

Kéroul

Tourism and culture for
people with restricted
physical ability



A Growth Market

**Behaviours of Tourists
with Restricted
Physical Abilities
in Canada**



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Québec



Développement
économique Canada

Canada Economic
Development

Canada

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MINISTER'S MESSAGES



International tourism is unquestionably one of the driving forces of Quebec's economy. Active participation in tourism by people with physical disabilities not only contributes to our society's economic prosperity but also promotes the values of inclusiveness that have shaped our country.

In the last Speech from the Throne, the Government of Canada made a firm commitment to showing the entire world a country devoted to social goals as well as economic targets, a society dedicated to the prosperity and well-being of all its citizens.

By supporting K eroul's efforts to make tourism accessible to people with restricted physical ability, Canada Economic Development is making a significant contribution to achieving our government's objectives.

As Minister of National Revenue and Secretary of State responsible for Canada Economic Development, I am proud to support K eroul in the pursuit of its mission. This effort will open doors for travellers and open new vistas for the entire tourism industry in Quebec.

Martin Cauchon
Minister of National Revenue and Secretary of State
responsible for Canada Economic Development



I am happy to be associated with K eroul in presenting this groundbreaking tourism study.

Persons with restricted physical ability account for an ever-growing share of the tourism market. This study enables us to home in on their expectations and to better assess their special needs.

As a government, it is our social duty to make tourism accessible to people with reduced mobility. Adapted tourism is a promising market that we should explore more fully in order to offer persons with reduced mobility tourism enjoyable and attractive tourism experiences.

Tourisme Qu bec acknowledges K eroul as its liaison with people with restricted physical ability and has provided it with financial and technical support since 1981.

I urge the business community to do likewise and to create partnerships with K eroul in order to develop and improve strategies for marketing these tourism products and services and to make them accessible to one and all.

Richard Legendre
Minister responsible for Youth, Tourism, Recreation
and Sport



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A GROWTH MARKET

In all developed societies, tourism is considered a high point in the lives of individuals. Unfortunately, travel and tourism is unavailable to a substantial portion of the population. The chief obstacle to travel for most individuals is economic in nature. Individuals with physical disabilities, however, are faced with both financial and physical obstacles to travel.

Physically disabled individuals represent approximately 15% of the Canadian population, and close to 80% of this segment of the population is conceivably able to take fairly frequent trips in Canada and abroad. These are among the conclusions of a previous study conducted for Kéroul in 1995 : *Tourism for People with Restricted Physical Ability : A little known but rapidly developing market*. From an economic standpoint, this represents substantial benefits to the tourism industry.

In order to have a better picture of the demand, Kéroul commissioned this study which was conducted by the Université du Québec à Montréal's (UQAM) Department of Urban and Tourism Studies and the firm of Léger & Léger. The report, financed by Canada Economic Development (CED) and Tourisme Québec, is the first Canada-wide study of the tourism needs and behaviours of people with physical disabilities. Kéroul, an organization devoted to the tourism and cultural interests of these individuals since 1979, is publishing the principal results of the study in this report in order to help stakeholders gain a better understanding of the expectations of this growth market. Some of the preliminary results were presented in April 2000, during the first ever Quebec Symposium on accessible tourism organized by Kéroul.

In general, people with physical disabilities were found to travel almost as much as the general

population, but more frequently and for extended periods of time. This clientele is therefore relatively valuable to the tourism and culture industries.

The leading criterion in these travellers' choice of a tourist destination is its accessibility. This is the one condition that is essential to any trip. Obstacles hindering access to tourist sites and facilities affect one third of this clientele either directly or indirectly. The importance of obstacles increases with the degree of mobility impairment of these individuals. A great deal of dogged determination is required to travel under these conditions.

The results of the study indicate that considerable efforts are still required to make tourism accessible to the entire population. The long-term goal is to reduce obstacles through legislation and incentives, and by working hand in glove with the entire tourism industry.

Increased tourism participation by people with physical disabilities would facilitate their integration into society as a whole.



Michel De Césaire
President



André Leclerc
Founder and Executive Director



METHODS

Government agencies and community organizations devoted to the well-being of persons with physical disabilities have for many years been trying to come up with as accurate as possible a picture of the tourism behaviours of travellers with physical disabilities.

To meet this need and provide a better foundation for decision making and actions, Kéroul launched a Canada-wide market study that draws a detailed picture of the tourism and culture behaviours and needs of persons with physical disabilities.

Conducted during the spring and summer of 2000 in 1,003 households containing at least one physically disabled person over 10 years of age, this Canada-wide survey presents an overall profile of this clientele, its travel habits, behaviours and needs.

The obstacles to travel faced by this clientele and its perceptions regarding any access difficulties that may be encountered are also examined briefly.

TARGET POPULATION:

Canadian adults with physical disabilities who can be reached by telephone and who are able to express themselves in either French or English

SAMPLE:

Drawn using the Canada Survey Sampler software.

The sample is stratified, by province, and non-proportional to the weight of the provinces, with a random sample in each province. The data have been weighted on the basis of the 1996 Census data to reflect the actual demographic weight of each province.

DATA COLLECTION:

Léger Marketing collected data from March 14 to April 6, 2000, and from July 11 to August 23, 2000.

- 1,003 interviews lasting an average of 16 minutes each were conducted with physically disabled individuals.
- Response rate: 65%
- Maximum statistical margin of error: $\pm 3.1\%$ 19 times out of 20.

NDLR : For a better viewing of the results, the data is presented without the decimals. Therefore sometimes the total % of respondents maybe adding up to 101% or 99% instead of 100% with the decimals.



INDIVIDUAL WITH RESTRICTED PHYSICAL ABILITY



DEFINITION FOR THE PURPOSES OF THE SURVEY

Examples of ADMISSIBLE cases	Examples of INADMISSIBLE cases
<ul style="list-style-type: none"> • Physical disabilities • <u>Mobility</u> problems • <u>Agility</u> problems • <u>Obesity</u> • <u>Dwarfism</u> (small size) • <u>Vision</u> problems (blindness, partial blindness, etc.) • <u>Hearing</u> problems (hard of hearing, individuals needing a hearing aid to be able to hear, etc.) • Individual needing a technical aid to move around (wheelchair, walker, cane, dog, prosthesis, etc.) • Individual who has difficulty making a physical effort <ul style="list-style-type: none"> – Cardiac cases – Arthritis – Severe chronic fatigue – Severe asthma – Etc. 	<ul style="list-style-type: none"> • <u>Cognitive deficiencies, psychological illnesses, psychosomatic illnesses, no physical disability</u> <ul style="list-style-type: none"> – Autism – Down Syndrome – Manic-depression – Schizophrenia – Alzheimer's – Migraines – Epilepsy – Slight chronic fatigue – Slight asthma – etc. • Pregnancy • Temporary accident (sprained ankle, broken leg, etc.) which will not be permanent • Individuals who can see well wearing glasses or contact lenses





PROFILE OF RESPONDENTS

THE FOLLOWING TABLE PRESENTS THE PROFILE OF RESPONDENTS
IN TERMS OF THEIR PHYSICAL DISABILITIES

PROFILE OF RESPONDENTS					
	Total (n=574) %	Hearing/Vision (n=1,001) %	Mobility impaired (n=572) %	Mobility very impaired (n=176) %	Mobility extremely impaired (n=179) %
Sex					
Male	43	54	40	36	53
Female	57	46	60	64	47
Age					
25 years	8	15	7	2	16
25-34 years	6	13	5	6	5
35-44 years	12	12	15	7	12
45-54 years	19	12	21	19	15
55-64 years	19	11	20	22	13
65 years and over	37	37	33	44	40
Schooling					
Elementary	15	8	13	15	25
Secondary	51	50	54	55	39
College	17	22	15	15	20
University	17	19	18	15	16
Occupation					
Professional/ Manager	5	5	6	3	3
Service	8	9	10	5	7
Technician/ Worker	6	12	7	5	3
At home	14	12	15	13	13
Student	5	7	4	2	10
Retired	43	40	42	54	38
Unemployed	18	15	17	19	25





It is clearly possible to identify relatively homogeneous segments of the physically disabled population.

One segment consists of lower-income individuals 65 or more years of age whose mobility is decreasing because of ageing. In accordance with general population data, this segment consists primarily of women.

The second-largest segment, in numerical terms, consists of mobility-impaired persons between the ages of 35 and 64.

Among individuals with extremely impaired mobility and those with vision/hearing problems is a small group of undoubtedly younger people with advanced levels of schooling and high income levels.

In short, the dominant or distinctive characteristic of the majority of respondents, in relation to the population at large, is their more advanced age:

56 % are 55 years of age or older and

75 % are 45 years of age or older.

Given the changing needs of these individuals as their age increases, care should be taken to distinguish between the 45-64 age group (38 % of respondents), the 65-and-over age group (37 % of respondents) and the less-than-45 age group (26 %).



TRAVEL BEHAVIOURS

In general, 56 % of respondents stated that they took at least one trip of at least one night more than 80 kilometres away from home in the twelve-month period preceding the survey. This proportion is substantially higher in the Prairies and Western Canada, and it is lower in Quebec.

Similarly, 76 % of respondents claimed to have taken a trip in the last 36 months and 48 % stated that they had plans to take a vacation trip in the next 12 months.

The data indicate that the proportion of travellers during the 12 months leading up to the survey is significantly higher among individuals below the age of 35 (67 %), people with university education (68 %)

and/or people with family incomes of more than \$40,000 (70 %).

The trip departure rate is therefore high, and the profile of these travellers is consistent with that of the general population.

The survey also found that persons with physical disabilities tend not to travel alone: 82 % travel as part of a couple, with family members or with colleagues and/or friends. Note that the proportion of individuals travelling alone is significantly higher in British Columbia (28 %) and lower in Quebec (12 %). Moreover, the greater their physical disabilities, the more travellers are likely to travel with someone else.



Proportion of respondents who took at least one trip of 80 km away from home at least one night in the 12 months preceding the survey.

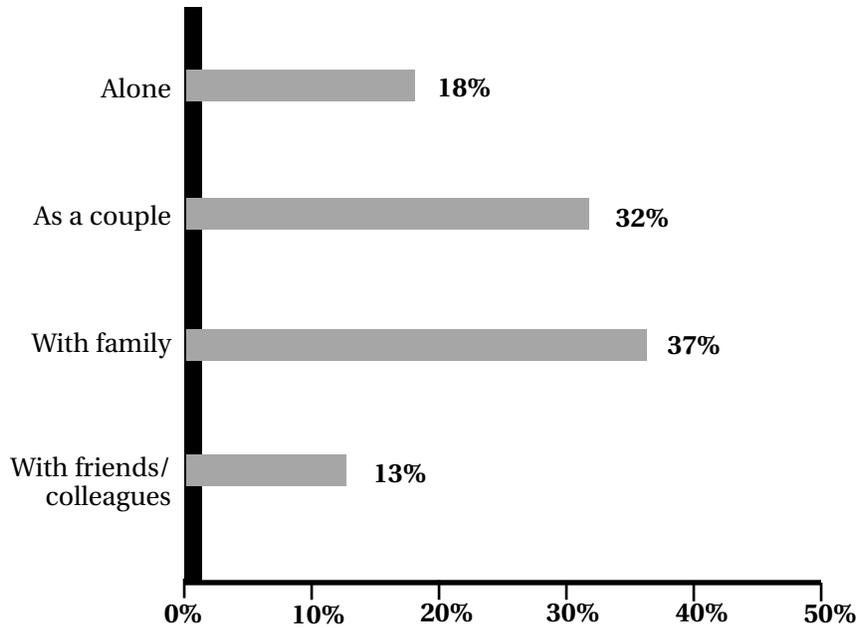




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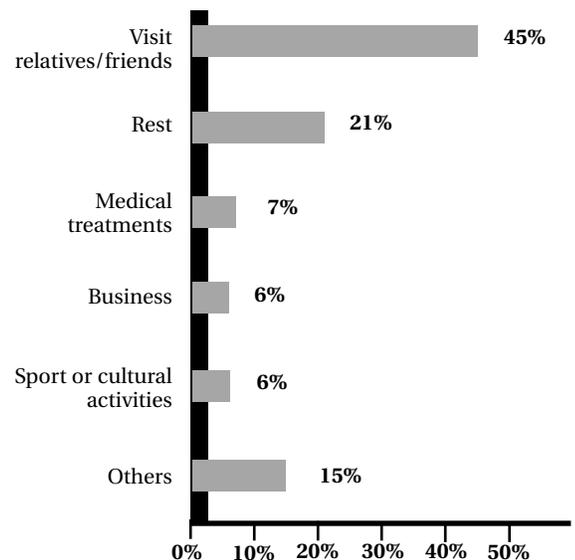
WHO PEOPLE TRAVEL WITH



In accordance with travel data for the Canadian population as a whole, physically disabled travellers frequently (45 %) cite visiting relatives or friends as the motive for their trip. In particular, this is true of 55 % of respondents in the 65-and-over age group.

Similarly, the survey found that 47 % of travellers claim to have stayed with friends or relatives during their last trip, while 31% stayed in a hotel or motel (other private means of accommodation: 22 %).

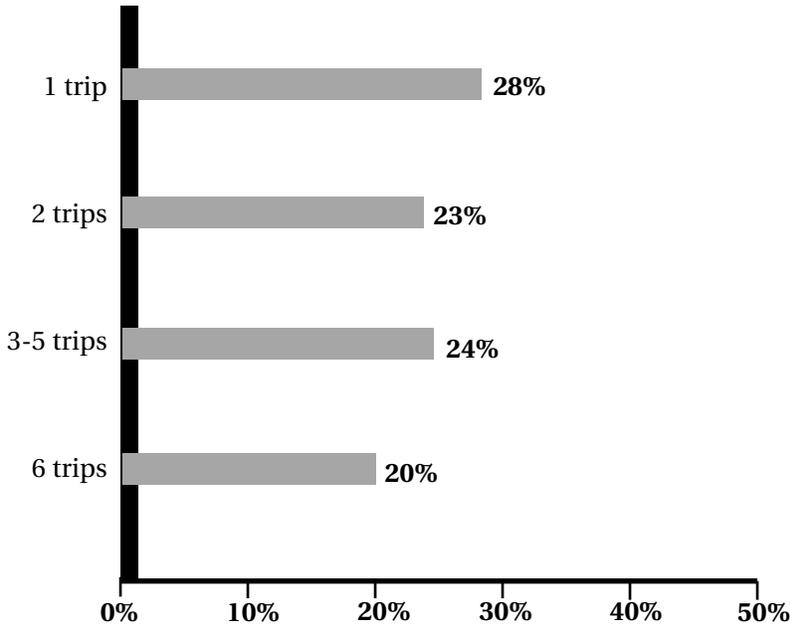
MAIN OBJECTIVE OF THE LAST TRIP



OTHER CHARACTERISTICS OF TRAVELLERS

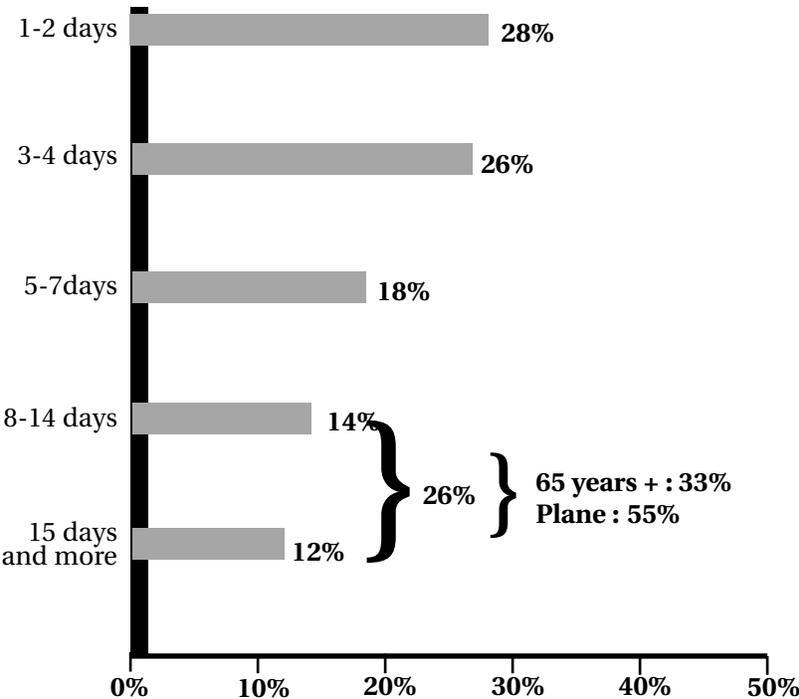
NUMBER OF TRIPS

Physically disabled individuals who travelled during the 12 months prior to the survey, on average, stated that they had taken four trips during the course of the one-year period.



DURATION OF TRIPS

The average duration of a travel stay is estimated at 8 days. There is a wide range of variation in the length of stays: 54 % of respondents stated that their stays were less than 4 days.



TRAVEL DESTINATION AND SPENDINGS

Most people travel in their own province. This is particularly true in Quebec (66 %). The following table also shows that 28 % of physically disabled people travel outside of Canada.

LAST TRIP DESTINATION		
	Destination (%)	Proportion of trips in own region or province (%)
Maritimes	5	50
Quebec	16	66
Ontario	26	55
Prairies	14	58
British Columbia	11	46
United States	15	
Other	13	

The mode of transportation used most often for these trips is the automobile (76 %). Twenty-two percent of respondents mentioned air travel and 13 % referred to mass transit⁽¹⁾. Train and bus travel was more popular with the 25-34 age group (34 %).

Average spending during these trips is estimated at \$652. However, average spending varies considerably from one subgroup of respondents to the next and becomes \$714 when non-spenders are excluded.

AVERAGE SPENDING			
	Amount (\$)		Amount (\$)
Maritimes	462	Air	1,728
Quebec	506	Automobile	517
Ontario	703	Mass transit	733
Prairies	671		
British Columbia	735		

Analysis of the data shows that the amount of travel spending declared by respondents does not vary significantly when various basic respondent characteristics are taken into account (i.e., age, schooling, sex, etc.). Higher-income respondents, however, are more likely to travel by air, stay in hotels or spend more during the course of their trip.

It is interesting to note that 37 % of those who spent \$500 or more on a trip stayed in a hotel—a proportion

only slightly higher (34 %) than those who stayed with relatives or friends. There is every reason to believe that a large proportion of the travel spending incurred by travellers staying with relatives or friends was for all sorts of purchases (e.g., gifts, restaurants), thus contributing to the local economy, whereas spending by travellers staying in hotels or motels was more for lodging and transportation (e.g., air travel).

(1) % higher than 100 % due to multiple mentions by respondents.

CHOICE OF DESTINATION

Numerous criteria come into play in choosing a destination. However, accessibility was spontaneously mentioned first by 29 % of respondents.

	First criterion in choosing a destination (%)	Total of 2 criteria mentioned (%)
Physical accessibility of premises	16	27
Accessibility of means of transportation	13	22
Price	19	33
Climate	17	26
Competent personnel	11	21
General safety	9	16
Variety	6	13
Novelty	5	8
Reputation	4	8

Accessibility criteria were clearly mentioned more often (combining the two criteria mentioned spontaneously) by very or extremely mobility-impaired individuals:

	Very mobility- impaired (%)	Extremely mobility- impaired (%)
Physical accessibility of premises	37	48
Accessibility of means of transportation	22	36

Younger people (28 %) mention the variety of activities more often, whereas price is a greater consideration for people in the 45-64 age group (43 %).





OF MEANS OF TRANSPORTATION

As a general rule, respondents felt that means of transportation were very (63 %) or fairly (28 %) accessible. The percentage of respondents who considered their mode of transportation very accessible is as follows:

- Air53 %**
- Automobile64 %**
- Mass transit (bus, train).....45 %**

Similarly, 28% of those queried encountered obstacles that hampered them with respect to the accessibility of means of transportation. These cases are broken down by mode of transportation as follows:

- Air39 %**
- Automobile28 %**
- Mass transit34 %**
- Other modes.....24 %**
- TOTAL28 %**

ACCOMMODATIONS

Overall, 56 % of respondents considered their place of lodging to be very accessible, while 20 % termed it fairly accessible. The perception of what constitutes a “very high level of accessibility” varies by type of disability:

- Vision/hearing68 %**
- Impaired mobility 61 %**
- Very impaired mobility.....46 %**
- Extremely impaired mobility41 %**

The preceding results are statistically comparable by type of lodging. However, obstacles to lodging accessibility (often associated with the presence of stairs) were more often cited in the case of private accommodations:

- Hotel/motel19 %**
- Relatives/friends29 %**
- Other private accommodations33 %**
- TOTAL26 %**





ACCESSIBILITY

RESTAURANTS

The survey found that 85 % of travellers ate at restaurants during their most recent trip. The proportion is higher (96 %) among those who stayed in hotels or motels than among travellers who stayed with friends or relatives (80 %).

Restaurant patronage is as follows:

Degree of impairment	
Hearing/vision	82 %
Impaired mobility	86 %
Very impaired mobility	78 %
Extremely impaired mobility	79 %

Amount of spending	
-\$100	71 %
\$100 to \$500	88 %
\$500 and over	93 %

It is clear that restaurant patronage is a routine part of travel, regardless of the type and degree of impairment or the size of the trip. A visit to a restaurant is a common practice even during short trips to visit friends or relatives.

More than two thirds (69 %) of people who patronized restaurants while travelling considered these establishments “very accessible” (25 % stated that they were fairly accessible). Moreover, 22 % stated that they had encountered obstacles that hindered them in restaurants; this proportion rose to 37 % and 29 % respectively for persons with very reduced mobility and extremely reduced mobility.

TOURIST ATTRACTIONS

Overall, 53 % of the travellers surveyed stated that they had visited a tourist attraction during their trip. This percentage is higher among:

University graduates	63 %
Travellers less than 25 years of age	62 %
Travellers in wheelchairs	63 %
Travellers who stayed in hotels/motels	63 % and/or
Air travellers	67 %

Fifty-eight percent of those who visited tourist attractions stated that they were “very accessible” and 29 % described them as “fairly accessible.” Only 6 % stated that they were “little or not at all accessible.” Nevertheless, 28 % of these travellers stated that they had detected obstacles to the accessibility of these attractions. This percentage is significantly higher among:

Travellers below the age of 25	53 % and/or
Travellers with extremely impaired mobility	46 %

COMPETENCE OF PERSONNEL

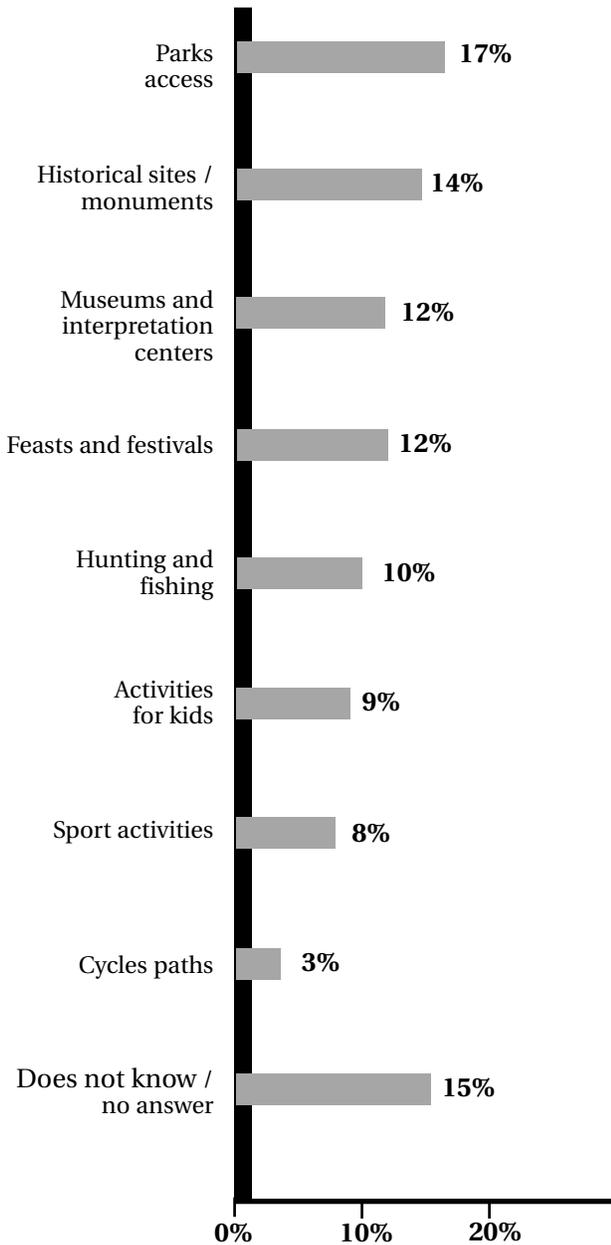
Twenty-one percent of respondents stated that the presence of competent personnel to meet their specific needs was their first (11 %) or second (10 %) consideration in selecting a travel destination. This criterion was mentioned by a significantly higher proportion of Quebec residents : 30 % compared to 21 % overall.

Nearly all respondents, whether travelling or not, were fully (75 %) or somewhat (20 %) in agreement with the statement that they expected service staff they encountered during trips to have received training to meet the specific needs of people with physical disabilities.



MOST IMPORTANT ACTIVITY IN THE CHOICE OF A TOURIST DESTINATION

The following table indicates that respondents' opinions were split when it came to identifying one activity as most important in the choice of a destination.



These selection criteria are closely related to the age of respondents, as shown in the following table, which considers the above-described categories by age group:

Age group	Sports %	Nature %	Culture %	Children %
18-24 years	32	16	38	14
25-34 years	29	19	23	29
35-44 years	25	25	24	26
45-54 years	26	18	44	12
55-64 years	27	20	51	2
65 years and +	17	21	57	5

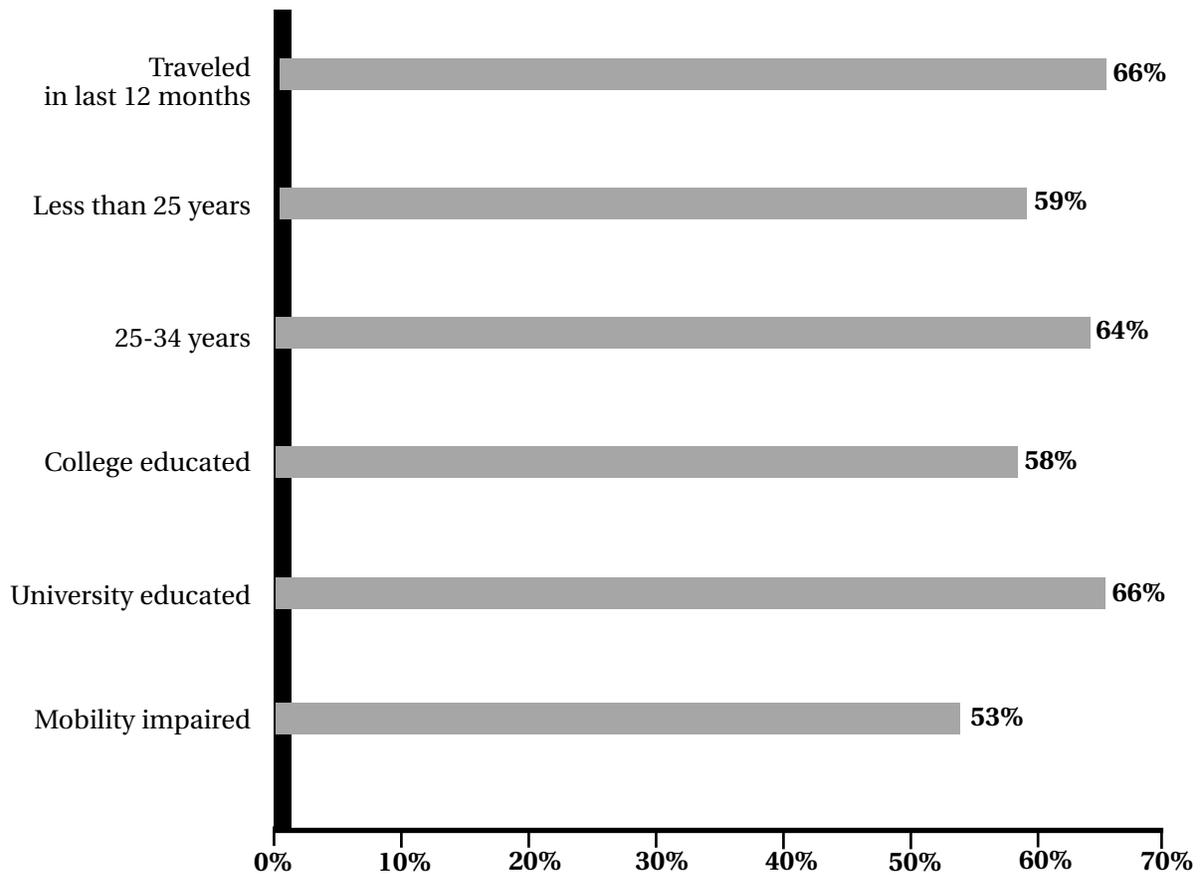
This table clearly shows the importance of cultural attractions, particularly to the large segment of older individuals. It also reveals that disabled people in younger age groups, despite their often severe disabilities, are interested in more intense experiences, their cultural interests being obviously different from those of older individuals. The table also shows the importance of the family framework, and sports activities, for travellers between 25 and 44 years of age.



TRAVEL PLANS

Forty-eight percent of the survey respondents stated that they planned to travel within the next 12 months. This percentage is significantly higher among certain subgroups identified in the chart below.

PLANNING TO TRAVEL WITHIN THE NEXT 12 MONTHS

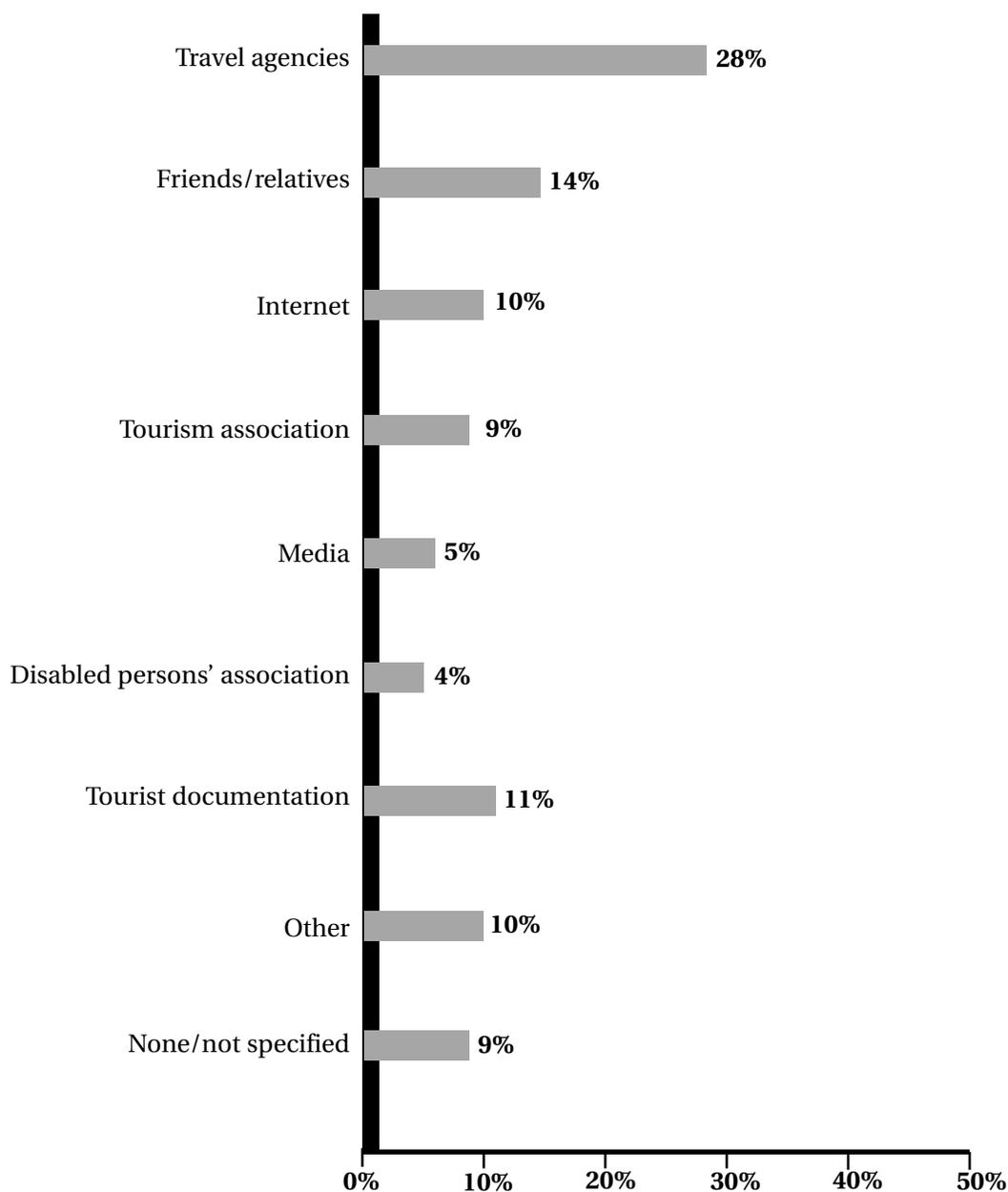


INFORMATION SOURCES

Required to identify their principal sources of information to help them plan their tourist trips, the respondents more often than not mentioned travel agencies.

The use of travel agents increases progressively with the age of respondents (65 and over = 34 %). Use of the

Internet is more frequent among respondents with more schooling and/or in the 35-44 age group. It should be noted that 32 % of respondents stated that they used the Internet, and that there was a strong correlation between Internet use and age (e.g., 65 % of those below the age of 35 versus only 10 % of those above the age of 65).





STRATEGIC ANALYSIS

Analysis of the tourism behaviours of persons with physical disabilities demonstrates the considerable potential of this market, given the large proportion of these individuals who travel and the fact that their stays are longer than those observed in the population as a whole. More than 2.2 million people with physical disabilities each year take trips of at least one night more than 80 kilometres away from home.

While the situations of individuals with very or extremely strong physical disabilities require a substantial infrastructure and extensive facilities to maximize accessibility, even those with moderate physical disabilities encounter significant obstacles with regard to transportation, lodging, restaurant services and tourist attractions. These individuals, a large number of who are between 50 and 64 years of age, have shown a special interest in structured cultural activities that are fulfilling and free of surprises.

This study has brought to light the importance of the human network surrounding persons with physical disabilities. Such persons rarely travel alone. In 82 % of cases, they are accompanied by one or more individuals, or a minimum of at least 1.8 million people. Given that persons with physical disabilities stay with relatives or friends in 47 % of cases and take an average of four trips annually, it can be estimated that at least 1 to 1.5 million Canadians receive these travellers in their homes. In short, the tourism behaviours of persons with physical disabilities directly affect 5 to 6 million Canadians !

Accordingly, the study clearly shows that, in addition to the services offered directly to persons with physical disabilities, consideration should be given to enhancing the services offered to travel escorts, friends and relatives. Possibilities include:

- information on accessible sites, services and attractions;
- assistance on what to do and how to do it;
- a supply of alternative, affordable private accommodations adapted to the special needs of these travellers.

The frequency of automobile travel indicates that monetary restrictions or safety considerations must be taken into account. Accordingly, short trips are certainly typical of the travelling done by persons with physical disabilities and should be given preference. Such trips undoubtedly contribute to the local and regional economies. The obstacles to automobile use identified by the respondents are indicative of the need to increase the supply of accessible means of transportation that are adapted to the needs of persons with physical disabilities.

The study confirms that people with physical disabilities do not constitute a homogeneous segment of the population and that solutions adapted to the various individual groups of these people must be developed. An integrated approach should therefore be taken in considering obstacles to travel in order to develop a series of product offerings that take these different obstacles into account. It would then be possible to generally propose destinations adapted not only to people with physical disabilities but also to all those involved in the travel activities of these individuals (e.g., spouses, escorts, relatives and friends). The scope of communication and specialized information would therefore be broadened.

Some travel agencies, which are front-line players according to this survey, could specialize exclusively in product offerings for the physically disabled market. The operating potential of destinations adapted to the needs of persons with physical disabilities could be easily achieved by developing and publicizing specific events (e.g., a national access week) on an equal footing with other major tourist, cultural or sports events (e.g., festivals) that help attract foreign tourists or encourage Canadians to travel in Canada or within their own region. All of these measures could undoubtedly have an impact on the proportion of non-travellers (in the neighbourhood of 44 %) — a market segment that would certainly be worth exploring and developing.



MISSION

Founded by André Leclerc in 1979, Kéroul seeks to make tourism and culture accessible to persons with physical disabilities, their families and those who are near and dear to them.

AREAS OF ACTIVITY

EVALUATION AND ACCREDITATION : Since 1987, Kéroul has been Tourisme Québec's prime partner in evaluating tourism establishments (lodging, restaurant services, and attractions). Kéroul has developed the only officially recognized accessibility criteria for rating establishments as follows: accessible, accessible with assistance, non-accessible. These criteria have now been incorporated into the Quebec tourism industry's Quality Program. Moreover, Kéroul's expertise in this area is recognized internationally (in Peru, Mexico, France, the United States and Asia) as well as in Quebec.

TRAINING : Kéroul has been offering courses since 1985 on hospitality and service to persons with disabilities. These courses are approved by the Conseil québécois des ressources humaines en tourisme (CQRHT) and by Emploi Québec. Kéroul's training, first offered to tourism workers and students, has been adapted to meet the needs of the business community, the cultural community, the health care sector and the transportation sector, as well as the needs of service agencies in Quebec and abroad. Training is given by qualified instructors, individuals with physical disabilities who use humour to demystify the needs of clients with disabilities.

Kéroul has therefore been working in close cooperation with industry to enhance tourism offerings and ensure that they are better adapted to the needs of these people.

PLANNING : Improved service to clients is a matter of planning and hospitality. Since 1986, Kéroul has published and updated the *Guide d'aménagement*, a planning manual that contains a good deal of careful advice on how to receive tourists with disabilities and plan an obstacle-free tourism and cultural site. Sometimes attention to small details can facilitate access for clients with physical disabilities. It should be noted that many improvements are eligible for federal and provincial tax deductions.

KÉROUL ENDORSEMENT : Since 1990, Kéroul has been awarding a special endorsement, during the Gala des grands prix du tourisme québécois (Quebec tourism awards presentation), to a tourism establishment or site that has demonstrated excellence in its concern for accessibility.

ADVOCACY : Over the years, Kéroul has developed a network of contacts with about thirty federal and provincial departments and agencies. These ties and collaborative relationships enable Kéroul to initiate development projects, participate in transfers of expertise, conduct market studies, and review legislation. These advocacy activities have an impact on the quality of life of people with physical disabilities, their relatives and those who are near and dear to them. **Behind-the-scene actions yielding tangible results !**



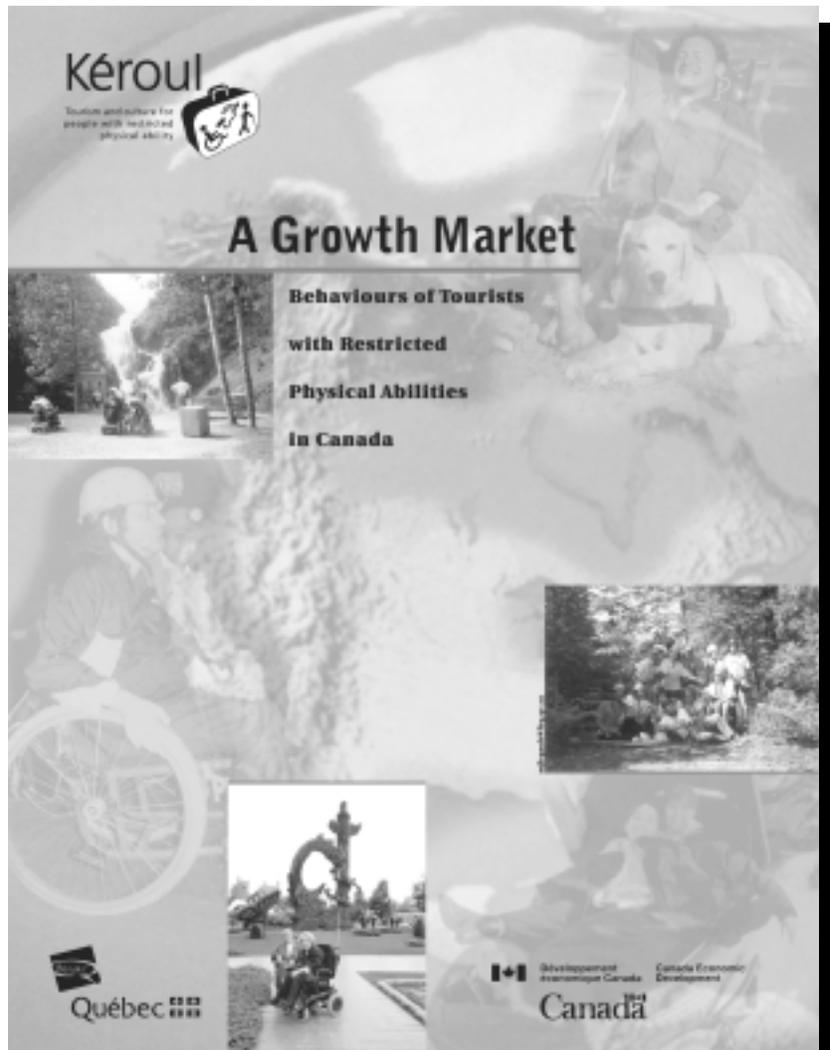
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