The Future of Tourism for People with Disabilities

Briefing Note

July 2024

Purpose of this note:
In fall 2023 and spring 2024, the MacEachen Institute for Public Policy and Governance at Dalhousie University, in partnership with University of Strathclyde (Glasgow, Scotland), brought together stakeholders in accessible tourism to examine the future of tourism for people with disabilities. We focused largely on the Nova Scotia context although, given the jurisdictional complexity of the issue, at times we necessarily went beyond it. The group engaged in scenario-planning exercises, during which we discussed barriers to accessible tourism and opportunities to improve accessible tourism in the short and medium terms.

Our research in this area will continue. The purpose of this note is to share our interim findings and provide opportunities for feedback.

About the MacEachen Institute:
The MacEachen Institute for Public Policy and Governance at Dalhousie University is a nationally focused, non-partisan, interdisciplinary institute designed to support the development of progressive public policy and to encourage greater citizen engagement.

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Key Observations from the Sessions

- People with disabilities face many significant physical, attitudinal, systemic, and informational barriers that prevent them from travelling and experiencing the benefits of tourism that others enjoy. These barriers persist despite province- and country-wide regulations supporting accessibility and the market potential of accessible tourism.

- While some key businesses in tourism are large corporations (e.g., airlines) for which formal regulations often influence change, the tourism industry is made up overwhelmingly of small and medium-sized businesses. These smaller businesses oftentimes lack the time, money, and knowledge to make necessary changes, and regulations are relatively 'light touch' for them.

- Businesses that make efforts to ensure their services are more accessible should be encouraged and good practices should be shared widely; however, misunderstandings about the nature of accessibility and disability are widespread, sometimes resulting in misguided attempts at improvement.

- Solutions lie in recognizing the rights of people with disabilities, developing a culture of respect and committing to continuous improvement. While individual businesses have an important role to play, solutions also lie in community-wide changes that engage business, government, the not-for-profit sector and the citizenry as a whole, including those with disabilities, and incorporating the learning from people with disabilities into the sector.

- There are many opportunities for positive change.

- Businesses must understand the important role they play in contributing to an accessible community; for example, how they offer their service, solicit and receive feedback, abide by laws, recruit and train staff, adopt technologies, and foster a culture of respect and acceptance all matter

- Governments, destination management organizations, and chambers of commerce can help small businesses by informing them of the changing legal and social context and the financial benefits for businesses when they are more accessible. These organizations can also help small businesses identify areas for improvement and help them apply for grants.

- In addition to working with individual businesses, governments and community groups can also take community-wide approaches to making neighbourhoods more accessible. Governments need to prepare communities for accessibility; accessible tourism is a growing market and large-scale events will increasingly demand venues and communities that are accessible, as evidenced by the efforts at the 2024 Paris Olympics.

- While many changes occur at the community level, change can be enabled by strong leadership, an appropriate regulatory framework across jurisdictions and dedicated resources. With this in mind, we recommend a federal-provincial-territorial ministerial meeting to address these issues and lead the effort for positive change in close consultation with people with disabilities and their advocates. Given the increased international profile of the issue, now is a good time to act.

Introduction

Tourism has become a central feature of modern life for many people,[1] and has lasting benefits for people's mental wellbeing.[2] Many people with disabilities are motivated to participate in tourism and travel; however, they often struggle to do so because of barriers built into society that 'dis-able' them.[3] Accessibility has increasingly become a priority for the tourism industry; for example, the Paris 2024 Olympics made accessibility one of the central features of its bid.[4]

Many jurisdictions in Canada aim to improve accessibility in the near term, but regulations have limitations and progress in some cases is slow.[5] Accessible tourism is a lucrative market that presents many opportunities for economic growth. People with disabilities are significant tourism consumers, whose expenditure on travel was increasing substantially in the years preceding the COVID-19 Pandemic.[6] Further, Canada's population of people with disabilities is projected to grow.[7] Note, also, that many non-disabled populations benefit from accessibility.[8]

Despite its importance and the many opportunities it presents, fully accessible tourism is far from a reality. People with disabilities face numerous barriers in society at large, which extend to the tourism industry and often prevent or discourage them from participating in tourism. These barriers are often categorized as follows:[9]

- **Physical barriers**, which are created when the design of the environment is such that it cannot be navigated without great difficulty or assistance.
- **Attitudinal barriers**, which are created by discriminatory behaviours, perceptions, and assumptions towards people with disabilities.
- **Systemic barriers**, which are created by discriminatory policies, procedures, or practices.
- **Informational barriers**, which are created when necessary information is unavailable or difficult to understand.

These barriers can make it difficult for people with disabilities to experience the benefits of tourism enjoyed by many others, and they also contradict and impede accessibility goals. Further, by failing to address these barriers and appeal to tourists with disabilities, tourism businesses are losing out on significant opportunities for economic growth.

The current project brought together accessible tourism stakeholders, including tourism industry representatives, people with lived experience of disability, organizations that advocate on behalf of people with disabilities, and academics to discuss the future of tourism for people with disabilities. Using a scenario-planning exercise, the group developed four plausible futures for the industry and identified potential causes, critical failures, and opportunities for each one. Based on the results from these scenario-planning sessions, we developed 12 recommendations for the tourism industry and the government to improve accessibility in tourism. Our goal is to help the industry move towards an improved future of tourism for people with disabilities, in which tourism opportunities are accessible to everyone, regardless of functional needs, disabilities, or age. We focused largely on the Nova Scotia context although, given the jurisdictional complexity of the issue, at times we necessarily went beyond it.

How we did it

The present project brought together accessible tourism stakeholders to participate in a scenario-planning exercise on the future of tourism for people with disabilities in fall of 2023 (September 28, October 19 and 20) and spring of 2024 (April 18). Scenario-planning is a risk modelling strategy used to envision plausible futures in an uncertain context and identify opportunities for change. We chose scenario-planning because while the government was pursuing accessibility goals for 2030, the COVID-19 pandemic created a highly uncertain future for the tourism industry.

We invited participants for their knowledge of, responsibility for, and interest in the future of tourism for people with disabilities. Following Dalhousie University ethics approval (#2021-5921), we reached out to six not-for-profits that serve persons with disabilities, asked them to recommend potential participants with lived experience of disability, and then selected participants from this pool. Other participants were contacted directly because of their positions with not-for-profits. There are many disabilities and functional needs to consider in the context of accessibility, and the lived experiences of our participants are not representative of people with disabilities as a whole; rather, they provided important insight that serves as a starting point for understanding these issues. A similar process was followed for

participants from the tourism industry. There were also seven academics present who studied tourism, disability, risk governance, and scenario-planning.

We encouraged all participants to engage actively during the group discussions. The moderator provided a structure for group discussion, asking a series of questions, while the content of the discussion was generated by the group. Prior to the first session, participants were provided with documents explaining the project, scenario-planning, and current research on tourism for people with disabilities. In the first scenario-planning session, the group identified variables that impact tourism for people with disabilities. In the second and third sessions, the group used supply and demand concepts to explore four plausible futures of tourism for people with disabilities. Using findings from these sessions, we developed 18 draft recommendations to improve accessibility in tourism. The group provided feedback on these recommendations in the final session, which we used to further refine them into the 12 presented here. For more information on our method and scenario-planning, please see the Appendix.

Our research in this area will continue. The purpose of this note is to share our interim findings and provide opportunities for feedback.

Recommendations

The following recommendations were developed with the goal of reducing barriers in the tourism industry to improve the experience of tourists with disabilities. When reviewing these recommendations, readers should consider that accessibility is an ongoing process that must be grounded in respect. While enforcement of regulations remains important, the best form of behaviour modification is culture change.[10] In a more inclusive society, people will improve accessibility because it comes to them naturally.

It is also important to understand the context of the tourism industry. There are two realities in tourism: 1 percent of tourism businesses are large companies like hotel chains and airlines that have significant staff, money, and lobbying capacity, and the other 99 percent are small and medium-sized enterprises (SMEs), 98 percent of which have 100 or fewer employees;[11] they work in a highly competitive context, with low cash reserves, little influence, and precarious employment.[12] Food and beverage services account for more than 55 percent of all tourism jobs.[13] Many in the sector work part time for low wages and few benefits and are vulnerable to market changes.[14] Job losses in this sector during the pandemic were greater than in any other; in May 2020, unemployment hit 30 percent.

Finally, these recommendations come in the midst of a national and global shift towards prioritizing accessibility in tourism, as evidenced by the importance of accessibility for the Paris 2024 Olympic bid.

Recommendation 1:

Governments: Given the growing importance of accessibility in tourism, **we recommend a federal-provincial-territorial first ministers' conference to develop a national strategy on this issue.**

Recommendation 2:

Tourism organizations, organizations that advocate on behalf of people with disabilities, and governments must develop a shared understanding of accessibility. Designs should be flexible and capable of accommodating different needs.[15] When accessibility is misunderstood, changes are often ineffective or produce additional barriers. Consulting people with disabilities is crucial when attempting to understand and improve accessibility.

Recommendation 3:

Governments and tourism industry: Developing good policies and strategies depends on having reliable information. At present, there are several gaps in information and, in fact, the mechanisms for collecting reliable data are not necessarily present. **Methods for collecting data about the experiences of people with disabilities should be improved.** These methods should consider the wide variety of functional needs across disabilities.

Recommendation 4:

Governments and tourism industry: Accessibility measures are most effective when they have been developed with input from people with disabilities.[16] **People with disabilities should be compensated for their feedback when appropriate and the process of soliciting feedback should accommodate their needs to avoid being burdensome.** People collecting accessibility feedback should be comfortable around people with disabilities and receive training to reduce bias.

Recommendation 5:

Governments, chambers of commerce, and tourism industry (Destination Management Organizations): **Community leaders need to convey to businesses that accessible tourism is a growing market**; the number of people with disabilities in Canada is on the rise and is expected to continue growing alongside the aging population.[17] People with disabilities often travel in groups, which may include family and friends or support people. Corporate tourism, including conferences, conventions, and other large-scale events, represents another significant market opportunity. Nova Scotia receives many cruise vessels, which often include people with disabilities or other diverse functional needs.

Recommendation 6:

Governments: **Standards should be set regarding the accessibility information tourism businesses are required to provide and how they deliver it.** Detailed and transparent information enables people with disabilities to plan for their trips and adapt to accessibility gaps. Out of necessity, people with disabilities often plan for months in advance of travel; inaccurate information can be highly disruptive, if not devastating to their plans. Essential information to provide includes how to get there, where to stay, and how to get around. Businesses should also provide information about which functional needs they are able to accommodate and the specific accessibility services they provide. People with disabilities can often be skeptical about the information they receive from tourism providers. Third-party validation about

information can be helpful; in fact, people with disabilities value information they receive from other people with disabilities.

Recommendation 7:

Governments: **A targeted program that approaches businesses directly, identifies eligible areas of improvement, and guides businesses through the grant application process could be especially effective for small businesses.** These programs should emphasize opportunities to improve accessibility that go beyond physical infrastructure, for example, providing detailed accessibility information and accessible websites (e.g. text alternatives for non-text content, transcripts for audio content). In Nova Scotia, one source of funding available to tourism businesses is the ACCESS-ability grant program, which can fund built environment, accessible communication services, assistive devices, universal design capacity building, and accessible transportation.

Recommendation 8:

Tourism industry: **Tourism businesses should consult people with disabilities when developing marketing campaigns to ensure that the campaigns are accessible, and people with disabilities are represented in the materials.** Marketing should be sensitive about representing the diverse experiences of people with disabilities, including diversity in the types of disability represented.[18] Representation must also accurately reflect the accessibility of tourism opportunities to ensure that people with disabilities are not being misled.

Recommendation 9:

Tourism industry: **Existing business-to-business communication networks could be used to share information about accessibility-related initiatives, opportunities, and successes throughout the business community.** This could include an increase in Chamber of Commerce events focused on discussing accessibility and regular accessibility promotion in their newsletter or other publications circulated to local businesses. This network could benefit accessible businesses by enabling them to recommend each other to tourists, while helping tourists with disabilities find accessible opportunities.

Recommendation 10:

Tourism industry and organizations that advocate on behalf of people with disabilities: **To work effectively with the**

government, the tourism industry and organizations that advocate on behalf of people with disabilities must coordinate to increase their lobbying capability. Tourism is largely a fragmented industry primarily comprising small to medium-sized businesses with limited lobbying power.[19] This means that coordination across the supply chain, including information, transportation, and accommodation, is both complex and essential to ensure consistency. Similarly, organizations that advocate on behalf of people with disabilities in Canada are often small operations with mixed and often limited nationwide coordination. It's important that these two groups develop a partnership and collaborate on areas of shared interest.

Recommendation 11:

Tourism industry: **People with disabilities should be employed at all levels of the tourism industry, from leadership to frontline positions**. Working alongside people with disabilities is often the most effective way to change workplace attitudes.[20] Employing people with disabilities may also help tourism businesses reduce staff turnover, which is generally high in the industry, because employees with disabilities have lower turnover rates.[21] Tourism businesses can connect with prospective employees with disabilities and learn more about creating an accessible workplace through organizations such as the Canadian Association for Supported Employment or reachAbility. The START program matches employers with unemployed Nova Scotians, including those with disabilities, and may offer wage incentives and cover training or equipment costs in certain cases.

Recommendation 12:

Governments: **Accessibility standards must be enforced through regular inspections and clear deadlines for accessibility improvements.** Enforcement should involve accessibility audits, the results of which should be made public to motivate change. Many regulations are not sufficiently enforced, which may allow inaccessible businesses to operate below the standard.

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Appendix: Scenario-Planning Methods and Exercises

There are many ways to do scenario-planning. We used the intuitive logics method.[22]

We defined accessible tourism as tourism destinations, products, and services that are accessible to all people, regardless of physical limitations, disabilities, or age. Demand for accessible tourism was defined as the quantity of these accessible tourism opportunities consumers are willing to buy, and supply was defined as the amount of accessible tourism opportunities that are available. We selected these variables as driving forces for the scenario-planning exercise. We chose these drivers because they encompass other variables identified by the group and provided considerable scope for discussion. Based on these drivers, we discussed four scenarios:

1. **Demand High, Supply High**: tourism opportunities are accessible, and tourists with disabilities are enjoying them without difficulty.

2. **Demand Low, Supply High**: tourism opportunities exist, but tourists with disabilities are not visiting them.

3. **Demand Low, Supply Low**: accessible tourism opportunities are few and tourists with disabilities are not visiting them.

4. **Demand High, Supply Low**: tourists with disabilities are seeking accessible tourism opportunities, but the supply is not sufficient.

After selecting the two driving forces, we use them as the axes on a 2 x 2 scenario matrix, which is often referred to as the "standard" tool in intuitive logics scenario-planning (see Figure 1).[23]
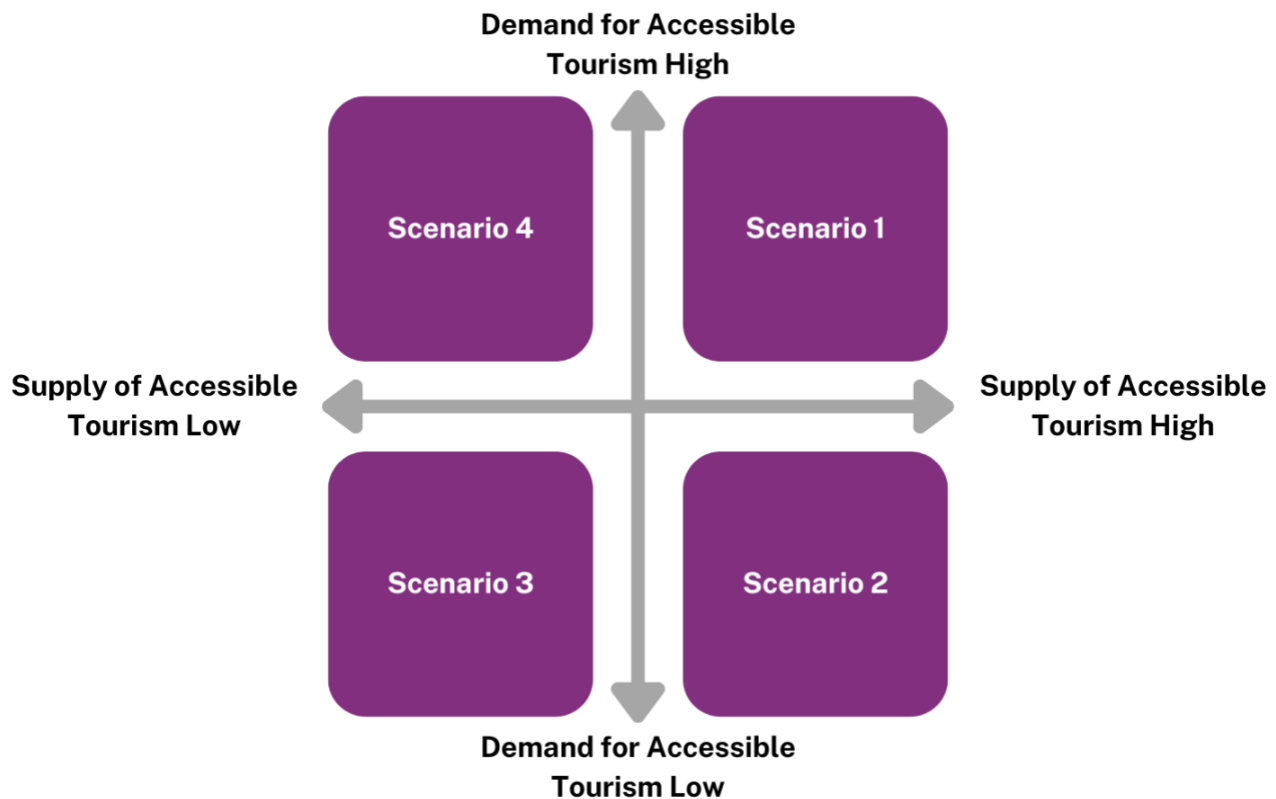

Figure 1: The Accessible Tourism Matrix. The 2 x 2 matrix that sets up four scenarios using the drivers of demand for accessible tourism and supply of accessible tourism.

The scenario-planning exercise involved discussions about each of the four scenarios, which were structured around the following questions, per the steps of scenario-planning:

1. What does the scenario look like?
2. How did you get to this scenario?
3. What are the underlying causes?
4. What are the potential critical failures?
5. What are the opportunities?

Participants identified several factors that would facilitate the High Demand–High Supply scenario of accessible tourism. First, information would be disseminated to businesses about the importance of improving accessibility and how to receive funding. Accessibility regulations for tourism businesses would account for the continuous evolution of best-practices and compliance would be regularly assessed and enforced. Businesses would have a clear understanding of accessibility, including the diversity of functional needs and disabilities, and would also employ people with disabilities. These represent some of the many factors that could help reduce and remove physical, attitudinal, systemic and information barriers to tourism.

Critical failures and events that might lead to one of the other three scenarios include the following:

♦ Many businesses and organizations misunderstand accessibility and fail to consult people with disabilities when making changes. This can result in changes, yes, but not necessarily improvements. These changes can be partially if not entirely ineffective and may even create additional barriers **(Low Supply).**

♦ If businesses have a reputation for poor accessibility, people with disabilities are unlikely to show up **(Low Demand, Low Supply).** If businesses address their accessibility issues but fail to inform people with disabilities appropriately of these changes, their low attendance will likely persist **(Low Demand, High Supply).**

♦ Most tourism businesses are small to medium-sized enterprises with high staff turnover and low margins. Smaller businesses may lack the time, money, and knowledge to make accessibility changes without significant support. They may also be unaware of the financial opportunities of accessible tourism that could incentivize change **(Low Supply).**

♦ Businesses require data to set targets and inform decisions. Ineffective or non-existent mechanisms to gather accessibility-related feedback from customers, track lost sales, and record usage of accessibility features will prevent businesses from improving **(Low Supply).**

♦ Poor attitudes amongst tourism operators and staff are a major barrier for people with disabilities that may discourage them from participating in future tourism **(Low Demand).**

♦ Lack of detailed and transparent accessibility information is a common barrier faced by tourists with disabilities, which hinders effective trip planning. Incorrect or incomplete information often results in unanticipated barriers that may be hugely burdensome and discourage future travel **(Low Supply and/or Low Demand).**

Limitations of the method

Scenario-planning is a valuable method of risk modelling that yielded valuable insights for the present project; however, we note some important limitations. First, scenario-planning requires a significant time commitment to allow people to prepare for the sessions and engage in thoughtful conversations. Scenario-planning also requires that all participants feel comfortable contributing their perspectives to the discussion; in our sessions, in which people with disabilities shared their experiences, it's possible that those without disabilities were uncomfortable expressing contrary views. There are also limitations surrounding representation: while we had several participants with disabilities, it is not possible to capture all disabilities and experiences in a single group; there was also lack of small tourism-business representatives, although industry associations and larger industry players were present. As noted, we will continue the research with an eye to improving our method and observations.

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