

DMOs and Tourism Product Development: Accessible destinations, The case of Monterrey, Mexico

By Blanca A. Carmargo and Isabel Sanchez Villarreal

Introduction

The evolving role of Destination Management Organizations (DMO) is highlighted through a case study related to accessible tourism development in Monterrey, Mexico. Specifically, it allows the future DMO professional to understand the characteristics, market potential and travel and service needs of the segment of more than one billion people with disabilities in the world, as well as the requirements of an accessible destination. The benefits, training needs and challenges that arise in developing and promoting accessible tourist infrastructure and services for this market segment will be discussed.

Background: Tourism Slowdown in Monterrey, Mexico

Monterrey, also known as the “City of the Mountains,” is the third most populous city in Mexico. Located in the northeast part of the country, Monterrey is an industrial city, home to the country’s most important national and international service and manufacturing companies. Its location and business orientation have made Monterrey an important destination for conventions, fairs and tradeshows. In addition, the city has developed an excellent internationally accredited medical infrastructure that attracts domestic and international visitors and has a growing reputation as an adventure tourism destination due to its mountainous and morphological landscape.

In the past few years, tourism in Monterrey has been negatively impacted by the economic crisis of 2008–2009 and travel warnings due to violent acts linked to drug trafficking. As seen in Table 1, tourist arrivals decreased from 2007 to 2009, slightly improving in 2010 and 2011. Hotels, however, suffered a steady decline in occupancy levels from 2007 to 2011 and, along with other tourism establishments, experienced decreased revenues and staff cuts during this timeframe.

The situation resulting from the tourism slowdown was an eye opener for Monterrey’s tourism stakeholders, in particular hotel owners and operators, of the need to attract different market segments and diversify the city’s tourism offerings. In February of 2011, 78 representatives of the tourism industry held a meeting to brainstorm ideas to reactivate domestic and international tourism. Some of the ideas proposed in this meeting included:

- A marketing campaign to emphasize Monterrey’s image as a safe destination
- Familiarization (FAM) trips for opinion leaders and celebrities to show the city’s thriving culture, natural attractions and cosmopolitan tourism infrastructure
- Development of new tourism products based on market research
- Alliances among tourism establishments to offer discounts and themed packages

Tourism stakeholders asked for the assistance of Monterrey Tourism Organization (MTO) to take some ideas generated in the meeting, in particular those related to product development for new market segments, and develop concrete strategies and action plans around them to increase tourism visitation. After a careful analysis of tourism market trends, the DMO realized the opportunity to increase tourism by catering to the underserved market of tourists with disabilities, whose characteristics are described in the following section, and make Monterrey the first and leading accessible destination in Mexico.

Literature Review: Accessible Tourism

Market segment: Tourists with disabilities

It is estimated that more than one billion people worldwide (about 15% of the population) have a disability (World Health Organization [WHO], 2011). The most common dimensions of disability are related to a person’s mobility, vision, hearing, or intellectual development, among others, and each one has unique medical and access needs. Table 2 shows the number of people with disabilities in selected countries and regions, representing the size of the potential market for Monterrey.

Apart from its size, other characteristics make the market of people with disabilities an attractive option for tourism purposes. Studies have found that this market segment is composed of people aged 55 or older (Barbeau, 2011; Burnett & Bender, 2001; Stafford, Samson & Roy, 2001; VisitEngland, 2010) who are not active in the labor market; therefore, have more leisure time than tourists without disabilities (Darcy, 1998; VisitEngland, 2010). Their main travel motivators are visiting friends and relatives, leisure, recreation, and relaxation (Barbeau, 2011; Burnett & Bender, 2001; Darcy, 1998; Stafford et al., 2001; NZTRI, 2011; Van Horne, n.d.; VisitEngland, 2010); and they tend to travel

Blanca A. Camargo, Ph.D. is affiliated with Universidad de Monterrey, Mexico. **Isabel Sanchez Villarreal** is affiliated with University of Illinois at Urbana-Champaign.

Table 1**Tourism Statistics for Monterrey**

Monterrey	2007	2008	2009	2010	2011
Passenger arrivals to Monterrey's International Airport	3,374,395	3,330,043	2,608,416	2,684,086	2,782,888
Domestic arrivals	2,943,644	2,894,029	2,327,322	2,402,479	2,610,267
International arrivals	430,751	436,014	356,764	380,409	438,854
Tourist arrivals to hotel rooms	1,761,359	1,919,211	1,645,626	1,450,869	1,388,139
Occupancy Level	58.34%	58.06%	47.13%	44.33%	42.71%

Adapted from DATATUR (2013).

during off-season time. The majority of people with disabilities travel accompanied by friends, relatives or care assistants (Chen, 2005; Darcy, 1998; NZTRI, 2011; Stafford et al., 2001), and when they take overnight trips, their length of stay in a destination is usually longer than that of tourists without disabilities (VisitEngland, 2010). However, they are most likely to travel within their country and take less overnight trips than tourists without disabilities (Darcy, 1998; Stafford et al., 2001).

Tourists with disabilities have specific pre- and during- travel needs that, if not attended to, can impact their travel decision making and travel experience: reliable information about accessible products and services, accessible built environments, and respectful and dignifying service from tourism staff. First, tourists with disabilities need to have detailed information about accessible accommodations and bathrooms, transportation, parking facilities, medical services, and other accessible establishments and attractions, among others, to feel they will have a safe and enjoyable trip (Darcy, 1998; Packer, McKercher & Yau, 2007). In regards to built infrastructure, people with a mobility disability require, in most cases, accommodations with acces-

sible bathrooms, establishments with continuous pathways, ramps or lifts, accessible transportation, etc. (Darcy, 1998). People with a visual disability require environments that can facilitate their mobility such as those which have clear edging of steps, color contrast on materials, suitable lighting, contrasting handrails, and clear signage, to name a few (Richards, Pritchard & Morgan, 2010). Tourists with hearing impairments require staff that know how to communicate with them in sign language as well as visual alarms and announcements, among others (The New Zealand Tourism Research Institute [NZTRI], 2011). Positive service attitudes are also important to ensure a good travel experience. Tourists with disabilities often experience lack of understanding of their impairments and, although not intentional, inappropriate communication and treatment from tourism staff (Poria, Reichel & Brandt, 2010; Richards et al., 2010).

People with disabilities have the right to participate in cultural life, recreational activities, leisure and sports as determined and supported by international conventions and national legislation. But to this day they continue to experience barriers that affect their travel and leisure experiences such as inaccurate and incomplete information about accessible sites and services, physical access constraints, and negative attitudes from staff. Very few cities have vigorously implemented strategies to provide accessible and inclusive environments to their visitors and residents.

Accessible Tourism

One recent initiative to provide tourists with disabilities the opportunity to enjoy trips by being able to access destinations and their attractions is called *Accessible Tourism*. Accessible tourism is defined as "a form of tourism that involves collaborative processes between stakeholders that enables people with access requirements, including mobility, vision, hearing and cognitive dimensions of access, to function independently and with equity and dignity through the delivery of universally designed tourism products, services and environments"

Table 2

Percentage of People with Disabilities in Selected Countries and Regions

Country/Region	People with disabilities
United States	18.7%
Canada	14.3%
Australia	20.0%*
European Union	15.0%*
Mexico	5.1%

* Estimated figures

(Buhalis & Darcy, 2011, p. 10, adapted from Darcy & Dickinson, 2009, p. 34). For a destination to be considered accessible it has to meet all information, infrastructure and service needs of tourists with disabilities during all phases of travel.

Accessible tourism benefits all tourism stakeholders: tourists and residents with disabilities, tourism businesses, government and the destination itself. Accessible tourism and recreation sites along with better quality services for people with disabilities will improve the image of the destination, which can lead to attracting new market segments and higher economic benefits. Economic benefits are brought by a higher number of tourists to the destination because people with disabilities tend to travel with a companion, off-season visitation, and higher tourist expenditure (América Accesible [AMERIACC], 2009). Australia, for instance, reported around AUD \$8 billion in tourists with disabilities' expenditure (State Government Victoria, 2012) while in the United Kingdom, the economic impact of tourists with disabilities and their companions reached £1.9 billion in 2009 (VisitEngland, 2010).

An Exploratory Assessment of Monterrey's Accessibility

Recognizing the potential benefits of becoming an accessible destination, Monterrey's DMO commissioned a local university to do an exploratory study to assess the city's readiness to serve the market of tourists with disabilities (see Guajardo, García & Sánchez, 2012). Specifically, the DMO was interested in evaluating the city's performance on the following aspects:

- Available information about accessible tourism products, sites, and services
- Accessibility of tourism and recreation related websites
- Accessibility of the physical infrastructure of tourism and recreation sites and establishments

In addition, the DMO requested an exploratory survey of tourism business managers' opinions and perceptions of accessible tourism and their willingness to implement accessibility initiatives in their establishments. Following a mixed-method methodology consisting of website and published material content analysis, on-site evaluations, and online surveys, the commissioned study showed the following results.

Information about accessible products and services and website accessibility

The first part of the study consisted of a content analysis of Monterrey's tourism brochures and tourism and recreation websites, including that of the DMO, to determine the type, if any, and detail of information about accessible products and services they offered. The study found that no printed tourism material (e.g. brochures, directories, etc.) provided information for tourists with disabilities; the information provided in tourism and recreation websites was found to be neither sufficient nor detailed enough to facilitate travel decision

making (Table 3). Websites with information about accessible products or services provided information about the availability of ramps, elevators, parking spaces, and wheelchairs; orientation at the venue, and a few displayed the international accessibility symbol, as well as photographs of accessible facilities.

Using a specialized software, the researchers also evaluated each

Table 3
Information about Accessible Products and Services

Tourism Establishments	Websites Evaluated	Websites with Information about Accessible Products and Services
Hotels	70	57.1%
Museums	25	20.0%
Shopping malls	11	63.6%
Parks	10	40.0%
Event facilities	6	50.0%
Transport terminals	2	100%
Restaurants	76	0.0%
Tour operators	17	5.9%
Total	217	28.6%

website in terms of its design. Only 6.3% of Monterrey tourism related websites were 100% accessible for visitors with disabilities. Most sites presented problems related to the provision of text for non-text elements, usability of pages that use scripts, applets or programmatic objects, and titles in each frame. Problems in these areas reduce the amount of information that can be accessed and affect navigation through a website. Table 4 shows the percentage of websites that were determined to be completely accessible, that is, with no problems in their design.

Accessibility of tourism and recreation physical infrastructure

Through on-site inspections to a sample of 124 tourism related establishments, the third part of the study evaluated selected aspects of accessibility in Monterrey's tourism physical infrastructure (Table 5). In regards of features that allow access and mobility of people with disabilities, the most common across all establishments were parking spaces for people with disabilities, ramps, elevators, and continuous pathways, which especially benefited tourists with a mobility disability. The inspections revealed a worrisome lack of physical infrastructure

Table 4

Accessible Design of Tourism Related Websites

Tourism Establishments	Websites Evaluated	Accessible Websites
Hotels	70	8.6%
Museums	21	4.8%
Shopping malls	11	9.1%
Parks	13	7.7%
Event facilities	5	0.0%
Transport terminals	2	0.0%
Restaurants	81	4.9%
Tour operators	20	5.0%
Total	223	6.3%

for people with a visual disability, in particular, tactile guide paths and signage in Braille, in almost every type of tourism establishment. The study also found that many establishments did not offer basic accessible products and services such as accessible restrooms, special equipment, teletypewriters or information in Braille. In general, among all sites, hotels tended to perform better in having key physical acces-

sibility features.

Tourism managers’ knowledge of and attitudes towards people with disabilities

The last part of the study consisted of a web survey designed to explore tourism managers’ opinions and perceptions of accessible tourism and their willingness to implement accessibility initiatives in their establishments. Results from this study indicate that, in general, tourism managers have positive attitudes towards people with disabilities and also acknowledge their rights to accessible and inclusive environments. The following highlights relate specifically to accessible tourism:

Knowledge about disabilities and travel needs of people with disabilities

62% of all managers were “slightly” to “not familiar at all” with national legislation related to disability; likewise 66% were “slightly” to “not familiar at all” with state accessibility legislation.

Only 31% of all participants indicated they were “familiar” to “very familiar” with ADA standards; 21% with Universal Design; and 28% with national accessibility standards.

More than 50% of participants were familiar with the concept of

Table 5

Tourism Establishments with Accessible Infrastructure

	Hotels (25)	Museums (19)	Shopping malls (20)	Parks (22)	Event facilities (5)	Transport terminals (3)	Restaurants (30)
Attributes that enable physical access and mobility							
Parking spaces exclusive for people with disabilities	56.0%	42.0%	85.0%	54.5%	60.0%	66.6%	56.7%
Ramps (when applicable)	65.2%	77.7%	93.7%	84.2%	75.0%	100.0%	62.9%
Elevators (when applicable)	78.2%	54.5%	76.9%	25.0%	100.0%	100.0%	0.0%
Continuous pathways	84.0%	100.0%	100.0%	86.3%	100.0%	100.0%	96.6%
Tactile guide paths	0.0%	0.0%	0.0%	0.0%	0.0%	33.3%	0.0%
Signage in braille	24%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Visual alarms	68.7%	68.4%	45.0%	6.25%	0.0%	0.0%	16.6%
Auditory alarms	87.5%	63.1%	40.0%	31.2%	20.0%	66.6%	23.3%
Accessible products and equipment							
Accessible rooms	64.0%	—	—	—	—	—	—
Accessible toilets	40.0%	42.0%	75%	41%	80.0%	66.6%	31.0%
Teletypewriter (TTY)	8.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Equipment loan (e.g. wheelchairs, walkers, cane, etc.)	40.9%	52.9%	55.5%	25.0%	40.0%	100.0%	—
Accessible services							
Information in braille	0.0%	0.0%	0.0%	5.5%	0.0%	0.0%	0.0%

accessible tourism.

In general, managers have more and better knowledge about equipment and services needed by tourists with mobile disabilities than visual or hearing disabilities.

Attitudes towards accessible tourism and accessible tourism initiatives

The perceived benefits of implementing accessible tourism initiatives among respondents included the development of an inclusive business environment, compliance with local legislation, better business image, and the attraction of niche market segments.

62% of all managers indicated that they would be “likely” or “very likely” to make investments in accessible infrastructure; similarly, 69% would invest in staff training in customer service for people with disabilities.

According to respondents, the main barriers to implement accessible tourism initiatives are the financial costs associated with accessibility improvements and people’s lack of awareness of the needs of people with disabilities.

Even though 90% of all respondents were in agreement that people with disabilities deserve equal job opportunities as people without disabilities, only 25% of them reported employing people with disabilities in their establishments.

Only 39% of the establishments provide training related to giving service to people with disabilities.

Discussion and Activities

The results of this study point to several issues that need to be considered in order to make and promote Monterrey as an accessible destination. As one of the DMO managers, you have been asked to review the results of the exploratory accessibility study and submit an evaluation of the potential of this tourism opportunity along with specific recommendations with respect to the following aspects:

Market potential

- Based on the information provided, is the segment of tourists with disabilities attractive enough to justify the capital investments required to improve the physical accessibility of Monterrey’s tourism and recreation sites?
- If so, should Monterrey DMO prioritize attracting domestic or international tourists with disabilities?
- Instead of tourists with disabilities, should Monterrey capitalize on other market segments to revitalize tourist visitation?

Destination preparedness to receive tourists with disabilities

- Do tourism and recreation establishments provide accessible and sufficient information to encourage tourists with disabilities to visit Monterrey? What type of information is provided

and who would benefit most from it? What type of information is not currently available to tourists with disabilities that could facilitate their travel decision making?

- Is the physical infrastructure of Monterrey’s tourism sites and establishments adequate to receive tourists with disabilities? What are the strengths and weaknesses of the tourism infrastructure with respect to accessibility? What types of disabilities are better attended to, if any?
- Can other tourism products be developed or promoted instead of accessible tourism that could reactive tourism in a faster, less demanding manner?

Action plan for accessible tourism

The DMO also requested, based on your evaluation of the current situation of the destination, an action plan to make Monterrey an accessible destination. This plan should cover the three most important dimensions of accessible tourism, information, accessible infrastructure, and staff training, and include Monterrey’s key tourism stakeholders.

Stakeholder involvement and collaboration:

- Who are the stakeholders, public and private, that need to be included in the accessibility action plan for Monterrey? What interests may drive their decision to collaborate, or not, in making Monterrey an accessible destination?
- What leadership role should the DMO play in this action plan?
- Given the results of the online survey, how can the DMO promote tourism stakeholders collaboration to make improvements in the accessibility of their businesses? What collaborative processes and partnerships between stakeholders can be established?
- Besides increased revenue, what are other benefits of improving the accessibility of the destination that could be shared with tourism stakeholders to gain their support?

Accessible infrastructure and services:

- What specific improvements must be made to enhance the accessibility of Monterrey for tourists with mobile, visual and hearing disabilities?
- What type of training should be provided to tourism staff to enhance the tourism experience of tourists with disabilities?

Research:

- What are some of the information gaps in the exploratory study that need to be filled in order to have a complete picture of the accessibility situation of Monterrey?
- What are the best practices in leading accessible destinations that could be implemented in Monterrey?
- What other types of disabilities should the DMO and the tourism industry be aware of?

Promotion:

- How can Monterrey promote itself as an accessible destination?
- How can it increase tourist awareness of its accessibility initiatives?

References

- América Accesible [AMERIACC]. (2009). El turismo como estrategia de desarrollo en la Región de Ica (PERÚ) [Tourism as a development strategy in the Ica Region (Peru)]. http://www.ameriacc.org/realizaciones_data/4.pdf [Accessed the 1st of April 2013, 17:56].
- Barbeau, L.P. (2011). Study on the Behaviours and Attitudes of People With a Physical Disability with Respect to Tourism, Culture and Transportation in Québec. 2011 Highlights. Kéroul. <http://www.keroul.qc.ca/library/pdf/KER-LivretFS2011-EN-WEB.pdf> [Accessed the 5th of April 2013, 12:27].
- Buhalis, D. & Darcy, S. (2011). Accessible Tourism. Concepts and Issues. Great Britain: Channel View Publications.
- Burnett, J.J. & Bender, H. (2001). Assessing the travel-related behavior of the mobility-disable consumer. *Journal of Travel Research*, 40, 4–11.
- Chen, R. (2005). Uses of Hospitality and Leisure Services: Voices of Visitors with Disabilities. *Advances in Hospitality and Leisure*, 1, 89–102.
- Darcy, S. (1998). Anxiety to Access: Tourism Patterns and Experiences of New South Wales People with a Physical Disability. *Tourism New South Wales*. http://archive.tourism.nsw.gov.au/Anxiety_to_Access_p783.aspx [Accessed 1st of April 2013, 16:35].
- DATATUR. (2013). Compendio Estadístico del Turismo en México 2012 [Statistical Compendium of Tourism in Mexico]. <http://datatur.sectur.gob.mx/wb/datatur/datatur>. [Accessed the 31st of March 2013, 11:40].
- European Commission. (2012). People with disability. http://ec.europa.eu/health-eu/my_health/people_with_disabilities/index_en.htm [Accessed the 31st of March 2013, 15:43].
- Guajardo, F., García A. & Sánchez, I. (2012). Evaluación de la accesibilidad de la industria turística de Monterrey: Un primer paso hacia el turismo accesible [Evaluation of the accessibility of Monterrey's tourism industry: A first step towards accessible tourism] (Unpublished undergraduate's thesis). Universidad de Monterrey, Monterrey, Mexico.
- Human Resources and Skills Development Canada. (2012). Canadians in Context—People with Disabilities. <http://www4.hrsdc.gc.ca/.3ndic.1t.4r@-eng.jsp?iid=40> [Accessed the 31st of March 2013, 15:31].
- Instituto Nacional de Estadística, Geografía e Informática [INEGI]. (2010). Discapacidad en México [Disability in Mexico]. <http://cuentame.inegi.org.mx/poblacion/discapacidad.aspx?tema=P> [Accessed the 31st of March 2013, 15:52].
- Packer, T.L., McKercher, B., & Yau, M.K. (2007). Understanding the complex interplay between tourism, disability and environmental contexts, *Disability and Rehabilitation*, 29(4), 281–292.
- Poria, Y., Reichel, A., & Brandt, Y. (2010). The flight experiences of people with disabilities: An exploratory study. *Journal of Travel Research*, 49(2), 216–227.
- Richards, V., Pritchard, A., & Morgan, N. (2010). (Re) envisioning tourism and visual impairment. *Annals of Tourism Research*, 37(4), 1097–1116.
- Stafford, J., Samson, M., & Roy, C. (2001). A growth market: Behaviours of tourists with restricted physical abilities in Canada. Kéroul, tourism and culture for people with restricted physical ability: Canada. <http://www.keroul.qc.ca/library/pdf/a-growth-market.pdf> [Accessed the 5th of April 2013, 12:35].
- State Government Victoria. (2012). Accessible Tourism. *Tourism Victoria*. <http://www.tourism.vic.gov.au/industry-resources/industry-resources/accessible-tourism/> [Accessed the 31st of March 2013, 15:18].
- The New Zealand Tourism Research Institute [NZTRI]. (2011). The Tourism Needs of People with Hearing Loss. AUT University. http://www.google.com.mx/url?sa=t&rct=j&q=new%20zealand%20hearing%20tourism&source=web&cd=3&ved=0CFEQFjAC&url=http%3A%2F%2Fg3ict.org%2Fdownload%2Fp%2Ffileld_881%2FproductId_196&ei=AuE0UPmiH-by2QWEnICYBw&usq=AFQjCNF0NmcZUR9GFJ_4UzS6xoWHhs6S-w&cad=rja [Accessed the 1st of April 2013, 16:47].
- United Nations Enable. (2006). Convention on the Rights of Persons with Disabilities. <http://www.un.org/disabilities/default.asp?id=290> [Accessed the 4th of April 2013, 19:52].
- United States Census Bureau. (2012). Americans with Disabilities: 2010. Household Economic Studies. <http://www.census.gov/prod/2012pubs/p70-131.pdf> [Accessed the 31st of March 2013, 15:04].
- Van Horne, L. (n.d.). The United States: Travellers with Disabilities. In Buhalis, D., Darcy, S., & Ambrose, I. (Eds.), *Best Practice in Accessible Tourism* (p. 65–78). Great Britain: Channel View Publications.
- VisitEngland. (2010). VisitEngland Accessibility Analysis UKTS data Full Year 2009. http://www.visitengland.org/Images/Accessibility%20analysis%202009%20-%20web%20download_tcm30-19527.pdf [Accessed the 1st of April 2013, 18:11].
- World Health Organization [WHO]. (2011). World Report on Disability. http://www.who.int/disabilities/world_report/2011/report.pdf [Accessed the 31st of March 2013, 13:01].
- World Tourism Organization [WTO]. (2005). Accessible Tourism for All. <http://www2.unwto.org/sites/all/files/docpdf/2005resolutionaccessibletourismforaII.pdf> [Accessed the 31st of March 2013, 12:45].