

Case study

Is the Turkish tourism industry ready for a disabled customer's market? The views of hotel and travel agency managers

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Abstract

The purpose of this study was to assess the ability of the Turkish tourism industry to meet the needs of disabled people by surveying the views of hotel and travel agency managers in Turkey. To achieve the aim of the study, a questionnaire-type survey was conducted; a total of 252 hotels and 168 travel agencies took part. These questionnaires were sent to managers of hotels and travel agencies by electronic mail. Following completion, the data were statistically evaluated using frequencies, percentages, arithmetic averages and *t*-tests. As a result of this analysis, a number of conclusions were drawn. First, although this market is new for the Turkish tourism industry, managers of hotel and travel agency sub-sectors are willing to take part in this market. Second, even though the Turkish tourism industry has a number of weaknesses in some areas, the industry will be able to cater for the customers of this market if some improvements are made. On the basis of the findings, a number of recommendations have been made that may be helpful for improving the conditions in the Turkish tourism industry for disabled customers.

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1. Introduction

According to the UK Disability Discrimination Act, a disabled person is someone who “has a physical or mental impairment that has a substantial and long-term adverse effect on his/her ability to carry out normal day-to-day activities” (<http://www.opsi.gov.uk>). The total number of disabled people in the world is more than 500 million. This constitutes around 8% of the world population (UNESCAP, 2000). The disabled customers' market is becoming an increasingly important developing market in the tourism industry worldwide. To be able to travel with the aim of relaxing, having a good time and getting around is as much of a human right for a disabled person as it is for non-disabled person. To have sufficient facilities and qualified human resources are preconditions to serve this market.

At present, although the disabled customer's market is an important niche market for the tourism industry, academic research regarding the travel of disabled people has been limited (Burnett & Bender, 2001; Darcy, 1998, 2002; Israeli, 2002; Ray & Ryder, 2003). Earlier studies concerning disabled people and travel were carried out at the end of the 1980s and in the middle of the 1990s (Cavinato & Cuckovich, 1992; Driedger, 1987; Gleeson, 1997; Muloin, 1992; Murray & Sproats, 1990; Smith, 1987). There have been a few additional studies carried out more recently (Aitchison, 2003; Daniels, Rodgers, & Wiggins, 2005; McKercher, Packer, Yau, & Lam, 2003; Ray & Ryder, 2003; Yau, McKercher, & Packer, 2004).

According to UNESCAP (2000), approximately 5–20% of a country's population are disabled people, highlighting the importance of this market. In England, there are 10 million disabled individuals (20% of the total population) (English Tourism Council, 2000) and in the USA, there are 50 million disabled people, which is equal to 19.3% of the total population (US Census Bureau, 2000). In Germany, 12% of the total population and in Australia, 18% of the

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total population are disabled (ABS, 1993). In Turkey, the disabled population is approximately 7.5–8 million (12.3% of the total population) (<http://www.ozida.gov.tr>). This means that there is approximately 20 million people affected in Turkey, if their families and relatives are included in this figure (Mengüç, 2002). Although there is a decrease in the number of child deaths and despite many advancements in medical science, it is predicted that the number of disabled people may increase in the future. It is estimated, for example, that in the USA, the number of disabled people may increase to 100 million by 2030 (Burnett & Bender, 2001).

The important issue here is how many disabled people are involved in tourism activities and whether or not there is a potential demand for tourism for disabled people. According to research carried out by Touche Ross (1993), 8 million disabled people in Europe take a trip abroad at least once per year. In addition, 15 million European disabled people travel within their own country and an additional 22 million European disabled people participate in daily excursions in their own country. If the companions of disabled people are taken into account, the potential demand for travel will exceed these figures. According to Pfenning (2002), this phenomenon will continue in the future and an estimated €96 billion will be spent on travel by people with disabilities by 2005. It cannot be denied that disabled people are a potentially important customer component for the tourism sector as more are reclaiming their right to travel around the world. Opening up this market could generate billions of euros for the travel industry (Arellano, 2003).

It is essential that countries that wish to expand their incoming travel markets should have the necessary facilities in place and an understanding of how to service the special needs of tourists with disabilities. (Shaw-Lawrence, 1999, p. 8)

Moreover,

research shows that disabled people are loyal customers, often returning to places that provide good accessibility. Other people may also benefit from improved accessibility—for example, parents with pushchairs, people with injuries, and tourists with heavy luggage. (Westcott, 2004, p. 7)

As mentioned above, disabled people represent a potential market for the tourism industry. However, does the Turkish tourism industry, in its current form, adequately meet the needs of this market? The aim of this study was to determine whether or not the Turkish tourism industry is ready for the disabled people's market by surveying the views of hotels and travel agency managers.

2. Travel and disabled people

The World Health Organization has described disability as “any restriction or lack (resulting from an impairment)

of ability to perform an activity in the manner or within the range considered normal for a human being” (<http://www.un.org>). Disability can be categorized into four different types: hearing disability, sight disability, physical disability and intelligence deficiency. Physical disability begins with an inability to act or move freely and continues with an inability to perform normal actions in a reasonable time at a reasonable level. It is also necessary to include diabetes patients in this category (Daniels et al., 2005). Moreover, according to the European Commission (1996, p. 5), “Physical disability: most commonly involving impaired mobility, with the disabled people often using wheelchair, sticks, crutches, etc.”.

Disabled people encounter numerous difficulties when they are travelling. These difficulties may affect their desire to take part in travelling activities. Travelling for any purpose can, and should be, regarded as a human right throughout the world. To deprive anyone of this right should be regarded as discrimination. Governments have to take measures to provide ease of travel for all people. There are a number of barriers that prevent disabled people's travel activities. The four main ones mentioned in the literature are: intrinsic, economic, environmental and interactive (McKercher et al., 2003).

Disabled tourists are not incapable of joining tourism activities or establishing relationships with other people. However, some arrangements should be made for physically disabled people in order for them to attend tourism activities (Turco, Stumbo, & Garnarcz, 1998) especially in the following areas: tourist attractions (theme parks, mountains, historical buildings, etc.), information resources (detailing the activities that will be offered, how the activities will be carried out done, the venues), transportation, accommodation and food and beverage facilities.

When a comparison is made between the last two decades and the current travel situation for disabled people, although there are still some negative aspects, there have been a number of positive developments—especially in terms of transportation, accommodation and tourist attractions. The Law for Americans with the Disabilities Act (ADA) enacted in the USA in 1990, and the Law of the Disability Discrimination Act (DDA), which was passed in England in 1995, both play an important role in the tourism industry. These laws require some obligations from hotel administrations in terms of usage of services by disabled people (Miller & Kirk, 2002).

In Turkey, the ‘Law for Disabled People’ drawn up in July 2005, aims to help disabled people by alleviating problems in relation to health, education, rehabilitation, employment, care and social security. The law also aims to assist their development in every aspect by taking measures to remove any obstacles and making the relevant arrangements for the coordination of these services (Item I). According to this Law, within 7 years, facilities for disabled people must be put in place, in terms of them being able to access buildings that belong to public institutions, roads,

sidewalks, pavements and public places (<http://www.tbmm.gov.tr>). Another law, the Code of Practice (18/c) of Law 2634 (<http://www.kulturturizm.gov.tr>) states that arrangements must be made for disabled people to use tourism enterprises.

3. Methodology

In this research, the survey population included managers of hotels and travel agencies in Turkey who use the Internet and their own e-mail addresses. In order to obtain the e-mail addresses of hotels and travel agencies, data from various tourism institutions and tourism catalogues were used. As a result, it was found that there were 962 travel agents and 1320 hotels that had e-mail addresses during the time the survey was being conducted.

Questionnaires were chosen as the survey instrument. To collect data, two types of questionnaires were developed and a pilot test was performed on five hotels and five travel agency managers in Ankara. As a result of the pilot test, a number of changes were made to the questionnaires. As the target individuals were managers of hotels and travel agencies with e-mail addresses, online questionnaire application was preferred. The questionnaires were posted at the following addresses http://www.absunmep.gazi.edu.tr/yayli/index_anket_otel.htm and http://www.absunmep.gazi.edu.tr/yayli/index_anket_acent.htm between 3 April and 3 June 2005. A standard document was prepared and sent to the e-mail addresses of the hotels and the travel agencies stating the aims and content of the research as well as giving instructions how to fill out the questionnaire. While sending this document, it was discovered that the e-mail addresses of 180 hotels and 92 travel agencies were no longer in use. As a result, 274 hotels and 185 travel agencies were included in the research. As 22 hotel and 17 travel agency managers did not fill the questionnaire out properly, these questionnaires were not included in the research. Owing to this fact, 252 hotels and 168 travel agency managers' completed questionnaires were used for the survey.

There are two main reasons to limit the research to physically disabled people. First, physically disabled people represent the majority population of all disability groups. Second, each group of disabled people has different needs requiring more complex research.

4. Survey findings

A total of 168 travel agencies and 252 hotel managers participated in the research. The distribution of hotels and travel agencies by type is given in Table 1. Hotel and travel agency managers were asked whether they had ever served disabled customers and what type of disability did the customer have. The majority of hotels and travel agencies had served disabled customers (Table 2). The distribution of disabled people who had been served by travel agencies and hotels is given in Table 3. The tables indicate that the

Table 1
The distribution of hotels by stars and travel agencies

	<i>f</i>	%
Types of establishment		
Travel agencies	168	40
Hotels	252	60
Total	420	100
Hotels		
Five star	64	25.4
Four star	72	28.6
Three star	64	25.4
Two star	12	4.8
Holiday village	8	3.2
Other	32	12.6
Total	252	100

Table 2
The distribution of hotels and travel agencies in terms of serving disabled customers

Serving disabled customers	<i>f</i>	%
Yes		
Hotel	224	88.9
Agency	112	66.7
No		
Hotel	28	11.1
Agency	56	33.3

'*n*' for hotels is 252; '*n*' for travel agencies is 168.

Table 3
The distribution of hotels and travel agencies in terms of the types of disabled customers served

Customer types	Response	<i>f</i>	%
Disabled people with walking problems	Hotel		
	Yes	216	96.4
	No	8	3.6
	Agency		
Disabled people with wheel-chairs	Agency		
	Yes	104	92.9
	No	8	7.1
	Hotel		
Blind people	Hotel		
	Yes	124	55.4
	No	100	44.6
	Agency		
Disabled people with hearing and speaking problems	Agency		
	Yes	64	57.1
	No	48	42.9
	Hotel		
Disabled people with hearing and speaking problems	Hotel		
	Yes	152	67.9
	No	72	32.1

Table 3 (continued)

Customer types	Response	<i>f</i>	%
	Agency		
	Yes	48	42.9
	No	64	57.1
	Hotel		
Disabled people with mental problems	Yes	160	71.4
	No	64	28.6
	Agency		
	Yes	52	46.4
	No	60	53.6
	Hotel		
Disabled people with asthma and allergic problems	Yes	152	67.9
	No	72	32.1
	Agency		
	Yes	68	60.7
	No	44	39.3
	Hotel		
Other	Yes	108	48.2
	No	116	51.8
	Agency		
	Yes	36	32.1
	No	76	67.9

'*n*' for hotels is 224; '*n*' for travel agencies is 112.

Turkish hotel and travel agency sectors are not unaware of this new market.

4.1. The appropriateness of the tourism industry for disabled people

The appropriateness of the Turkish tourism industry for disabled people has been examined in terms of the following criteria: architectural, environmental, transportation, staff, interest in the market, related organizations (governmental and non-governmental) and hotel facilities. The managers of hotels and travel agencies have evaluated these factors in terms of their suitability to physically disabled customers (Table 4). The table illustrates that managers of hotels and travel agencies are unaware that the structure of the Turkish tourism industry is not sufficiently ready to serve physically disabled people. Governmental and non-governmental organizations do not seem to be working effectively to help people with disabilities. Transportation facilities are the second most important barrier to travel by physically disabled people. Environmental conditions and the quality of personnel in tourism enterprises are also seen as an issue. The architecture of the hotel is not seen to be a problem for people with a disability. Moreover, it can be seen that there are no statistical differences between the opinions of hotel and travel agency managers ($p = 0.534$).

4.2. The appropriateness of hotels for disabled people

Hotels were examined in detail and the appropriateness of the hotels available to disabled customers is given in Table 5. According to Table 5, the appropriately equipped/ designed areas of hotels for disabled people are entrances, parking areas, reception areas and restaurants. Unsuitably equipped/ designed areas of hotels for disabled customers include stairs, baths and toilets, which are all fundamentally needed by disabled customers. In addition to this, areas such as swimming pools, bar-discos and saunas are designed for non-disabled people; these areas are less suitable for disabled customers.

4.3. Opinions of managers about how to improve conditions in the tourism industry for disabled people

The opinions of hotel and travel agency managers about areas needing improvement in the Turkish tourism industry for physically disabled customers are given in Table 6. The hotel and travel agency managers' opinions, which include 12 different ideas, were evaluated. The majority of hotel and travel agency managers have positive opinions about this market and they believe that something should be done to improve the conditions in the industry. Their opinions are:

- The state should take measures to improve the attendance of physically disabled people on trips.
- There is a need to inform the Turkish community regarding this subject.
- There is a need for cooperation between institutions, both public and private.
- Physical changes of the existing hotels should take place, taking physically disabled customers into consideration.
- Advertisement of activities should be taken into consideration.
- Signs for the physically disabled people should be obligatory in tourism enterprises.
- Service personnel should be required to be educated on this subject.
- The tourism enterprises should have necessary literature to introduce themselves to physically disabled people.

5. Results and suggestions

Currently, one in eight people have a physical or mental disability. Depending on the developmental level of an individual's country, it is estimated that this number will increase in the future. The disabled customers' market is gaining in importance and taking this market into consideration has become an important issue for tourism authorities. By understanding the importance of this market, many countries aim to obtain a greater share of this market. Disabled people should not be considered incapable of participating in tourism activities or of

Table 4

The opinions of managers of hotel and travel agencies about the ability of the Turkish tourism industry to meet the needs of physically disabled people

Opinions		<i>n</i>	\bar{x}	σ	<i>t</i>	<i>p</i>	Difference
1. Transportation infrastructure is not suitable for physically disabled people	Hotel	252	3.79	1.463	0.272	0.786	None
	Agency	168	3.83	1.467			
2. Environmental arrangements are not suitable for physically disabled people	Hotel	252	3.54	1.437	1.178	0.240	None
	Agency	168	3.71	1.521			
3. Administrations of tourism enterprises are not aware of the physically disabled customers market	Hotel	252	3.38	1.530	1.332	0.184	None
	Agency	168	3.57	1.369			
4. The architecture of the hotels are not suitable for physically disabled people	Hotel	252	2.94	1.261	0.302	0.763	None
	Agency	168	2.98	1.358			
5. Staff who work in tourism enterprises have insufficient knowledge to serve physically disabled people	Hotel	252	3.46	1.426	0.996	0.320	None
	Agency	168	3.60	1.314			
6. Associations in this matter do not work effectively	Hotel	252	3.49	1.248	0.251	0.802	None
	Agency	168	3.52	1.281			
7. Local administrations (municipals etc.) do not do what should be done	Hotel	252	3.89	1.429	0.111	0.912	None
	Agency	168	3.90	1.449			
The average of the elements which were used to determine the evaluations of the managers towards the disabled customers market in Turkey	Hotel	252	3.63	0.874	0.622	0.534	None
	Agency	168	3.69	1.097			

(1) Strongly do not agree, (2) do not agree, (3) neutral, (4) agree, and (5) strongly agree.

Table 5

The suitability of the hotels for physically disabled customers

Facilities	Suitable		Unsuitable		Do not have the related units		<i>n</i>
	<i>f</i>	%	<i>f</i>	%	<i>f</i>	%	
Parking places	212	84.1	20	7.9	20	7.9	252
Entrance	228	90.5	24	9.5	—	—	
Reception	216	85.7	32	12.7	4	1.6	
Lifts	160	63.5	24	9.5	68	27.0	
Stairs	116	46.0	132	52.4	4	1.6	
Rooms	212	84.1	36	14.3	4	1.6	
Baths	168	66.7	80	31.7	4	1.6	
Toilets	184	73.0	64	25.4	4	1.6	
Restaurants	228	90.5	16	6.3	8	3.2	
Swimming pool	128	50.8	68	27.0	56	22.2	
Bar-disco	120	47.6	56	22.2	76	30.2	
Sauna	96	38.1	44	17.5	112	44.4	
Places to sunbathe	172	68.3	12	4.8	68	27.0	

Table 6

The opinions of hotel and travel agency managers about areas needing improvement in the Turkish tourism industry for physical disabled customers

Opinions		1	2	3	4	5	\bar{x}
1. It is not necessary to do anything	Hotel						
	<i>f</i>	192	12	20	8	20	
	%	76.2	4.8	7.9	3.2	7.9	1.62
	Agency						
2. As serving physical disabled customers requires increased cost, this market can be eliminated	<i>f</i>	108	12	12	8	28	2.02
	%	64.3	7.1	7.1	4.8	16.7	
	Hotel						
	<i>f</i>	132	24	60	20	16	2.06
%	52.4	9.5	23.8	7.9	6.3		

Table 6 (continued)

Opinions		1	2	3	4	5	\bar{x}
	Agency						
	<i>f</i>	64	28	48	–	28	2.40
	%	38.1	16.7	28.6	–	16.7	
3. The state should take measures to provide the attendance of the physical disabled people on trips	Hotel						
	<i>f</i>	24	–	28	52	148	4.19
	%	9.5	–	11.1	20.6	58.7	
	Agency						
	<i>f</i>	32	4	12	40	80	3.79
	%	19.0	2.4	7.1	23.8	47.6	
4. Signs for the physical disabled people should be obligatory in the tourism enterprises	Hotel						
	<i>f</i>	32	8	40	20	152	4.00
	%	12.7	3.2	15.9	7.9	60.3	
	Agency						
	<i>f</i>	32	8	12	28	88	3.79
	%	19.0	8.4	7.1	16.7	52.4	
5. The tourism enterprises should have the necessary literature to introduce themselves to physical disabled people	Hotel						
	<i>f</i>	40	4	48	44	116	3.76
	%	15.9	1.6	19.0	17.5	46.0	
	Agency						
	<i>f</i>	32	4	20	32	80	3.74
	%	19.0	2.4	11.9	19.0	47.6	
6. To make the Turkish nation conscious about this matter	Hotel						
	<i>f</i>	24	4	16	24	184	4.35
	%	9.5	1.6	6.3	9.5	73.0	
	Agency						
	<i>f</i>	32	8	8	16	104	3.90
	%	19.0	4.8	4.8	9.5	61.9	
7. Special hotels (for only physical disabled customers) should be built	Hotel						
	<i>f</i>	76	32	68	40	36	2.71
	%	30.2	12.7	27.0	15.9	14.3	
	Agency						
	<i>f</i>	28	16	44	36	44	3.31
	%	16.7	9.5	26.2	21.4	26.2	
8. Physical changes to existing hotels should be reorganized taking the physical disabled customers into consideration	Hotel						
	<i>f</i>	32	16	52	48	104	3.70
	%	12.7	6.3	20.6	19.0	41.3	
	Agency						
	<i>f</i>	32	12	20	36	68	3.57
	%	19.0	7.1	11.9	21.4	40.5	
9. Service personnel should be educated about this matter	Hotel						
	<i>f</i>	16	8	28	80	120	4.11
	%	6.3	3.2	11.1	31.7	47.6	
	Agency						
	<i>f</i>	28	8	20	36	76	3.74
	%	16.7	4.8	11.9	21.4	45.2	
10. Legal arrangements should be considered effectively	Hotel						
	<i>f</i>	28	12	60	52	100	3.73
	%	11.1	4.8	23.8	20.6	39.7	
	Agency						
	<i>f</i>	24	8	16	44	76	3.83
	%	14.3	4.8	9.5	26.2	45.2	
11. Advertisement of activities should be taken into consideration	Hotel						
	<i>f</i>	20	8	44	64	116	3.98
	%	7.9	3.2	17.5	25.4	46.0	
	Agency						
	<i>f</i>	32	8	8	36	84	3.79
	%	19.0	4.8	4.8	21.4	50.0	

Table 6 (continued)

Opinions		1	2	3	4	5	\bar{x}
12. There should be cooperation between the Culture and Tourism Ministry and civil and public institutions	Hotel						
	<i>f</i>	24	–	20	72	136	4.17
	%	9.5	–	7.9	28.6	54.0	
	Agency						
	<i>f</i>	36	4	4	40	84	3.79
	%	21.4	2.4	2.4	23.8	50.0	

(1) Strongly do not agree, (2) do not agree, (3) neutral, (4) agree, and (5) strongly agree.

establishing relationships with other people. It is necessary to accept that travel is a human right for all, including disabled people. A number of conclusions have been drawn from a literature review and the present survey findings. These are:

- The Turkish tourism industry is not sufficiently prepared for the disabled customers market. The industry has a number of weaknesses. First, governmental and non-governmental organizations do not seem to be working effectively to help people with disabilities. Second, transportation facilities are the second most important problem as a barrier for physically disabled people's travel activities. Third, environmental conditions are also seen as a problem. The quality of the personnel of tourism enterprises is seen as a fourth problem. Finally, the architecture of hotels is not seen to be a problem for people with a disability. Service areas, such as entrances of hotels, parking areas, and lobby and reception areas, are more suitably equipped for physically disabled people than are areas such as bathrooms and lifts.
- The majority of hotel and travel agency managers consider that the market for physically disabled customers has potential. Although they are new to this market, the majority of the hotel and travel agencies have catered for a disabled customer at least once.
- Instead of building special hotels for physically disabled people, reorganizing the existing capacity will be more feasible for enterprises.

On the basis of the literature review and survey findings, a number of recommendations can be made in order to improve conditions in the Turkish tourism industry for the disabled customer market. These recommendations can be used by managers of tourism enterprises, decision-makers in local and national governmental and non-governmental organizations in Turkey, as well as in other countries where the disabled market needs to be developed:

- The state should take steps in order to develop the market for the physically disabled customer. An important development in this matter is Law 5378. However, this has not been implemented entirely. As seen in previous studies of the USA and England (Coles & Shaw, 2003;

Ray & Ryder, 2003), to implement this type of law fully will provide further participation of physically disabled people in tourism activities in Turkey.

- As emphasized by Ray and Ryder (2003), disabled people now constitute an important part of the tourism market. As a result of this, Turkish hotels and travel agencies should cooperate with international travel agencies who already organize tours for physically disabled people, in order to realise a share of the market.
- Although, in Turkey, there is 1 confederation, 6 federations and more than 300 associations for disabled people, they are not effectively working on the travel issues of their members. These organizations, the main aim of which is to serve the disabled population, should be more sensitive to this issue.
- Separate service units should be organized in the centre and province organizations of the Ministry of Culture and Tourism to provide information for disabled people. Information should include where to go, how to get there, where to stay, etc.
- A separate fund should be allocated by the government for use in the disabled people's tourism industry.
- Turkish people should be informed about disabled people's travel opportunities by both media and training institutions. It is necessary to first begin with physically disabled people and their relatives.
- There should be topics covering service elements aimed at disabled people, in the curriculum of tourism schools. This may help students gain a more positive attitude towards disabled people and provide appropriate services.
- Hotels and travel agencies should provide detailed information about travel opportunities and arrangements for disabled people on their web pages.
- The use of international symbols for the physically disabled should be obligatory in the tourism industry.
- Each enterprise should provide training for their personnel about the disabled people's tourism market.
- Physical changes to existing hotels should be made to ensure that they become more suitable for use by disabled people.
- Travel agencies and hotels should have vehicles designed for use by disabled travellers.
- In future studies, research should be broadened by including all types of disabled people. Furthermore, the

views of local administrations and public institutions should be evaluated.

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