

How to seize the niche market of Accessible Tourism. Kéroul studies results on behaviors and attitudes of people with physical disabilities.

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Situation/purpose of study

Kéroul conducted studies on the behaviors and attitudes of people with a physical disability, with respect to tourism, culture and transportation in Québec, a province of Canada with a population of 8 million, and for its bordering markets.

The purposes of these market studies were to:

- Analyze the behaviours and attitudes of persons with limited physical ability residing in bordering markets or in the Province of Québec and who visit Québec;
- Shed light on the evolution of conditions in Québec and evaluate the actual and potential economic impacts of Kéroul's initiatives for disabled people on tourism;
- Serve as a guide to help better meet the travel needs of individuals with disabilities.

Approach and/or methodology

The results of two surveys helped write the conclusion. The 2009 survey was conducted in markets bordering the Province of Québec; 695 interviews were conducted by internet. The 2011 survey targeted the Province of Québec market. A total of 730 interviews was completed - 152 by phone and 578 by Internet. The survey was weighted by expanding the joint distribution of age and sex according to Statistics Canada's 2006 *Participation and Activity Limitation Survey*.

Results/conclusions.

Not only do many people with limited physical ability travel, they also:

- Travel several times a year;
- Their trips last several days;
- Their trips are most often planned far in advance and involve many other people as well, including: family, friends and caregivers for the trip;
- They represent a lucrative market that travel when they are informed.

Travellers with restricted mobility without adequate services may be receptive to a high-quality offer. They are faithful and will return to the venue that treated them well. This clientele is still largely unknown and has garnered quite a bit of interest among industry players questioned as part of this study.

To find information, people with restricted mobility still tend to rely on their own experiences, to put themselves in the care of loved ones or to resort to more traditional methods such as travel agencies.

For the Province of Québec, with a population of 8 million, its own clientele with disability represents a domestic annual contribution of \$174M. The clientele with disability in its surrounding markets (Ontario, Maritimes and New-England) represents an annual potential of \$335M.

A municipality or a tourist region which has no accessible infrastructure or establishment is out of this potential market and revenues.