



# ACCESSIBLE Tourism

CHALLENGES AND OPPORTUNITIES





# *Accessible Tourism:* *understanding an evolving aspect of Australian tourism*

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## Sustainable Tourism Cooperative Research Centre

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*Tourism QLD and Kel Smith*

### CONTENTS

Accessible Tourism Research Snapshot.....	02
Aim of the Research .....	03
Accessible Tourism Overview .....	04
Report One: Setting a Research Agenda for Accessible Tourism (2006) .....	08
Report Two: Developing Business Case Studies for Accessible Tourism (2008) .....	14
Report Three: Tourist Experiences of Individuals with Vision Impairment (2008) .....	18
Report Four: Visitor Accessibility in Urban Centres (2008) .....	20
Sustainable Tourism CRC Online Bookshop .....	28

Sustainable Tourism Cooperative Research Centre (STCRC) is established under the Australian Government's Cooperative Research Centres Program. STCRC is Australia's largest dedicated tourism research organisation, with over \$187 million invested in tourism research programs, commercialisation and education since 1997. The aim of STCRC research is to underpin the development of a dynamic, internationally competitive and sustainable tourism industry. STCRC is a not-for-profit company owned by its industry, government and university partners.

STCRC falls under the Commonwealth CRC program, which aims to turn Australia's research and innovations into successful new products, services and technologies, making our industries more efficient, productive and competitive.

The program emphasises the importance of collaboration between business and researchers to maximise the benefits of research through an enhanced process of utilisation, commercialisation and technology transfer.

#### STCRC's objectives are to enhance:

- the contribution of long-term scientific and technological research and innovation to Australia's sustainable economic and social development
- the transfer of research outputs into outcomes of economic, environmental or social benefit to Australia
- the value of graduate researchers to Australia
- collaboration among researchers, between researchers and industry or other users
- efficiency in the use of intellectual and other research outcomes.

# CHALLENGES AND OPPORTUNITIES

## Accessible Tourism Research Snapshot

This document profiles key Sustainable Tourism Cooperative Research Centre (STCRC) research into disability and accessible tourism perspectives and issues, an important and growing component of the Australian tourism landscape.

*This publication has been developed with the visitor, service provider, planning agency and industry operator in mind—bringing together summaries, statistics, key findings and recommendations in an easily accessible format.*

### The Research

The following four research reports are profiled in this Snapshot.

- **Setting a Research Agenda for Accessible Tourism (2006)**, Simon Darcy
- **Developing Business Case Studies for Accessible Tourism (2008)**, Simon Darcy, Bruce Cameron, Shane Pegg and Tanya Packer
- **Tourist Experiences of Individuals with Vision Impairment (2008)**, Tanya L Packer, Jennie Small and Simon Darcy
- **Visitor Accessibility in Urban Centres (2008)**, Simon Darcy, Bruce Cameron, Larry Dwyer, Tracy Taylor, Emma Wong and Alana Thomson

To access the full technical reports relating to this research, please refer to [www.crctourism.com.au/bookshop](http://www.crctourism.com.au/bookshop).

The research indicates that the relationship between disability and ageing is clearly evident and both present a challenge for the Australian and global tourism industry. In Europe and America, this has been recognised and the tourism industry has been seeking ways to ensure that its infrastructure and products are accessible to all. There has been recognition the tourism industry needs to adopt universal design principles as a foundation to achieving greater social sustainability as part of the triple bottom line imperative for tourism development.

Understanding the broader issues of visitor accessibility is paramount to developing positive tourism experiences and building capacity in the tourism industry to cater for all levels of disability. The research has indicated that visitor accessibility encompasses all tourism markets including seniors and people with disabilities who have been defined through accessible tourism. The challenges associated with ensuring that people can freely move within and between regions and destinations require further research and investigation in order to effectively plan and implement best-practice access to a tourism experience.

*In particular, the research projects:*

- consider the current state of play from the perspectives of supply, demand and regulation/coordination research, as well as accessible tourism industry practice
- document the business case for accessible tourism through the development of business based case studies of successful operators and consider 'best practice'
- develop an understanding of the experience of travelling with vision impairment
- develop an understanding of the broader issues of visitor accessibility, with a focus on urban destinations

**“There are an estimated 650 million persons living with disabilities in the world today. If one includes the members of their families, there are approximately 2 billion persons who are directly affected by disability, representing almost a third of the world’s population. Thus, persons with disabilities represent a significant overlooked development challenge, and ensuring equality of rights and access for these persons will have an enormous impact on the social and economic situation in countries around the world.”**

United Nations Convention on the Rights of Persons with Disabilities (2008)

# ACCESSIBLE Tourism

## Aim of the Research

The individual research projects cover a variety of elements and challenges to be addressed by the tourism industry in developing more accessible tourism experiences for travellers with a disability. This includes an examination of:

- dimensions, approaches and issues surrounding disability and tourism and recognising the broad context of accessible tourism initiatives commissioned and the incorporation of universal design principles in new buildings, and the development of Easy Access Markets
- the business case for accessible tourism through the development of business based, case studies of successful operators in the Australian context
- exploring the tourist experiences of people with vision impairment through in-depth interviews and focus groups
- significant structural barriers that may constrain the experiences that visitors with a disability have in urban centres. A research project evaluated and assessed urban tourism environments, including urban national parks, in the context of universal design principles.

## Interest Groups

The research has relevance to a broad range of industry and government stakeholders and those seeking a greater understanding of the challenges and opportunities relating to accessible tourism.

*The following audiences will find this research especially beneficial:*

- product and destination developers and marketing managers in state tourism organisations (STOs)
- product and destination developers and marketing managers in regional and local tourist organisations
- tourism, policy, planning and development officers within the state and local government environments
- the various bodies, associations and organisations representing the interests of Australians with disability and other access issues.

## Using the Research

This research can be used to assist in better planning for and addressing the needs of visitors with disability and access issues. The research helps investigate and understand the needs and demands of an increasingly significant market.

The research will assist the tourism industry and policy and planning agencies in understanding the various elements that contribute to positive visitor experiences for those with access issues and hopefully contribute to improved capacity building in the industry. This includes the requirement of infrastructure, marketing and product development to better accommodate a variety of visitor needs.



# CHALLENGES AND OPPORTUNITIES

## Accessible Tourism Overview

The United Nations World Tourism Organization (UNWTO) formed a resolution in 2005 supporting 'accessible tourism for all' and is recognised as a key reference document for guiding the development of the tourism sector along the path of greater accessibility.<sup>1</sup> Also of importance for equal access to tourism is the UNWTO's Global Code of Ethics for Tourism (1999) which sets a frame of reference for the responsible and sustainable development of world tourism.

The reason why people with accessibility requirements are not served adequately by the travel and tourism industry is a combination of a lack of tourism product supply and inadequate information.<sup>2</sup> Consistent with this sentiment, the European Network for Accessible Tourism (ENAT) defines 'Tourism for All' as '*making travel and tourism destinations, products and information suitable for all those who have particular accessibility needs, their families and friends*'<sup>3</sup>.

ENAT observes that:

*Physical access and access to information are often less than adequate in transport, at tourist destinations, in accommodation and all kinds of venues and attractions. This lack of accessibility has a direct and negative effect on tourist numbers (both inbound to Europe and within Europe) and on the quality of tourism destinations and products. Many tourists and would-be travellers experience access problems, especially those with physical or sensory disabilities, people who are older and perhaps a little more frail, as well as pregnant women, families with small children and people with a chronic health condition or a temporary disability. All of these people need 'accessible tourism'*<sup>4</sup>.

**Tourism Australia** also recognises that 'the demand for information on travel for people with disabilities (and seniors) has never been greater. These two groups have been identified as the **accessible tourism market**'<sup>5</sup>.

Tourism Australia defines Accessible Tourism as:

*... a process of enabling people with disabilities and seniors to function independently and with equity and dignity through the delivery of universal tourism products, services and environments (adapted from Olympic Co-ordination Authority 1999). The definition is inclusive of the mobility, vision, hearing and cognitive dimensions of access*<sup>6</sup>.

Tourism Australia states that a number of research studies have shown that the Australian tourism environment has a number of systemic constraints that make travel for the accessible tourism market more difficult than for other travellers. It believes that by international standards, '*Australia has precinct areas within most major tourism destinations that provide high quality accessible tourism experiences*'. It also notes that due to Australia's building regulations and the Disability Discrimination Act, 1992:

*... many of the hotels, restaurants, cinemas, theatres, museums, stadiums, shops, public transport and public open space areas have excellent provisions for all dimensions of access. These environments are complemented by arts, recreation, sporting and outdoor recreation activities that have had a long history of having inclusions for people with disabilities.* Tourism Australia

It observes that there are many opportunities to develop this segment and that Tourism Australia will support efforts to inform consumers about accessible tourism products. As such, state and territory tourism organisations in partnership with Tourism Australia have developed *Accessible Touring Routes and Day trips*, supporting the 'National Road Tourism Strategy'. These guides have been developed to meet the need for more accessible experiential tourism opportunities for people with disabilities. They feature a variety of driving routes and day trips highlighting the best that Australia has to offer.

**Tourism New South Wales** has a fairly broad definition of Accessible Tourism which includes<sup>7</sup>:

- seniors
- people with a disability
- people from non English speaking backgrounds
- parents with children

<sup>1</sup>[www.accessibletourism.org](http://www.accessibletourism.org) <sup>2</sup> [www.ossate.org/doc\\_resources/OSSATE\\_Market&Stakeholder%20Analysis\\_Public\\_Version\\_Fina..pdf](http://www.ossate.org/doc_resources/OSSATE_Market&Stakeholder%20Analysis_Public_Version_Fina..pdf) <sup>3</sup>[www.accessibletourism.org](http://www.accessibletourism.org) <sup>4</sup> <http://www.accessibletourism.org>

# ACCESSIBLE Tourism

They also refer to the **Easy Access Market** which is defined as, 'any segment within the tourism market that prefers accessing tourism experiences with ease'. Tourism New South Wales has identified that there are 730,000 people with a physical disability in New South Wales. Research indicates that 77% of these people travelled within Australia in the previous year and 11% travelled overseas. The average group size for domestic trips was 4.1 people, generally with only one person in having a disability in the group.

Tourism New South Wales draws reference to Simon Darcy's report, *Anxiety to Access – Tourism patterns and experiences of NSW people with a physical disability (1998)*. The report presents the findings of research conducted into the tourism patterns and experiences of people with physical disabilities in New South Wales. It provides the basis for the first comprehensive quantitative study of the tourism patterns and experiences of people with a physical disability in New South Wales.

The report was used to produce the first market estimates of the size of the tourism market of people with a physical disability and draws on the results to develop recommendations for government and the tourism industry to better serve the tourism needs of people with a physical disability. The study provided government agencies and the tourism industry with information to capitalise on the 2000 Sydney Olympics and Paralympics.

**Tourism Queensland (TQ)** identifies Accessible Tourism closely with 'disability' and it is also linked to 'special interest tourism'<sup>8</sup>. Tourism Queensland draws its definition from the Australian Bureau of Statistics.

*Australian Bureau of Statistics defines 'disability' as:*

*... the functional consequence of impairment (any loss or abnormality of psychological, physiological or anatomical structure or function). To be classified as a disability, limitations or restrictions to normal functioning must be likely to last for a period of at least six months.*

The research conducted by the STCRC was informed by a social approach to disability that recognises that the disability is a complex set of social, economic and political relationships imposed on top of a person's impairment. The research was informed and conducted to empower people with disabilities to experience tourism in an independent, equitable and dignified manner that recognises tourism as part of their rights of citizenship. This places the STCRC research at the cutting edge of understanding that the tourism industry can facilitate the citizenship of people with disabilities through providing an inclusive environment and service practices.<sup>9</sup>

*The National Visitor Survey estimated that:*

- Some 88% of people with disability take a holiday each year that accounted for some 8.2 million overnight trips.
- The average travel group size for people with a disability is 2.8 people for a domestic overnight trip and 3.4 for a day trip.
- There is a myth that the accessible tourism market does not spend because of economic circumstance and are a significant proportion of each travel market segment.
- They travel on a level comparable with the general population for domestic overnight and day trips.
- The total tourism expenditure attributable to the group is \$8bn per year or 11% of overall tourism expenditure.

*National Visitor Survey 2003 as analysed by Darcy and Dwyer (2008)*

*When evaluating whether or not to visit a destination, the following factors are assessed:*

- accessible accommodation as a foundation of any visit
- the overall accessibility of the destination—including mobility, vision, hearing and cognitive dimensions
- presence of continuous pathways
- accessibility of public transport (low floor buses, accessible train platforms and trains)
- things to do and see—accessible destination experiences
- accessibility of dining and shopping outlets

*“Countries are now committed to promoting participation in cultural life, recreation, leisure and sport for people with disabilities. This is a truly global concern which must be tackled by raising the quality standards of the tourism industry as a whole.”*

Mr. Ivor Ambrose, Managing Director of European Network for Accessible Tourism (ENAT)

<sup>5</sup> [www.tourismaustralia.com](http://www.tourismaustralia.com) <sup>6</sup> [www.tourismaustralia.com](http://www.tourismaustralia.com) <sup>7</sup> [http://corporate.tourism.nsw.gov.au/Accessible\\_Tourism](http://corporate.tourism.nsw.gov.au/Accessible_Tourism) <sup>8</sup> [www.tq.com.au/tqcor](http://www.tq.com.au/tqcor) <sup>9</sup> [www.epress.lib.uts.edu.au/dspace/handle/2100/260](http://www.epress.lib.uts.edu.au/dspace/handle/2100/260)

# CHALLENGES AND OPPORTUNITIES

- accessibility of attractions
- accessibility of pubs, bars and nightclubs (including the provision of accessible toilets)
- whether accessible accommodation is available
- availability of disability aids at the destination—eg: hire car facilities, taxi services, carers, equipment and supplies.

Beachside destinations are visited but are generally less attractive to people with disabilities due to problems getting in and out of the water and moving around in the sand. Some also find the heat difficult to cope with and therefore find cooler hinterland areas more appealing than coastal areas.

'Newer' destinations, such as Australian capital cities (Perth and Adelaide are mentioned) are considered more accessible than older destinations where little to no attention has been paid to providing access (for example: some older parts of Sydney). The most popular forms of accommodation for travellers aided by wheelchairs are hotels and motels, followed closely by staying with friends and relatives. People with a disability who are not aided by wheelchairs are most likely to stay with friends and relatives, followed by hotels and motels.

**Transport** is a crucial component of travel for people with a physical disability. Much of the Australian public transport system has limited accessibility, significantly reducing transportation options for people with a physical disability. The most common form of transport used by people with disabilities is driving their own car. This is the most cost efficient and convenient as it provides transport that they can use once at their destination.

Table 1: Domestic Main Transport to Reach Destination

Transport to destination	All (%)	Wheelchair (%)	Other (%)
Plane	15.9	16.8	14.2
Bus/coach	3.7	2.5	5.9
Private vehicle	59.8	54.0	67.3
Private vehicle modified	11.3	17.6	3.1
Rented or hired vehicle	0.6	0.6	0.6
Rented or hired vehicle modified	0.1	0.2	0.1
Train	5.1	3.4	7.5

In terms of future opportunities, TQ found that the demographics of Australia are changing, including:

- *We have an ageing population that is increasingly affected by disabilities.* These people are retiring at a younger age and living longer.
- They are not necessarily wheelchair users and want to enjoy life to the maximum despite their physical restriction.
- *The majority of Australia's inbound markets are sourced from nations with ageing populations.*
- *Providing accessible tourism facilities and services opens the door to a large and growing market.*
- While wheelchair users appear to comprise of a small number of the overall people with a disability, design and planning that incorporates the needs of this group will be good design and planning for other markets.
- Effectively many people will benefit from these provisions including the ageing population, parents with prams, and employees as it incorporates good design practice for a range of occupational health and safety requirements.
- Queensland has a great range of accessible tourism product, but the problem has been getting information about it to people who need it.

**“American adults with disabilities or reduced mobility currently spend an average of \$13.6 billion a year on travel. Creating accessible cruise ships, accessible ship terminals, accessible ground transportation, and accessible tourist destinations is not charity. It is just good business.”**

Dr Scott Rains, a US expert on disability issues

# ACCESSIBLE Tourism

**Tourism Victoria** produces the 'Disability Travel Facts Sheet' to assist people with disabilities to move about the state freely and identify activities and facilities that suit their needs. Tourism Victoria states that the Victorian Government has also been working with the tourism industry and the disability sector to ensure that the industry is more responsive to improving access and increasing the information available to travellers with a disability. *The Victorian Accessible Tourism Plan 2007–2010* is currently being developed<sup>8</sup>.

**The South Australia Tourist Commission (SATC)** in its South Australian Tourism Plan 2003–2008 identifies a need to 'incorporate disability needs into the provision of hard infrastructure providing for a range of paths, signage, interpretation and ramps to buildings and tourist facilities'<sup>3(9)</sup>. SATC says that being an accessible destination means more than just ease of getting around. SATC comments that 'much time and effort has been spent in recent years to ensure that travelling with a disability won't stop you enjoying what South Australia has to offer'<sup>4(10)</sup>. Via SATC's website, visitors can search through accommodation, tour and attraction listings to find South Australia's tourism operators offering easy access for travellers with disabilities and other support services.

**Tourism Tasmania** welcomes visitors with disabilities<sup>5</sup> (11). Via its web portal it identifies attractions, accommodation and so on that are easily accessible.

*“Of the 650 million people with disabilities worldwide, a significant portion of them are travellers with special needs. In addition, there are 600 million older persons in the world, and their number is expected to be doubled by 2025. While a growing number of Asian-Pacific countries are paying attention to accessible tourism, barriers of many kinds still inhibit people with disabilities and reduced mobility from enjoying the travel experiences. Getting on and off airplanes, finding an accessible bus, taxi, hotel room, bath room, or restaurant could all be a challenge. In addition, ignorance of and prejudice against persons with disabilities can spoil their travel experiences.”*

Economic and Social Commission for Asia and the Pacific (ESCAP)



<sup>11</sup> [http://www.discovertasmania.com/about\\_tasmania/equal\\_access](http://www.discovertasmania.com/about_tasmania/equal_access)

# CHALLENGES AND OPPORTUNITIES

## Report One: Setting a Research Agenda for Accessible Tourism (2006)

Simon Darcy

### Objectives of Study

In July 2005, a Sustainable Tourism Cooperative Research Centre Research (STCRC) workshop was held at the NSW Department of State and Regional Development, titled *Setting a Research Agenda for Disability and Tourism*. The Australia-wide workshop involved key academic researchers, industry partners, community organisations and government authorities interested in disability and tourism, with 45 invited participants attending. While looking broadly at dimensions, approaches and issues surrounding disability and tourism, the workshop recognised the broad context of *accessible tourism* initiatives recently commissioned by Tourism Australia, the incorporation of *universal design* principles in new buildings and the development of *Easy Access Markets*. Workshop participants were thus asked to review the current state of play from the perspectives of supply, demand and regulation/coordination research, as well as accessible tourism industry practice.

*Key objectives were to:*

- assess and critique the state of accessible tourism in Australia
- identify current research gaps and opportunities for necessary collaborative research
- establish a prioritised research agenda for accessible tourism in Australia for STCRC.

### Methodology

A participative action research process was employed to engage the workshop participants to focus their collective knowledge and expertise to develop a prioritised research agenda for disability tourism. Participative action research is an appropriate methodology to use in the production of knowledge amongst the stakeholder groups. To this end, three information sessions were held during the day (state of research, current Australian practice and developing a research agenda). Small group breakout sessions followed each of these with each small group (four in all) preselected by the workshop organisers, based on the desirability of having a suitable mix of demand, supply and regulation/coordination stakeholders in each group. Each small group was led by a facilitator who had been briefed on the expectations of the exercise prior to their engagement with the group. Each group was assigned a note-taker external to the group, to assist in reporting and documenting the small group discussions.

*The participative action research process involved the following sequential steps:*

- an overview of accessible tourism research in Australia and overseas
- a small group breakout session to brainstorm potential areas of research
- an overview of disability tourism initiatives in Australia based on a sectorial approach
- a small group breakout session to identify potential areas to create a greater understanding of disability by industry sector
- a facilitator group session to generate research questions on which to base a research agenda
- identifying three main areas of research by each individual at the workshop
- establishing the prioritised research agenda by tallying the three main areas identified by each individual, cross-checking this against the small group breakout notes and circulating prioritised research agenda to all participants for feedback and
- once feedback was received, further adjustment of the prioritised research agenda was undertaken.



# ACCESSIBLE Tourism

## Key Findings

### Literature

The Australian research is limited to the few identified key studies and while the overseas research was far more extensive, the review found a series of themes, gaps and omissions that provide fertile ground for research into accessible tourism. The themes to emerge from the demand literature are:

- size of the tourism market of people with disabilities
- a comparison of tourism patterns of people with disabilities to the non-disabled
- role of tourism marketing and the provision of tourism access information in tourism planning for people with disabilities
- inaccessibility of the transport, accommodation and attractions sectors
- disability market segmentation
- impact of anti-discrimination legislation on goods and services provision
- medical approaches of disability tourism research and
- lack of explanation for the experiences of people with disabilities.

Over the last 25 years, research from the tourism industry perspective on supplying goods and services for people with disabilities has been sporadic and varied both within Australia and overseas.

*The research has had four foci:*

- self-reported assessments of the accessibility of tourism industry product
- interviews that seek to document current tourism industry approaches to people with disabilities
- instruments that review tourism industry attitudes towards people with disabilities
- assessments of compliance with human rights legislation.

The quantitative studies all had low response rates, which may be indicative of the tourism industry disinterest or lack of understanding of disability tourism. The major difference between the US and the Australian and UK research was the impact of the Americans with Disabilities Act (ADA) in shaping a research agenda. There was a commonality between overseas and Australian research, suggesting there is an under supply, or constraint of opportunities, for people with disabilities wishing to travel. This under supply or constraint is compounded by tourism industry managers, who do not perceive people with disabilities as a market segment or regard disability as a low-yield market segment. Further, the research demonstrates the lack of understanding on the part of the tourism industry about the legislated responsibility to provide equality of experience for this group.

In an Australian context, the STCRC workshop has come together at a time when two significant developments in Australian tourism were occurring. First, the recent 'Nican' conference that reviewed accessible tourism in Australia and, second, the significant restructuring of tourism at a federal level, with the establishment of Tourism Australia's niche market initiatives. These two developments have provided the momentum and the opportunity to address this significant issue in global tourism. The Tourism White Paper and the Tourism White Paper Implementation Plan outline the importance of developing uniquely Australian experiences and niche market experiences. An accessible tourism research agenda would significantly contribute to addressing the Tourism White Paper initiatives through providing a foundation of understanding for all tourists to experience the best of Australia. It would also provide valuable knowledge on which to base the development of niche experiences for the group.

### The workshop

The workshop identified that there was a tremendous amount of goodwill between the stakeholders to move the position of accessible tourism forward through developing a research agenda. Yet, to do this requires an understanding of where we are at, the gaps in knowledge and a strategy to redress the acknowledged shortcomings. In the first two workshop sessions, the stakeholders identified many issues and problems related to accessible tourism. The third session focused on developing a series of questions that the stakeholders would want answered through research. This section presents the findings of the workshop through an interrogation of the workshop sessions. The major findings of the workshop are divided into themes that developed from the three collaborative workshop sessions.

# CHALLENGES AND OPPORTUNITIES

*The process for developing the themes involved:*

- starting with the questions posed in session three to identify those questions that were 'prioritised' in the final session of the day
- reworking the questions to reduce any repetition and then grouping like questions into themes
- interpreting the questions into research themes and recognising that while other problems and issues were identified, they did not necessarily translate into research and
- analysing the outcomes of the first two sessions to provide further detail for each of the themes.

*The identified research themes were:*

- Information provision, marketing and promotion
- Dimensions of disability
- Market dynamics and segmentation
- Total product development
- Industry engagement—profile, partnerships and understanding
- Education and training
- Access to all sectors of the tourism industry

In the body of the report, the research themes are presented with a summary as to the direction of each theme. It should be recognised that while each of these themes is presented separately, there is significant interdependence and overlapping between the themes. From this position, the themes were prioritised based on the tallies from workshop session three.

## Recommendations

The priority areas for future accessible tourism research are:

### Information provision, marketing and promotion

- Determine relevant information requirements, format and presentation preferences for each dimension of disability across each sector of the tourism industry
- Test the validity or otherwise of rating systems and alternative information formats for tourism accommodation
- Pilot the outcomes of the above for inclusion on the Australian Tourism Data Warehouse
- Establish collaborative projects with OSSATE and other accessible tourism information projects in other parts of the world

### Dimensions of disability

- Understand the different tourism requirements of people based on hearing, vision and cognitive dimensions of disability

### Market dynamics and segmentation

- Establish a commitment to ongoing collection of domestic and international data sources that include a disability module
- Undertake analysis of the size and role of accessible tourism within Australian tourism
- Develop market segmentation studies of disability in tourism

### Total product development

- Operationalise universal design and easy living principles within tourism product development
- Test the operationalisation of the above concepts through place-based approaches, local access precincts and access trail development
- Understand the diversity of experiences of people with disabilities through an application of the recreation opportunity spectrum to industry sectors.

### Industry engagement—profile, partnerships and understanding

- Development of best practice cases
- Establish the business case for accessible tourism

# ACCESSIBLE Tourism

- Provide resources for identified SME to enter the Australian Tourism Awards
- Encourage industry-linked research between disability groups, tourism enterprises and tourism industry representative groups
- Establish accessible tourism organisation/association/lobby group
- Establish an internal government driver of accessible tourism through cooperative Commonwealth and State Government Tourism Ministers' Council.

## Education and training

- Extend information provision to interactive industry-based disability awareness training that is tested using recognised Australian/international scales
- Undertake disability awareness training with a key industry group to provide the basis for ongoing industry engagement
- Incorporate disability awareness training/curriculum into industry, TAFE and university courses

## Access to all sectors of the tourism industry

- Reinforce the need for best practice case studies that also investigate the business case for accessible tourism (see Industry Engagement)
- Develop experiential case studies of disability tourism activities to provide the industry with a diverse understanding of what constitutes disability tourism experience
- Promote the designation of a specific universal design or accessible tourism award within the Australian Tourism Awards to highlight the importance for the triple bottom line

It was the hope of the workshop participants that the report to STCRC would become the catalyst for the inclusion of accessible tourism as a new and most worthy area of the STCRC research program. To facilitate this process, the partner universities of Curtin University, the University of Queensland, University of Technology Sydney and Griffith University have undertaken to prepare five possible expressions of interest for consideration for inclusion in 2006. Further, the academics involved believe that a foundation for the development of this research area would be accelerated through the designation of at least two STCRC-supported PhD scholarships to begin in 2006–07.

In conclusion, it is recognised that this prioritised research strategy is the product of a collaborative participative action research workshop between all stakeholders. In recognising the collaboration required to produce a document of shared knowledge, the academic researchers acknowledge they have had to interpret problems and issues to create a research agenda for accessible tourism. The research agenda is based upon the prioritised questions identified in session three of the workshop and was informed by the earlier breakout sessions and the circulated draft report. A number of respondents to the draft report noted that while the report is a promising document with potential, it would remain so unless there is an organisation that accepts responsibility for the implementation of the proposed strategy.

While there were suggestions that ownership should reside within various government entities, others suggested that an empowered not-for-profit entity in collaboration with government and the commercial sector might be a more appropriate means to achieving outcomes. One person suggested that Keroul, an organisation founded by people with disabilities but operationalised in conjunction with Tourisme Québec and the Ville de Montréal, might be one such model that may benefit from further investigation.

Lastly, the organising group recognises the potential to commercialise expertise in this area for overseas markets, particularly in the Asia-Pacific. While there have been a number of initiatives in the Asia-Pacific region over the last five years, it is recognised that there is a significant development lag that provides the opportunity for STCRC to commercialise in the areas of information provision, universal design, access auditing, total product experience and consulting to NTOs.

The organising group has already undertaken scoping projects in Hong Kong, Vietnam, Thailand, Taiwan, Fiji, Bali and Cambodia. The organising group recognises that the key concepts of access, disability and accessible tourism require an understanding of the different cultural paradigms between eastern, western, developed and developing nations.

# CHALLENGES AND OPPORTUNITIES

Table 2: Demand research summary to 2004

Study	Origin	Year	Method	Sample	Impairment
Murray and Sproats	Aust	1990	Postal survey	N=93 pwd and family	Not stated
Darcy	Aust	1998	Postal membership survey Qualitative feedback	N=2,647 100,000 words	Physical
Market and Comm Research	Aust	2002	Focus groups	6 focus groups in all states of Australia	Mobility
Darcy	Aust	2002	Mail questionnaires In-depth interviews	N=760	Mobility requiring attendant
Darcy	Aust	2002	Content analysis of the HREOC legal cases	N=150	All
Forward	Aust	2004	Phone survey	N=10 N=33	Vision Mobility
Darcy	Aust	2004	Secondary data analysis ABS NVS Member surveys	N=12 582 N=8458 N=2647	All
<b>Transport Research</b>					
Faulkner and French	Aust	1982	Game simulation interview and secondary data analysis	N=60 pwd	Physical
Tisato	Aust	1997	Travel cost secondary data	NA	Mobility
Folino	Aust	1998	Focus groups, meetings and submissions	N=100	All
DDA Standards Project	Aust	2000	Open ended survey	N=6,000	All



# ACCESSIBLE Tourism

Table 3: Supply research summary to 2005

Study	Origin	Year	Method	Sample	Impairment
Weiler and Muloin	Aust	1989	Letter requests/mail survey 18 Govt TA, 3 returned, 8 of the 15 replied	8 Australian Govt tourism authorities	Wheelchair
Muloin and Weiler	Aust	1991	Letter requests/mail survey 18 Govt tourism authorities, 2 returned, 14 of the 16 replied	14 Canadian Govt tourism authorities	Wheelchair
Murray and Sproats	Aust	1990	Access audit Interviews	23 motels audited 8 resort managers 8 NPWS managers	NA
WADSC	Aust	1997	Think tanks of TI leaders	4 sectors	General
Daruwalla	Aust	1999	Pre and post testing of disability awareness interventions via 2 scales	175 H&T tertiary students	NA
Darcy	Aust	2000	Interviews	15 managers of accessible accommodation	NA
O'Neill and Ali-Knight	Aust	2000	Interviews Survey	20 industry 73 establishments	NA
Foggin, Darcy and Cameron	Asia Pacific	2003	Literature review, questionnaire, web-based search of NTO	26 member countries	NA
Daruwalla and Darcy	Aust	2005	Intervention through videos, role play and contact with disabled people Pre and post IDP and SADP scales	175 H&T tertiary students 176 employees and trainers from STO	NA



## Report Two: Developing Business Case Studies for Accessible Tourism (2008)

Simon Darcy, Bruce Cameron, Shane Pegg and Tanya Packer

### Background

The realisation of economic, environmental and social benefits in the tourism industry demands an understanding of the broader issues of visitor accessibility. It is paramount the tourism industry appreciates all the elements that contribute towards positive visitor experiences and the nexus with capacity building in the industry. Visitor accessibility encompasses all tourism markets including seniors and people with disabilities who have been defined through accessible tourism (Darcy 2006). There are significant structural barriers that may constrain the experiences of this group in tourism. The research contends that one key constraint is the lack of information available to the broader industry which profiles successful enterprises operating in accessible tourism.

*The lack of industry awareness of organisational benefits that flow from accessible product supply in tourism remain undefined. Many businesses meet their legislative requirements, for example, accessible parking and accessible toilets, but do not consider the issue further. Industry has not connected a high standard of access provision with other elements of corporate performance.*

One reason for this is the lack of case studies highlighting the business success of enterprises which are committed to servicing the accessible tourism industry. The only case study in the Australian context is *The Tourism Challenge: Access for All* (Office of National Tourism 1998). This research sought to identify the profile of enterprises regarded by the research team as providing a high quality accessible tourism product or experience. The study employed the triple bottom line concept of measuring business performance to assist in developing the case studies.

*The philosophical stance of the research team is that there has been little attention paid to understanding the elements which comprise a successful accessible tourism enterprise. A great deal of research around sustainability has ignored social arguments, where ageing and disability are global demographic changes that the tourism industry needs to engage with for it to be both economically efficient and socially and environmentally sustainable. Greater awareness will enable industry to better plan for accessible tourism product development and delivery. It is noted that to this point in time, no STCRC-funded projects have considered these issues as part of a fundamental shift in mind-set. This project offers the opportunity to demonstrate a broader understanding of accessible tourism in terms of economic, social and environmental considerations.*

It should be stated that this project is considered to be a scoping project where the information gathered points the way towards further research offering an expanded approach in business cases. The research team documented the business case for accessible tourism through the development of business based case studies of successful operators offering accommodation, tourism experiences and hospitality by identifying the individual business performance on the triple bottom line (financial, social and environmental).

### Objectives of Study

The aim of the research was to bring the insights and interdisciplinary expertise of the research team to develop best business practice case studies in accessible tourism. This project builds upon the STCRC-funded workshop held on 12 July 2005: *Sydney—Setting a Research Agenda for Accessible Tourism*. Key findings are contained in the subsequent report (Darcy 2006). This research project seeks to address the third prioritised outcome from that workshop: *Industry Engagement—The Business Case for Accessible Tourism*, by documenting the business case for accessible tourism through the development of business based case studies of successful operators.

*The objectives of the research project were to:*

- document the business case for accessible tourism through the development of business based case studies of successful operators
- identify examples of 'best practice' in delivery of accessible tourism product
- identify the key indicators or key result areas to measure the business case, social case and environmental case
- develop and refine a Business Case Instrument to reflect the key result areas and facilitate data collection
- collect information and document each business case, social case and environmental case
- use innovative methods of information presentation to present the above measured information
- develop an innovative format to present the case studies to industry to demonstrate the benefits to the triple bottom line for the provision of inclusive tourism practices.

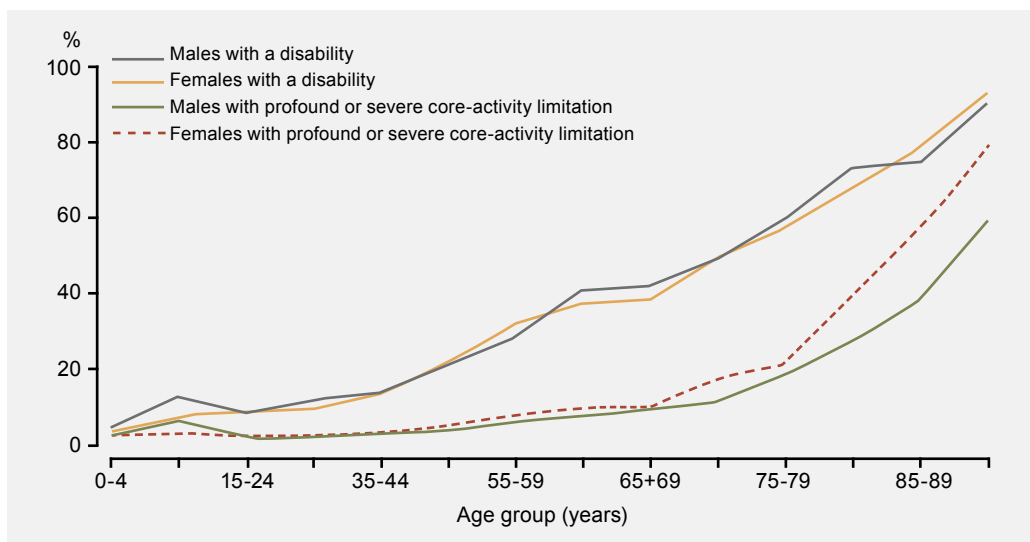
# ACCESSIBLE Tourism

## Methodology

Due to the relative lack of attention to accessible tourism business case studies within academic and business research, an explorative qualitative research approach is appropriate. Such an approach was employed using selected cases as the objects for study. The methodology was informed by case study approaches and the triple bottom line scorecard. The research design sought to expand the thinking in general business to consider performance more broadly than financial measures. The evaluation of environmental and social benefits has become part of core corporate practice. The preliminary work utilised a Delphi group to identify a range of high standard of accessible product, across states, segments and reflecting a range of ownership structures. The next stage involved developing a Business Case Instrument to 'capture' triple bottom line metrics. The 'metrics' work collected through reviews of management information systems, in-depth interviews with key informants and review of financial and performance information.

Collectively, the information gathered in the context of each case served as its database. The information sources contained notes from the case study interviews, copies of documents and archival material sourced for the study. Tabular material was generated from these sources. A matrix of categories or themes, placing the evidence collected within them and developing, as appropriate, flowcharts, tables and frequency tables, facilitated a process of analysis and interpretation involving continual reflection about the data.

Figure 1: Disability Rates in Australia by Age and Sex



Source: ABS (2004, p. 6)

The research employed a three stage process.

### Stage one: delphi

This stage employed the experience of the research team and a selected Delphi group to determine critical components of the research:

- possible best-practice examples of accessible tourism for inclusion
- key measures to determine successful examples of the accessible tourism best-practice
- develop the Business Case Instrument (BCI) reflecting the key measures.

The research involved a series of iterations involving an e-mail survey of the Delphi group, individual interviews with the group and finally a focus group meeting (in person and via teleconference) gaining final agreement on the two components to be operationalised in this research.

### Stage two: fieldwork

This stage operationalised stage one with the case study approach. It involved approaching the identified participants with the BCI by email which followed with phone calls and in person visits to the identified businesses. This stage was highly iterative involving a series of continual reflections about the data which involved completing the BCI and revisiting e-mails, phone calls and in some cases in person visits.

# CHALLENGES AND OPPORTUNITIES

## Stage three: data analysis and report writing

This stage applied a common base-line methodology to each business, on top of which the research team explored different approaches and methods. The research identified key measures which reflect best business practice in accessible tourism.

As Table 4 shows, the research identified businesses delivering excellence in accessible tourism across a range of parameters.

Table 4: Business Case Study Parameters

Tourism Sub-group	Ownership Structure	Location/Scope
Transport	Public	National
Accommodation	Local Government	Queensland
Destination Experiences	Private	New South Wales
Tour Operators		Victoria
Hospitality		Western Australia

## Key Findings

The research developed a BCI comprising a series of key indicators or key result areas to reflect good business practice meeting the components of the triple bottom line concept, reflecting a call for the tourism industry to adopt universal design principles as a foundation to achieving greater social sustainability as part of the triple bottom line:

- Financial Report Card
- Environmental Report Card
- Social Report Card

The purpose of this technical report is to document and present the Business Case Instrument. The business case studies are to be used for refereed journal articles and conference presentations.

## Recommendations

The use of business cases for accessible tourism is an underdeveloped area in Australia, with one instance of identifying business cases in accessible tourism available: 'The Tourism Challenge: Access for All' (Office of National Tourism 1998) and this has only provided an overview of the businesses. There is a perception that accessible tourism is 'low yield' due to a stereotype that people with disabilities have significantly less disposable income and are more likely to be dependent on a government pension. This has often been raised as a deterrent to investment in accessible tourism. Unfortunately, this view has also affected government tourism marketing authorities, who on the whole have not responded to their responsibilities of providing equitable access to tourism experiences.

Until examples of good business practice are identified and promoted, the industry cannot be guided with any certainty as to the benefits in providing expanded accessible tourism products. This research project attempted to add additional information about business cases offering a good accessible product. Key measures or indicators were to be developed and operationalised to assist the understanding of what enablers are required for accessible tourism businesses. The insights provided by the analysis will be used to promote the benefits of accessible tourism product provision to the tourism industry. The industry will be better informed and better able to plan for delivery of accessible tourism product.

While the number of businesses included in this research is small, this project is a scoping study designed to point the way to additional research which would expand upon the key measures identified as important and informative. Future research directions are bullet pointed, following the conclusion. The Delphi group identified the participant businesses as offering a high degree of accessible tourism experience. The sample was developed across tourism sectors, ownership structures and geographic location. However, the transport sector, which is a major component in accessible tourism, did not contribute a component to the research.

# ACCESSIBLE Tourism

*The research found that those businesses exhibited several key and common features:*

- The business is mature, operating in excess of ten years.
- The businesses go beyond minimum or legislated requirements in respect to access and safety.
- The businesses all demonstrated a high degree of environmental awareness and activity, which resulted in outcomes like substantial recycling and reclamation work.
- Most businesses had developed strong relationships with community and regional groups which often benefited the local community as a whole.
- Most were surprised that other market segments were attracted to their business due to the access provision.
- All had a national catchment and most benefited from an international demand.
- All benefited substantially in activity and occupancy from the provision of an accessible tourism experience but were reluctant to provide financial data to support the case.

On closer analysis of each of the accessible tourism case studies presented in this report, the simple truth behind the push for change (regardless of the philosophical alignment or theory involved) is that in each case, the operator has recognised that they needed to cope with a new and dynamic business environment which necessitated them to rethink how and why they do business (Department for Works and Pensions 2008). As such, the case studies serve to highlight innovation—such initiatives pivot intrinsically on motivated individuals, within a supportive culture, informed by a broad sense of the future (Tourism Victoria 2008). Importantly however the case studies also serve to bring due attention to those operations that have recognised the philosophical importance of accessible tourism, and its value to them as a business entity. As such, the case studies serve to emphasise for all the fact that sustainability (in its broadest sense) and prudent governance must go hand-in-hand with other more commonly accepted business practices if a tourism operator, be they large or small, is to succeed (and prosper) in today's highly competitive business environment.

## Future Research

*Future research opportunities are numbered below:*

1. Transport sector in accessible tourism. This would include research into the sector as well as research into the company that went into liquidation during the research time frame.
2. Developing an expanded and detailed financial analysis of those businesses which were prepared to provide financial data. The recognition of the importance of further research in this area is also recognition of the limited success that this project had with obtaining detailed financial information.
3. Businesses providing a quality accessible experience are drawing their business from an international market. Research offering a detailed analysis/breakdown.
4. More defined sectorial analysis ensuring the benefits to each sector (Transport, Accommodation, Experience/Activities).
5. Financial information remains a key component of the research and some method of satisfying participants their commercially sensitive base financial data must be found to enable future research.

## Key Measures

*The measures identified as signifiers in this research are found to be:*

- business operating period
- degree to which the business provides an inclusive access experience
- businesses demonstrating a high degree of environmental awareness, which may also be a consequence of a broader understanding of universal design principles
- the business did not seek to meet the 'minimum requirements' in respect to safety of guests/visitors and staff
- developed strong collaborative relationships with other businesses and community groups who have similar philosophies
- targeting a broader national and international market.

*Globally there are over 650 million people with disabilities (Fujiura & Rutkowskikmitta 2001; Mercer & MacDonald 2007), equating to about 10% of humanity. Approximately 20% of the Australian population, or 4 million people, identify as having a disability. Of these people 520,000 have a mobility disability, 480,000 are blind or vision impaired, and 1 million are deaf or hearing impaired (ABS 2003). The numbers of people with disabilities are set to increase due to the ageing of the population. WHO (2007) state that by 2020 there will be 1.2 billion people over 60 years of age. The 'greying' of the population has been well documented by the ABS, identified by Tourism Research Australia as a market opportunity (Tourism Australia 2005b) and is a phenomenon that affects all of our major inbound markets. These trends have considerable implications for global tourism (Dwyer 2005).*

## Report Three: Tourist Experiences of Individuals with Vision Impairment (2008)

Tanya L Packer, Jennie Small and Simon Darcy

### Objectives of Study

This research sought to develop understanding of the experience of travelling with vision impairment. It used an inductive approach with theory developed from the data. The paucity of research on travelling with vision impairment necessitated this first step in a process designed to gain a fuller understanding of the existing and potential tourism market. Without an understanding of the tourist experience, determination and creation of a viable market are not possible.

### Methodology

The research approach was informed by a social constructionist approach to disability which views disability as a product of social relationships. This approach firmly places disability on the social, economic and political agendas rather than locating disability as the fault of an individual's impairment. Using an inductive, qualitative and iterative approach that drew on grounded (Strauss & Corbin 1994) and phenomenological (Holstein & Gubrium 1994) traditions, the study explored the tourist experiences of people with vision impairment through in-depth interviews and focus groups. All were transcribed verbatim and content analysis was undertaken.

Participants were selected on the basis of interest in the research topic and self-identification of vision impairment. Interviews and focus groups were audio-taped (with permission) and transcribed verbatim. The transcripts were analysed by the investigators who comprised a multi-disciplinary group. Emerging themes from the content analysis were then compared, elaborated and validated through continuous dialogue among the investigators. Research participants were recruited and focus groups held until saturation was reached. Ethical approval was obtained from the human research ethics committees at the University of Technology, Sydney and Curtin University of Technology, Perth.

Twenty-eight people (21 in Western Australia and seven in New South Wales) participated in the focus groups and 12 (six in each of Western Australia and New South Wales) participated in individual interviews. Most were female and had acquired their vision impairment after birth. They ranged in age from twenties to nineties with most of those in the focus groups in the older age categories. Five travelled with a Guide Dog.

From the qualitative findings, the key industry messages emerged and were used to develop the industry fact sheets. These were reviewed by key industry partners, in particular the Association for the Blind of Western Australia (ABWS) and Vision Australia.

### Key Findings

It is important to recognise that people with vision impairment have similar tourist experiences to their sighted peers—similar travel motivation, pleasures, benefits, anxieties. They stay in the same types of accommodation, travel the same transport, go to similar attractions and do similar activities. Just like sighted people, people with vision impairment talk of 'sightseeing' and of 'seeing' places. However, at the same time, their tourist experiences are very different.

The first theme which accentuates this difference was titled 'managing the tourist experience'. It was an overarching theme that highlighted the complexity of travelling with vision impairment. The participants' experiences were summed up by one participant who observed that '[to us] little things are big things'.

A second theme focused on issues of 'inclusion or exclusion' with stories and experiences coalescing into four sub themes that resulted either in the inclusion or exclusion from the tourist experience:

- accessing information
- navigating the physical environment—safety
- knowledge and attitudes of others
- travelling with a Guide Dog.

Finally, their recommendations for stakeholders formed the third theme.

# ACCESSIBLE Tourism

## Recommendations

Theme three was composed of the recommendations for stakeholders. These are reproduced here as critical to the development of the accessible tourism market.

### For the tourism industry

The key recommendations for the tourism industry were to:

- provide education for members to ensure provision of safe and dignified service for people with vision impairment
- provide marketing and destination information in auditory and tactile formats
- improve navigation services
- provide specialised travel agent/websites for people with vision impairment.

### For agencies advocating for people with vision impairment

Participants recommended that agencies should:

- educate the tourism industry about vision impairment and the experiences of tourists with vision impairment
- lobby the tourism industry regarding safety issues, such as evacuating a person with vision impairment from a plane or a hotel room in the event of an emergency
- develop specialist tourism planning information for people with vision impairment.

### For the community

Recommendations for the community focused on better education about vision impairment and facilitation of navigation in public spaces.

### For governments

Enforcement of legislation was seen as the role of governments. Introduction of legislation mandating equal access (free entrance to companions, auditory and tactile safety features etc.) was suggested as ways for governments to improve equity of access.

### For researchers

Participants appreciated their involvement in the research project and requested that researchers continue to focus on ways to improve access and equity to the overall tourist experience, with the aim of identifying, articulating and promoting best practice internationally.



# CHALLENGES AND OPPORTUNITIES

## Report Four: Visitor Accessibility in Urban Centres (2008)

Simon Darcy, Bruce Cameron, Larry Dwyer, Tracy Taylor, Emma Wong and Alana Thomason

### Objectives of Study

Understanding the broader issues of visitor accessibility is paramount to positive visitor experiences and building capacity in the tourism industry for full economic and social benefit realisation. However, the challenges associated with ensuring that people can freely move within and between urban environments must be fully understood before access can be effectively planned and managed. Visitor accessibility encompasses all tourism markets including seniors and people with disabilities who have been defined through accessible tourism.

There are significant structural barriers that may constrain the experiences of this group in urban centres. With this in mind, the aim of the research project is to evaluate and assess urban tourism environments, including urban national parks, in the context of universal design principles. This research project incorporates all sectors of the tourism industry present within designated precincts that facilitate the essence of experience.

*Key objectives of the research project were to:*

- provide a framework for assessing access related considerations for all visitors to urban environments
- utilise the framework to audit key urban attractions
- evaluate existing way-finding systems to consider whether they create barriers to movement in and around urban environments
- estimate the economic contribution of the accessible tourism market
- make recommendations on accessible tourism to key stakeholders in urban centres.

### Methodology

*Within this research project there are two components that use different methodological approaches. They are:*

1. Economic contribution; and
2. Accessible destination experiences.

### Economic contribution

The previous market estimates on accessible tourism in Australia was last undertaken in 1998 (Darcy). The main method used for economic modelling of accessible tourism in Australia and overseas has been gross demand estimation with the addition of applying specifically collected travel patterns about people with disabilities. These methods are rudimentary, not based on expenditure patterns of tourists and are not regarded as valid or reliable by economists (Dwyer et al. 2004). This research project offered the opportunity to draw on the expertise of tourism economist Professor Larry Dwyer of the STCRC Centre for Economics and Policy Analysis to utilise the Tourism Satellite Accounts (Dwyer et al. 2007). A number of steps and associated data sources required to accomplish the task are outlined in Table 5.

*Table 5: Steps and Data Sources for Economic Modelling*

Requirement	Source
1. Data must be available on Australians with disabilities	Disability and Ageing and Carers survey (ABS 2004)
2. Data must be available on the Australian population estimates	Australian Demographic Statistics (ABS 2007)
3. Data must be available on the overall contribution of tourism	Contribution to GDP (Tourism Research Australia 2006), based on TSA
4. Data must be available on the expenditure associated with tourists with disabilities both in aggregate and in respect of the types of goods and services that they purchase (i.e. their expenditure patterns)	National Visitor Survey (Bureau of Tourism Research 2003)
5. The expenditure data must be converted into estimated contribution of key economic variables such as Gross Value Added (GVA), Gross Domestic Product (GDP) and employment	Carried out through TSA

# ACCESSIBLE Tourism

- **Step 1** utilised the most recent ABS (2004) Disability and Ageing and Carers survey.
- **Step 2** updated the ABS (2004) statistics to the ABS (2007) Australian population estimates.
- **Step 3** drew on the Tourism Satellite Accounts to provide the baseline contribution of tourism to the economy.
- **Step 4** utilised the National Visitor Survey, which included a disability module in 1998 and 2003, to undertake expenditure analysis in aggregate and on the goods and services that they purchased. Tourism Research Australia provided the data in SPSS format.
- **Step 5** used the data from Steps 1 to 4, in association with the Australian Tourism Satellite Account, to convert the expenditure data into estimated contribution in respect of key economic variables such as Gross Value Added (GVA), Gross Domestic Product (GDP) and employment.

## Research design for accessible destination experiences

This part of the research broadly adopted an action research process (Zuber-Skerritt 1996). Action research is particularly appropriate in working with stakeholder groups to produce shared knowledge. Further, action research has been identified as an empowering practice to use with individuals with disabilities or advocacy groups of people with disabilities (Clear & Horsfall 1997; Duckett & Fryer 1998; Goodley & Lawthom 2005; Kitchin 2000b; Taylor 1999). Action research has been successfully used in the development of arts and recreation programs but its use has been limited in tourism (Lynd 1992; Pedlar, Gilbert & Gove 1994).

It has proved invaluable in the study of accessibility of cities where stakeholder groups need to gain an understanding of each other's perspective and work together to bring about successful interdisciplinary policy outcomes (Kitchin 2001). As such, this research project adopted the Participative Action Research (PAR) methodology. According to Reason (1994), PAR is probably the most widely practiced participative research approach where it emphasises the political aspects of knowledge production.

*The three objectives of the PAR strategy are to:*

- produce knowledge action directly useful to a group of people
- empower people at a deeper level by the process of constructing and using their own knowledge
- value authentic commitment and processes of genuine collaboration.

PAR research, therefore, emphasises working with groups as co-researchers (Reason 1994). Adopting the PAR methodology permits the use of diverse methods, and the preferred way to communicate the practice of PAR is through the description of actual cases.

*From a disability perspective, to create enabling accessible destination experiences the research is guided by the principles of:*

- independence
- equity and
- dignity

These accessible destination experiences need to be based on the Australian systems of building codes, planning processes and the Disability Discrimination Act. In practice, this is operationalised through access auditing and appropriate checklists/templates (HREOC 2007b; Villamanta Publishing 1997). However, the accessible destination experiences need to go beyond accessibility to understand that the focus must be on those experiences that are regarded as part of the destination's 'sense of place'. To develop accessible destination experiences based on the above principles requires an understanding of universal design and destination management processes placed in context with the experience economy. For this to be successfully developed and implemented, the destination must have knowledge management responses that allow individuals to make informed decisions for their access needs. The research design breaks new ground by going beyond checklists and access audits to focus on the accessible destination experiences.

*The research is founded on a geographic hierarchy of accessible tourism. This is based on the following:*

- accessible infrastructure (built environment, transport, attractions, accommodation and way-finding)
- access precincts and destinations areas (connected by a continuous accessible path travel)
- quintessential destination experiences within these areas
- accessible touring routes.

# CHALLENGES AND OPPORTUNITIES

The foundation for accessibility can be found in the Australian Standards for Access and Mobility, which defines the concept of a **continuous accessible path of travel (access way)** as: 'An uninterrupted path of travel to or within a building, providing access to all required facilities'.

NOTE: For non-ambulatory people, this accessible path does not incorporate any step, stairway, turnstile, revolving door, escalator or other impediment which would prevent it from being safely negotiated by people with disabilities (Standards Australia 2001 p. 8).

A great deal of understanding about access stops at the base unit level. This research project sought to move beyond the infrastructure of access and develop a broader destination management approach, where 'access precincts' encompass all the base units in an area, space or place of a pre-defined function. In this case, recreational/tourism precincts that are overlaid with accessibility provisions. As Darcy (2006) suggests, accessible tourism extends this 'continuous pathway' and can be defined as '... a process of enabling people with disabilities and seniors to function independently and with equity and dignity through the delivery of universal tourism products, services and environments' (adapted from OCA 1999) (p.4). The definition is inclusive of mobility, vision, hearing and cognitive dimensions of access. The common domain plays an important role by linking public and private places to create a unifying precinct.

Yet, identifying 'accessibility' within a precinct area does not necessarily contribute towards providing the visitor with a tourism experience. The research on disability and tourism has shown that the tourism experiences of people with disabilities are significantly different to that of the rest of the population. While people with disabilities want to experience the same 'sense of place' (Lew 1989) the tourism industry and destination management responses have not engaged with the group on accessible destination experiences.

The research does not involve the next level of accessible touring routes (Cameron & Tourism Australia 2008), which were developed in conjunction with the 40 drive touring routes (Tourism Australia 2007) that seek to provide a three to four day itinerary covering 200 to 400 kilometres of travel through regional and/or metropolitan areas. Assessments for the accessible touring route drew together the required access information to allow an individual to function independently and with equity and dignity along the route. For the purposes of this study, specific accessible touring route information was not compiled but the proposed access precincts have been developed in a compatible way to Cameron's (2008) approach.



# ACCESSIBLE Tourism

**The research was designed in four phases outlined below.**

## *Phase 1: Review*

- Drew on past research that provides an understanding of the requirements for access within tourism destinations to document the needs of this population (see Darcy 2006).
- Supplementary literature review was undertaken to fully document the tourism experiences of seniors and compare and contrast these to the disability literature.
- Review of access related material to identify current practices in the communication of accessibility information to people with disabilities and seniors. The extent to which these practices are informed by tourism opportunities and experiences for a designated precinct and associated base units (various tourism sectors) were examined. The data included organisational management information documents, external studies, online material, internal reports and archival records.

## *Phase 2: Stakeholder collaboration*

- 1 Identification of Sydney quintessential experiences in the precincts.
- 2 Evaluation of the accessibility of these precincts.
- 3 Determined by the IRG the precinct study area was the main Sydney tourism precinct that incorporates:
  - the transport hub from Central to Circular Quay
  - East and West Circular Quay
  - The Rocks
  - Royal Botanic Gardens
  - Sydney Harbour environs and Sydney Harbour National Park
  - Manly Ferry, Manly boardwalk and North Head Lookout.

The above precinct is deemed a 'quintessential Sydney' accessible day trip experience that would be open to all Sydneysiders (disabilities and seniors) to test as well as people from outside of Sydney who are undertaking overnight stays. For people to make decisions about whether a destination area is appropriate for their access needs there are a number of 'enablers' that need to be present. 'Enablers' facilitate accessible tourism experiences and are those key elements that afford the prospective traveller confidence to make an informed decision to travel. Information about the enablers needs to be provided as a foundation to travel planning.

The key enablers in a destination area include:

- accessible transport to the tourism destination region
- accessible transport at the tourism destination region
- accessible parking
- accessible accommodation
- accessible toilets
- accessible way-finding information.

Any destination experience would need to provide a foundation of information with respect to the enablers to assist people in making an informed decision. This information for the precinct area is critical for these decision-making processes. For the purposes of this research, information on accessible transport within the precinct, parking, toilets and way-finding information have been examined. Accessible transport to the destination region and accessible accommodation has been excluded as outside of the scope of this study. Accessible accommodation was the focus of another research project.

## *Phase 3: Determine quintessential accessible destination experiences*

Assessment and collation of accessible experiences:

- format and presentation of the experiences based on a destination management approach consistent with the promotion and marketing of accessible tourism
- direction taken from a successful approach used as part of an overseas guide, Australian wide guides and as part of a citywide approach to developing access information in Melbourne for the 2006 Commonwealth Games (Tourism Australia 2006; Cameron 2000; City of Melbourne 2006; Fodor's 1999)
- validation of the experiences through the stakeholder group
- mock up of a web portal concept to present to IRG and stakeholders.

# CHALLENGES AND OPPORTUNITIES

## *Phase 4: Web portal*

- determined best practice web accessibility based on W3C and WAI protocols
- constructed and tested website
- Presentation to stakeholders
- launch of live site
- provision for feedback on the accessible destination experiences and the usefulness of the experience to consumers.

No previous research has evaluated information provision and this research project provides an opportunity to assess people's satisfaction with this approach to information provision.

## **Data collection instruments**

Accessibility is based on four broad dimensions of access—mobility, vision, hearing and cognitive disabilities. For the purposes of the study, the population is people who have access needs. The research project builds on accessible destination experiences that are already offered by organisations for recreation, the arts or tourism. To this point, a great deal of accessible tourism research has focused on people with mobility needs. However, there has been recent research into the tourism experiences of people with vision impairments (Packer, Small & Darcy 2006), people who are deaf or hearing impaired (HREOC & HMAA 2005) and a great deal can be learnt from the work of the recreation sector with people with cognitive disabilities. The research project drew together existing sources of information about access, best-practice examples of formulating products, and evidence about how to meet the accessibility market's needs, and applied this to the specified precinct area. The data collection methods used includes:

### *Access audit/management information systems*

Audit using accredited access auditors through the ACAA ([www.access.asn.au](http://www.access.asn.au)) and directed by a combination of the generic and specific contemporary best practice (Cameron 2000; City of Melbourne 2006; Villamanta Publishing 1997). Disability Action Plans and relevant official documents of individual organisations were reviewed so as to not replicate previous work and provide a realistic time frame and consideration of the budget of the project.

### *Semi-structured interviews with key precinct stakeholders*

The interviews were designed to elicit the interviewee's ideas and opinions regarding issues, innovations, constraints, enablers and possible solutions to accessibility in their precincts on organ or as Asians and/or attractions. This provided in-depth knowledge of how key providers manage accessibility within their precincts. This method allowed the researchers to explore unexpected facts or attitudes in relation to accessibility. An ongoing snowballing approach was used where interviews identified new possibilities of accessible infrastructure, enablers and accessible destination experiences.

### *Observation research of precinct areas*

This involves both participant observation and unobtrusive observation of tourist behaviour in public spaces to monitor how people engage with an area, space or place within urban precincts. The latter enabled the researchers to better understand how people with disabilities use their surroundings including products and services. This observation involved the researchers photographing people's behaviour such as the directions they take or are forced to take (as a consequence of constraints) and browsing behaviour. Various locations were randomly visited at different times. Inferences and judgment were made by the researchers regarding the observed behaviour of people following 'continuous pathways'.



Sydney's Museum of Contemporary Art Photo: Emma Wong



Accessible public transport at the Sydney Paralympics 2000 Photo: Fiona Darcy

# ACCESSIBLE Tourism

Table 6: Accessible Destinations

Domain	Organisation/Product	Experience
SHFA	Self Guided Walking Tours	Accessible Rocks Rolling Tour
SHFA	The Rocks Discovery Museum	Interactive history of The Rocks pre-European days to the present
	The Garrison Church	Historic insight into Sydney's first church
	Sydney Opera House	Access 'Lift' backstage tour
	Sydney Theatre Company	Sensory interpreted performances (SOH and Walsh Bay Theatre)
RBG	Cadi Jam Ora First Encounters	Understand Indigenous Australians
RBG	Mrs Macquarie's Chair	Iconic view of the Sydney Opera House and the Harbour Bridge
RBG	Royal Botanic Gardens Guided Tour	Provides insights into the gardens
RBG	NSW Art Gallery	After hours Auslan tours (Deaf)
CoS	Museum of Contemporary Art	Art gallery and restaurant
	Dendy Cinema Opera Quays	Accessible Cinema with hearing augmentation and foreign language subtitles;
CoS	Customs House (City of Sydney)	Public exhibition, meeting & reading space
Harbour	Captain Cook Cruises	Guided Sydney Harbour cruise with lunch, dinner or coffee
Harbour	True Blue	Sydney Whale Watching experience
Harbour	Sydney Ferries	Manly Ferry Trip (All)
NPWS	DECC NPWS	North Head Lookout Scenic Sydney Harbour
NPWS	DECC NPWS	Fort Denison (Pinchgut)
	Sydney Light Rail and the Fishmarkets	Seafood Sydney!

## Online survey evaluation

Evaluation of the precinct information and the accessible destination experiences needs to be built into the Web portal. This would be achieved through an optional link to an online survey powered by Survey Monkey. This online survey sought respondents' views about the usefulness of the accessibility information in their planning for, and undertaking, recreational and tourism activities in urban precincts. This evaluation served as an ongoing research opportunity for precinct stakeholders enabling them to improve and update the quality of information they provide to the accessible tourism market. It can only be included once the information is made live to the general public.

A combination of the disability advocacy organisations, Council of the Ageing and the online discussion list 'Ozadvocacy' would be used as a sampling frame.



Signage and views of The Sydney Harbour Bridge & the Opera House  
Photo: Fiona Darcy



West Head Lookout, Sydney Photo: Fiona Darcy

# CHALLENGES AND OPPORTUNITIES

## Data analysis

As stated, this research project developed an access overlay for precinct operations and the marketing of the precinct experience to people with disabilities. This involved taking complex technical information based on the Building Codes of Australia (1996) and the Australian Standards (Standards Australia 1992, 1993, 2001) and transforming this information into spatial and experiential dimensions. A number of contemporary approaches (Tourism Australia, 2006; Cameron, 2000; City of Melbourne 2006; Fodor's 1999) were reviewed in conjunction with the IRG.

The foundation of the base level of the hierarchy is encompassed by a broad understanding of the sectors of the tourism industry with direction taken from Leiper (2003) and Weaver & Oppermann (2000) as:

- marketing specialist/travel agencies
- carrier sector/transportation
- accommodation
- hospitality
- attractions
- tour operator
- coordinating
- miscellaneous/merchandisers.

Each infrastructure unit, access precinct and accessible tourism route incorporates audited examples from each sector that formed the basis of developing a 'sense of place' for the particular context. This information was viewed through appropriate theoretical frameworks such as universal design; social model of disability; and market position (profitability/yield). Upon completion, an appropriate format was determined to present the information as an 'accessible tourism product'. The precise format was determined during the research process.

## Key Findings

The key findings can be split into two major areas:

- Economic Contribution; and
- Accessible Destination Experiences

### Economic contribution

In Australia in 2003-04, it is estimated those tourists with a disability:

- Spent between \$8034.68 million and \$11980.272 million;
- Contributed between \$ 3075.5243 million and \$4580.219 million to Tourism Gross Value Added (12.27% - 15.60 % of total tourism GVA);
- Contributed between \$ 3885.168 million and \$5787.435 million to Tourism Gross Domestic Product (11.02% - 16.41% of total); and sustained between 51,820 and 77,495 direct jobs in the tourism industry (11.6%- 17.3% of direct tourism employment).

### Accessible destination experiences

The methodology identified 18 accessible destination experiences (outlined in Table 6).

In reviewing the experiences, it became apparent that most of the experiences are only appropriate for one dimension of access, with some being appropriate for two and a number of experiences being appropriate for all dimensions of access.

All experiences included are those that domestic and international tourists and day-trippers would seek out during a visit to Sydney. They are accessible destination experiences that are quintessentially Sydney. Most visitors would seek information about those experiences either before they travel to Sydney or before they attempt to visit the attraction. The Internet is identified as a growing source of information and the vast majority of Sydney's experiences benefit from Internet-based accessing of their information. Information availability, detail and accuracy can be a significant constraint to travel. It is the way in which information is conveyed, which can present a constraint. Website accessibility is critical to inclusive organisational practice.

# ACCESSIBLE Tourism

For example, font sizes, font colours, contrast, page backgrounds and page design can all present a barrier to people with vision impairment. Further, even if the content and the accessibility are sound, locating the access information can be a barrier particularly where there are no collaborative outlets for accessible destination experiences.

The research team then developed a mock Web portal as a concept to present to the IRG and stakeholders. From the significant support even at this meeting, Tourism New South Wales decided to move from the conceptual to developing a test Web portal. After further discussions with the IRG and the stakeholders, Tourism New South Wales has decided to brand the Web portal Sydney for All. It is envisaged that a test website will be launched in March 2008 complete with a built in feedback loop to test consumer perspectives.

## Recommendations

This scoping project has broken new ground in accessible tourism through accessible destination experience development. Where previous work on accessibility has focused on individual enablers - transport, accommodation, attractions, way-finding and industry attitudes to disability—this research project has gone to the essence of why people travel to destinations in the first place: to experience the 'sense of place'. Whether people have access requirements or not they should be able to have the same 'sense of place' as anyone else travelling to an area. Yet, no research has focused on this aspect of accessible tourism.

The research offers five major opportunities for benefits to stakeholders and travellers with disabilities. They include:

- The estimated economic contribution of the market segment based on the Tourism Satellite Account provides a sound understanding of the contribution of the accessible tourism market to the economy.
- The review of information and the destination experience provision helps industry stakeholders understand the need of travellers with a disability, and suggests how such provision can be improved.
- The accessible destination experiences and the Web portal are the first of its kind. They offer quality access information about accessible destination experiences to anyone who is planning to visit Sydney.
- The Web portal can also serve as a collaborative marketing channel for industry stakeholders.
- A consolidated access map will provide tourists with disabilities with a single way-finding instrument in the precinct area.

## Project potential and future extension project

The research team has been working with Tourism Australia and each of the state tourism organisation's representatives on the accessible tourism task force to develop an Australia wide approach to accessible tourism information provision across all facets of tourism, including urban tourism precincts. This research project has contributed significantly to an understanding of the requirements for developing accessible destination experiences in urban environments. Australia is well positioned to be at the forefront of developing accessible tourism market opportunities through not only this research project but also a series of other research projects and initiatives. These are:

- research agenda accessible tourism
- the economic contribution of accessible tourism outlined in this report
- information needs for accessible tourism accommodation
- business case studies on accessible tourism
- understanding the experiences of tourists with vision impairment
- the Western Australian You're Welcome Program
- the Accessible Alpine Tourism Project.

The accessible tourism market has been recognised in Europe, by UNESCAP and the United States as having significant potential. For example, the European Commission's research on the One-Stop Shop for Accessible Tourism Europe (OSSATE), Europe for All that was the outcome of the OSSATE research and the European Network for Accessible Tourism (ENAT) provide an insight to developing a national approach to accessible tourism in Australia.

Similarly, the ASEAN countries with the facilitation of UNESCAP had held a series of initiatives to develop a cooperative approach to accessible tourism since 2000. It is suggested that there would be synergies to collaborate with Tourism New Zealand on developing an Australasian approach to accessible tourism given that both countries are long haul destinations. Further, both countries use an identical set of standards for access and mobility, which are the basis for understanding the accessibility of the built environment.

# CHALLENGES AND OPPORTUNITIES

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