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EUROPEAN TRENDS OF INCLUSIVE TOURISM IN POST-COVID-19

The article discusses the inclusive tourism significance and its trends. Challenges for persons with disabilities during travelling and main types of disabilities are presented. The present state of European inclusive tourism market is highlighted. Recommendations for inclusive tourism recovery in post-COVID-19 are proposed.

Keywords: inclusive tourism, persons with disabilities, accessible tourism, types of disabilities, impact of COVID-19 on inclusive tourism.

Background. More than 1 billion persons worldwide (15 % of world's population) have disabilities. Combined with families and caregivers, this number of persons is growing to 2.2 billion. In total, they control USD 8 trillion in annual disposable income. Countries that have the highest number of persons with disabilities are China (82 million), United States (78 million) and United Kingdom (11 million). Persons with disabilities visiting the European Union contribute more than USD 118 billion in both direct and indirect economic benefits [1]. Modern trends on the international tourism market show the creation of infrastructure for tourists with disabilities,

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selection of inclusive tourism in a separate type of tourism and promoting its further development. As we can see inclusive tourism represents a significant market opportunity and the economic contribution of this market is large.

Analysis of recent research and publications. Ukrainian scientists as L. Slatvinska [2], I. Trunina [3], N. Vlashchenko [4] paid attention to inclusive tourism. Their scientific works reveal the main theoretical aspects of inclusive and accessible tourism, state of inclusive tourism and its infrastructure development in Ukraine. I. Trunina [3] defines the concept of disabled person and the main functions of tourism for persons with disabilities. L. Slatvinska [2] theoretically describes essence of accessible tourism and analyse current state of accessible tourism in Ukraine. N. Vlashchenko [4] analyses problems of inclusive tourism infrastructure development and define priority directions of its modernization in Ukraine. However, this problem needs further investigation, especially in the light of current trends in post-*COVID-19*.

In the view of the current situation, there is an urgent need to review existing theoretical and practical approaches of inclusive tourism.

The **aim** of this paper is to analyze the present state of the inclusive tourism in Europe in post-*COVID-19*.

Materials and methods. The theoretical and methodological basis of research was the works of domestic and foreign scientists in the sphere of inclusive tourism and statistical information of United Nations World Tourism Organization (UNWTO). The research used a set of scientific methods: analysis, synthesis, comparison.

Results. Inclusive tourism encompasses a range of concepts and terms relating to ideas that tourism should be accessible to all. There are multiple terms used internationally to describe «inclusive tourism». Some examples are: accessible tourism, adapted tourism, Tourism for All, Barrier Free Tourism (BFT), Easy Access Tourism and Universal Tourism. Inclusive tourism is a global movement to ensure the full social participation of all persons with disabilities in travel.

The United Nations Convention on the Rights of Persons with Disabilities (CRPD) was adopted by the UN General Assembly in December 2006. Article 9 of the Convention on Accessibility requires States parties to take appropriate measures to ensure equal access for persons with disabilities to the physical environment, information, transport and other means and services, open or provided to the public. It also calls for the removal of barriers and obstacles to accessibility, including all transport and facilities. In addition, article 30 on participation in cultural life, recreation, leisure and sport also calls on States parties to ensure that persons with disabilities enjoy the benefits of tourism [5].

In the 2030 Agenda for Global Action, which contains the Sustainable Development Goals (SDGs 2015), Goal 11 focuses on the principles of «Make cities and towns inclusive, safe and sustainable». This goal includes tourism and recreation through a call for universal design of accessible and sustainable transport systems, inclusive urbanization and access to green

and public spaces. In Declaration of United Nations World Tourism Organization (2011) predicted tourism will increase and experience sustained development. Accessible cities and tourism provisions therefore ensure the full social and economic inclusion of all persons with direct benefits of promoting more sustainable travel habits among users [6].

For people with disabilities, travel can be a challenge, as finding information about available services, checking in luggage, and booking a room to meet access needs are often difficult, expensive, and time consuming. Challenges for people with disabilities include:

- Untrained professional staff capable of informing and advising on accessibility issues;
- Unavailable booking services and related websites;
- Lack of available airports and transfer facilities and services;
- Unavailability of adapted and accessible hotel rooms, restaurants, shops, toilets and public places;
- Inaccessible streets and transport services;
- Unavailable information on accessible facilities, services, equipment rentals and tourist attractions [7].

There are various types of disabilities which has divided as physical, visual, hearing and mental illness, effects mobility (*figure 1*).

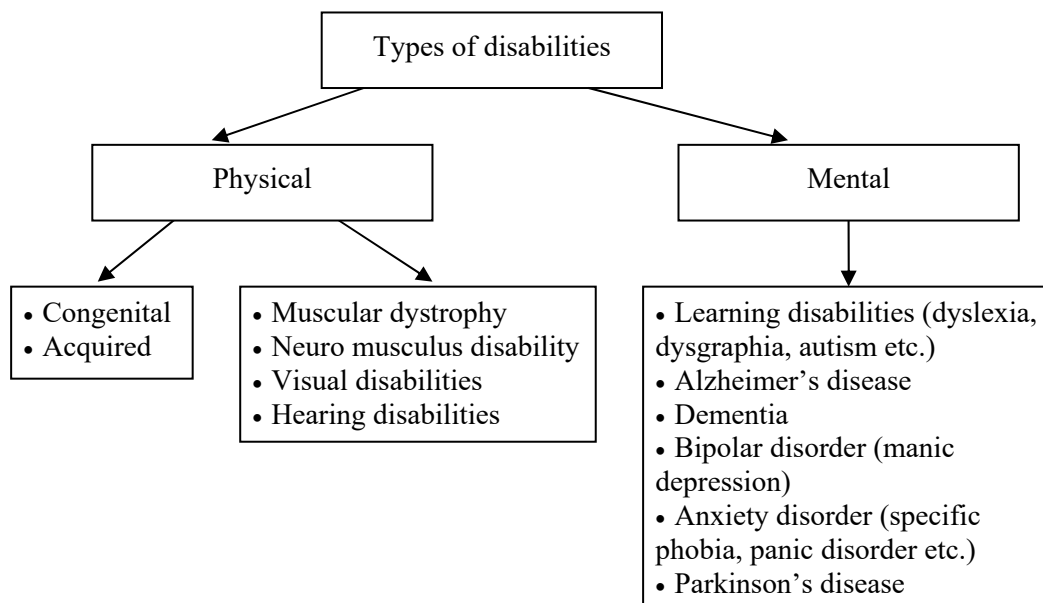


Figure 1. Types of disabilities [8]

The potential market of people with disabilities in the European Union (EU) is of more than 80 million people (130 million if we add senior citizens and accompanying persons). 70 % of people with disabilities in the EU have financial and physical capabilities to travel. Average holiday expenditure of tourists with disabilities is EUR 800+ compared to EUR 600 of tourists without any disability. In Asia and the Pacific, the market size is

of 690 million people and in Latin America and Caribbean this figure reaches 85 million people. The economic impact of disability travel reaches USD 58.7 billion in the United States of America. In Australia, when domestic and inbound markets are added the total accessible tourism market is worth AUD 10.8 billion [9].

Across the 11 inbound markets, the USA and Switzerland are the two most important source markets for European inclusive tourism, in terms of the size of demand. The travelers with access needs from these two countries accounted for almost half of the total demand by all the 11 markets. As can be seen from *table 1*, big shares of demand are unambiguously found in more developed countries, such as the USA, Switzerland, Japan, Norway, Australia and Canada. An exception is Russia, which is less developed. As explained by the low departure figures, the considerably huge population of China and India does not translate into much of the tourism demand [10].

Table 1

**Share of current demand for European inclusive tourism
from key international inbound markets, % [10]**

Country	Share
USA	29.2
Switzerland	20.2
Russia	10.9
Japan	9.1
Norway	9.0
Australia	6.6
Canada	5.7
Brazil	4.4
China	3.8
India	0.7
South Africa	0.3

Inclusive tourism in Ukraine is just beginning to develop. The development of inclusive tourism is impossible without the development of special infrastructure and system of training volunteers. Negative factors of inclusive tourism development in Ukraine are: lack of specialized tourism offices for persons with disabilities; insignificant offer of tourism services for persons with disabilities; insufficient number of tourism bases adapted to the needs of such type of tourists; insufficient support from the state and social funds. Lack of tourism offer gives the opposite reaction – lack of tourism demand on the part of persons with disabilities.

According to the *table 2*, the number of persons with disabilities in Ukraine at the beginning of 2020 was 2703 thousand persons. The number of persons with disabilities in 2020 have trends to increase compared to 2019, increasing was 1.63 %. It is important to note that the number of children with disabilities is growing also, in 2020 compared to 2019 it increased by 1.42 % and it was 163.9 thousand persons [11].

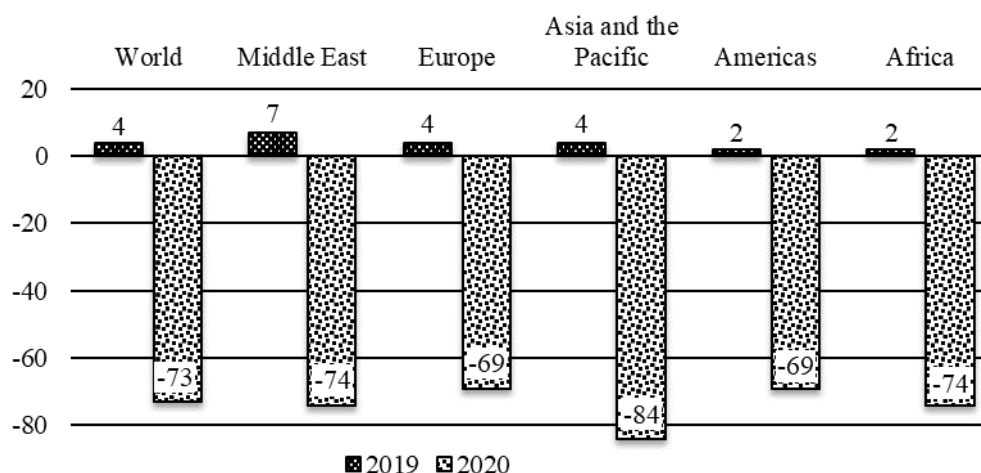
Table 2

**Dynamics of the number of disabled people in Ukraine
in the period 2018–2020 [11]**

Indicator	2018	2019	2020	2019/2018	2020/2019
	thousand persons			%	
Persons with disabilities	2635.6	2659.7	2703	0.91	1.63
Including children with disabilities	159	161.6	163.9	1.64	1.42

Unfortunately, the number of persons with disabilities among the participants and victims of the anti-terrorist operation in Ukraine is progressively increasing. They need qualified rehabilitation assistance, both psychological and social. Those types of special rehabilitation don't have a clear structure in our country and they are still in the process of formation.

The negative impact of the *COVID-19* pandemic on world tourism continues in 2021. Data shows 73 % drop in international tourist arrivals in 2020. Asia and the Pacific, the region with the highest levels of travel restrictions, had the largest declines (–84 %) in international tourist arrivals in 2020. The Middle East and Africa recorded declines of 74 %, while Europe and Americas registered declines of 69 % (figure 2).



**Figure 2. Changes of International Tourist Arrivals
by region in 2019–2020, % [6]**

The outlook for 2021 year remains cautious, as the World Tourism Organization (UNWTO) continues to call for stronger coordination of travel protocols between countries to ensure a safe restart for tourism and avoid further major losses for the sector [6].

Persons with disabilities and seniors have been hit hard by *COVID-19*. Many have been excluded from communications on public health and travel updates, decision-making and information on accessibility of basic tourism services. These customers generally encounter a wide range of barriers due to the way environments and services are often designed, without considering

these visitors' different access requirements. Ensuring good accessibility is not a «favour» to visitors with access requirements but rather a game-changer for businesses, helping them to combat the effects of *COVID-19*. Destinations and companies should see travellers with disabilities, seniors and families with young children as important source markets for their businesses to thrive again [9].

Tourism ministries, destinations, regional and local administrations should work with disabled peoples' organizations (DPOs) in understanding different obstacles for clients with disabilities and the ways to bridge them. DPOs may assist DMOs, not only in emergencies but also by playing an active role in co-designing accessible experiences.

Transportation providers need to keep their assistance staff and facilities operational amidst the pandemic. Accommodation facilities, cultural attractions and venues, and natural settings, should keep their accessibility measures, as people with access needs still travel.

Decision-making on future developments in the sphere of accessible tourism should be based on specific and comparable data. Data needs to reveal the profile, the behavior and the expenditure patterns of travelers with access needs, their families and the essential staff. Quality data collected globally would make the business case of Tourism for All much more evident.

Administrations should keep their role in mainstreaming accessibility in marketing and training programmes, and in inspiring their industry partners to do the same. Customers with disabilities should be targeted by mainstream marketing channels and not considered as a niche market.

Companies will reap the benefits of putting accessibility in place once they realize its competitive advantages. Designing inclusive experiences produces personalized services and accommodates the widest range of potential visitors, their needs and their preferences. Confronting *COVID-19* requires embracing a greater diversity of clients to ensure economic sustainability.

Tourism service personnel usually lack training on catering for customers with disabilities and therefore lack confidence. Staff can expect that travelers with disabilities have varied aspirations and, with careful planning, many activities that might not be considered as «accessible» can be adapted for those with access needs (e.g., adventure tourism, visits to archaeological sites, etc.). The pandemic opens opportunities for destinations and companies to embrace a more inclusive tourism [9].

Conclusion. Inclusive tourism is important component of tourism development today, that generate a considerable amount of revenue and positively impacts on the host destination. Europe has a huge potential for inclusive tourism. More than 80 million persons in the European Union are persons with disabilities, 70 % of which have financial and physical capabilities to travel. The negative impact of the *COVID-19* pandemic on international tourist arrivals in Europe was declines on 69 % in 2020. It's important to promote and develop inclusive tourism in different tourism

destinations for tourism recovery in post-*COVID-19*. Main directions of inclusive tourism recovery should be: collaboration of tourism local administrations with disabled peoples' organizations (DPOs), staff training for serving customers with disabilities, development of accessibility measures by the transportation services, accommodation facilities and cultural attractions.

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Кириленко А., Мельниченко С., Дупляк Т. Європейські тренди розвитку інклюзивного туризму в період пост-COVID-19.

Постановка проблеми. Понад 1 млрд осіб у світі мають інвалідність, що становить 15 % усього населення планети. У поєднанні з родинами та опікунами ця цифра зростає до 2,2 млрд осіб, які акумулюють понад 8 трлн доларів США щорічного доходу. Люди з інвалідністю, що відвідують Європейський Союз, здійснюють внесок у розвиток економіки у розмірі понад 118 млрд доларів США як прямих, так і непрямих економічних надходжень. З огляду на ситуацію, що склалася, існує нагальна потреба дослідити наявні теоретичні та практичні підходи до розвитку інклюзивного туризму.

Аналіз останніх досліджень і публікацій виявив, що питання розвитку інклюзивного туризму серед українських науковців набуває популярності. Загалом їхні наукові праці розкривають основні теоретичні аспекти інклюзивного туризму. Однак ця проблема потребує подальшого вивчення у світлі сучасних тенденцій у пост-COVID-19 період.

Метою статті є дослідження сучасного стану розвитку інклюзивного туризму в Європі та його особливостей у пост-COVID-19 період.

Матеріали та методи. Теоретичною та методологічною основою дослідження є наукові праці вітчизняних та закордонних учених у галузі інклюзивного туризму та статистична інформація Всесвітньої туристичної організації (ЮНВТО). У процесі дослідження використано наукові методи аналізу, синтезу, порівняння.

Результати дослідження. Інклюзивний туризм в Україні лише починає розвиватися. Такий процес неможливий без розвитку спеціальної інфраструктури. Негативний вплив пандемії COVID-19 на світовий туризм продовжується й у 2021 р. Дані свідчать про падіння міжнародних прибуттів туристів на 73 % у 2020 р. Найбільший спад у кількості міжнародних туристів у 2020 р. зазнали країни Азії та Тихого океану. Близький Схід та Африка також зафіксували значне зниження показників, як і Європа та Америка. Люди з обмеженими можливостями та особи похилого віку також зазнали сильних обмежень у подорожах та туризмі через пандемію COVID-19.

Висновки. Негативний вплив пандемії COVID-19 у 2020 р. призвів до зменшення прибуттів міжнародних туристів до Європи на 69 %. Основними напрямками відновлення інклюзивного туризму в період пост-COVID-19 мають бути: співпраця місцевих адміністрацій з питань туризму з організаціями людей з інвалідністю, навчання персоналу для обслуговування клієнтів з інвалідністю, розробка заходів щодо доступності транспортних послуг, закладів розміщення та культурних пам'яток для людей з інвалідністю.

Ключові слова: інклюзивний туризм, люди з інвалідністю, доступний туризм, види інвалідності, вплив COVID-19 на інклюзивний туризм.