

Why Marketing Accessibility is vital to the health of the Florida Tourism Industry.



Maureen Murphy

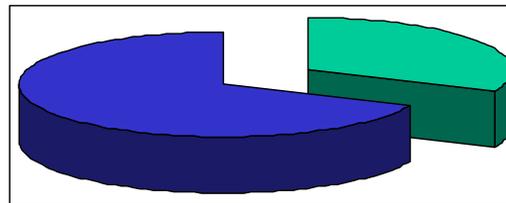
Florida Division of
Cultural Affairs



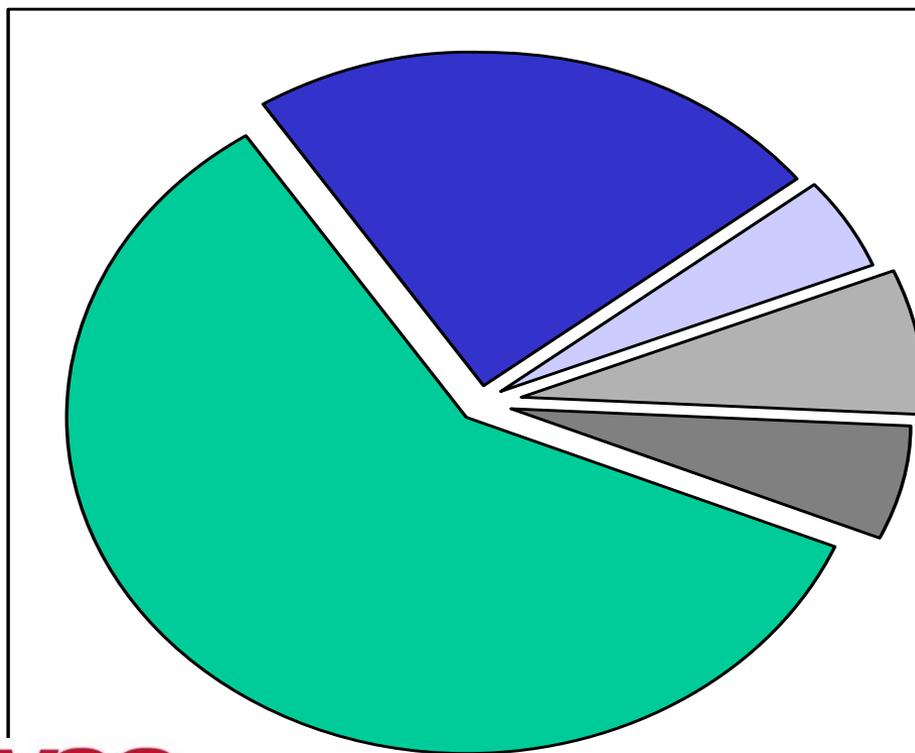
Marian Winters



Art and Cultural Organizations



■ Non-Residents
31.8%
■ Residents 68.2%



■ Specifically visiting to attend event 59.4%
■ Vacation/Holiday 23.7%
■ Work/Business 4.3%
■ Visit Friends/Relatives 7%
■ Other 5.6%

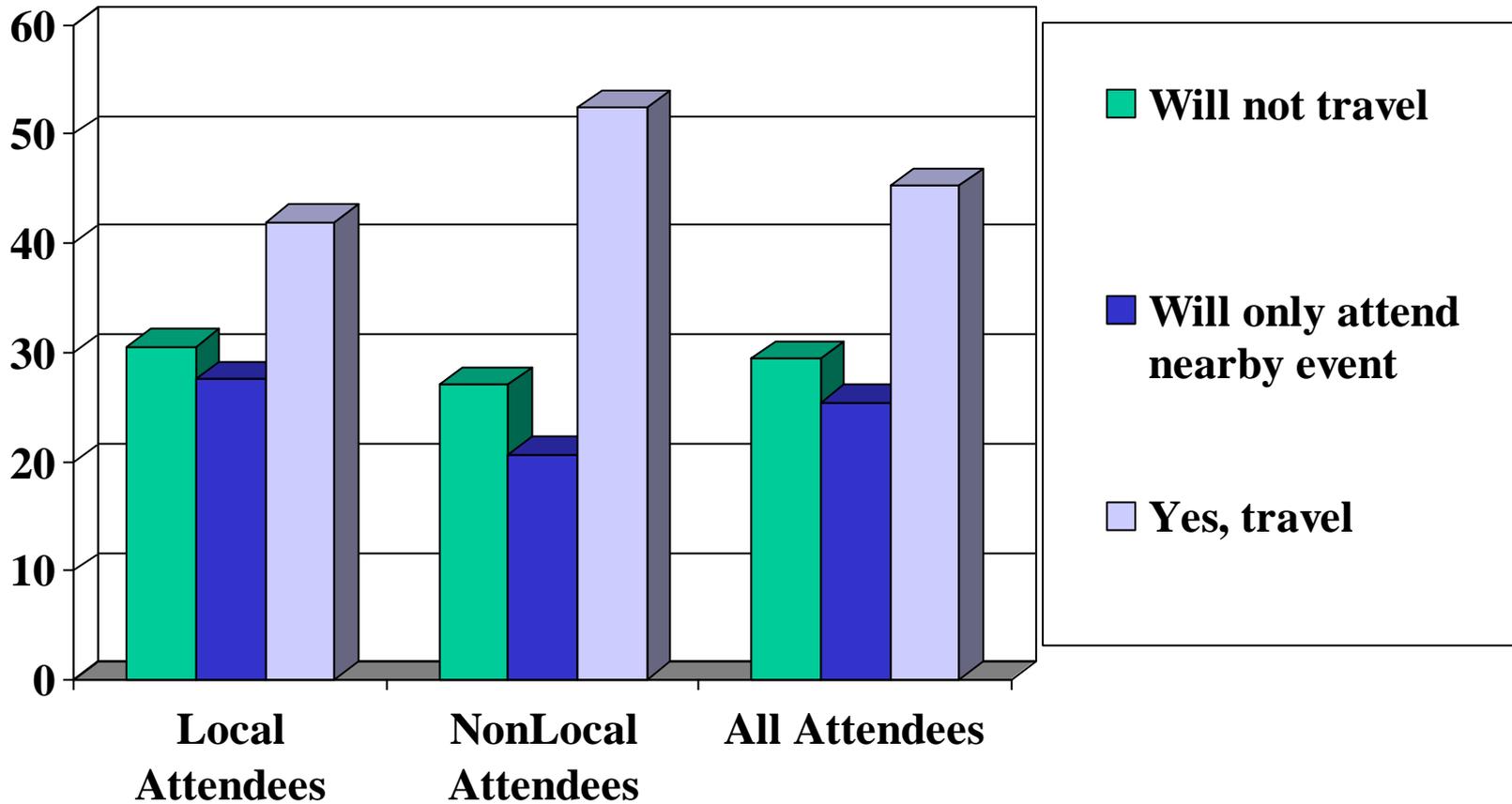
How Art/Cultural organizations impact tourism in their communities

- Art/Cultural Travelers spend more than other travelers
- Are more likely to stay in overnight lodging.
- Are more likely to spend \$1000 or more during their stay
- Travel longer than other travelers.
- 2/3 of Americans included a cultural, artistic, heritage or historic activity while on a trip of 50 miles or more... which equates to 92.7 million cultural travelers-
 - 26 million of which added extra time to their trip, and
 - 57% of this group did so by one or more nights

Local vs. Nonlocal Audiences

- 2010 study Non local attendees spend more than twice the amount than their local counterparts
- They spend \$39.96 vs. \$17.42 per person in addition to the cost of admission,
- In the US audiences 31.8% non residents

How far will tourists go?



Florida Economy of Tourism 2012

- Average Florida tourism compensation \$28,105.06
- Florida tourism employs 1,047,100 people
- Florida tourism industry employees' personal income & earnings \$ 31.16 billion
- Florida tourism industry employees' disposable personal income 27.19 billion
- Direct GDP contribution of Florida tourism \$51.14 billion



Accessibility is:

- A crucial requirement for around 10 % of the population
- A necessity for about 30 to 40%
- Comfortable for 100 %

- 41% people in US have some type of disability
- People with disabilities have a combined income of more than \$1 trillion with \$220 billion in discretionary income



What needs to be done

- To gain competitive advantage, organizations must provide a complete suite of best practice inclusive products and then market them appropriately. When the concept is put into practice; demand follows innovation.



WHAT IS CAPI?

- Committee to Advocate for Persons with Impairments for the City of St. Petersburg, Florida
- Consists of 11 volunteer advocates appointed by the Mayor and approved by City Council
- Created in 1972, decades before the ADA
- Purpose:
 - Advocate, Advise & Formulate positions on issues facing people with disabilities
 - Provide guidance relative to affairs, concerns & rights of people with disabilities
 - Ensure that people with disabilities can participate and enjoy all of the City's facilities, programs and services



Committee to Advocate for Persons with Impairments
City of St. Petersburg, Florida

DISABILITY INQUIRIES

- Inquiries from residents & visitors come through the Community Affairs Office and the Mayor's Action Line.
- Any issued related to disability is routed to the ADA Coordinator in Community Affairs Department.
- Inquiries are logged, resolved and closed
- CAPI monitors the disability related inquiries for needed action.



Committee to Advocate for Persons with Impairments
City of St. Petersburg, Florida

RANKING OF TOURISM RELATED INQUIRIES

➤ Review of the log from 2007-2013, the ranking by frequency of inquiry topic for those who indicated they are visiting the area or are new to the area.

1. Beach Wheelchair
2. Transportation & Parking
3. Accessible Accommodation
4. Recreation & Attractions
5. Other: events,



Committee to Advocate for Persons with Impairments
City of St. Petersburg, Florida

RESOURCES:

Contact the ADA Coordinator with any questions or need for consult.

Lendel Bright
Community Affairs Division
727-893-7345
Lendel.Bright@stpete.org

We are here to help people with disabilities who are residents as well as visitors.



Committee to Advocate for Persons with Impairments
City of St. Petersburg, Florida

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What is Inclusive Tourism?

Inclusive Tourism is an environment where people of all abilities are felt welcome and wanted as customers and guests.

Inclusive Tourism is no longer a disability rights issue, it is an economic imperative.



Money Talks



Statistics must be presented consistently. When it comes to Inclusive Tourism spending directly relating to people with a disability is a meaningless number. Most people travel in a group and the multiplier is between 2.8 and 3.5 depending on the type of trip. It is the group number that is important as it is the total group expenditure that is affected if the destination is not accessible either physically or through lack of published information.

Statistics

- * On an annual basis, adults with disabilities spend approximately \$13.6 billion on travel. More than 21 million people, take 2 trips every 2 years.
- * Twenty percent (63 million) of Americans have a disability; approximately 10 million aged 15 and older use a walking aid such as a cane or walker. This group may include many "slow walker" individuals who don't consider themselves disabled, but who could benefit from special needs products and services.
- * Studies show that 24 million disabled Americans would travel or travel more frequently if their special needs were met.
- * Each year for the next 20 years, 4 million Baby Boomers will turn 65 in the U.S. alone.
- * Between 2006 and 2016 in the U.S., the age 50+ population will have grown by 22 million; the age 18-49 population will have grown by 1 million.
- * Over 40 percent of Baby Boomers will be retiring with some form of disability, raising the total value of the accessible travel segment to over 25 percent of the travel market by 2020.
- * In 2009, households headed by adults aged 65 and older ... had 47 times as much net wealth as the typical household headed by someone under 35 years of age.



Investments in Accessible Tourism are worthwhile investments into the future, with the benefits available to all groups of the society:

- to older and disabled travelers for whom traveling becomes easier and more attractive,
- to all other holiday-makers as a result of enhanced convenience and quality,
- to tourism service providers as a result of a rising number of guests and higher capacity utilization,
- to destinations, which improve their competitive standing and gain more value added,
- and last but not least to the whole country as a tourism destination, due to new demand impulses and a stronger tourism industry.

Market Size

For the first time Inclusive Tourism is being regarded as an economic market driven by the retirement of the baby boomer sector. Inclusive Tourism is already a major tourism sector with Australian research putting its value at 11% of the total industry market share. US research by McKinsey & Company predicts that by 2015, the baby boomer generation will command almost 60 percent of net U.S. wealth and 40 percent of spending. In many categories, like travel, boomers will represent over 50 percent of consumption. The impact on the Inclusive Travel sector is significant as over 40% of them will be retiring with some form of disability, raising the total value of the Inclusive Tourism sector to over 25% of the market by 2020.

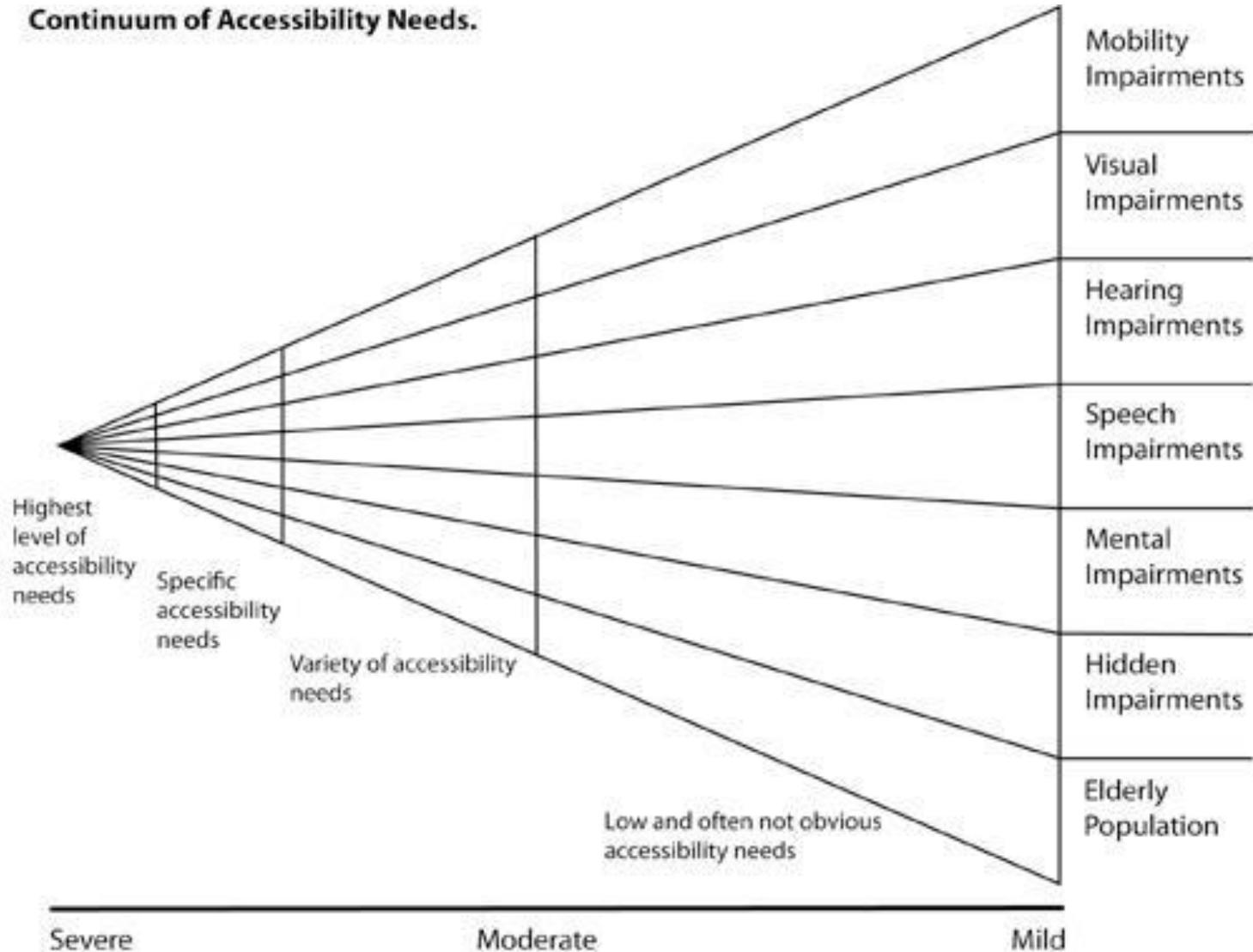
Statistics

- Some 88% of people with disability take a holiday each year that accounted for some 8.2 million overnight trips.
- There is a myth that the inclusive tourism market does not spend because of economic circumstance. That is false as it is a significant proportion of each travel market segment.
- People with disabilities travel on a level comparable with the general population for domestic overnight and day trips.
- The total tourism expenditure attributable to the group is \$8bn per year or 11% of overall tourism expenditure.

Major Issues for this Market

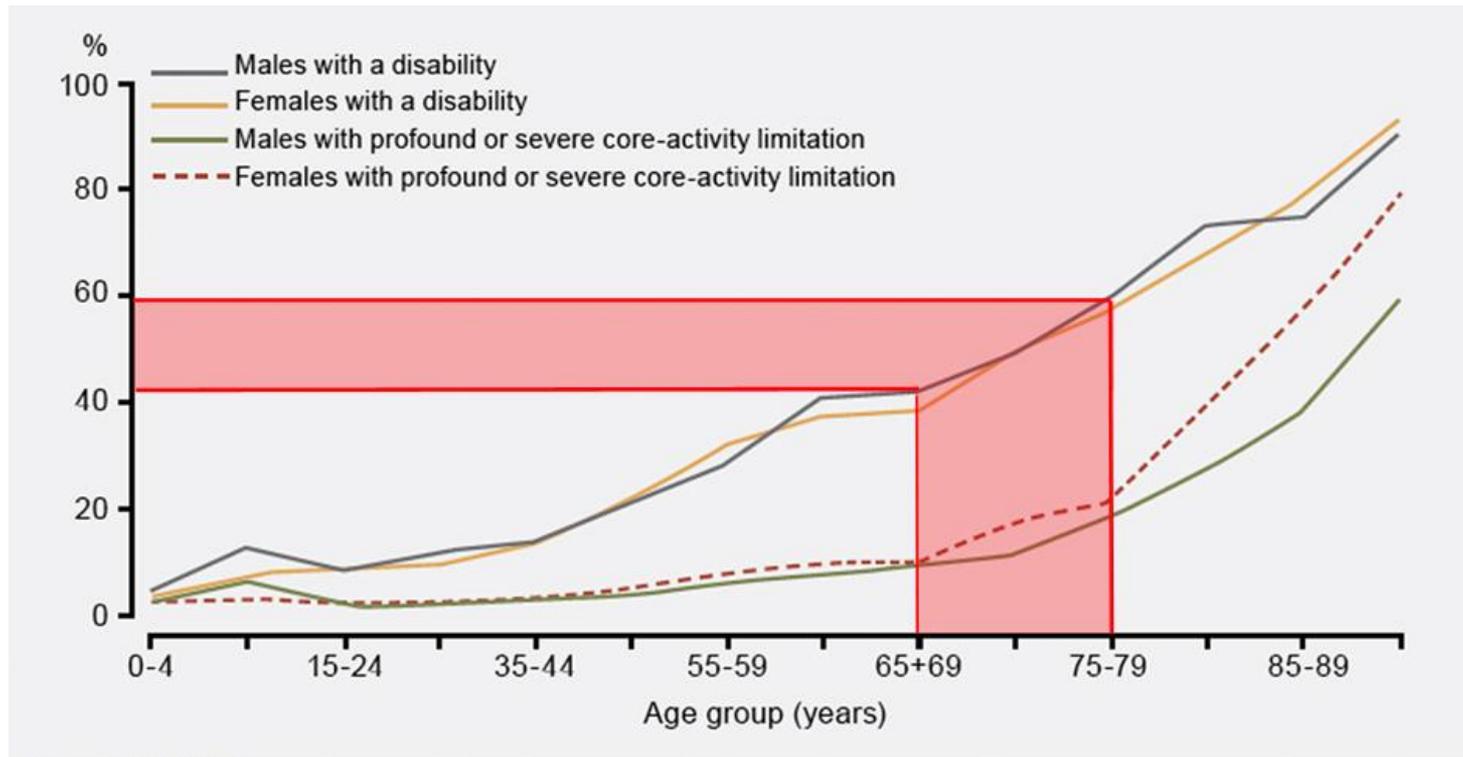
- There is insufficient marketing and information in terms of existing accessible facilities
- There is a lack of transparency due to the absence of standardization and labeling
- Tourism service providers are unaware of the economic impact of Accessible Tourism
- Insecurity and lack of knowledge prevent many providers from investing in accessibility
- To realize economic impact, actual investments must be made in accessible facilities.

Continuum of Accessibility Needs.



Adapted from Dimitrios Buhalis and Simon Darcy: *Accessible tourism: concepts and issues* Channel View Publications, 2010

Inclusive Travel Sector



Source ABS 2004

The retirement of the Baby Boomer generation will significantly increase the market size of the Inclusive Travel sector through age acquired disabilities

Travel Behavior of Disabled Tourists- German study

- Travel is largely independent of the season
- loyalty to a certain destination
- Relatively high travel spending
- 52% need a travel companion
- 37% have previously decided not to travel due to the lack of accessible facilities
- 17% who travel abroad do so specifically because of the accessible facilities there
- 48% would travel more frequently if more accessible serves were available
- 60% of the surveyed persons would be willing to pay higher travel expenses in exchange for improved accessible facilities or services.

German study

Importance ranking

1. Accommodation (82%)
2. Moving around (76%)
3. Arrival/departure (74%)
4. Excursions (71%)
5. Organization of the trip (71%)
6. Cultural Activities (62%)
7. Arrival/familiarization (61%)
8. Services on location (58%)
9. Medical Care (52%)
10. Catering (51%)
11. Shopping (37%)
12. Sports (19%)

Restriction Ranking

1. Cultural Activities (67%)
2. Moving around (65%)
3. Excursions (63%)
4. Sports (55%)
5. Arrival/Departure (52%)
6. Accommodation (47%)
7. Arrival/familiarization (44%)
8. Shopping (42%)
9. Services on Location (42%)
10. Organization of the Trip (40%)
11. Medical care (35%)
12. Catering (24%)

Marketing

- Marketing of cultural destinations and events accounts for the largest portion of all marketing expenditures (26 percent) by national tourism organizations



Tourism Web Resources

- City
- County
- Region
- State
- Disability sites and social media
- Travel providers- airlines, hotels, agents, tours



Information for a disability-friendly visit to Florida

Accessibility Marketing

Domestic marketing measures:

- Higher-level project management and coordination
- Close cooperation between all actors
- Training and enhancing the service level in the tourism industry



Marketing Your Accessibility

- Mainstream tourism publications and websites
- To the media
- Internet plays a key role



Communicate Accessibility

Clearly Visible:

- Pictures
- Symbols
- Provide Alternative formats
 - You Tube videos in ASL
- People First Language
- Access Coordinator
- Accessible information
- Structural Descriptions
- Accessible Programs



Successful Organizations

- 504 Plan
- Accessibility Coordinator
- Accessibility Task Force
- Physical structures
- Programmatic
- Training
- People First Language
- Policies



Building Policies

- Building
 - New Construction
 - Renovation
- 504 Plan
 - Parking lot
 - Egresses
 - Restrooms



- Integrated into and dispersed seating throughout regular seating areas;
- Wheelchair accessible stage, back stage and orchestra pit;
- Audio description and captioned film;
- Signage at inaccessible entrances directing people to accessible entrances, which must be unlocked and open the same hours as other entrances; and
- The proper height for box office, registration tables, food service counters, as well as display cases and pedestals for art.
- Maintenance Training
- Common Errors <http://www.ada.gov/errors.pdf>

Beyond Bricks



- Tourism is all about the experience of traveling. It is about seeing new sights, new cultures, living history and natural wonders. Most importantly though it is about sharing those experiences with family and friends, old and new. Inclusive Tourism will never succeed while the emphasis is only on infrastructure both buildings and equipment. It needs to be incorporated into the touring product and wholesale markets

Items to Consider

Training

Every person who deals with members of the public or other third parties on behalf of the provider, whether the person does so as an employee, agent, volunteer or otherwise.

Use of service animals and support persons

If a person with a disability is accompanied by a guide dog or other service animal, the provider of goods or services shall ensure that the person is permitted to enter the premises with the animal and to keep the animal with him or her unless the animal is otherwise excluded by law from the premises.

Policies, Practices and Procedures

Clearly written, updated and all staff trained

Website

Information easily found and clear in reference to activity

People first

- Put person first – Jane who is vision impaired not blind Jane
- Do not ask about Disabilities
- Do ask about:
 - What/if any accommodations are needed
 - Ask people what they need, don't assume they need help.
 - Service Animals “Commonly Asked Questions About Service Animals.” <http://www.ada.gov/qasrvc.htm>



People First Language



Please consider the following when writing or speaking about people with disabilities:

- Do not focus on the disability unless it is crucial to a story. Avoid tear-jerking human interest stories.
- Do not portray successful people with disabilities as superhuman or heroes.
- Do not sensationalize a disability by saying afflicted with, crippled with, suffers from, victim of, and so on.
- Emphasize abilities, not limitations. Do not use emotional descriptors such as unfortunate, pitiful and so forth.
- Do not use condescending euphemisms. They reinforce the idea that disabilities cannot be dealt with up front.
- Show people with disabilities as active participants of society. Portraying persons with disabilities interacting with nondisabled people helps break down barriers and open lines of communications.



Affirmative Phrase	Negative Phrase
Person with a disability	The handicapped or disabled
He has a cognitive disability.	He's mentally retarded.
She is on the autism spectrum.	She's autistic.
Person with mental illness	Crazy, Psycho, Lunatic
She has a learning disability.	She's learning disabled, slow
He has a physical disability.	He's a quadriplegic/crippled.
She's short of stature.	She's a dwarf or midget.
He has an emotional disability.	He's emotionally disturbed.
She uses a wheelchair or mobility chair.	She's wheelchair bound. She's confined to a wheelchair.
He receives special ed services.	He's in special ed.
Typical kids Kids without disabilities	Normal or healthy kids
Congenital disability	Birth defect
Brain injury	Brain damaged
Accessible parking	Handicapped parking
She needs or she uses	She has a problem with



vsa
FLORIDA

The State Organization
on Arts and Disability

Steps to consider when making information accessible:

What does it mean to make information accessible?

Think about accessibility from the start

Techniques for accessible documents:
<http://adod.idrc.ocad.ca/>

Assess your information and communications processes

Make it accessible upon request

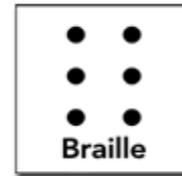
Provide it as soon as possible

Let the public know include a note on your website or promotional materials, create a sign, send a memo or post a notice on your staff bulletin board

Where to find more information

Brochure Accessible Information and Communication Guide for Small Business **<http://www.gaates.org/aic/>**

Symbols



Partnerships

- Make it a day
- Make it a day and night
- Out of the box thinking- Partnering/ Packages
 - State Parks
 - Ecotourism
 - Theme Parks
 - Other Art and Cultural organizations
 - Shopping
 - Restaurants and Hotel Packages
 - Transportation
 - Accessible Service Providers



New Standards of Inclusive Tourism

- Inclusive Tourism will need standards. The marketing message and the presentation has to be in a consistent format so that the end consumer has confidence in the information provided.
- Government has be lobbied to lead the way in the promotion of Inclusive Tourism through their national tourist boards and set the example with public transport and public infrastructure.
- Inclusive Tourism has to be elevated to the mainstream. It has to be put on the agenda of major mainstream events in much the same way as Eco, Adventure and Cultural tourism have been.
- Education is the key. Inclusive Tourism is not currently taught in any travel course, nor is it part of any travel related management training. There is some training available for Travel Agents which is of limited use given the lack of commercial Inclusive Tourism product.

Maureen Murphy

Grant Administrator

- **Division Accessibility Coordinator**
 - **Arts In Education**
- **Underserved Cultural Community Development**
- **Florida Department of State, Division of Cultural Affairs**

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