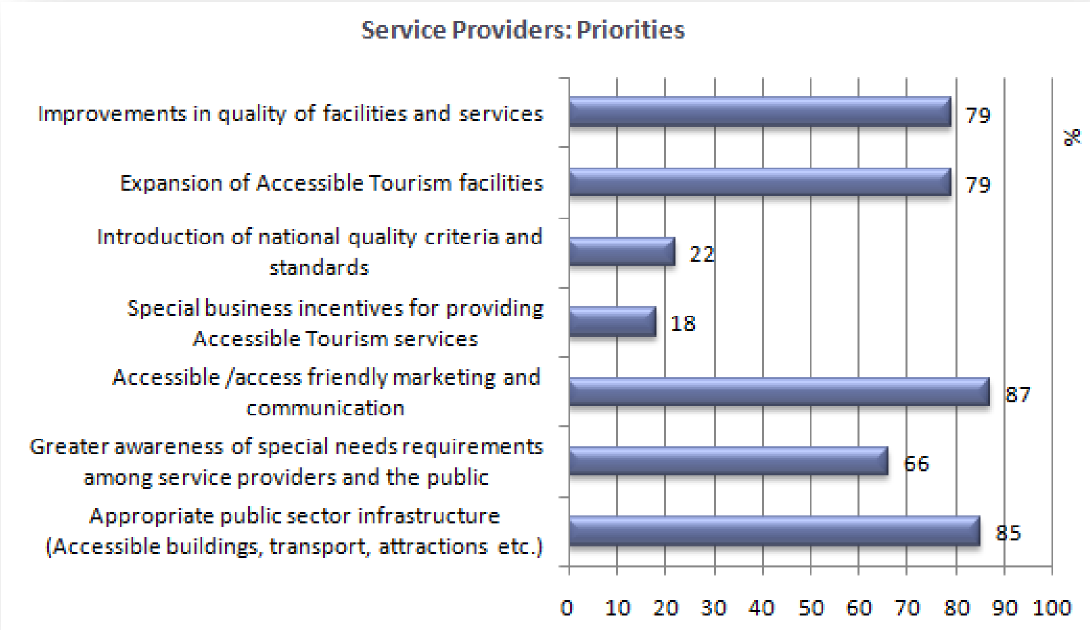
National Center on Accessibility
Department of Recreation, Park and Tourism Studies
School of Health, Physical Education and Recreation

The National Center on Accessibility at Indiana University has a training course in April called "Retrofitting for Accessibility" which focuses on the application of the Americans with Disabilities accessibility standards and proposed guidelines to the built environment and outdoor developed areas. The course (which doesn't have the most positive of titles) includes an introduction to the draft final accessibility guidelines for outdoor developed areas, barrier removal, safety issues associated with accessibility, and ongoing facility maintenance to assure optimum access for visitors including those with disabilities. It will be of interest to maintenance professionals, construction specialists, facility managers, trails supervisors, architects, forest access coordinators, landscape architects, civil engineers, parks planners, visitor services specialists, program development specialists, preservation supervisors, concessionaires, safety officers, and accessibility coordinators. Sessions will also provide an understanding of the characteristics and needs of people with disabilities, and has an active field-based component identifying design problems in existing facilities.

4.4.1.5 PRIORITIES IDENTIFIED BY SERVICE PROVIDERS

Service providers were requested to identify the most important priorities for the development of Accessible Tourism. The following development priorities were indicated by respondents: improved marketing and communication (87% of respondents),appropriate public sector infrastructure (85% of respondents);expanded Accessible Tourism facilities (79% of respondents);improved quality of facilities and services (79% of respondents);a greater awareness of special needs requirements (66% of respondents);the need to introduce national quality criteria and standards (22% of respondents) and the need for special business incentives for providing Accessible Tourism services (18% of respondents).

FIGURE 4.17: PRIORITIES IDENTIFIED BY RESPONDENTS



Source: Accessible Tourism Survey, 2011

The second most common priority identified concerns the role of the public sector in the development of Accessible Tourism. A well-designed accessible infrastructure is the basis for ensuring thatthe destinationcaters for all market segments.

Marketing and communication has also been identified as a priority. For the successful marketing of accessible facilities in South Africa, it is important to communicate informationregarding accessible facilities and services to all potential customers, thus influencing the decision making, travel planning and booking process.

The introduction of national quality criteria and standards was one of the least identified priorities (22%). However, such standards and criteria are fundamental to the development of the market. A prerequisite for the successful implementation of any standard is the education of the general public on the basic concepts of Accessible Tourism and its positive impacts. This entails recognition that most of the features needed by travellers with functional limitations are also useful to other travellers.

PHILIPPINES GOING AFTER THE ACCESS TOURISM MARKET

The Philippines Department of Tourism pledged to eliminate barriers to travel for people with disabilities (PWDs) at a forum with tourism stakeholders and representatives from the PWD sector this week. The government is hoping to increase visits by PwDs by suggesting that operators offer tourists with disabilities discounts on fares, hotels, and leisure establishments to this potentially huge and under-served market segment. The government has called on tourism businesses to apply a 20% discount – already guaranteed by law to disabled Filipinos – to all visitors with disabilities, Tourism Secretary Alberto Lim said. "The trend is not to have separate services for PWDs, but for full integration in our hospitality industry. This entails making our products suitable for persons with particular needs so that they may enjoy travel equally with everyone else." Because the disabled make up about 20% of the world's population, this is a big market.

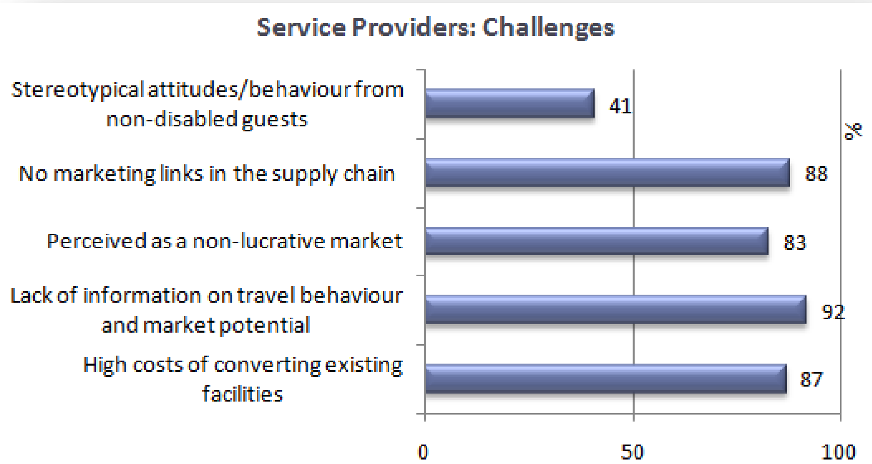
Source: Access Tourism New Zealand, 2011

4.4.1.6 CHALLENGES CONFRONTED BY SERVICE PROVIDERS

Service providers were also requested to identify the challenges confronting them in the development of Accessible Tourism. The lack of information on the travel behaviour and market potential of the Accessible Tourism market was identified as the most common challenge by 92% of respondents, followed by the lack of coordinated marketing links in the supply chain, mentioned by 88% of respondents.

The high cost of converting existing facilities was identified by 87% of respondents as a challenge while the perception of Accessible Tourism as a non-lucrative market was identified by 83% of the respondents. Only 41% identified the stereotypical attitude/behaviour of non-disabled guests as a challenge.

FIGURE 4.18: CHALLENGES CONFRONTED BY RESPONDENTS



Source: Accessible Tourism Survey, 2011

The lack of marketing links in the supply chain can be partly attributed to the limited presence of accessible products and facilities in the country. It is therefore critical not just to provide accessible products and services throughout the tourism value chain, but to also market those that are available. What is required is the creation of coordinated marketing initiatives throughout the accessible tourism supply chain, which is currently characterised by isolated marketing efforts. This will not add value only to the Accessible Tourism market but all tourists will benefit from improved levels of information.

4.4.2 MARKETING, INFORMATION AND COMMUNICATION

With regard to marketing, 55% of all the respondents market themselves as being accessible. Marketing initiatives, however, are primarily aimed at those with mobility limitations. This is denoted by the use of the “International Wheelchair Symbol”, without any explanatory notes on exactly what is provided. Thecriteria for the use of the symbol have been undefined to date. However, the development of TGCSA guidelines leads to a better understanding of what one can expect as a traveller. Hotel chains tend to use photos of bedrooms and bathrooms in their brochures and websites, which can be misleading if not accompanied by the actual dimensions.

Only 18% of respondents consider themselves to be specialist providers. However, the actual provision of accessible services and facilities listed is limited and varied, leading to the conclusion that accessibility is very subjectively defined and applied by the industry. The findings of the surveys indicate that there is a tendency to under-provide information, which is also often not correct and reliable. Poor information leads to customers having expectations that they will experience an “accessible” holiday only to find that the information is flawed. Many catalogues do not meet basic information requirements and provide incomplete, unclear, unverifiable or unreliable information on accommodation facilities, the environment and services. The term “accessible” or “disable friendly” is often used without specifying the underlying criteria. Thus, it is crucial to widely disseminate correct and reliable information about accessibility if service providers wish to benefit from the multiplier effects generated by friends and relatives travelling with guests who have accessibility requirements.

An examination of the marketing initiatives of the service providers who consider themselves to be specialists indicate that little consideration has been given to the design and delivery of communication and information sources. They are generally inconsistent in terms of their marketing efforts. For example, the Internet has become an important source of information when planning a trip. It is therefore crucial that travel and tourism related websites are accessible to persons with different functional limitations who use several types of assistive technologies. The analysis indicated that hardware and software, such as screen readers, voice recognition, alternative pointing devices, alternate keyboards and refreshable Braille displays to access and interact with online content is infrequently used to address this segment. International tour operators have embraced the use of profiling and personalisation features on websites. This allows users to specify their requirements. Suitable tours and itineraries are then prepared based on the particular needs of each traveller. This has not been adopted in South Africa.

Websites generally fail to take into account the font sizes, colour contrast and web page layout. Where these have been considered, they are addressed in isolation to each other. All service providers have thus not embraced the use of information communication technologies to assist in addressing the particular requirements of their clients.

WEB CONTENT ACCESSIBILITY GUIDELINES

Web Accessibility initiative
<img alt="Web Accessibility Initiative logo"

Guideline 1. Provide equivalent alternatives to auditory and visual content.
Guideline 2. Don't rely on colour alone.
Guideline 3. Use mark-up and style sheets and do so properly.
Guideline 4. Clarify natural language usage
Guideline 5. Create tables that transform gracefully.
Guideline 6. Ensure that pages featuring new technologies transform gracefully.
Guideline 7. Ensure user control of time-sensitive content changes.
Guideline 8. Ensure direct accessibility of embedded user interfaces.
Guideline 9. Design for device-independence.
Guideline 10. Use interim solutions.
Guideline 11. Use W3C technologies and guidelines.
Guideline 12. Provide context and orientation information.
Guideline 13. Provide clear navigation mechanisms.
Guideline 14. Ensure that documents are clear and simple.

Source: Http://www.w3.org

4.4.3 ACCOMMODATION

Accommodation service providers constituted the majority of respondents participating in the survey, comprising 73% of the total sample. Of these, 87% wereTCGSA graded, with a star grading ranging between 2 and 5 stars.

Respondent establishments are located throughout the country, with 70%of these establishments located in the Western Cape. The domestic market is the main market served with an average of 62% of guests originating locally. Only42%of respondent establishments indicated that they considered the Accessible Tourism market to be of high importance. However, 65% of all the establishments considered themselves to be accessible, though not specialist providers. This has been contested by an industry specialist, who contends that only 40% of establishments in South

Africa offer some form of accessibility.[43] The actual provision of accessible services and products is very limited with almost all the provisions aimed at persons with mobility limitations.

The accessible facilities and services offered by establishments within the same category differ extensively. Formal accommodation facilities located in major cities and that receive a higher proportion of international guests offer a wider range of accessible services and facilities, with such facilities largely directed towards persons with mobility limitations. Only basic accessibility features are provided in some of the formal accommodation establishments for persons who have sight or hearing limitations. A number of factors have contributed to this inequality such as the invisible and variable nature of the limitation, communication barriers, a tendency by many not to self-identify and historic differences in activism and media coverage.

Only 29%of the accommodation establishments cater for groups with accessibility requirements and those that do state that only small groups can be accommodated. The larger hotel chains that are more receptive towards accessibility strive to have more than 1 in 50 of their rooms being accessible for wheelchair users. However, this is insufficient for group travel. The occupancy rate of adapted facilities is below 10%. This market contributes on average approximately 10% towards total income.

Costs of conversion is regarded by 61%of the establishments as being high and 39% as being medium, with only 31% of the establishments indicating that they have future plans to increase the levels of accessibility. Examples mentioned of exorbitant costs include the adoption of some mechanical equipment (such as stair elevators) and mobility aids that require continuous monitoring and costly maintenance. When their correct operation is not periodically checked, they are often unusable when required.

The general perception is that this is not a market segment that provides significant financial rewards and that investment costs are significantly higher than for other segments of the tourism market in general. It also requires slower returns on investments that might not be feasible for some businesses. The risks that service providers bear is that they may find themselves facing significantly higher financial costs arising from law suits, if they do not comply with the Promotion of Equality and Prevention of Unfair Discrimination Act, particularly if reasonable adjustments can be carried out without incurring significant costs.

Since the cost of conversion is perceived to be high by most of the respondents, becoming accessible then becomes an additional and burdensome task. However, this is largely due to the lack of understanding of the requirements of this market and the belief that significant alterations in infrastructure and the built environment are required in order to remove obstacles. The perceived costs also result in minimal attention being given to this market. However, in some cases, what is required does not involve financial costs but rather a change in attitude which often makes up for the lack of accessible products or services. The poor understanding on the costs of conversion also explains the lack of budget hotels with accessible rooms or supporting infrastructure.

[43] http://www.disabledtravel.co.za

The most important priorities are those of improving the public sector infrastructure and the quality of services and facilities, creating a heightened awareness/promotion of existing accessible facilities and accessible friendly marketing. The greatest challenges confronting establishments are the high costs of conversion, the lack of information on travel behaviour and market potential and the perception of the market being non-lucrative.

Secondary research among the large international hotel chains reveals that they provide a wider variety of features. However, like the smaller accommodation establishments, the extent and type of accessible rooms and facilities vary. The following are generally provided by 4 and 5 star hotels: black-out curtains; easy-to-set alarm clock radios; Braille or raised signage; lever door handles; desk level electric plugs; HSIA connection and phone jacks; roll-in showers; lowered light switches and shelf storage; telephones with speaker phone; alarms – audible and visual strobe; automatic door closer and emergency call button on phone.

Some amenities offered by the formal guest accommodation may incur additional fees. All of the surveyed establishments advise guests to include specific requests during the booking process. The limited number of rooms that have been adapted for persons with functional limitations means that rooms are often booked. Smaller establishments such as B&BS and private guesthouses still remain relatively inaccessible. This can be attributed to the relatively low importance attached to serving this market segment and the perceived high cost of converting facilities.

In terms of informal accommodation such as caravan parks and camping sites, the South African National Parks (SANParks) advertises that it caters to travellers with mobility, hearing and sight limitations[44]. SANParks provides a number of accessible accommodation types and attractions in all of the national parks in South Africa for persons with mobility limitations. It also provides a detailed account of physical access at some of the more popular parks, such as Kruger National Park. Persons with sight limitations are catered for with the provision of Braille brochures for some of the parks. Guide dogs are also allowed entry once a screening process has occurred. Persons with hearing limitations are catered for through the use of clear signage in the entire park. Accessibility requirements for the elderly have also been incorporated and SANParks offers discounts on normal tariffs to pensioners above 60 years of age. SANParks also provides a list of all campsites and the accessible ablutions that are available at each site. The reliability of this information can only be ascertained when one actually travels to these parks.

The results of the survey among accommodation establishments in South Africa is summarised in the following table.

TABLE 4.4: FINDINGS ON THE ACCOMMODATION ESTABLISHMENTS

ACCOMMODATION ESTABLISHMENTS	
TGCSA Establishments	88%
Top five most popular products and services provided	Hand rails Reserved parking Clear pathways

[44] http://www.sanparks.org/groups/disabilities/

ACCOMMODATION ESTABLISHMENTS	
	Baby care facilities (cots, playpens, play areas, swimming nets) Large signage posts with directional arrows
Top 5 products and services most in demand	Accessible accommodation Accessible bathroom Accessible transport/vehicles Toys/supervised activities and child minding services Ramps available to access all levels
Value that it generates for business	Average of 10%
Plans to increase levels of accessibility	No- 68% Yes – 31%
Examples of future plans	Pathways without steps Convert rooms and bathrooms Tar pathways

Source: Accessible Tourism Questionnaire, 2011

BEST PRACTICE: IMPROVED ACCESSIBILITY – A COMMERCIAL SUCCESS FOR SCANDIC HOTELS

Scandic – which has 160 hotels in the Nordic region and Northern Europe - is intensifying its successful focus on improved accessibility for visitors with disabilities and others who want improved access. This year, over 100 new accessible rooms will be added to the portfolio and 2012 there will be even more to meet the large and growing demand.

Design for All is a key concept in Scandic's accessibility work. The aim is for the accessible rooms to be just as well designed as any other room, with practical solutions that go almost unnoticed, except by those who really need them. Hooks, mirrors and keyholes at two heights are appreciated by children, short adults and those who use a wheelchair. Height-adjustable beds and extra spacious bathrooms are popular with all guests. Scandic's comprehensive 110-point accessibility programme covers everything from team member training to adapted rooms and extensive, detailed accessibility information on every hotel's website.

A lowered reception desk for wheelchair users, a guest computer in the lobby at a comfortable height for a wheelchair and an ordinary chair, a hearing loop in conference facilities and reception, and vibrating alarm clocks that also hear the fire alarms are just some examples of smart solutions that ensure a high level of accessibility.

Source: Access Tourism New Zealand

BEST PRACTICE: THE CRUISE INDUSTRY

Over the past three decades, the cruise industry in South Africa has emerged as one of the fastest growing and popular segments of the worldwide travel and leisure industry, particularly for travellers over the age of 60. In contrast to other tourism sectors, the attitude of the cruise industry, largely market driven, is very positive. All of the ships of the major cruise line in South Africa are designed to accommodate persons with mobility requirements. The needs of passengers with sensory impairments are also being met through use of Frequency Modulated systems (removes background noises) in theatres, communication and alerting devices in cabins, Braille and tactile signage and accommodations for service animals.

4.4.4 TOURIST ATTRACTIONS AND ACTIVITIES

Tourist attractions and activities represent 3% of the total number of service providers that responded to the survey. Of these only 48% have plans to increase their accessibility. More than half or 54% of the respondents regarded the costs of conversion as being high and 46% as being medium. In terms of group travel, 88% cater for groups. For those that are planning to increase their levels of accessibility, future plans include more access ramps, clearer signage and pathways without stairs, accessible restrooms and audio descriptions. Despite the growing awareness around access needs, there still appears to be a hesitancy to convert existing facilities. In some situations, the geographical location increases the costs of installing accessible features or involves remodelling part of an existing facility, which increases the total costs of conversion. Similarly many cultural heritage resources and attractions are often too fragile or unsuitable for adaptations.

The main access difficulties confronted were related to the mobility of travellers and guests travelling with babies and small children or with older persons. Facilities that are provided include accessible pathways, ramps available to access all levels, hand rails, wheelchair/scooters/walking aids.

TABLE 4.5: FINDINGS ON ATTRACTIONS AND ACTIVITIES

ATTRACTIONS AND ACTIVITIES	
Most common products and services provided	Hand rails Accessible pathways Wheelchair/scooters/walking aids Ramps available to access all levels
Services most in demand	Accessible transport/vehicles
Perception of costs of conversion	High costs – 54% Medium costs – 44%
Value that it generates for business	Average of 15%
Plans to increase levels of accessibility	No- 52% Yes - 48%
Examples of future plans	Access ramps Clear signage

ATTRACTIONS AND ACTIVITIES	
	Pathways without steps/level surfaces Installation of accessible restrooms and/or remodelling of existing ones Audio descriptions

Source: Accessible Tourism Questionnaire, 2011

One of the main activities that both domestic and international tourists engage in when in South Africa is to visit the beaches. In South Africa there is a 3000km coastline with hundreds of beaches. Twenty-seven South African beaches have been awarded international Blue Flag status for 2010/11 for excelling in safety, cleanliness, provision of amenities and maintenance of environmental standards. However, beach-friendly wheelchair access is not a requirement for achieving Blue Flag status. Presently, approximately five beaches in South Africa offer beach wheelchairs.

Some of the World Heritage Sites such as Vredefort Dome, uKhahlamba Drakensberg Park, Richtersveld Cultural and Botanical Landscape and the MapungubweCultural Landscape, due to their location and the surrounding terrain, are not accessible for travellers with functional limitations. The Cape Floral Kingdom, Isimangaliso Wetland Park, Cradle of Human Kind (Maropeng) and Robben Island provide for wheelchair users in some of the areas. Visitors are advised to be accompanied by a companion that can assist them where necessary.

WHEELIES CAN HOT AIR BALLOON FOR THE FIRST TIME IN CALIFORNIA

This North American spring (2011), a company called will become the first hot air balloon operator in the United States to offer wheelchair using adventurers the opportunity to soar above the California's Sonoma County. Up & Away Ballooning ordered specially-designed easy-access basket from London, designed to include everyone. The basket measures approximately 4 feet by 7 feet and can carry a wheelchair rider and up to three others. Owners of the company made the decision to purchase the wheelchair accessible basket in response to numerous inquiries from private individuals and travel agents with clients seeking to experience Northern California's picturesque Wine Country from a balloon.

Source: Access Tourism, New Zealand, 2011

BEST PRACTICE: AUCKLAND THEATRE NOW OFFERING SIGN LANGUAGE AND AUDIO INTERPRETATION

The Edge in Auckland New Zealand is now offering a new initiative called SIGNAL. This programme offers Sign Language Interpreted performances for the deaf or hearing impaired and Audio Described performances for blind or vision impaired patrons. During shows for the visually impaired, a sign language interpreter stands at the side of the stage so people can watch the performance and the signing at the same time. Audio described performances involves people wearing headsets – similar to those used in conferences for translation – and a trained audio describer sits at the back of the theatre describing the non-verbal aspects of the performance, including introductory notes before the performance describing the set, costumes and characters.

Source: Access tourism, New Zealand (2011)

4.4.5 LOCAL TRANSPORT

Local transport service providers represent 2% of the total number of respondents. Accessible Tourism is regarded as being of high importance by 50%, medium importance by 40% and of low importance by 10% of the respondent transportation service providers. Only 44% cater for groups with access requirements and the costs of conversion is regarded as being high by 68% and medium by 32%. Awareness of accessibility tends to be associated with wheelchair users. Interview findings indicate that some effort is being made to upgrade and improve the level of services and facilities in the public and private transport sectors. In some areas such as the public transportation system, the efforts to increase accessibility have generally been limited with few long-term plans formulated for upgrading facilities.

An analysis of the levels of services and products provided to the Accessible Tourism market by transportation services is provided below.

- **Vehicle rental**

The initial findings indicate that only two of the major vehicle renting companies provide wheelchair accessible transport. However, the high cost of these services means that only a limited number of users can afford them. These companies can cater for up to two wheelchairs per van, which have been adapted to accommodate wheelchair users only. Vehicles have been fitted with a hydraulic side-lift that raises passengers in their wheelchairs onto a customised platform alongside the vehicle, for easy access and exiting. Some vehicles are also fitted with automatic transmission and hand controls that operate the accelerator and brakes. An additional fee is charged for an adapted vehicle. Door-to door services are also provided, at a cost, by some of the rental companies.

- **Private and mini bus taxis**

Metered taxis in South Africa do provide services to persons with functional limitations, although vehicles are generally not adapted for wheelchair users. For those companies that provide adapted vehicles, these are part of the regular fleet and are not reserved exclusively for the use of wheelchair users.

In terms of mini bus taxis, the “Taxi Recapitalisation Programme” is an intervention by the government to bring about safe, effective, reliable, affordable and accessible taxi operations by introducing New Taxi Vehicles (NTVs) designed to undertake public transport functions in the taxi industry. In terms of accessibility, a compulsory requirement is that NTV’s should be of adequate dimensions to accommodate a wheelchair in the taxi, should the operator opt to offer a taxi that is accessible.[45]The number of taxis that are accessible is unknown.

- **Bus liners**

Long distance luxury coaches and short distance bus liners constitute another form of transportation that can be utilised by this market. While service providers in South Africa accommodate all persons with functional limitations they require that such persons be accompanied by an individual who can assist with their needs. Seats are unreserved and sell on a first-come basis. The Accessible Tourism market is regarded as being extremely important since a large number of elderly persons make use of bus liners to travel between cities. This has been attributed to the convenience of use (bus stations are relatively easy to navigate around and are usually not very crowded) and the comparative costs (when compared to air travel).

The “Bus Rapid Transit System (BRT) is a flagship project of the 2009 and 2010 FIFA soccer tournaments[46]. This is a mass road-based public transport system in key South African cities that mimics rail systems, geared to providea high quality, customer oriented transport system which will deliver fast, comfortable, and low cost urban mobility. The BRT system also provides specific physical provisions to ease access for persons with functional limitations. All the South African BRT systems are planned to expand in phases over the next decade.

[45]Http://www.arivealive.co.za/
[46]Http://www.arivealive.co.za/

BEST PRACTICES: BEIJING BRINGS IN BUS RAPID TRANSIT SYSTEM QUICKLY AND EFFICIENTLY

The BRT system emerged as a necessary option for Beijing to reduce emissions from traffic, and particularly the soaring number of private vehicles. The system, which took a mere 16 months to implement from conception to completion, was launched in 2003 when daily trips in the city had reached nearly 21-million.

The speed at which the system was brought into existence and the efficiency with which it operates, could serve as a lesson to South Africa.

The BRT system, which is global positioning system-controlled and takes right-of-way priority over normal traffic, runs between 5:00 and 23:00 after which it shuts down for maintenance. The system is operated from a central intelligent transport system control room, which manages signal priority, fare collection, platform safety and electronic information.

While Johannesburg's Rea Vaya BRT system will use high-floor buses and raised, enclosed central platforms, in part for controlled access and security reasons, in contrast, Beijing's low-floor buses are level with its open, pavement platform stations. Beijing BRT operator proposes that the low-floor buses offer significant advantages over high-floor buses for BRT by reducing boarding and alighting speed and bus-stop staying time. The average stopping time at each bus stop is reduced by more than ten seconds, saving about three minutes of staying time at bus stops for each trip and contributing to operational capacity, punctuality and reliability. While full low-floor buses may cost more than high-floor buses, these expenses are offset by alleviating the need for raised platform infrastructure and its associated costs. Full low-floor bus technology is also advantageous when implementing a BRT system as it alleviates the need for time-consuming platform construction, which can interfere with traffic flow.
Source: Http://www.engineeringnews.co.za

- **Tour Buses**

Only one specialist tour operator offers tour bus services for travellers with disabilities. The specially adapted bus is configured to accommodate eight guests. Other specialist tour operators use adapted mini buses and those offering safaris use specially built safari Land Rovers and LandCruisers. Mainstream tour bus operators that operate nationally and undertake long distance trips do not accommodate persons in wheelchairs. Local tour operators, providing day excursions generally cater for persons with access requirements but also advise travellers to be accompanied.

- **Rail**

In terms of public rail services, the Public Rail Agency of South Africa (PRASA) aimsto transform public transport in South Africa, with rail services forming the backbone of the network. PRASA Rail Operations is the operating division of PRASA which manages urban commuter, long distance intercity and cross border train services. This includes Metrorail (including Business Expresses) and ShosholozaMeyl (including Premier Class).These service providers do provide access for persons with functional limitations. Metrorailonly provides assistance to board trains and advise that travellers be accompanied. ShosholozaMeyl requires travellers needing assistance to inform them in advance so that suitable arrangements can be made. For example, travellers will be met at the station and accompanied on-board. However, given that the passage-ways on board are too narrow for a wheelchair to fit through, a collapsible wheelchair is recommended. Guide dogs are also allowed.

Private luxury trains alsoaccommodate persons with functional limitations. Travellers with physical, sight, visual and cognitive difficulties are advised to be accompanied by someone who can assist them.

In terms of new rail services, the following extract was taken from the Gautrain website. These claims however have been disputed by an industry specialist.

GAUTRAIN: BEST PRACTICE IN EASING TRAVEL FOR PASSENGERS WITH SPECIAL NEEDS

"Special care is taken for mobility, sight and hearing impaired passengers on the entire Gautrain system including stations, buses and trains. Besides providing convenient access for wheelchairs, Gautrain will also ease travelling for passengers with walking difficulties, mothers with babies and passengers carrying luggage on the airport link.

Facilities for sight and hearing impaired passengers include audible and visual announcements, tactile and audible guidance, warning surfaces, clear signage and lighting, non-reflective surfaces and the use of colour contrasts. Tactile strips will identify the platform edge while colour contrasts will indicate the difference between the platform edge and the remainder of the platform surface.

Level boarding is a long-time feature of global underground railways. Matching the height and minimising the gap between Gautrain's coach floor and the platform is designed to allow easy access for children, shoppers with heavy bags and the elderly. For people with difficulties in walking or balancing, features such as non-slip surfaces and handrails are provided. Space is also allocated for wheelchairs in a designated area on each train.

Station environments are designed to ease access for the mobility impaired. Wide access gates to make provision for wheelchairs, passengers carrying bags, or mothers with prams. The accessible levels of ticket vending machines, toilets and lift designs are all accommodating the needs of the mobility impaired. The window level at the ticket office will be within easy reach for those in wheelchairs. For the elderly, seating has been provided on station platforms although passengers are not expected to wait very long.

Mothers will find the entire system to be pram-friendly with nappy changing facilities at stations.

Passengers carrying luggage on their way to and from the airport will find several measures in place to ease mobility. Lifts at Gautrain's OR Tambo International Airport terminal will be able to accommodate luggage trolleys. Arrangements are in place with the Airports Company of South Africa to ensure a steady supply of luggage trolleys. Design features at Sandton Station and the interiors of airport coaches will accommodate the needs of passengers that carry luggage.

On Gautrain's dedicated Bus Link, low entrance floors, wide doorways and folding ramps will make it easier for passengers who have walking difficulties or those who need to use wheelchairs. Inside the buses, wheelchair positions will be fitted in accordance with the best practice designs available.

In all instances, Gautrain has complied with statutory requirements as well as industry best practice."
Source: Http://www.gautrain.co.za

- **Airlines and airports**

South African Airways is the largest airline in the country followed by a number of other domestic carriers. All airlines have units to assist passenger at the international airports, providing support services for the elderly and persons with mobility limitations. Interviews with persons with functional limitations indicate that while the main airlines have taken steps to become more sensitized, access for persons using wheelchairs is still problematic. Poor accessibility when boarding and disembarking the aircraft, changing flights and the inaccessibility of airplane restrooms have been noted to be problems experienced by mobility impaired travellers. Problems experienced also relate to the attitude of staff, the lack of training provided to bag handlers who are responsible for the storage of wheelchairs and general lack of discretion. As regards airline reservations, travellers with functional limitations or any special needs are required to notify the airline of their presence on board as well as the type of reduced mobility and any assistance needed. This is fundamental for preparing the reception and assistance for embarking and disembarking from the aircraft as well as waiting time inside the departing, connecting and arrival airports. Persons with visual or hearing impairments or anyone, who cannot provide for their own personal needs, are advised to travel with a companion. However, guide dogs are allowed on aircrafts for free.

ACSA owns and operates 10 principal airports, including the three major international airports in Johannesburg, Cape Town and Durban. The others are domestic airports in various parts of the country. The 2010 FIFA World Cup resulted in a number of infrastructural improvements at the major airports. These were largely related to increasing capacity levels, resulting in the airports still requiring some effort to navigate around. Most airports have basic accessible features such as lifts, ramps and reserved parking for wheelchair users. The international airports offer a greater number of accessible features such as Braille on some elevator buttons or voice prompts, available in both domestic and international terminals. Interviews with travellers with functional limitations indicate that services offered at airports as well as within airports are not standardised or if similar facilities and services are offered, they are not communicated to users.

AVIATION INDUSTRY TO ADDRESS CONCERNS OF DISABLED PASSENGERS

"In March 2008, ACSA convened an emergency aviation industry meeting regarding concerns expressed by the disability sector on the handling of disabled passengers by airlines and ramp handlers at ACSA airports. The meeting was attended by the Quadriplegic Association of South Africa (QASA), the National Council for Person with Physical Disabilities in South Africa (NCPPDSA), the Airlines Association of Southern Africa, South African Airways, BA/Comair, 1Time, BidAir, Menzies and Swissport and SA Human Rights Commission.

The purpose of the meeting was to address the concerns of the disability sector and find industry wide immediate, short and long term initiatives which will focus on meeting the needs of disabled passengers.

QASA and NCPPDSA highlighted the key concerns of disabled passengers which include dissatisfaction with regard to being inconvenienced by flight delays and sub-standard handling which does meet the requirements of the disabled market. The meeting noted that most of these concerns, notably flight delays, were caused by a worldwide shortage of Passenger Aid Units (PAUs) and the impact this has had on South Africa.

The immediate steps that the meeting agreed upon include:

- Airlines should liaise with ACSA to ensure that, where operationally possible, flights that are carrying disabled passengers are allocated to air bridges to minimise the need for PAUs and the resultant discomfort and delays;
- Ground handling companies to ensure they have appropriate equipment which can be sourced locally available as a matter of urgency;
- Airlines and ground handling companies to work with QASA and NCPPDSA to ensure that disabled passengers are handled humanely and comfortably through appropriate training;
- Airlines and handling companies to deploy more trained staff to facilitate the handling of disabled passengers; and
- Ground handling companies have made a commitment to consult with QASA and NCPPDSA in order to facilitate approved training of their employees.

ACSA has as part of the licence granted to the ground handling companies, implemented a Service Level Agreement which compels them to render top quality service to airlines and passengers.

Specific concerns have been raised by the disability sector regarding the way in which passengers are being handled. In response SAA will be putting a number of urgent measures in place to improve the quality of handling by our staff and are working with QASA and the council to improve comfort levels for all disabled passengers. This will include sensitivity training for our staff under the guidance of the disabled community and will also include placing water and towels on board its PAUs."

Source: Http://www.acsa.co.za/

- **Public transport**

Investments in Accessible Tourism public transport is isolated and often of a small scale. For persons with functional limitations, inaccessible public transportation and complementary infrastructure reduce the accessibility and attractiveness of a destination. Examples of initiatives that have been launched at local, provincial and national government level to improve the accessibility of the transport system range from installing kerb cuts and ramps at some CBD intersections and new transport hubs, demonstration projects involving full-size buses retrofitted with wheelchair lifts (Durban), Dial-a-Ride services operated by smaller accessible vehicles (Durban, Cape Town and Johannesburg), and state-of-the-art low-floor buses (Durban, Cape Town). Generally, public transportation in South Africa is extremely inaccessible which also decreases the extent of private sector investments in accessible facilities.

BEST PRACTICE: NEW TERMINAL AT TOKYO'S HANEDA INTERNATIONAL AIRPORT HAS EASY ACCESS FOR ALL

Tokyo's Haneda Airport (Tokyo International Airport) has a new runway and new international terminal that "makes life easy for international travellers". According to USA Today "And in a country well-known for its high-tech toilets, the airport restrooms are a delight. "Ordinary toilets" have wider-than-normal doorways to accommodate both manual wheelchair users and travellers with suitcases. Folding doors on the cubicles include a sign indicating whether or not there's a baby seat and a fold-down changing table inside. And inside each woman's restroom area there's a urinal for use by small boys.

To accommodate wheelchair users, passengers travelling with babies or toddlers, elderly people and anyone with a special need, there are restrooms equipped with just about every facility imaginable. In addition to diaper changing tables, beds and changing platforms, these restrooms have ostomate showers and sinks, layouts that allow for right or left hand transfers to the toilet seat from a wheelchair and an emergency button linked directly to the airport's Disaster Control Centre. And, in what is certainly an airport first, there's even a restroom designed specifically for use by service dogs." Amongst the improvements making this airport highly accessible to all, including people with disabilities is excellent information on the airport website about access.

TABLE 4.6: FINDINGS ON THE LOCAL TRANSPORTATION

LOCAL TRANSPORTATION	
Most common products and services provided	Adapted vehicles Hand rails Audio aids
Services most in demand	Accessible transport/vehicles Wheelchair/scooters/walking aids Ramps available to access all levels
Value that it generates for business	Average of 30%
Plans to increase levels of accessibility	Yes - 50%

	No-50%
Examples of future plans	Adapt more vehicles Vehicles retrofitted with wheelchair lifts

Source: Accessible Tourism Questionnaire, 2011

4.4.6 TOUR OPERATORS AND TRAVEL AGENTS

Of the service providers that responded, 8% consisted of tour operators and travel agents. All of the tour operators were specialist-accessibility tour operators that primarily serve the international travel market. The main demand is from travellers with physical limitations. Tour operators also deal with guests who do not understand the local languages, dialects etc. Some of the services provided by these tour operators include adapted vehicles, registered nurse, and medical equipment hire (manual wheelchairs and oxygen therapy) and specialised tours. The costs of conversion are perceived to be high by 60% of tour operators.

All of the respondent travel agents were mainstream service providers who also provide services to the Accessible Tourism market. The majority of the respondents (87%) consider the Accessible Tourism market to be of medium importance. The domestic market is the primary market served. The main access difficulties confronted with relate to families travelling with babies and small children, elderly travellers with limited mobility and persons travelling with an older person. The services provided by respondent travel agents are travel insurance, customised accessible holidays and itineraries, general information on accessibility at accommodation and tourist sites and group tours and cruises. Services most in demand by both groups are accessible accommodation, transport, guided tours and foreign language fluency.

TABLE 4.7: FINDINGS ON THE TOUR OPERATORS AND TRAVEL AGENTS

	TOUR OPERATORS	TRAVEL AGENTS
Most common types of products and services provided	Airport transfer in ramped or lift-equipped vehicles Manual wheelchairs Car-hire Specialised tours (safari, wine tasting, bird viewing etc.)	Detailed information on accessibility at accommodation and tourist sites Group tours and cruises Travel insurance Customised accessible holidays and itineraries
Services most in demand	Accessible accommodation Accessible transport Accessible guided tours	Accessible accommodation Accessible transport Accessible guided tours
Perception of costs of conversion of facilities	High costs – 60% Medium costs – 40%	High costs – 55% Medium costs – 45%
Value that it generates for business	Average of 20%	Average of 15%
Plans to increase levels of accessibility	Yes - 63% No – 37%	No- 82% Yes – 17%
Examples of future plans	Adventure tourism	Variety of packaged tours for the elderly

Source: Accessible Tourism Questionnaire, 2011

Due to the dissatisfaction among travellers with functional limitations with mainstream operators, a number of specialist tour operators and travel agents have been established in South Africa. Awareness of access requirements is highest among these service providers since they provide a point of contact between the traveller with access requirements and the supply of accessible services and facilities. Mainstream travel agents on the other hand generally do not understand accessibility requirements and tend to associate the term with wheelchair access. Mainstream travel agents are also unclear and unaware of the accessibility features required for the sight and hearing impaired in the hotels they promote. These constraints result in travellers either using the services of a specialist travel agent, which is a costly option, or directly contacting potential service providers.

TRAINING TOUR GUIDES TO SERVE PEOPLE WITH HEARING LOSS IN TASMANIA

Source: David Closs, Hearing Link Tasmania info@hearinglink.com.au

Many hearing impaired people say that when they participated in tours, they can't hear the commentary over the noise of other people. Quite often their hearing aids amplify not only the information they want to hear, but all the surrounding noise they didn't want to listen to (shuffling feet in gravel, side conversations, rustling papers, birds singing, wind in the trees, and passing traffic). This makes their tourism experience a frustrating and less than rewarding activity.

As an organisation that supports and assists people with hearing impairment, Hearing Link Tasmania worked with the Tasmanian Polytechnic – which provides tour guide training – to provide a short course in how to assist people with hearing impairment to get more out of tour presentations. During the course, we first play the students a tape of what hearing loss sounds like to people with hearing impairment. We advise them that rarely will clients tell them about their hearing loss and that they must look for the signs that the clients are unable to hear (leaning towards you, partners explaining what you said, looking elsewhere because they have lost interest etc)

The hearing loss and impairment training sessions have been running for the last two years in Tasmania and have been very well received by all the students. Longer term results will be analysed as we move further along with this program.

4.4.7 MEETINGS, INCENTIVES, CONFERENCE AND EXHIBITIONS(M.I.C.E)

Of the total number of service providers, 11% represented MICE service providers. Only25% of these respondents indicated that they supply products and services to the Accessible Tourism market. Respondents with a specific accessibility focus cater to both international and domestic markets, providing a variety of services and facilities. These include computerised billboard displays, automatic doors and adapted restrooms on all levels. The importance of the market is regarded as being high by 42% of respondents, followed by 68% who consider it to be of medium importance. Services most in demand include accessible transport. Only 35% cater for groups with access requirements and of these68% cater for small groups, 20% for medium groups and 12% for large groups. Most of the respondents (85%) have no plans to increase their levels of accessibility.

TABLE 4.8: FINDINGS ONM.I.C.E SERVICE PROVIDERS

M.I.C.E	
Top 5 products and services provided	Reserved Parking Ramp entrances Reserved seating areas Adapted restrooms Large directional signage
Services most in demand	Accessible transport
Plans to increase levels of accessibility	Yes – 15% No – 85%
Examples of future plans	Remodel restrooms Convert to automatic doors

Source: Accessible Tourism Questionnaire, 2011

The majority of facilities (82%) are located within accommodation establishments. Only 12% are purpose built, specialised facilities located outside accommodation establishments.

The International Conference Centres offer a wider range of accessible facilities and assistive devices. These buildings have had to incorporate a number of accessibility features during their construction based on international codes and guidelines. Consequently, they feature communication systems, orientation aids and signage based on Universal Design principles. For example, the Durban International Convention Centre had accessibility incorporated into its design using Universal Design principles, with minimal special features exclusively designed for people with disabilities.[47]

4.5 CONCLUSION

The size of the domestic Accessible Tourism market was estimated by including the populations of the identified user groups. Thereafter a number of life cycle and lifestyle criteria were applied to determine the size of the market. Families with babies and small children represent the largest category of domestic travellers, followed by the elderly. The size of the international Accessible Tourism market was estimated using the total international tourist's arrivals by air and applying an estimated percentage, based on research by other long haul destinations, to the this market. The market size of both the domestic and international markets is not definitive. Consequently, there is an urgent need for more robust data collection to assist in the quantification of these markets.

The primary research on domestic and international travellers attempted to profile the markets in terms of their demographics, access difficulties and travel characteristics. Despite the attempts to increase the response rates, these were still poor. This means that the findings only reflect the attributes of those that responded to the survey. The full spectrum of access difficulties have not been captured which also necessitates furtherresearch.

[47]Robert Metts. 2000. '*Disability issues, trends and recommendations for the World Bank*'

Primary and secondary research on the service providers reveals that none of the respondents caters for all of the requirements of travellers with access needs and the elderly. The variety of services and facilities that are provided are not consistently provided across the industry. The importance of accurate information provision is highlighted throughout all the sectors since by stating honestly what the extent of accessibility is, travellers can decide what trade-offs can be made.

Even though accessibility is misunderstood and generally associated with wheelchair users, interviews with a number of service providers indicate that there are clear attempts at trying to understand the market. For accommodation establishments registered with the Tourism Grading Council, to be graded as a "universally accessible" establishment, they will have to comply with international requirements to accommodate those who have mobility, vision or communications difficulties. These requirements are now integrated with standard criteria to determine the level of Universal Access compliance across the industry. The implementation of this grading scheme will increase the awareness of accessibility as a fundamental requirement and not just as an afterthought.

Awareness levels of accessibility among respondents in general is poor and will only be improved once information on accessibility can be easily obtained from mainstream sources as opposed to considering Accessible Tourism to be a niche market. However there is a growing sensitisation towards the provision of accessible products. Research findings suggest that new service providers are more likely to introduce accessible products and services with only the larger more well established businesses introducing elements of access to their existing portfolios. However, even though awareness levels among attractions are steadily increasing, this does not necessarily translate into actual implementation of accessibility.

5. ECONOMIC IMPACT ANALYSIS

5.1 INTRODUCTION

Tourism has a variety of economic impacts. Tourists contribute to sales, profits, employment, tax revenues, and income in an area. The most direct effects occur within the primary tourism sectors such as lodging, restaurants, transportation, attractions, and retail trade. Through secondary effects, tourism affects most sectors of the economy. An economic impact analysis of tourism activity normally focuses on changes in sales, income and employment resulting from tourism activity in a region.

In Europe, the US and Australia, Accessible Tourism is gradually contributing an increasing part of the national tourism income. In South Africa, no information exists on the economic impacts of this market. Section 5determines theeconomic impactsto be accrued by the tourism industry when serving this market. The total demand for accessibility forms the basis for calculating the economic impacts.

5.2 ECONOMIC IMPACT ASSESSMENT

Economic impact refers to the effects on the level of economic activity in a given area as result of some form of external intervention in the economy. The intervention can be in the form of new investment in for example, transport facilities, social developments, housing, business development, or the expansion of existing production capacity.

Recent advances in economic forecasting and modelling techniques consider not only the direct benefits of the proposed development for its users, but also the broader impacts on the local and regional economy. The economic impact in this regard is defined as effects on the level of economic activity in a given area and the benefit to the economy, such as the generation of additional jobs, business sales, and/or disposable income. To quantify the most likely economic impact of a new business or expansion of an existing activity in a specific area, two types of economic impact can be measured, namely, direct and multiplicative impacts.

Direct impact: The direct economic effects are generated when the new business creates new jobs and purchase goods and services to operate the new facility.

The **multiplicative effects** can be grouped into two distinct effects: indirect and induced.

- The indirect economic effects occur when the suppliers of goods and services to the new business experience larger markets and potential to expand. For purposes of this study, indirect suppliers include those industries who deliver goods and services to the first round suppliers of the Accessible Tourism market. Both the direct and indirect effects result in an increase in employment creation and household income and this increase in turn allows households to increase their spending.

- Induced impacts: The induced impacts are the impacts on goods and services demanded due to increased expenditure by households based on income earned from the project. Examples include the income of employees and shareholders of the project, as well as the income arising through the backward linkages of this spending in the economy. The impact is sometimes confused with the forward linkage of a project.

Economic impacts can also result from changes in production processes or downscaling of activities. This report illustrates two types of economic impacts, namely:

- The economic impacts felt during the construction of a particular development. These impacts are short-term impacts, which occur while the development is being built.
- The long-term or sustainable impacts, which are on-going in an economy during the operation of facilities built as part of the development.

The economic effects may be viewed in terms of a change in:

- Employment creation;
- Value added (Gross Geographical Product);and
- Business output (or sales volume).

Any of these measures can be an indicator of improvement in the economic well-being of residents, which is usually a goal of investment projects. The net economic impact is usually viewed as the expansion or contraction of an area’s economy, resulting from changes in (i.e., opening, closing, expansion or contraction of) a facility, project or programme. Sometimes there is also interest in assessing the economic impact of an already existing facility, policy or project. This is usually viewed in terms of the jobs, income and/or business sales that are directly or indirectly supported by the facility or project.

In order to quantify the economic impact of the Accessible Tourism market, an input/output model was used. The model contains information on inter-sector relations, including tables that describe, for each sector included in the model, the amount of input the sector requires from other sectors to produce one unit of output. It is thus a set of equations describing the relationships that link the output of one industry with all other industries in an economy.

These models are able to estimate impacts within each industry in the model and thereby provide much more information than simple total economic impacts on income, output, and employment. Using, for example, new investment or operational expense data, multipliers are calculated to estimate different impacts of development investment and its ripple effects through the economy. Measures of input also take into account imports and exports to and from the specific geographic area.

In order to simplify the impact assessment, households have been incorporated in the input/output model as a productive sector because they provide inputs in the form of labour and their reward (i.e. income) is spent in the economy. Thus, by closing the input/output model with respect to households, the direct and indirect multipliers are higher in order to accommodate the induced effects of household expenditure in the economy.

The input/output table that will be used for the purpose of this study is derived from the national input/output table which was developed from the national accounting system updated to 2010. The model that will be applied is a comprehensive source of information of all the industry transactions between the buyers, sellers and consumers in the economy and differentiates between 38 different industrial sectors.

5.3 EXPENDITURE PROFILE OF THE DOMESTIC AND INTERNATIONAL TOURISM MARKET

The purpose of this section is to determine the spend per annum of the domestic and international Accessible Tourism market using the economically viable market group of LSM 5 to LSM10.The information produced in Section 4 of the report dealing with the domestic and international profiles of the accessible tourists is used to determine the economic impact. The total spend of the user groups is based on the estimated size of the domestic and international Accessible Tourism market.

The expenditure of tourists is based on the application of the parameters shown in Table 5.1 reflecting the tourists profiles extracted from Section 3.

TABLE 5.1: DOMESTIC AND INTERNATIONAL ACCESSIBLE TOURIST PROFILES USED TO DETERMINE TOTAL TOURISM EXPENDITURE IN TABLE 5.2

EXISTING / CURRENT SIZE OF THE MARKET (LSM 5-10)	DOMESTIC MARKET	INTERNATIONALMARKET
	UNITS	UNITS
PERSONS WITH ACCESS NEEDS		
NUMBER OF INDIVIDUALS	333,109	120,138
NUMBER OF COMPANIONS / ASSISTANTS	0.5	0.5
NUMBER OF TRIPS	1.0	1.0
SPEND PER ANNUM (R MILLION)	2,600	13,000
ELDERLY		
NUMBER OF INDIVIDUALS	272,294	30,034
NUMBER OF COMPANIONS / ASSISTANTS	0.5	0.5
NUMBER OF TRIPS	1.0	1.0
SPEND PER ANNUM (R MILLION)	1,800	13,000
FAMILIES WITH SMALL CHILDREN		
NUMBER OF FAMILIES WITH BABIES AND CHILDREN	239,847	
NUMBER IN FAMILY GROUP	2.5	
NUMBER OF TRIPS	1.0	
SPEND PER ANNUM (R MILLION)	2,600	

Source: Urban-Econ Calculations and Surveys, 2011

Table 5.2 indicates the total spend per category. This indicates that the total spend of the domestic market is estimated to be R2.6 billion while the spend of the international market is R2.9 billion. The total spend for both categories is R5.5billion for2010. The expenditure calculated in Table 5.2 takes the following into account as indicated in Table 5.1 for each of the user groups:

- The number of individuals tourists and their companions / partners who travel;
- The number of trips that the tourists take per annum; and
- The total spend for all tourists in the particular user groups.

TABLE 5.2: TOTAL SPEND OF THE DOMESTIC AND INTERNATIONAL ACCESSIBLE TOURISM MARKET, 2010

EXISTING / CURRENT SIZE OF THE MARKET	DOMESTIC MARKET	INTERNATIONAL MARKET
	UNITS	UNITS
PERSONS WITH ACCESS NEEDS		
NUMBER OF INDIVIDUALS	333,109	120,138
NUMBER OF COMPANIONS / ASSISTANTS	166,555	60,069
NUMBER OF TRIPS	499,664	180,207
SPEND PER ANNUM (R)	1,299,125,100	2,342,686,320
ELDERLY		
NUMBER OF INDIVIDUALS	272,294	30,034
NUMBER OF COMPANIONS / ASSISTANTS	136,147	15,017
NUMBER OF TRIPS	408,441	45,052
SPEND PER ANNUM (R)	735,193,800	585,671,580
FAMILIES WITH SMALL CHILDREN		
NUMBER OF INDIVIDUAL FAMILIES	239,847	
NUMBER IN FAMILY GROUP	599,618	
NUMBER OF TRIPS	839,465	
SPEND PER ANNUM (R)	623,602,200	
TOTAL SPEND PER ANNUM OF ALL GROUPS	2,657,921,100	2,928,357,900
TOTAL SPEND OF DOMESTIC AND INTERNATIONAL ACCESSIBLE TOURISTS (R PA)	**5,586,279,000**	

Source: Urban-Econ Calculations, 2011

Table 5.3 indicates the domestic tourism expenditure by type of product (R million and percentage contribution) for 2009.Domestic tourism expenditure totalling R 78 992 million (including the domestic portion ofoutbound tourism expenditure) was recorded in 2009.[48] The main expenditure items were “road passenger transport services” (32,7%), “accommodation for visitors” (19,9%), “non-specific products” (12,1%) and “air passenger transport services” (11,9%).

[48] TheTourism Satellite Account estimates that of the R78922 million domestic tourism expenditure, outbound expenditure is R53 553 million. This means that R25 369 million is inbound expenditure. However the expenditure profile of this is unknown.

TABLE 5.3: DOMESTIC TOURISM SPEND PER TOURISM PRODUCT TYPE, 2009 (%, RM)

Domestic tourism expenditure by type of product, 2009

Tourism product	2009 (R million)	2009 (%)
Accommodation for visitors	15 693	19,9
Restaurants and similar services	3 822	4,8
Railway passenger transport services	210	0,3
Road passenger transport services	25 798	32,7
Water passenger transport services	6	0,0
Air passenger transport services	9 428	11,9
Transport equipment rental	1 780	2,3
Travel agencies and other reservation services	2 954	3,7
Cultural services	93	0,1
Sports and recreational services	2 121	2,7
Tourism-connected products	7 534	9,5
Non-specific products	9 555	12,1
Total	78 992	100,0

Individual figures may not add up to stated totals due to rounding

Source: Stats SA, Tourism Satellite Account[49]

Table 5.4 indicates the inbound tourism expenditure by type of product (R million and percentage contribution). The year 2009 had 9 933 966 foreign visitors to South Africa. Inbound tourism expenditure totalling R67 141 million was recorded in 2009. The main expenditure items were "non-specific products" (28%), "accommodation for visitors" (15,6%) "road passenger transport services" (13,0%) and "connected products" (12,6%). Inbound tourism expenditure totalling R69 964 million was recorded in 2008 and the main expenditure items were "non-specific products" (33,6%), "accommodation for visitors" (13, 9%), "road passenger transport services" (12,0%) and "connected products" (12, 0%). The following inbound tourism expenditure profile is applied to determine the expenditure per tourism product.

[49] Provisional Report No.:04-05-07 for 2009, March 2011

TABLE 5.4: INTERNATIONAL TOURISM SPEND PER TOURISM PRODUCT TYPE, 2009 (%, RM)

Inbound tourism expenditure by type of product, 2009

Tourism product	2009 (R million)	2009 (%)
Accommodation for visitors	10 456	15,6
Restaurants and similar services	7 584	11,3
Railway passenger transport services	84	0,1
Road passenger transport services	8 753	13,0
Water passenger transport services	1	0,0
Air passenger transport services	6 659	9,9
Transport equipment rental	964	1,4
Travel agencies and other reservation services	1 241	1,8
Cultural services	137	0,2
Sports and recreational services	4 038	6,0
Tourism-connected products	8 431	12,6
Non-specific products	18 793	28,0
Total	67 141	100,0

Individual figures may not add up to stated totals due to rounding

Source: Stats SA, Tourism Satellite Account, 2011

The 2010 Accessible Tourism expenditure per tourism product type is calculated using the mainstream 2009 expenditure profiles contained in Tables 5.3 and 5.4. The categories that were used to determine the total spend of the markets were derived from Stats SA's tourism expenditure profile. Table 5.5 indicates a breakdown of the total spend per expenditure item.

TABLE 5.5: ACCESSIBLE TOURISM SPEND PER TOURISM EXPENDITURE CATEGORY, 2010

EXISTING CURRENT TOURISM SPEND PER CATEGORY	DOMESTIC MARKET		INTERNATIONAL MARKET	
	%	RAND	%	RAND
ACCOMMODATION FOR VISITORS	19.9	528,926,299	15.6	456,823,832
RESTAURANTS AND SIMILAR SERVICES	4.8	127,580,213	11.3	330,904,443
RAILWAY PASSENGER TRANSPORT SERVICES	0.3	7,973,763	0.1	2,928,358
ROAD PASSENGER TRANSPORT SERVICES	32.7	869,140,200	13.0	380,686,527
WATER PASSENGER TRANSPORT SERVICES	0.0	0	0.0	0
AIR PASSENGER TRANSPORT SERVICES	11.9	316,292,611	9.9	289,907,432
TRANSPORT EQUIPMENT RENTAL	2.3	61,132,185	1.4	40,997,011
TRAVEL AGENCIES AND OTHER RESERVATION SERVICE	3.7	98,343,081	1.8	52,710,442
CULTURAL SERVICES	0.1	2,657,921	0.2	5,856,716
SPORT AND RECREATIONAL SERVICES	2.7	71,763,870	6.0	175,701,474
TOURISM CONNECTED PRODUCTS	9.5	252,502,505	12.6	368,973,095
NON-SPECIFIED PRODUCTS AND SERVICES	12.1	321,608,453	28.1	822,868,570
TOTAL	**100.0**	**2,657,921,100**	**100.0**	**2,928,357,900**
GRAND TOTAL FOR BOTH MARKETS				**5,586,279,000**

Source: Urban-Econ Calculations, 2011

5.4 IMPACT ASSESSMENT - INPUT/OUTPUT MODEL

An input-output analysis traces the flow of goods and services, income and employment among the interrelated sectors of the economy. This approach measures direct, indirect and induced effects of tourism related transactions in the local economy. The market expenditure profiles are regrouped in Table 5.6 in terms of the economic categories useful for assessing the direct and indirect impacts through the input/output model. The economic categories that are aligned to the input/output model are: wholesale and retail trade, catering and accommodation services; transport and storage and communication. Where expenditure categories fell under the same input/output multiplier, these were combined, for example, “accommodation” and “food and beverage.”

TABLE 5.6: MARKET EXPENDITURE PROFILEIN TERMS OF THE RELEVANT ECONOMIC CATEGORIES, 2010

GROUPING OF EXISTING TOURISM SPEND PER MAJOR CATEGORY FOR THE INPUT / OUTPUT ASSESSMENT	DOMESTIC MARKET		INTERNATIONAL MARKET	
	%	RAND	%	RAND
Wholesale and retail	21.6	574,110,958	40.7	1,191,841,665
Catering and accommodation services	24.7	656,506,512	26.9	787,728,275
Transport and Storage	47.2	1,254,538,759	24.4	714,519,328
Communication and services	6.5	172,764,872	8.0	234,268,632
TOTAL	**100**	**2,657,921,100**	**100**	**2,928,357,900**
GRAND TOTAL FOR BOTH MARKETS	**5,586,279,000**			

Source: Urban-Econ Calculations, 2011

DIRECT AND INDIRECT ECONOMIC IMPACTS BASED ON THE INPUT/OUTPUT MULTIPLIERS

Multipliers capture the secondary economic effects (indirect and induced) of tourism activity. They represent the economic interdependencies between sectors in the local economy. The input/output model multipliers for new business development, employment and gross value added per economic group are shown in the Table 5.7. The information in the table is based on the national input/output multipliers as indicated in the table below. The multipliers are divided into the direct and indirect multipliers with a total for the combined impact. The economic impact of the market was determined by applying the multipliers with the total spend per group.

TABLE 5.7: NATIONAL 2010 INPUT/OUTPUT MULTIPLIERS

National 2010 Input/Output multipliers (closed with respect to Households)			
NEW BUSINESS SALES MULTIPLIER PER R1 SPENT			
	Direct	**Indirect**	**Total**
Wholesale and retail trade [61-63]	1.2871	0.9480	2.2352
Catering and accommodation services [64]	1.0262	1.2429	2.2692
Transport and storage [71-74]	1.1374	0.9660	2.1034
Communication[75]	1.3564	1.2772	2.6335
GROSS VALUE ADDED MULTIPLIERS PER R1 SPENT			
	Direct	**Indirect**	**Total**
Wholesale and retail trade [61-63]	0.3743	0.5513	0.9256

Catering and accommodation services [64]	0.4933	0.4416	0.9349
Transport and storage [71-74]	0.3908	0.5498	0.9406
Communication[75]	0.4217	0.5171	0.9388
EMPLOYMENT MULTIPLIERS PER R1000000 SPENT			
	Direct	**Indirect**	**Total**
Wholesale and retail trade [61-63]	2.7856	2.4222	5.2078
Catering and accommodation services [64]	3.0469	2.6642	5.7112
Transport and storage [71-74]	3.7632	1.2787	5.0419
Communication[75]	4.1993	0.4150	4.6083

Table 5.8 indicates the economic impact of the existing domestic and international markets for new business development, employment and gross value added per economic group. This reveals the following:

- **The total economic impact of new business sales in 2010 wasR12 438 million.**New business sales include all business revenue generated as a result of Accessible Tourism. Accessible Tourism leads to the direct expansion of business sales by R12 438 million. The increase in business sales is mainly noted in the wholesale and retail sector and transport and storage. The increase in direct business sales has positive spin-off effects on the supporting businesses, for example, companies that sell assistive devices and other inputs required for the Accessible Tourism market segment.
- **Employment generated in 2010 was 29 249.**Employment generated reflects the number of additional jobs created by Accessible Tourism.
- **Gross Value Added (GVA) in 2010 was R5 212 million.**GVAis an ideal measure of the real net impact of a project. This measure essentially reflects the sum of wage income and corporate profit generated in the study area. The estimated GVA of R5 212 million indicates the direct impact that Accessible Tourism will have on the economy. Tourism GDP is tourism gross value added plus taxes paid less subsidies received on tourism related products as these are reflected in prices that tourists actually pay.

TABLE 5.8: ECONOMIC IMPACT OF EXISTING DOMESTIC AND INTERNATIONAL MARKETS FOR NEW BUSINESS DEVELOPMENT, EMPLOYMENT AND GROSS VALUE ADDED PER ECONOMIC GROUP, 2010

National 2010 IO-multipliers (based on IO Table closed with respect to Households)			
NEW BUSINESS SALES RAND MILLION			
	Direct	**Indirect**	**Total**
Wholesale and retail trade [61-63]	2273	1674	3947
Catering and accommodation services [64]	1482	1795	3277
Transport and storage [71-74]	2240	1902	4142
Communication [75]	552	520	1072
TOTAL	**6,547**	**5,891**	**12,438**
EMPLOYMENT			
	Direct	**Indirect**	**Total**
Wholesale and retail trade [61-63]	4919	4278	9197
Catering and accommodation services [64]	4400	3848	8248

Transport and storage [71-74]	7410	2518	9928
Communication [75]	1707	169	1876
TOTAL	**18,436**	**10,812**	**29,249**
GROSS VALUE ADDED RAND MILLION			
	Direct	**Indirect**	**Total**
Wholesale and retail trade [61-63]	974	661	1635
Catering and accommodation services [64]	638	712	1350
Transport and storage [71-74]	1083	769	1852
Communication [75]	172	210	382
TOTAL	**2,866**	**2,353**	**5,219**

Source: National I/O Model, 2010

ACCESSIBLE TOURISM CONTRIBUTION TO GDP

Table 5.9 indicates the Accessible Tourism's market contribution to national GDP, at 0.23%.

TABLE 5.9: CONTRIBUTION TO GDP

NATIONAL VALUE ADDED RAND MILLION, 2010	2 304 628
ACCESSIBLE TOURISM GROSS VALUE ADDED RAND MILLION, 2010	5 219
% of National GDP	0.23

Basic Gross Demand approaches used in the USA reveal that in 2001, the Accessible Tourism market spent $13.6 billion on 31.7 million trips, generated 194 000 travel-related jobs and $2.52 billion in tax revenues (Rudney, 2003). A similar approach in Europe found that the general demand for accessibility in 2003 was estimated to be 127.5 million people. Of this only 89.3 million are estimated to have the economic and physical ability to travel. The potential tourism revenues of these travellers ranged between €83 and €166 billion and would increase sales in the European tourism sector from €249.2 billion in 2003 to over €300 or €400 billion respectively (OSSATE Accessibility Market and Stakeholder Analysis, 2005).In Australia, using secondary data, Tourism Satellite Accounts and the National Visitor Survey, the economic contribution of domestic Accessible Tourism market to GVA was estimated to be between A$3075 and A$4580 million in 2007, contributing between A$3885 and A$ 5787 million to tourism GDP (11-16%). The market sustained between 51 820 and 77 495 direct employment opportunities.(Dwyer and Darcy, 2008).

5.5 CONCLUSION

The findings of this section indicate that Accessible Tourism hada significantimpact on the South African tourism economy in 2010, through its effects on the following:

- New business sales the total economic impact is R12 438 million;
- Employment generated is 29 249; and
- Gross Value Added (GVA) is R5 212 million.

The value of this market segment is conservatively estimated since everyone has accessibility requirements and this will have an effect on the general travel market seeking accessibility. It is also important to note that the impact assessment does not account for capital expenditure (CAPEX) and only takes into account the 5-10 LSM groups.

6. SWOT ANALYSIS AND RECOMMENDATIONS

6.1 INTRODUCTION

In order to maximise the potential benefits as outlined in the impact analysis above it is necessary to implement strategicinterventions. In this section, a "Strengths, Weaknesses, Opportunities and Threats" (SWOT) analysis is undertaken on the Accessible Tourism market segment, which informs recommendations for growing the market.

6.2 SWOT ANALYSIS OF ACCESSIBLE TOURISM IN SOUTH AFRICA

This SWOT analysis is made on the key elements of the Accessible Tourism value chain. These are:

- The enabling environment (legislation, regulations and institutions);
- Information, marketing and communication;
- Tourism Products (accommodation, attractions and activities); and
- Transport.

THE ENABLING ENVIRONMENT	
LEGISLATION AND REGULATIONS	
Strengths and Opportunities	**Weaknesses and Threats**
Various pieces of legislation and regulations provide the foundations for the implementation of Accessible Tourism through the incorporation of Universal Design principles.	No separate legislation or regulations exist for Accessible Tourism and despite the attempts to incorporate the principles of Universal Design, public and private buildings and service providers throughout the country have not been able to meet these requirements. However, it is also a challenge to put existing standards into practice due to lack of resources for implementation as well as the inadequate monitoring and enforcement of the standards.
INSTITUTIONS	
Strengths and Opportunities	**Weaknesses and Threats**
A number of public institutions exist, that can provide the stimulus to develop and promote the Accessible Tourism market. A strong advocacy sector for persons with functional limitations also exists to promote the accessibility requirements of their respective members.	There is no research which indicates how the institutions can mobilise their resources to advocate for changes in tourism products and the delivery thereof so that it can become more accessible. Current institutional attempts are *ad hoc and* do not address all sectors and functional limitations.

Significant improvements in the accessibility of public and private tourism products and services can only be achieved once alegislative and regulatory framework for equality-of-access is in place. Once this has been achieved there is a need to translate legal principles into concrete actions for implementation by way of strategy formulation and programme development for Accessible Tourism. Advocacy by associations for persons with functional limitations plays a major role in placing access issues on the social agenda. In South Africa, one of the most immediate interventions is to strengthen the role of these associations.

INFORMATION, MARKETING AND COMMUNICATION	
MARKETING	
Strengths and Opportunities	**Weaknesses and Threats**
A number of marketing channels including major national marketing bodies, private sector operators and local development agencies are available to promote Accessible Tourism.	Absence of strong advertising and promotion strategies, due to the perceptionthat the Accessible Tourism market may not be a profitable market segment and misconceptions about types of products and services suitable for elderly travellers and those with functional limitations.
INFORMATION	
Strengths and Opportunities	**Weaknesses and Threats**
The Tourism Grading Council has introduced the Universal Access Grading Scheme. The implications are that the information on accessibility of facilities will be more reliable. Opportunities exist to introduce a similar grading scheme in other sectors.	The overall quality and quantity of information on accessible services and facilities is poor. There is a propensity to exaggerate the levels of accessibility by service providers. Information regarding accessibility is scattered amongst different service providers and is difficult to align.
COMMUNICATION	
Strengths and Opportunities	**Weaknesses and Threats**
A number of different mainstream communication channels exists that can be effectively used including websites and printed material.	ICT on accessible products and services is limited to mainstream formats and do not take into account the different functional limitations. Persons with sight, hearing and language limitations are not targeted through the use of alternative formats.

The marketing, information dissemination and communication of accessibility in South Africa cannot be successfully undertaken if there is no shared understanding of what constitutes access and who the persons that require accessibility are. This includes the provision of the right level of detail about the accessibility, using the most appropriate format and distributed via the correct channels, including the internet and both mainstream and disability media.

TOURISM PRODUCTS	
ACCOMMODATION	
Strengths and Opportunities	**Weaknesses and Threats**
Service providers are becoming sensitised to the access requirements of travellers with access requirements and clear attempts are being made to address barriers. **Improvements can be made that may not necessarily entail radical changes to physical infrastructure (awareness training exercises)**	Poor understanding of accessibility. It tends to be associated with the removal of architectural barrier- other levels of accessibility not taken into consideration, such as the accessibility of information. Incorrect and misunderstood perceptions of the costs of conversion of facilities.

In national parks, accommodation has higher levels of accessibility and cater to a larger number of different functional limitations as compared to accommodation in other areas.	Establishments provide products and services that lean towards wheelchair users. Limited supply of medium to low costs accommodation available. There are no training courses on Accessible Tourism so personnel are not adequately prepared to welcome these travellers.
ATTRACTION AND ACTIVITIES	
Strengths and Opportunities	**Weaknesses and Threats**
A number of tourism attractions, including World Heritage Sites consciously strive to provide some form of accessibility.	Landmark attractions have not embraced alternative readable formats or hearing devices for travellers with sight and hearing limitations. Attractions that do provide accessible facilities do not use it as a competitive advantage in their marketing initiatives and when they do, limited information is provided that necessitates contacting the service provider directly.

The provision and expansion of existing accessible products and facilities is the most important area of concern for achievingan accessible tourism environment. In South Africa, service providers need to become aware and understand that the needs of travellers with vision, hearing and cognitive limitations are quite different from those with physical limitations. Most service providers of accessible products respond to the latter, specifically to those in wheelchairs. Bearing in mind that it is unlikely that the situation will change in the short-term, service providers should strive to achieve reasonable level of accessibility that balances the needs of all travellers with functional limitations.

TRANSPORT	
Strengths and Opportunities	**Weaknesses and Threats**
A number of efforts, particularly prior to the World Cup were made to upgrade and improve the level of services and facilities in the public and private sectors. **A number of private sector service providers offer vehicles with customised features.**	Transport infrastructure for travellers with functional limitations falls below the standard of international competitors. The overall impact of efforts to increase accessibility has been limited without any long term plans to ensure that facilities are effectively utilised. High costs are associated with adapted transport that only affluent persons can afford. Air transport facilities are still inadequate to meet the needs of travellers with functional limitations. There is no specifically designed mainstream public and private bus transport for persons with functional limitations. Private train travel for persons with functional limitations is limited to those who can travel

with a companion to assist them.

Accessible transport is a major challenge in South Africa and concerted efforts need to be pursued to upgrade and improve the level of facilities for travellers with functional limitations. This can be undertaken by introducing accessible transportation as part of the overall legislation on disability rights (right to accessible transport).Other strategies to improve the accessibility of public transport include the application of Universal Design principles in the design and operation of public transport, for example in the selection of buses or by removing physical barriers when renovating stops and stations. However, continuity has to be established throughout the travel chain. For example, improvements in the quality of pavements and roads, pedestrian access, installing ramps (curb cuts), and improving the affordability of transport (subsidize transport (including air) fares for travelers with functional limitations). Accessible transportation features, such as toilets in aircrafts, are fundamental requirements for travel.

6.3 RECOMMENDATIONS

The NTSS (National Tourism Sector Strategy) identifies promoting sustainability and good governance as a strategic objective. This encapsulates the promotion of "responsible tourism" practices within the sector. The Responsible Tourism Declaration of Cape Town explicitly requires Responsible Tourism to be accessible for persons with disabilities. Consequently, the overlap between Responsible Tourism and Accessible Tourism is clear. The incorporation of Universal Design also means that Accessible Tourism has the capacity to produce "better places for people to live in and for people to visit". The recommendations that follow are geared towards developing the Accessible Tourism market, which in turn can address the following strategic objectives of the NTSS:

- ✓ To grow the tourism sector's absolute contribution to the economy;
- ✓ To increase domestic tourism's contribution to the tourism economy;
- ✓ To deliver a world-class visitor experience;
- ✓ To promote "responsible tourism" practices within the sector; and
- ✓ To position South Africa as a globally recognised tourism destination brand.

RECOMMENDATION 1: AWARENESS CREATION OF ACCESSIBLE TOURISM

RATIONALE

Accessible Tourism is aimed at benefiting all travellers however services providers in South Africa have not yet recognised the importance of taking action in this regard. The results of the service provider survey indicate a subjective understanding of accessibility as well as poor awareness levels of accessibility. None of the respondent service providers indicated that their staff members have been trained to provide services to travellers with functional limitations. This can be attributed to the absence of explicit government policies and strategies for the promotion of Accessible Tourism, lack of training for tourism service personnel on means of meeting the access needs of travellers with access requirements, and shortage of tourism programmes that address such needs. Available programmes, such as those offered by People for Awareness on Disability Issues (PADI), focus on education and awareness of disability issues in both the academic and business worlds. Courses designed to sensitise service providers on the unique problems of travellers with functional limitations or any travellers with access requirements are planned by the TGCSA.

DETAILED RECOMMENDATIONS

The NTSS recognises that tourism awareness is generally low in South Africa and proposes that, to improve general tourism awareness, an advertising campaign be developed and rolled out across all media. Accessible Tourism should be included in this initiative in order to raise awareness and demonstrate the potential economic benefits.

Awareness creation can be achievedthrough the following initiatives.

- ✓ Proper awareness creation and sensitisation of the general public about access requirements can be created by devising target-specific measures. Besides information distributed and displayed at main public places and utilities, radio, TV (Sho't Left campaign), social networks and tourism guidebooks can also be used.
- ✓ The NTSS proposes that tourism be further developed as a school subject. Accessible Tourism should be incorporated throughout the curriculum on tourism.
- ✓ An "Access Awareness Day" should be celebrated annually. This should be part of a comprehensive campaign to raise awareness about functional limitations, accessibility, and social inclusion. However, it should be more than just one day a year, but a call to respond creatively and purposefully to build an accessible society for the benefit of tourists and community members.
- ✓ An access city/town/local area award should be introduced for cities or towns that have implemented products and services that make it easy for persons with functional limitations and persons with access requirements in general to navigate around.
- ✓ An "awareness fair on functional limitations" should be held. This should be an interactive event exploring Universal Design. Such an event could feature information displays and adaptive technology demonstrations.
- ✓ Compile a compendium of good practices in the fields of education, staff training, and accessible tourism services.

MAJOR STAKEHOLDERS TO DRIVE THIS PROCESS

- ✓ All Government Departments;
- ✓ Tourism Business Council of South Africa; and
- ✓ Associations for persons with functional limitations.

BEST PRACTICE EXAMPLE

NATIONAL ACCESS AWARENESS WEEK - CANADA

The concept of National Access Awareness Week is to bring together, in a spirit of partnership voluntary organizations of persons with disabilities, business, labour and governments to affect meaningful changes in the daily living of persons with disabilities. There are now 23 National Partners and 8 corporate sponsors participating in National Access Awareness Week. The corporate sponsors not only commit financial resources, but are also committed to employment issues, access to goods and services and portrayal of persons with disabilities in their advertising. The objectives of the Week are to: 1) assess the accessibility of services and facilities, 2) set measurable goals, 3) make practical improvements, and 4) celebrate achievements.

The Week is not a fundraiser. It is a grass roots oriented tool for social change. It is locally and provincially based and supported by a national executive committee. It is a time to look forward and ask "What can be done to ensure the integration of persons with disabilities in Canadian society."

The main focus is on the issues of education, transportation, housing, employment, and recreation. National Access Awareness Week is intended to raise public awareness of the barriers, to encourage communities to assess the level of accessibility in their jurisdiction, and to plan for the removal of barriers. "Access" means more than just removing physical barriers; it means changes in attitudes and support that allows all people with visible or invisible disabilities to be part of community life. People with learning, developmental, and psychiatric disabilities or other invisible impairments should not be forgotten when we strive for equal access.

The work to remove barriers must continue year-round. Tangible accomplishments such as improved transportation services or increased employment occur when there is long-term strategy to address them. A progress reporting system was established to assess movement forward and to create challenging goals for the upcoming years.

Source: Disability Awareness in Action. Http://www.independentliving.org/

RECOMMENDATION 2: SKILLS TRAINING AND EDUCATION

RATIONALE

Skills training and education is one of the major challenges facing the tourism industry in relation to Accessible Tourism. Sensitive and willing staff with the right attitude and strong interpersonal skills can overcome many of the constraints that persons with functional limitations face and turn what may be perceived as an inaccessible experience into an accessible one.[50]It is essential for the South African tourism industry to strengthen its customer service straining in order to serve those with functional limitations. Regardless of how well an establishment has been designed to accommodate travellers with functional limitations or how well policies have been formulated to cater to the needs

[50]O'Neill, M., Cowan, E. and Knight, J. A. 2001. *Accessing the Disability Tourism Dollar – An Evaluation of Current Awareness and Provision by Hotel Enterprises in Western Australia.* Paper presented at the Sixth Asia Pacific Tourism Association Annual Conference, Phuket, Thailand, 28 June – 1 July 2005.

of such travellers, it will be of little value if the personnel employed are uncomfortable and ill-prepared to serve guests with functional limitations.

DETAILED RECOMMENDATIONS

- ✓ According to the NTSS, service levels across the tourism value chain are extremely inconsistent. In order to improve local tourism service levels, research is proposed to develop objective benchmarks for identifying gaps that need to be addressed and to monitor service improvement. This can also include service levels in the Accessible Tourism market. The NTSS recognises that service is rooted in attitude. To address this, sustainable behavioural changes are essential. According to the NTSS, this could be facilitated by educating all major frontline job categories on appropriate behaviour and customer care.

- ✓ A significant part of this education should be focussed on how to treat travellers with functional limitations. However, education and training on Accessible Tourism can start at FETCollege level although even children at primary and secondary school levels can be taught the importance of equity in accessing local transport, supermarkets, cinemas and schools etc.

- ✓ Skills development on Accessible Tourism should be incorporated as part of mainstream Hospitality and Tourism Courses at FET level in order to develop the hospitality and customer service skills of industry personnel.

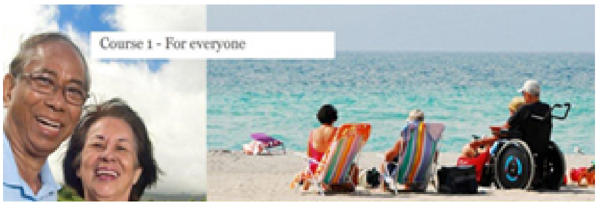
- ✓ For personnel already working in the tourism field, the education and skills training should be conducted at the place of business, by organisations such as PADI (People for Awareness on Disability Issues).Courses should be tax deductible for companies and organizations and/or grants should be made available. Training should also be certified by CATHSSETA (Culture, Arts, Tourism, Hospitality and Sports Sector Education and Training Authority).

BEST PRACTICE EXAMPLE

NEW FREE COURSE ON ACCESSIBLE TRAVEL MADE EASY AND WHY IT MAKES GOOD BUSINESS SENSE

Source: http://www.equalityhumanrights.com

The Association of British Travel Agents (ABTA) has a free Accessible Travel Made Easy online training course aimed at travel agents, tour operators and other front-line travel industry staff. The course is run in conjunction with the UK Equality and Human Rights Commission (EHRC). This interactive course provides an overview of the importance of accessible travel and why it makes good business sense to meet the diverse needs of customers. The first module was launched at ABTA's first Travel Matters conference, attended by high level stakeholders from Government, media and the travel industry.
The second advanced module 'Inclusive travel – making business sense' was launched recently, and aims to help those working in the travel industry to understand good business practice in relation to accessibility. It shows them how to:



- Communicate this effectively with colleagues and customers
- Understand customers' expectations and needs
- Tackle barriers that restrict choice and autonomy for disabled people and for those whose mobility is temporarily impaired
- Improve and change business practice as appropriate, so that the best service is offered to all.

This project links in with the Commission's work on Air Travel Accessibility. Under European law (EC1107), disabled passengers and those with limited mobility, have a right to assistance when they fly to, from and within Europe.

STAKEHOLDERS TO DRIVE THE PROCESS

- ✓ National Department of Tourism;
- ✓ Associations for persons with functional limitations;
- ✓ PADI;
- ✓ Department of Education, THETA (Tourism, Hospitality and Sport Education and Training Authority) and CATHSSETA; and
- ✓ Tourism Business Council of South Africa.

RECOMMENDATION 3: DEVELOPMENT, PROMOTION AND ENFORCEMENT OF UNIVERSAL ACCESSIBLE STANDARDS

RATIONALE

Finding out about the levels of accessibility and the suitability of an environment prior to travelling is important for persons with functional limitations. This determines both how and where they will travel, or if they can travel at all. Therefore, the accessibility standards and related measures which are used in a country are of fundamental importance to intending travellers who require access.

The United Nations Convention on the Rights of Persons with Disabilities provides that states should enact laws and other measures to improve disability rights, and also abolish legislation, customs and practices that discriminate against persons with disabilities. Among other obligations, states that ratify the convention undertake to promote Universal Design in the development of standards and guidelines, as well as to undertake research on the use of universally designed goods, services, equipment and facilities. The rights of persons with disabilities are also protected in the Constitution of South Africa and the Promotion of Equality and Prevention of Disability Act.

In South Africa, the TGCSA has incorporated the Universal Access grading scheme into all of its star-grading systems. The establishment of these standards represents the first initiative to ensure a wide range of accessible accommodation. However the NTSS recognises that current quality assurance programmes for tourism accommodation and conference facilities excludes other aspects of the sector.

DETAILED RECOMMENDATIONS

- ✓ In line with the NTSS, it is important to examine the effectiveness of current regulations, such as the tourism grading scheme and in the process to consult tourism providers, experts and also the beneficiaries of the Standards.
- ✓ Presently, there are no standards in place that make it necessary for all businesses to be accessible to everyone. This includes aspects such as advertising, marketing and training of staff. However, costs to implement these measures should not prevent previously disadvantaged groups from entering the sector.
- ✓ For South Africa to become an Accessible Tourism destination and to be marketed as such internationally and locally, the country will have to develop standards regulating all facets of the value chain. The NTSS recommends that the grading scheme or other forms of quality assurance should be expanded to include all sub sectors of the tourism industry including restaurants, tourist attractions, transport operators and tour operators.
- ✓ Existing standards should be reviewed in terms of their effectiveness in addressing accessibility. Noncompliance with relevant standards should be enforced through the provision of incentives.

BEST PRACTICE EXAMPLE

ACCESSIBILITY FOR ONTARIANS WITH DISABILITIES ACT, 2005

THIS ACT LAYS THE FRAMEWORK FOR THE DEVELOPMENT OF PROVINCE-WIDE MANDATORY STANDARDS ON ACCESSIBILITY IN ALL AREAS OF DAILY LIFE.

PURPOSE: Developing, implementing and enforcing accessibility standards in order to achieve accessibility for Ontarians with disabilities with respect to goods, services, facilities, accommodation, employment, buildings, structures and premises on or before January 1, 2025.

APPLICATION: This Act applies to every person or organization in the public and private sectors of the Province of Ontario, including the Legislative Assembly of Ontario.

Accessibility standards will apply to five important areas. Four standards have already been made into law:

- Customer service
- Employment
- Information and Communications
- Transportation
- The fifth standard — built environment — is being developed.

CONTENT OF STANDARDS: An accessibility standard shall set out measures, policies, practices or other requirements for the identification and removal of barriers with respect to goods, services, facilities, accommodation, employment, buildings, structures, premises or such other things as may be prescribed, and for the prevention of the erection of such barriers and require the persons or organizations named or described in the standard to implement those measures, policies, practices or other requirements within the time periods specified in the standard.

REVIEW OF THE LEGISLATION: The Accessibility for Ontarians with Disabilities Act, 2005 requires the Lieutenant Governor to appoint someone to conduct an independent review of the legislation and regulations within four years of it coming into force, and every three years after that.

Source: Ontario Ministry of Community and Social Service. Http://www.mscc.on.ca/

STAKEHOLDERS TO DRIVE THE PROCESS

- ✓ National Department of Tourism;
- ✓ Associations for persons with functional limitations;
- ✓ Tourism Grading Council;
- ✓ Tourism Business Council of South Africa; and
- ✓ Department of Arts and Culture.

RECOMMENDATION 4: MARKETING OF ACCESSIBLE TOURISM

RATIONALE

The NTSS has identified, as a strategic gap, the lack of coordination from national level to ensure alignment between national marketing promises and actual product development. Consequently, marketing is a crucial process that must be undertaken as a parallel process to accessibleproduct and service development. South Africa presently cannot be marketed as an Accessible Tourism destination if the components of the Accessible Tourism value chain are undeveloped or developed in isolation of each other. Only once accessibility that satisfies set criteria and standards has been achieved, cane marketing strategy and/or brand strategy be developed to market South Africa as an accessible destination. Accessibilityshould be incorporated in SAT's marketingstrategy as a competitiveness advantage.

DETAILED RECOMMENDATIONS

- ✓ A number of strategic gaps have been identified by the NTSS with regard to marketing and brand management in South Africa. These include the limited attention to niche tourism marketing, the failure to stay abreast of technological advances, the limited focus on traditional markets at the expense of emerging economies and the failure to expand target markets geographically and by economic level. Accessible Tourism should be considered in the action plans to address these gaps.
- ✓ The NTSS proposes that a marketing strategy be developed specifically targeting the African market and also proposes that SAT continues to develop new markets. Such a marketing strategy should include Accessible Tourism by raising awareness of the concept and to encouraging service providers to offer accessible products and services.
- ✓ Tourist destinations/attractions where certain accessible facilities already exist should be identified and promoted first. These include places such as Sun City, Kruger National Park, Victoria and Alfred Waterfront etc. A number of other appealing destinations should be identified for accessible development and promotion in the proposed marketing strategy.
- ✓ South Africa may in future consider a specific accessible tourism campaign such as "Accessible South Africa".
- ✓ To hasten the development of Accessible Tourism, provisions for access-enabling facilities and infrastructure should be made mandatory for all government-funded tourism projects. This can provide a source of competitive advantage in the marketing and promotion of mainstream tourism projects.

STAKEHOLDERS TO DRIVE THE PROCESS

- ✓ National Department of Tourism;
- ✓ South African Tourism; and
- ✓ Tourism Business Council of South Africa
- ✓ Provincial tourism associations.

BEST PRACTICE EXAMPLE ON THE FOLLOWING PAGE

MARKETING TOURISM TO UK DISABLED: A £2 BILLION OPPORTUNITY

Tourism for All UK will run in the northern autumn a conference for Senior Marketing, Sales and Business Development & Owner Managers in the UK Hospitality and Tourism Industry about marketing to and service for People with Disabilities (PwDs). Recent research by VisitEngland (England's national tourism board) revealed that the demand for travel and leisure products from disabled people is growing rapidly, and worth £2 billion a year in domestic travel alone. Yet many businesses are missing out on a share of this market. VisitEngland recently released a booklet which was created through a joint partnership with the Government's Accessible Tourism Stakeholder Forum with the aim of inspiring tourism businesses to improve accessibility for customers in the lead up to the London 2012 Olympic Games & Paralympic Games. The booklet – "At Your Service" – describes how to capture this £2 billion market. Around 11 million people in England have an impairment of some kind whether they are wheel chair users, have poor vision, hearing loss or learning difficulties. Overseas, there are potentially 78 million American and 75 million European disabled visitors, friends and family.

The Tourism for All conference will look at how a focus on exceptional customer service, accurate information and clear leadership can open up a whole new market for tourism businesses, how the long term loyalty of this market can be achieved at relatively low cost, and how to maximise the opportunities offered by the huge interest in the Olympic and Paralympic Games.

Source: Access Tourism New Zealand, 2011

RECOMMENDATION 5: INSTITUTIONAL DEVELOPMENT

RATIONALE

There is a need to establish an institutional mechanism through which all stakeholders and interested persons and organisations that would like to promote and advance Accessible Tourism can get together and promote the concept and exchange ideas and experiences. This may include the development of a co-ordinating forum or could be included in an existing national forum. Existing institutional mechanisms should be re-evaluated in terms of their ability to develop and grow this market segment.

DETAILED RECOMMENDATIONS

- ✓ The NTSS proposes the development of an “Intergovernmental and Stakeholder Engagement Framework” which will enable the National Department of Tourism to establish delivery forum consisting of various stakeholders with specified roles and responsibilities. Accessible Tourism stakeholders, such as associations for persons with functional limitations and the elderly could be incorporated as a permanent part of this. They could have an on-going advisory role in order to develop and deepen the exchange of views and information on the accessibility requirements of the respective functional limitations.
- ✓ An Accessible Tourism Co-ordinating Forum would consist of public and private sector stakeholders and associations of persons with functional limitations. The forum should function at the national level, ensuring the implementation of strategies and monitoring the progress thereof. Its role should be to develop mechanisms to monitor the progress and impact of measures to address functional limitations in the tourism sector, ensure participation by persons with functional limitations and the elderly in decision-making forums and other structures, and establish links with research, educational and civil society institutions.
- ✓ In order to monitor the implementation of the National Tourism Sector Strategy, the National Department of Tourism has established aMonitoring and Evaluation Unit. Through the delivery forum mentioned above, this unit will collate progress reports on the achievement of targets identified in the NTSS and other documents. This unit provides a suitable vehicle for incorporating the monitoring and evaluation of Accessible Tourism implementation programs. However, participatory monitoring with Disability Associations is crucial to ensure that the needs of persons with functional limitations are addressed.

BEST PRACTICE EXAMPLE

TOURISM VICTORIA HOLDS FORUM ON ACCESS TOURISM

The Victoria Tourism and Industry Council (VTIC) is cognisant of the fact that the population is ageing, experiencing increased disability, retiring, and travelling more frequently. Darren reports about the forum that several speakers gave presentations, including one on the imminent retirement of the Australian Baby Boomer generation, whose number one priority is travel. Their average age will be 64, and over half of Australians 60 or older have a physical disability. Therefore, Access Tourism is not a niche market but a large and very important one. Successful Access Tourism case studies were presented and Bill Forrester suggested that there is an information problem for accessibility more than an infrastructure problem. He said that often facilities are available but tourism operators do not clearly explain the facilities or the level of assistance available from staff to help provide access. Sometimes this information is available but tucked away on a website, as if to meet legal obligations rather than treating people with accessibility needs as a valued customer. Forester explained that tourism operators should readily make enough detailed information available to customers for them to make their own decision about whether it is safe and convenient to visit. He noted the sector is loyal and will bring friends if these customers feel safe and valued. Enjoy Inspire considers good information will enable visitors to make their own risk assessment and will provide less inconvenience to operators from unexpected surprises for guests with accessibility needs. For instance, an accommodation provider could explain clearly on its website where rails are situated in its guest rooms along with the height of the rails from the floor. An explanation of internet access and whether televisions have captions functionality will assist those with hearing difficulties.

Source: Access Tourism New Zealand, 2011

STAKEHOLDERS TO DRIVE THE PROCESS

- ✓ National Department of Tourism;
- ✓ South African Tourism;
- ✓ Tourism Business Council of South Africa; and
- ✓ Associations for persons with functional limitations.

RECOMMENDATION 6: RESEARCH AND DEVELOPMENT

RATIONALE

According to the NTSS, research, information and knowledge management is identified as a strategic gap in the tourism sector. To address this, it is proposed that the "capacity of the research and knowledge management of tourism is enhanced to coordinate and guide tourism related research through a strategic framework that meets the needs of all major stakeholders in tourism..." A database of all tourism assets is also proposed where service providers will be encouraged to register to enable improved data collection regarding supply capacity in the sector. It is also recommended that national tourism documentation and tourism related research be stored and continuously managed in an e-library. Existing databases could be consolidated with this.

In order to effectively develop Accessible Tourism in South Africa, high quality research is required to define the size and features of the Accessible Tourism market and to track changes, trends and progress. Accordingly, consistent terminology and criteria for national surveys need to be adopted, in co-operation with associations representing persons with functional limitations. Along with this there is a needto review all the data collection systems (including national censuses and surveys) to ensure that relevant information is obtained.

DETAILED RECOMMENDATIONS

- ✓ The NTSS proposes that in order to capture accurate information on tourists movements, specially designed departure forms will be used. Questions on the accessibility requirements of travellers, whether these have been met during their stay and similar relevant questions, should also be included.
- ✓ Disability representative organisations, South African Tourism and other research bodies such as Statistics South Africa need to joinforces to exchange information by setting up a database for Accessible Tourism as part of the proposed e-library. Such an endeavour can also be integrated into the National Accessibility Programme (NAP) Website. This Accessibility Programme is aimed at addressing the marginalisation of persons with functional limitations from the mainstream society and economy through the use of information, communication and technology. Existing devices and software that allow people with disabilities to interact with ICT systems are prohibitively expensive and have not been designed for use in South African. NAP focuses on addressing such needs and is positioned as an integrated service provider catering for different functional limitations including hearing, visual, and speech, physical, mental and intellectual disabilities. NAP is thus a one-stop information, services and communications channel.
- ✓ A tourism component should be integrated as part of the services offered. NAP can be used as a communication medium that will allow persons with functional limitations to share their tourism experiences with each other as well as find travel-related information.

BEST PRACTICE EXAMPLE

ACCESS TOURISM RESEARCH AT NEW ZEALAND TOURISM RESEARCH INSTITUTE

The New Zealand Tourism Research Institute at Auckland University of Technology has created a Research Programme Area in Access Tourism. NZTRI's Access Tourism programme aims to research and develop Access Tourism in NZ. Access Tourism is tourism, travel, and hospitality for people with permanent or temporary disabilities, seniors, parents with strollers, and any person with a need for improved access. This is an interdisciplinary research area that addresses the challenges and opportunities presented by Access Tourism.

The Access Tourist already represents a sizeable proportion of our tourism markets. Between 17 and 20% of the population in our main markets already report a disability, and this percentage is bound to grow because the large Baby Boomer cohort is ageing and disability increases with age. Those aged 45 or older already comprise almost half of our domestic and international visitors (and over 70% of our cruise ship visitors).

Areas of interest include:

- Research and policy development
- Understanding the Access Tourism market
- Awareness promotion and education of government and industry to the potential of Access Tourism
- Access Tourism product development and marketing in NZ
- Promotion of cooperation in a developing Access Tourism sector, including in the public and private sector
- Access Tourist satisfaction and motivation
- Economic and social benefits of Access Tourism
- Access Tourism as an important factor in tourism sustainability
- Relationship of Access tourism to Health, Wellness, and Medical Tourism
- Opportunities for Access Tourism legacy development around major events.

Source: Access Tourism New Zealand, 2011

STAKEHOLDERS TO DRIVE THE PROCESS

- ✓ National Department of Tourism;
- ✓ South African Tourism;
- ✓ Tourism Business Council of South Africa;
- ✓ Associations for persons with functional limitations; and
- ✓ Statistics South Africa
- ✓ Medical research council (NAP).

6.4 CONCLUSION

This section described the strengths, weaknesses, threats and opportunities of the Accessible Tourism market segment. Thereafter, a number of recommendations were put forth. These are:

- Recommendation 1: Awareness creation on Accessible Tourism
- Recommendation 2: Skills training and education
- Recommendation 3: Development, promotion and enforcement of Universal Accessible standards
- Recommendation 4: Marketing of Accessible Tourism
- Recommendation 5: Institutional development
- Recommendation 6: Research and development

The approach that is proposed for South Africa to adopt in developing Accessible Tourism is an integrated one which will be more successful than one of catering to the needs of particular user groups only. Primary and secondary research findings indicate that most travellers with functional limitations travel with family or friends. Furthermore, accessibility is also a requirement for a number of travellers that have hidden disabilities. This further expands the customer base of this segment.

Consequently an approach based on the principles of Universal Design and Accessibility, where tourism services and facilities are designed for the optimal use of all tourists is recommended. Although Universal Design and Accessibility aims to address all requirements, the tourism industry needs to appreciate different types and levels of accessibility requirements in order to address these. Central to creating such opportunities is also the necessity of agreeing to a widely accepted common way ofdescribing accessibility within the tourism system. The term 'Universally Accessible Tourism' is proposed which transcends the boundaries of a niche market and does not view Accessible Tourism as being marginal or extraneous to tourism in general.

7. CONCLUSION

Accessible Tourism is based on the fundamental principles of Universal Accessibility and Universal design. These are compatible with the social model of understanding functional limitations. Based on this model, it is essential for the tourism industry to create and implement strategies which remove attitudinal, social, physical and informational barriers that currently prevent or reduce the travel options of persons with functional limitations. Ageing is identified as a key contributor to functional limitations and with an ageing society the need for accessibility is emphasised. The benefits of Universal Accessibility and Universal Design extend to various other travellers with access requirements such as families with babies and small children, pregnant and breastfeeding women and obese persons.

In South Africa, no confirmed statistical data exists for travellers with access requirements. For this reason the specific travel behaviour of this market was researched by adopting a multi-disciplinary methodology, based on an extensive literature review, survey questionnaires and telephone interviews. In order to address the research objectives, emphasis was placed on primary and secondary data analysis to investigate Accessible Tourism demand and the supply in South Africa.

A demandanalysis investigates the market size for persons with access requirements in South Africa. In this study, the most significant parameter for determining the market size is the share of the population with functional limitations. A distinction was drawn between elderly travellers (65+ years) and travellers with physical, sight, hearing and cognitive disabilities. The market profiles of these user groups werethen explored in terms of their demographic and travel attributes. Both domestic and international travellers to South Africa were taken into account.

The supply analysisreveals thatmany tourism service providers (accommodation, attractions, and transport and tour operators) consider themselves to be accessible. However “accessibility” is subjectively defined and is generally related to being “wheelchair friendly”, which has led to the prevalence of inaccurate and unreliable information. An analysis of available information also demonstrates that the services and facilities across the industry are not up to world-class standards.

A comparison of the total demand for and supply of Accessible Tourism products and facilities illustrate the lack of such products and services. It also reveals the need for accessibility through the design and modifications of existing facilities. The findings suggest that access to suitable and accurate information isof crucial importance to persons with accessibility needs. Efforts to address these concerns, such as the Accommodation Grading Scheme, only have an impact on a part of this market.

The findings of the economic impact assessment, using the Input/output Model indicate that Accessible Tourism has an impact on the South African tourism industry by:

- Generating new business sales of R12 439million;
- Creating 29 249 new employment opportunities; and
- Generating an income of R5, 32billion, contributing approximately 3% to the GDP of the tourism sector and 0, 23% of national GDP.

A number of key recommendations were putforward for addressing thepriority issues relating to the future development of the Accessible Tourism market. These are:

- Recommendation 1: Awareness creation of Accessible Tourism;
- Recommendation 2: Skills training and education;
- Recommendation 3: Development, promotion and enforcement of Universal Accessible standards;
- Recommendation 4: Marketing of Accessible Tourism;
- Recommendation 5: Institutional development; and
- Recommendation 6: Research and development.

THE WAY FORWARD

South Africa should adopt an integrated approach towards Accessible Tourism. This approach is based on the principles of Universal Accessibility and Universal Design, where tourism services and facilities are designed for the optimal use of all tourists. Although Universal Accessibility and Universal Design are broadapproaches, the tourism industry needs to appreciate different types and levels of accessibility requirements. Central to creating such opportunities is also the need to agree on a widely accepted common way to describe accessibility within the tourism system. The term ‘Universally Accessible Tourism’ is proposed which transcends the boundaries of a niche market and does not view Accessible Tourism as being marginal or extraneous to tourism in general.

This research is the first official study on Accessible Tourism and is largely exploratory in nature. Research findings are also broadly indicative of the Accessible Tourism market. It is therefore important that research on Accessible Tourism continues and becomes part of all tourism studies and private and public investment initiatives.

ANNEXURE A: USER GROUP ORGANISATIONS AND REPRESENTATIVES

ELDERLY ASSOCIATIONS/TRAVEL GROUPS – SOUTH AFRICA

Age-In-Action (South African Council for the Aged)
South African Association of Retired Persons (SAARP)
Senior Service (Retirement places)
Grey power - 150
Evergreen
Twilanga
Safaris4Seniors
Senior service

ELDERLY TRAVEL GROUPS – INTERNATIONAL

Eldertrek
Walking the world
50 Plus Expeditions
Grandparent Travel

ORGANISATIONS FOR PERSONS WITH ILLNESSES – SOUTH AFRICA

Cansa South Africa
Diabetes South Africa
Strokeaid
Depression and Anxiety disorders group
Parkinson's Association South Africa

DISABILITY ORGANISATIONS – SOUTH AFRICA

DPSA Western Cape
DPSA Eastern Cape
DPSA Free State
DPSAKZN
DPSA Gauteng
DPSA Limpopo
DPSA Mpumalanga
DPSA Northern Cape
DPSA North West
Disabled Children Action Group (DICAG)
Quad PARA Association of South Africa (QASA)
The National Council for persons with physical disabilities (NCPPDSA)
Deaf Federation of South Africa (Deafest)
Down syndrome South Africa
Autism South Africa (ASA)
South African Federation for Mental health
South African National Council for the Blind (SANCB)
Southern African Federation of the Disabled (SAFOD)

Association for the for the Physically Disable
Beaufort West Association for the Physically Disabled
Bergrivier Association for Persons with Disabilities
Breede Valley Association for Persons with Disabilities
Cape Town Association for the Physically Disabled
Cederberg Association for Persons with Disabilities
Drakenstein Association for Persons with Disabilities
George Association for the Physically Disabled
Heidelberg Association for the Physically Disabled
Jo-Dolphin Swartland Association for Persons with Disabilities
Knysna Association for Persons with Physical Disabilities
Mossel Bay Association for Persons with Disabilities
Ocean View Association for Persons with Disabilities
Olifantsrivier Association for Persons with Disabilities
Oudtshoorn Association for Persons with Disabilities
Overstrand Association for Persons with Disabilities
Paarl Stimulation Centre
Plettenberg Bay APD (Die Sterreweg)
Sterreweg Centre for Children with Disabilities
Tembaletu Day Centre
Tygerberg Association for the Physically Disabled
Wallace Anderson Home
West Coast Association for the Physically Disabled
Witzenberg Association for Persons with Disabilities
Cape Mental Health
APD Eastern Cape
Disability Solutions
Enabler
Oasis Association
Quad Para Association of Western Cape
Quassar Trust
Beyond Ability
Disability Action Research Team (DART)
The Orion Organisation
Disabled Travel
NAPCP
Down Syndrome Association Gauteng
Down Syndrome Association Pretoria
Down Syndrome Association Western Cape
Down Syndrome Association Support Cape
Down Syndrome Association Amathole (East London),
Down Syndrome Association Port Elizabeth,
Down Syndrome Association Free State

INTERNATIONAL
International disability Alliance (650 million members)

ANNEXURE B: SERVICE PROVIDER ASSOCIATIONS – SOUTH AFRICA AND INTERNATIONAL

Accommodation providers – 71 (from disabled travel website)
SAACI (Conference Industry) – 1154 people
ASATA (Travel agents) - 450
FEDHASA (Accommodation) Western Cape- 700
FEDHASE – Inland - 800
NAA-SA (Accommodation) – 1000
BABASA (Accommodation)
RETOSA (Regional tourism)
RASA (Restaurants)
BTSA (Backpackers) - 240
SAVRALA (Vehicle and renting)
SATSA
ACSA
PRASA (Passenger rail agency)
Chambers accommodation and tourism
GHASA (Guest house accommodation) -500
Brand South Africa
Boundless SA
South African Peace Parks
Open Africa

SPECIALISTS TRAVEL INFORMATION SERVICES AND TOUR OPERATORS -INTERNATIONAL

ENAT (Europe)
Rolling Rains (USA)
Disability Travel (UK)
2 by2 African Holidays (UK)
Differently –abled travel (Facebook)
Able to travel (USA)
Able Travel (Canada)
Clear Path (India)
Disabled holidays 4U (USA)
e-ability (Australia)
Easy Asia (Asia)
Discover Africa (USA)
African Travel and Tourism Association (UK)
Society for Accessible Travel and Hospitality (SATH) (USA)

TOUR OPERATORS – SOUTH AFRICA
Epic-enabled
Endeavour Safaris
Flamingo Tours and Disabled Ventures
Enchantment Tours
Access2Africa

TOUR OPERATORS - AFRICA
Hemingways – Zambia
Adventures in Africa - Tanzania
Wild Africa – Namibia
African Bush Camp safari

5 STAR HOTEL CHAINS – SOUTH AFRICA
Hilton
Three cities
Protea
Hyatt Regency
Southern Sun
Sheraton Grand
Radisson Blu

VEHICLE HIRE – SOUTH AFRICA
Avis
Budget
Tempest
Europcar
Hertz

RAIL
Blue Train
Rovos Rail
Shozalosa-Meyl

ANNEXURE C: SURVEY QUESTIONNAIRES

INTERNATIONAL AND DOMESTIC TRAVELLERS

Dear Traveller

We would like to improve your tourism experience in South Africa from the time you start planning your trip, right until the moment you leave your destination and return home. Through your participation and contribution in completing the attached questionnaire, problems and challenges to the creation of an accessible tourism environment can be identified and with your assistance, make the tourism experience more enjoyable and comfortable for everyone.

WHO SHOULD COMPLETE THE QUESTIONNAIRE

Persons that experience any difficulties or limitations in travelling as a tourist are targeted through this survey. These could be due to a number of causes, such as:

- **Persons travelling with babies and small children**
- **Persons with temporary or permanent illnesses or injuries**
- **Difficulties related to walking**
- **Difficulties related to vision**
- **Difficulties related to hearing**
- **Cognitive difficulties**
- **Language difficulties**

Consent Form

☐ I have understood the information concerning the purpose of this survey, and the intended usage of the information obtained. I consent to participate in the research on the basis of this, and I understand that I may withdraw such consent at any time and that I do so, any provided data will be destroyed.

☐ I do not wish to participate.

1. **In answering these questions are you … (Select the appropriate response)**

- ☐ A person with a disability
- ☐ A carer/ attendant of a person with a disability
- ☐ A family member or a friend of a person with a disability
- ☐ A person who prefers using an accessible product/service
- ☐ An elderly person

For the remainder of this portion of the questionnaire, answer for your access needs or the access needs of the person that you travel with.

2. **Of the following list of access dimensions, which one(s) is/are the most applicable? (Select as many responses as appropriate).**

- ☐ Mobility - requiring the use of an aid (power or manual wheelchair, scooter)
- ☐ Mobility - requiring the use of a walker, walking stick or other mobility aid
- ☐ Mobility - no aid required by but you feel that your mobility is limited, i.e. your feel that your ability to cover a distance is limited
- ☐ Blind - profound blindness
- ☐ Vision - you have difficulties seeing, or require the use of glasses
- ☐ Deaf - profound deafness
- ☐ Hearing - you have difficulty hearing, or make use of a hearing aid, such as a cochlear implant or hearing aid
- ☐ Cognitive - involving issues of speech, understanding or learning
- ☐ Linguistic - not understanding local languages, dialects etc.
- ☐ Psychological - involving issues such as depression, bipolar/ manic-depressiveness etc.
- ☐ Contextual - Travelling with Luggage
- ☐ Lifecycle - Travelling with babies and small children
- ☐ Lifecycle - Travelling with older persons
- ☐ Cultural - misunderstandings or pleasurable trip reduction caused by cultural, ethnic or similar issues
- ☐ Other (please specify)

3. How often do you use a wheelchair or mobility aid when travelling, e.g. at the airport, hotel environments, attractions and destinations.

- ☐ 100% All the time
- ☐ 75-100% Almost all the time
- ☐ 50-75% Sometimes
- ☐ 25-50% A few times
- ☐ 0-25% Very occasionally
- ☐ I don't use a mobility aid
- ☐ Prefer not to say

4. From which source(s) do you normally obtain information when you plan a trip? Select as many as appropriate.

- ☐ Tourism Information Centres
- ☐ Travel Intermediaries e.g. Travel agent, tour operator
- ☐ Phone enquiries direct to service providers e.g. hotel, car hire, airlines
- ☐ Accessibility/disability specific/specialised sources e.g. travel agents, websites, accommodation, Guides
- ☐ Generic travel and guide books
- ☐ Recommendations from friends, family etc.
- ☐ Advertisements in newspaper, magazine, TV or radio
- ☐ Other (please specify)

5. How do you prefer to arrange your travel?

- ☐ Self organised
- ☐ Organised by travel company (travel agency, tour operator, tourism office, etc)

6. Describe the booking channel you have typically chosen in order to book trips, transportation and accommodation. You may choose more than one option if appropriate

- ☐ Telephone booking
- ☐ Booking over the Internet/online
- ☐ Booking in person/walk-in
- ☐ Other (please specify)

7. When do you most prefer to travel?

- ☐ December-January
- ☐ February-May
- ☐ June -July
- ☐ August-November

8. Please choose the appropriate reason for your last trip as a tourist (In South Africa, a "tourist' is defined as persons who travel more than 40km away from home AND slept one or more nights away from homes). Select more than one choice if appropriate.

- ☐ Holiday/ Vacation
- ☐ Visit friends and/ or family
- ☐ Business
- ☐ Medical
- ☐ Religious
- ☐ Education

9. How often do you travel away from home for at least one night? Select the most appropriate response.

- ☐ Less than once a year
- ☐ Once a year
- ☐ 2-3 times a year
- ☐ 4-6 times a year
- ☐ More than 6 times a year

10. When last travelled, what was the length of stay?

- ☐ 1-3 nights
- ☐ 4-7 nights
- ☐ 1 week
- ☐ 2 weeks
- ☐ 3 weeks +

11. With what kind of group(s) do you normally travel with? Select as many as appropriate

- ☐ Self
- ☐ Partner
- ☐ Friends/ Relatives
- ☐ Parents and children
- ☐ Parents, children and other friends/ relatives
- ☐ Business associate
- ☐ Couple with other adults (no children)
- ☐ Specific disability group
- ☐ Organised tour group
- ☐ With attendant
- ☐ Other (please specify)

12. How many people are normally in your immediate travel party? State number.

13. Were you the only person in your group with a disability or problem relating to accessing the service offering? Select the appropriate response.

☐ Yes ☐ No

If No, how many other people with disabilities or difficulty accessing the service offering are there?

14. You mostly travel by ... Select more than one response if appropriate.

☐ Plane	☐ Mini-Bus Taxi	☐ Commercial Bus
☐ Tour Bus	☐ Train	☐ Own car
☐ Rented car	☐ Someone's else's car	☐ Cruise
☐ Adapted vehicle	☐ Other - Please specify	

15. When last travelled what were the main types of accommodation used? Select as many as appropriate

☐ Formal service accommodation (Hotel, lodge)

☐ Guest accommodation (B&B, Country house, Guest house)

☐ Self Catering accommodation

☐ Backpackers and Hostelling accommodation

☐ Caravan and Camping accommodation

☐ Family and Friends

☐ Other (Please specify)

16. Have there been any types of accommodation that you have been unable to stay at due to a lack of accessibility? Select appropriate response

If yes, what were the types of accommodation and how did this affect your holiday choice? Note answer in space provided.

17. How much do you normally spend on your vacation or travel PER DAY when travelling in South Africa? Please include costs of accommodation, food, souvenirs, transport etc.

☐ R0 - R100 ☐ R100 - R250 ☐ R250 - R500
☐ R500 - R1000 ☐ R1000 - R1500 ☐ R1500 - R2500
☐ R2500 - R5000 ☐ R5000+ ☐ Prefer not to say

18. What was the average spend PER TRIP? Please guess conservatively.

☐ R0 - R1000 ☐ R1000 - R2500 ☐ R2500 - R5000
☐ R5000 - R7500 ☐ R7500 - R10,000 ☐ R10,000 - R15,000
☐ R15,000 - R20,000 ☐ R20,000 - R25,000 ☐ R25,000 - R30,000
☐ R30,000 - R40,000 ☐ R40,000 - R50,000R ☐ Prefer not to say

19. What activities do you participate in during a trip? Select more than one response if appropriate

☐ Shopping ☐ Social ☐ Beach
☐ Wildlife ☐ Nightlife ☐ Natural attraction
☐ Casino/Gambling ☐ Cultural ☐ Theme parks
☐ Adventure ☐ Other (please specify

20. Are you satisfied with your current level of travel? Select the appropriate response

☐ Not satisfied ☐ Neutral ☐ Satisfied ☐ Very satisfied

21. What are the main obstacles for you when travelling in South Africa?

	Not an obstacle 1	2	3	4	A major obstacle 5
Non-accessible transportation to get to destinations	☐	☐	☐	☐	☐
Non-accessible accommodation	☐	☐	☐	☐	☐
Lack of confidence	☐	☐	☐	☐	☐
Lack of assistant	☐	☐	☐	☐	☐
Lack of interest in travelling	☐	☐	☐	☐	☐
Health Problems	☐	☐	☐	☐	☐
Can't speak the local language	☐	☐	☐	☐	☐
Difficulty of the pre-planning requirements	☐	☐	☐	☐	☐
Previous problems encountered	☐	☐	☐	☐	☐
Difficulties in obtaining accurate information throughout the trip	☐	☐	☐	☐	☐
Problems with how information is made available	☐	☐	☐	☐	☐
Attitude	☐	☐	☐	☐	☐
Non Accessible attractions	☐	☐	☐	☐	☐
Levels of service	☐	☐	☐	☐	☐
Availability of public facilities (parking, restrooms etc)	☐	☐	☐	☐	☐

22. Could you please explain your responses to the answers you have shared in this question, in your own words

23. Where do you live?

Country	Province	Town/City

24. Gender

☐ Male ☐ Female

25. Age

☐ 15-19 years ☐ 20-24 years ☐ 25-29 years ☐ 30-34 years
☐ 35-39 years ☐ 40-44 years ☐ 45-49 years ☐ 50-54 years
☐ 55-59 years ☐ 60-64 years ☐ 65-69 years ☐ 70-74 years
☐ 75-80 years ☐ 81+ years

26. Which of the following best describes your lifecycle status? Select the appropriate response

☐ Young single living at home
☐ Young single living alone or in shared accommodation
☐ Midlife single
☐ Young/ midlife couple, no kids
☐ Parent with youngest child aged 5 or less
☐ Parent with youngest child aged 6-14
☐ Parent with youngest child aged 15+ still living at home
☐ Older working single
☐ Older non-working single
☐ Older working couple
☐ Older non-working couple
☐ Other (please specify

27. To which race group do you belong?

☐ Black ☐ White ☐ Coloured ☐ Indian/ Asian
☐ Would prefer not to say

28. What was the highest level of formal education you completed? Select the appropriate response

☐ Primary ☐ Secondary School ☐ Some trade certificate
☐ University or other tertiary graduate ☐ Postgraduate

29. Which of the following best describes your employment status? Select the appropriate response

☐ Full-time home duties ☐ Looking for work/ unemployed ☐ Retired
☐ Voluntary unpaid work ☐ Part-time education ☐ Full-time education
☐ Part-time paid work ☐ Full-time paid work (40+ hrs/wk) ☐ Self-employed
☐ Full pension ☐ Other (please specify

30. Please indicate what your annual income is

☐ R0 - R50,000 ☐ R50,000 - R100,000 ☐ R100,000 - R150,000
☐ R150,000 - R200,000 ☐ R200,000 - R250,000 ☐ R250,000 - R300,000
☐ R300,000 - R350,000 ☐ R350,000 - R400,000 ☐ R400,000+
☐ Would prefer not to say

31. Please use the space provided below if you have any other comments about your travel experiences.

ACCESSIBLE TOURISM SERVICE PROVIDER QUESTIONNAIRE- MAY 2011

SURVEY OF TOURISM SERVICE PROVIDERS

Request for tourism service providers to complete the attached questionnaire.

The ability of all people to have equal access to facilities and services is a high priority for Government. Towards this end, The Department of Trade and Industry (**the dti)** has initiated research into **ACCESSIBLE TOURISM**. This questionnaire is aimed at collecting information about this tourism sector that is currently poorly developed.

Tourism businesses that provide services to persons who experience any difficulties or limitations in travelling are targeted through this survey. These could be due to a number of causes, such as for example:

- **Travelling with babies and small children**
- **Walking difficulties**
- **Sight difficulties**
- **Hearing difficulties**
- **Cognitive difficulties**
- **Language difficulties**

If you are a tourism service provider that provides a service to persons who experiences any of the above, we would appreciate your participation and contribution by completing the attached questionnaire.

Thank you.

ACCESSIBLE TOURISM SERVICE PROVIDER QUESTIONNAIRE- MAY 2011

BUSINESS BACKGROUND

Q.1 **What sector of tourism or travel industry does your business operate in? (If more than one applies, please select the primary one)**

- ☐ Tour Operator
- ☐ Travel Agency (Retail)
- ☐ Travel Agency (Wholesale - inbound/outbound tours)
- ☐ Information resources (Destination Marketing Organisation, Visitor Information Centre)
- ☐ Tourism Attraction
- ☐ Accommodation Provider (Hotel, B&B, Backpackers)
- ☐ Food and Beverage Provider (Cafe, Restaurant etc.)
- ☐ Transport (land, air, road, sea)
- ☐ Meetings/ Conferences facilities and venues
- ☐ Adventure Tourism
- ☐ Ancillary Services (Souvenir shops etc)
- ☐ Other (Please specify in the space provided)

Q.2 **In which province(s) is/are your business located?**

☐ The Eastern Cape	☐ The Free State	☐ Gauteng
☐ KwaZulu-Natal	☐ Limpopo	☐ Mpumalanga
☐ The Northern Cape	☐ North West	☐ The Western Cape

Q. 3 **What is the size of your business in terms of the following:**

a) The total number of full time employees

b) The approximate number of clients/guests/customers that are handled PER YEAR?

Q.4 **Please indicate if you are TGCSA graded.**

☐ Yes ☐ No

Q.5 **If yes, please indicate your star grading.**

☐ 1 star ☐ 2 star ☐ 3 star ☐ 4 star ☐ 5 star

Please indicate if other accreditation applies.

BUSINESS OPERATIONS

Q. 6 **Can you please estimate what percentage of the following markets your business serves?**

Domestic	**%**
International	**%**

Q. 7 **How important is the accessible tourist market to your business?**

☐ High ☐ Medium ☐ Low ☐ Not Important

Q. 8 **Of the following list of functional limitations, which one(s) is/are the most common ones that your business is confronted with? (Select as many responses as appropriate).**

☐ Mobility – guests requiring the use of a power wheelchair or scooter

☐ Mobility – guests requiring the use of a manual wheelchair

☐ Mobility – guests requiring the use of a walker, walking stick or other mobility aid

☐ Mobility - no aid required by guests but mobility is limited, i.e. ability to cover a distance is limited

☐ Blind – guests that are profoundly blind

☐ Vision – guests that have difficulties seeing, or require the use of glasses

- ☐ Deaf – guests that are profoundly deaf
- ☐ Hearing – guests with difficulty hearing, or make use of a hearing aid
- ☐ Cognitive – guests that have issues of speech, understanding or learning
- ☐ Linguistic – guests that do not understand the local languages, dialects etc.
- ☐ Psychological – guests that suffer from depression, bipolar/ manic-depressiveness
- ☐ Lifecycle – guest travelling with babies and small children
- ☐ Lifecycle - guests travelling with older persons
- ☐ Other (Please specify in the space provided)

Q. 9 Does your business provide products or services for persons with the functional limitations identified above?

☐ Yes ☐ No

Q.10 If yes to Q. 9, to what extent does your business provide for these?

☐ 100% ☐ 70-100% ☐ 50-70% ☐ 30-50% ☐ 10-30%

☐ Less than 10%

Q.11 If yes to Q.9, can you please select the appropriate options OR tell us what these are.

- ☐ Ramps available to access all levels
- ☐ Clear pathways
- ☐ Audio aids
- ☐ Visual aids
- ☐ Adapted room (with bathroom)
- ☐ Large Print/Braille (brochures/menus, lift buttons etc)
- ☐ Hand rails
- ☐ Emergency call systems

- ☐ Room specific emergency log in
- ☐ Golf Cart
- ☐ Playroom
- ☐ Child minding services
- ☐ Attendant care
- ☐ Universal access staff training
- ☐ Wheelchairs/scooters/walking aids
- ☐ Adapted vehicles
- ☐ Sign language interpreter
- ☐ Other (Please specify in the space provided)

Q.12 What services are most in demand in your business?

- ☐ Accessible accommodation
- ☐ Accessible transport/vehicles
- ☐ Accessible guided tours
- ☐ Wheelchairs/Other mobility aids
- ☐ Assistant
- ☐ Child Minding
- ☐ Other (Please specify in the space provided)

Q.13 Is your business marketed as being accessible?

- ☐ Yes
- ☐ No

Q.14 Can your business cater for GROUPS that travel with similar functional limitations?

☐ Yes ☐ No

Q. 15 If yes to Q. 13, what group size can be accommodated?

☐ Small (5-10) ☐ Medium (10-20) ☐ Large (20 +)

Q.16 What percentage occupancy do you achieve in the adapted facilities that your business may have? (The average occupancy rate of hotel rooms in South Africa is 70%)

☐ 100% ☐ 70-100% ☐ 50-70% ☐ 30-50% ☐ 10-30%
☐ Less than 10%

Q.17 If you were to convert a standard facility/service into an accessible one, what is your perception of the cost of conversion (an adapted room, restroom, walkway etc)?

☐ High costs ☐ Medium costs ☐ Low costs

Q. 18 Can you please estimate the value that accessible tourism generates for your business?

Per annum

Q. 19 Do you consider your business as a specialist accessible tourism service provider?

☐ Yes ☐ No

Q.20 Do you have future plans to increase the levels of accessibility?

☐ Yes ☐ No

If yes, please state what these may be in the space provided.

Q.21 Are you familiar with any accessibility standards for TOURISTS?

☐ Yes ☐ No

Q.22 How would you rate the priority that should be given to the following?

(1-low priority; 2- medium priority; 3-high priority)

	1	2	3
a) Greater awareness of special needs requirements among service providers and the public	☐	☐	☐
b) Appropriate public sector infrastructure (Accessible buildings, transport, attractions etc.)	☐	☐	☐
c) Heightened awareness/promotion of existing accessible facilities	☐	☐	☐
d) Expansion of accessible tourist facilities	☐	☐	☐
e) Improvements in quality of facilities and services	☐	☐	☐
f) Introduction of national quality criteria and standards	☐	☐	☐
g) Accessible /access friendly marketing and communication	☐	☐	☐
h) Special business incentives for providing accessible tourism services	☐	☐	☐

j) Other (Please specify and indicate rating)

Q.23 In your view, what are the challenges facing your business regarding delivery of services to this market?

- ☐ Perceived as a non-lucrative market
- ☐ No marketing links in the supply chain
- ☐ High cost of conversion (equipment, construction etc.)
- ☐ Lack of information on travel behaviour and market potential
- ☐ Stereotypical attitudes/behaviour from non-disabled guests
- ☐ Other (Please specify in the space provided)

Q.24 Are there other aspects related to ACCESSIBLE TOURISM that you would like to bring to our attention? If yes, please use the space provided.

THANK YOU FOR YOUR PARTICIPATION.

Please note that the answers to this questionnaire will remain confidential and anonymous. However, should you wish to provide your contact details, please do so in the space provided below.

- ☐ Perceived as a non-lucrative market
- ☐ No marketing links in the supply chain
- ☐ High cost of conversion (equipment, construction etc.)
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- ☐ Stereotypical attitudes/behaviour from non-disabled guests
- ☐ Other (Please specify in the space provided)

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