

# SETTING A RESEARCH AGENDA FOR ACCESSIBLE TOURISM



*Simon Darcy*

SUSTAINABLE  
TOURISM



CRC

## TECHNICAL REPORTS

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## Abstract

On 12 July 2005, a Sustainable Tourism Cooperative Research Centre Research workshop was held at the New South Wales 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, and was attended by 45 invited participants. While broadly looking 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*. The workshop looked at the state of the field from the perspectives of supply, demand and regulation/coordination research and accessible tourism industry practice. The workshop invoked a participative action research process where three information sessions were held during the day (state of research, current Australian practice and developing a research agenda) followed by small group breakout sessions where each small group (four in all) was selected by the workshop organisers based on having a mix of demand, supply and regulation/coordination stakeholders. Each small group was led by a facilitator with a note-taker external to the group on hand to assist in reporting and documenting the small group discussions. The final session sought to bring together the work of the day by, first, generating a list of research activities and second, providing time and space for individuals to prioritise the list through designation of their three main research priorities. The first outcome of the process is this report, which outlines the background to disability and tourism in both the Australian and overseas settings, and details the process used for the workshop, which has led, in turn, to the prioritised research agenda that forms an integral part of this report. It is expected that, from this collective effort, a more focused approach to research with respect to the issue of accessible tourism in Australia will be developed.

## Acknowledgements

The Sustainable Tourism Cooperative Research Centre, an Australian Government Initiative, funded this research.

The workshop was organised by Dr Simon Darcy, Mr Bruce Cameron, Professor Tanya Packer and Dr Shane Pegg. The organising group would like to acknowledge the work of the following people in the success of the workshop.

First and foremost, to all the participants who attended the workshop and so generously gave of their time and expertise.

To the following people for their addresses to the workshop

- Lester Bostock (Welcome to Country)
- Bill Healey (Australian Hotels Association Director National Affairs Opening Address)
- Michael Small (Human Rights and Equal Opportunity Commission Status Report)
- Hon Tim Fisher (Chairman Tourism Australia Closing Address)

For the following people for their assistance before, during and after the workshop

- |                        |                  |
|------------------------|------------------|
| • John Allen           | • Sacha Reid     |
| • Megan Craig          | • May Carter     |
| • Stephen Schweinsberg | • Neil Robinson  |
| • Carmel Foley         | • Elisabeth Lord |

The organisers staged the workshop in conjunction with the Third International Event Management Conference, which provided the secretariat and the networks to gain access to the Trade & Investment Centre of the New South Wales Department of State and Regional Development. Further, the research grant also facilitated the opportunity to incorporate into the workshop a series of inclusive practices. Such practices included the provision of a hearing augmentation system, the delivery of materials in a range of alternative formats suited to the dimensions of disability present, limited travel expenses, personal assistant aide, and free registration for people from economically disadvantaged backgrounds or for people from the not-for-profit sector.

Lastly, I would like to thank all those people who provided feedback to the draft versions of the report as they have contributed to strengthening the final document substantially. In particular, I would like to thank John Evernden, Stewart MacLennan, Janet Elms-Smith, Suzanne Bain-Donohue, Scott Rains, Neil Robinson, Tanya Packer, Shane Pegg, and Bruce Cameron. Tanya Packer and May Carter contributed the major proportion of the section in *Chapter 2 - Lessons from Other Market Segments*.

## Bruce Cameron

Bruce has a spinal injury following a swimming accident in 1976 and uses a manual wheelchair for his mobility. Following an extended trip to the United Kingdom and Europe in 1992, he left the finance industry to research, write and publish *Easy Access Australia*, Australia's only travel guide for people with a disability. He has

published two editions of the guide (1995 and 2000) as well as *Accessing Melbourne* (2001). He is active in promoting the concept of accessible tourism, having spoken at the Prime Minister's Gold Medal Access Awards (1999), several conferences, and on numerous television and radio programmes. He has written many travel articles for the disability and generic press and contributed to Lonely Planet travel guides to Australia, (1994-2000) and The Rough Guides, published in the United Kingdom (1994-1996). Bruce is passionate about accessible travel, works as a consultant to the travel industry and is an Accredited Member of the Association of Consultants in Access Australia. [www.easyaccessaustralia.com.au](http://www.easyaccessaustralia.com.au)

### **Professor Tanya Packer**

A Canadian occupational therapy scholar, Professor Packer completed her PhD at Queen's University in 1993. After almost 10 years at Queen's University she spent three-and-a-half years at The Hong Kong Polytechnic University before taking up the position of Professor of Occupational Therapy and Director of the OT Research Centre of Western Australia in 2002. She continues to hold an Adjunct Professorship at Queen's University. Her research and teaching career has been undertaken in an international context including the design and testing of mobility devices in India, introduction of the first occupational therapy curriculum in Russia, and family education in China. Professor Packer is the author or co-author of 19 articles in peer reviewed journals and over 20 conference proceedings, two books, and seven training manuals. Since moving to Perth she has founded the Centre for Research into Disability and Society at Curtin University, where she is committed to community and consumer partnerships. Tanya has continued her interest in accessible tourism and has made it a core component of the Centre, currently supervising a number of postgraduate student projects in this area.

### **Dr Shane Pegg**

Shane Pegg is a Senior Lecturer with the School of Tourism and Leisure Management in the Faculty of Business, Economics and Law at The University of Queensland. Shane is a past recipient of the Future Scholars Award from the Academy of Leisure Sciences, and a current member of the World Leisure Commission on Access and Inclusion. He has been involved in a wide array of research projects related to service evaluation, therapeutic recreation, tourism access and inclusion issues, and the tourism and leisure behaviour of people with disabilities. More recently, this has included a study of the links between leisure boredom, alcohol use and levels of self-determination of rural and urban youth in Australia, the risk-taking behaviour of Gold Coast Schoolies Week participants and the effective management of such tourism events, satisfaction with volunteer engagement in community events, as well as an investigation of the key motivators for engagement of young adults in sport tourism.

## SUMMARY

In July 2005, a Sustainable Tourism Cooperative Research Centre Research 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

- Assess and critique the state of accessible tourism in Australia;
- Identify current research gaps and opportunities for necessary collaborative research; and
- Establish a prioritised research agenda for accessible tourism in Australia for the 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:

1. An overview of accessible tourism research in Australia and overseas;
2. A small group breakout session to brainstorm potential areas of research;
3. An overview of disability tourism initiatives in Australia based on a sectoral approach;
4. A small group breakout session to identify potential areas to create a greater understanding of disability by industry sector;
5. A facilitator group session to generate research questions on which to base a research agenda;
6. Identifying three main areas of research by each individual at the workshop;
7. Establishing the prioritised research agenda by tallying the three main areas identified by each individual, crosschecking this against the small group breakout notes and circulating prioritised research agenda to all participants for feedback; and
8. Once feedback was received, further adjustment of the prioritised research agenda was undertaken.

## 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 ADA in shaping a research agenda. There was a commonality between overseas and Australian research, suggesting there is an undersupply, or constraint of opportunities, for people with disabilities wishing to travel. This undersupply 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. 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.



## **Future Action**

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; and
- 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; and
- 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; and
- 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;
- 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; and
- 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; and
- Incorporate disability awareness training/curriculum into industry, TAFE and university courses.

### ***Access to All Sectors of the Tourism Industry***

- Reinforces 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; and

- 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 is the hope of the workshop participants that this report to the STCRC will 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 EOI 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 / 2007.

## Conclusion

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 3 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 recognise 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 the STCRC to commercialise in the areas of information provision, universal design, access auditing, total product experience and consulting to NTOs. The organising group have already undertaken scoping projects in Hong Kong, Vietnam, Thailand, Taiwan, Fiji, Bali and Cambodia. The organising group recognise that the key concepts of access, disability and accessible tourism require an understanding of the different cultural paradigms between eastern and western, and developed and developing nations.

## Chapter 1

# INTRODUCTION

The relationship between people with disabilities and tourism has started to receive increasing academic and government attention over the last decade in Europe, the Americas and the Asia-Pacific (Darcy 2005). Prior to this, disability and tourism were largely an under-researched phenomenon. Since the World Tourism Organization (1991) resolution for *Creating Opportunities for Handicapped People in the Nineties*, a number of other international bodies have called for a coordinated approach to dealing with issues of disability and access in the travel and tourism industries (International Bureau of Social Tourism 1997; Community Based Rehabilitation Development and Training Centre 2000; United Nations Committee on Transport, Communications, Tourism and Infrastructure Development 2000; International Congress on Inclusion by Design 2001; Vignuda 2001; United Nations Economic and Social Commission for Asia and the Pacific 2002; Walsh 2004; U.S. Architectural and Transportation Barriers and Compliance Board (Access Board) 2005). A focus of these approaches is the need to develop a sound research base on which to make decisions about disability and tourism. The requirement for a more sophisticated approach to understanding disability and tourism has been the subject of a series of conferences on the topic. Since 2001, there have been five major conferences on disability and tourism:

- International Accessible Tourism Conference (Taiwan, May 2005) (Asia Pacific Accessible Tourism League & Asia Pacific Disability Forum 2005);
- 1st International Tourism Forum for People with Special Needs in the Middle East (Dubai, May 2005) (Travel Impact Newswire 2005);
- Designing for the 21st Century III – Travel and Hospitality Stream (Rio, Brazil, November 2004) (Walsh 2004);
- Nican Out of the Blue – Valuing the Disability Market in Tourism Conference (Perth, Australia, October 2004) (Packer & Carter 2005b); and
- European Ministerial Conference Tourism for All (Bruges, July 2001) (Liikanen 2001).

In an Australian context, Nican (Packer & Carter 2005b) identified the importance of the role of research in developing accessible tourism in Australia. In particular, one of the recommendations of the conference report was to implore the STCRC to place disability within their tourism research agenda. The STCRC were timely in providing funding for the workshop. The call for a greater understanding of accessible tourism in Australia has been replicated by the Asia-Pacific, Middle East, Americas and European initiatives.

In July 2005, an STCRC Research workshop (the workshop) was held at the NSW Department of State and Regional Development. The workshop involved key academic researchers, industry partners, community organisations and the government authorities interested in disability and tourism and was attended by 45 invited participants from across the country. While broadly looking 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 and the development of *Easy Access Markets* (see glossary for definitions of italicised words). The workshop looked at the state of the field from the perspectives of supply, demand and regulation/coordination research and accessible tourism industry practice.

This report of the workshop presents:

- A brief background of the importance of the area;
- A summary of research that has already been undertaken in Australia and overseas;
- The aims and objectives of the workshop;
- An outline of the major findings;
- A bullet-pointed research agenda based on the major findings; and
- A prioritisation of the research agenda identified by the workshop participants.

The key objectives of the workshop were to:

- Assess and critique the state of accessible tourism in Australia;
- Identify research needs and opportunities; and
- Establish a prioritised research agenda for accessible tourism in Australia for the STCRC.

## **Chapter 2**

# **A BRIEF BACKGROUND TO ACCESSIBLE TOURISM RESEARCH**

This chapter presents a brief background to the area by first outlining the relationship between disability, ageing and tourism. It then reviews the development of easy access markets and accessible tourism, and places these in context with universal design. Thirdly, the chapter overviews disability and built environment legislation that shapes the accessible tourism environment. Last, the chapter presents a summary of accessible tourism research by reviewing the Australian research and presenting a critical appraisal of the field from a supply and demand perspective.

## **Disability, Ageing & Tourism**

The Australian Bureau of Statistics (2004) show that substantial numbers of Australians have disabilities, and the level of disability in the community increased from 15 to 20 percent of the population from 1988 to 2003. There is also a significant relationship between ageing and disability, such that a person is 14 times more likely to have a disability by the time they reach 65 years than they were as a four-year-old (Australian Bureau of Statistics 2004). Australia has an ageing population and the numbers and proportion of older people in Australia is growing dramatically (Commonwealth of Australia 2002). This situation is largely reflected in all western developed nations, with a noticeable difference in Asian countries where ageing is occurring at a faster rate and the higher proportions will be reached earlier (Albrecht, Seelman & Bury 2001) with significant implications for global tourism (Dwyer 2005). Despite the significant numbers of Australians and people from overseas that have disabilities – 600 million worldwide (Fujiura & Rutkowski 2001) – there has been very little Australian research or policy that has sought to systematically engage with disability in a tourism sense (Darcy 2004).

## **Easy Access Markets and Accessible Tourism**

The relationship between disability and ageing is undoubted and presents a challenge for the global tourism industry. This has been recognised in Europe and America, and the tourism industry has been seeking ways to ensure that its infrastructure and products are accessible. Design, planning and any service operation can benefit from the principles of universal design that address the easy access market (EAM) (Tourism New South Wales 2005). Tourism New South Wales identifies EAM as:

Any segment within the tourism market that prefers accessing tourism experiences with ease. This may include seniors who may prefer walking up a gentle ramp rather than tackling a large number of stairs.

People with a disability, including those with physical and sensory disabilities, will find it easier to access tourism facilities where there is a continuous pathway and tactile surfaces and clear signage.

Effectively the majority of people will benefit from these provisions, including our ageing population, parents with prams, and employees, as it incorporates good design for a range of occupational health and safety requirements (Preiser & Ostroff 2001).

Visitor numbers to Australia from overseas will double by the year 2015 and beyond, and there is a steadily increasing domestic tourism market (Tourism Forecasting Committee 2005). Amongst these will be an increasing number of people with disabilities and who are ageing. The greying of the population is both a Western and Asian phenomenon, and many of our most lucrative international markets are drawn from countries experiencing an ageing of the population. Yet, unlike past generations of older people, this generation of baby boomers is seeking active, fulfilling and adventurous experiences for their post-work lives (Mackay 1997; McDougall 1998; Moschis 2000; Muller & Cleaver 2000; Hilt & Lipschultz 2005). Tourism is seen as an important component of this quest for life experiences and the tourism industry and government are planning to incorporate the needs of the combined EAM for accessible tourism (Commonwealth Department of Industry, Tourism and Resources (CDITR) 2003; Tourism Australia 2005b; Tourism New South Wales 2005).

The CDITR (2003) has identified people with disabilities and seniors as an emerging market area, and Tourism Australia (2005b) has established accessible tourism as a niche experience. However, to this point in time, there has not been a research or industry strategy developed to realise the opportunity that these groups offer. The STCRC workshop provided an opportunity to bring stakeholders together to collaboratively develop a research agenda for disability and tourism.

*Accessible tourism* is not defined in any of the government documents. For the purposes of the workshop, *accessible tourism* was 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 Olympic Co-ordination Authority 1999). The definition is inclusive of the mobility, vision, hearing and cognitive dimensions of access.

The term accessible tourism will be used for the remainder of this report. The other term central to the development of accessible tourism is universal design. Universal design is a paradigm that extends the concepts of continuous pathways, access and mobility, and barrier-free environments to incorporate intergenerational and lifespan planning that recognises the nexus between ageing, disability and the continuum of ability of people over lifespan (Aslaksen, Bergh, Bringa & Heggem 1997; Steinfeld & Shea 2001). Universal design has been defined as:

... the design of products and environments to be usable by all people, to the greatest extent possible, without the need for adaption or specialised design...The intent of the universal design concept is to simplify life for everyone by making products, communications, and the built environment more usable by more people at little or no extra cost. The universal design concept targets all people of all ages, sizes and abilities (Center for Universal Design 2003).

Most recently, there has been 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 (Rains 2004). A recent conference on universal design that had a stream on the travel and tourism industry, ended with delegates proposing the *Rio de Janeiro Declaration on Sustainable Social Development, Disability & Ageing* (Walsh 2004). In many countries, the framework for developing accessible tourism or implementing universal design can be found in the building codes and the accessibility standards. The next section of the report briefly reviews the Australian context of the built environment legislation for access and mobility.

## Disability and Built Environment Legislation

In an Australian context, the process for developing accessible tourism is governed by the disability discrimination and built environment legislation. The introduction of the *Disability Discrimination Act 1992* (Comm) (DDA) ensured that there are legal controls against discrimination on the grounds of disability. The spirit and intent of the DDA is further reinforced through existing and complementary State legislation and strategies. Provisions for mobility, vision, hearing and cognitive access are complemented through each state's environmental planning and development legislation. Each state's planning process makes reference to the Building Codes of Australia (Australian Building Codes Board 1996) and this in turn calls upon Australian Standards for Access and Mobility (Standards Australia 1992, 1993, 1999 & 2001). Under the DDA, there are two disability standards that had a significant impact on tourism. The first is the Disability Standard for Accessible Public Transport (Commonwealth Attorney General's Department 2005) that stipulates the levels of accessibility for public transport. The second is more recent, where the Australian Building Codes Board (2004b) has entered into a process with Commonwealth Attorney General's Department and the Human Rights and Equal Opportunity Commission (2004) to harmonise the DDA with the Australian Building Codes, through the development of a draft Disability Standard for Access to Premises (Commonwealth Attorney General's Department 2004). The draft standards are at an impasse that includes all aspects of the built environment, the common domain and class three accommodation (Australian Building Codes Board 2004c). This short overview of the disability discrimination and built environment legislation frames the process for developing accessible tourism.

## Disability and Tourism Research

A summary of accessible tourism research is now presented. A significant review of the accessible tourism research literature has been carried out by Darcy (2004). Summary tables of Australian and overseas supply and demand research are provided in Appendix 2. The rest of this chapter will then provide a summary of the major research themes and omissions of accessible tourism research.

### Demand Research

Table 1 provides a summary of Australian-based demand research and Appendix 1 has a summary table of the overseas research.

**Table 1: 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 & 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

## Overview of Australian Research

Smith's (1987) seminal paper, which categorised constraints to leisure travel, concluded with a call for greater empirical investigation of disability and tourism internationally. Similarly, in Australia, Downie's (1994) review of tourism called for empirical research into disability and tourism. Only three Australian empirical studies have been conducted of people with disabilities and tourism. Murray and Sproats (1990) undertook an investigation of the tourism experiences of people with disabilities in Townsville. The findings were prefaced with a market estimate based on the ABS (1998) 2.6 million Australians with disabilities who were potential tourists. The demand research was based on a survey which examined attitudes of tourists with disabilities and their families (n=93) towards tourism to national parks and resorts. While detailed statistical results were not provided, several of the findings are worth noting. The respondents visited national parks more than resorts, but half had visited neither. Among those who had visited, there was a greater propensity to re-visit, thus, Murray and Sproats (1990 p.13) argue, 'exposure to tourist experiences creates its own demand'. There was also a limited discussion of the barriers to tourism using economic, physical and attitudinal constructs. Mobility was reported as the major barrier encountered, and respondents believed that other guests' reactions to their disability were more negative than staff reactions. Murray and Sproats recommended increased provision of relevant information and encouragement of government and industry to develop tourism opportunities.

It was not until Tourism NSW (Darcy 1998) acted that a substantial investigation of the tourism patterns and experiences of people with physical disabilities in Australia was undertaken. In the previous 12 months, 75 percent and ten percent of respondents in that study undertook domestic trips and overseas trips respectively. Further, 70 percent had undertaken a day trip in the last six months. In general, it was found that respondents were not satisfied with their current level of tourism (74%). The major constraints identified in the study were grouped into economic, accommodation, destination, attraction, travel planning, information, transport, air travel, attendant and equipment categories. The study also produced the first Australian market estimates of the \$1.5bn annually spent on disability tourism, based on the survey data and the ABS (1998) disability statistics. Further analysis of this data focused on people with mobility disabilities with higher support needs who travelled with attendants (Darcy 2002a). Subsequent research focused on analysing the complaint case and Federal Court actions under the DDA taken by people with disabilities in a tourism context (Darcy 2002b). This research

highlighted further discrimination against people with vision, hearing and cognitive disabilities by the tourism industry, based on access to information, assistance animals, smoke-related environments and warning systems, lack of appropriate telecommunications, and alternative interpretation provisions. This discrimination occurred in customer service and employment contexts.

Market and Communication Research (2002) held focus groups around Australia for Tourism Queensland to investigate the potential of developing specialist tourism packages (fly – accommodation – transport – attractions) for people with disabilities wishing to holiday in Queensland. This research was groundbreaking in that it sought to focus on packaging the essence of the Queensland tourist experience for people with disabilities. Tourism Queensland also provided a series of information resources to assist those wishing to travel to Queensland (Queensland Tourist and Travel Corporation 1998; Queensland Tourism 2000a, 2000b).

The Domestic Tourism Monitor (DTM) (Bureau of Tourism Research 1988-1998) and the ABS short-term arrivals and departures monitor (Australian Bureau of Statistics 2000) collected data about Australians' domestic, day-trip and overseas tourism patterns. None of these sources contained disability related information. The National Visitor Survey (NVS) (Bureau of Tourism Research 1998) replaced these sources. The survey of 78,312 households includes day trips, domestic travel and overseas travel. The 1998 NVS was the first to include a disability module for the respondent or other travellers in the respondents' travel party. Darcy (2003b, 2004) presented a secondary analysis of this data, detailing the lower levels of travel by people with disabilities compared to the non-disabled. People with vision and mental health disabilities were identified as the most marginalised and it established that people with disabilities did not regard their impairment as their reason for not travelling. Further, this research presented nationally validated constraints identified by people with disabilities that affected their participation.

In an important recent honours study, Forward (2004) investigated the information source preferences and travel needs of people with mobility and vision disabilities. The study found that both groups accessed different information sources and had different travel needs. This study reinforces Darcy's (2003b) analysis of the NVS and reinforces that information is a key foundation for travel planning for people with disabilities.

A number of studies have also investigated accessible public transport use (Faulkner & French 1982; Tisato 1997; Folino 1999; DDA Standards Project 2000). Faulkner and French (1982) and Tisato (1997) did not question the oppressive nature of a segregated public transport system. In fact, both studies questioned the likely benefits of providing an accessible public transport system in their respective cities, due to the major infrastructure cost of providing such a system. These assumptions did not incorporate disability perspectives in their research or investigate the benefits of improved access to public transport. This was essentially different to the documentation of the disability experience of public transport and paratransit systems in Folino (1999), DDA Standards Project (2000) and Human Rights and Equal Opportunity Commission (2002). The Australian experience of accessibility of public transport appears similar to that of other Western nations (Revis & Revis 1978; Brjesson 1989; Cavinato & Cuckovich 1992; Almon-Hamm 1997; United Nations Committee on Transport, Communications, Tourism and Infrastructure Development 2000; Hine & Mitchell 2001; Porter 2002).

## Summary of Major Demand Research Themes

The demand research has been sporadic since the first empirical study (Woodside & Etzel 1980). Progress has been slow in developing an understanding of the tourism needs of people with disabilities. In the Australian context, there is the lack of empirical research on accessible tourism, with only two studies on the phenomenon, whereas the overseas research has been more plentiful, but sporadic and regionally-based. A number of themes emerge from the literature. These 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 to disability tourism research; and
- Lack of explanation for the experiences of people with disabilities.



### ***Size of the tourism market***

Durgin, Lindsay and Hamilton (1985), Touche Ross (1993) and Keroul (1995) attempted to quantify the level of tourism by people with disabilities in the US, Europe and Canada, through secondary data estimates of disability and their physical and financial ability to travel. While these assumptions were flawed because they made assumptions about disability, they estimated that a substantial market existed. The estimates of Tourism NSW (Darcy 1998), the English Tourism Council (2000), Keroul (2001) and HarrisInteractive Market Research (2003) took a more sophisticated approach by combining national disability statistics with survey findings of domestic tourism patterns for the preceding year. Each of these studies developed an argument for disability as a market, firstly by showing people with disabilities as a significant proportion of the population, and secondly by providing evidence of their tourism patterns.

Part of the rationale of understanding the size of the market is to estimate the contribution and proportion of accessible tourism to overall tourism expenditure. Darcy (1998) estimated that, in Australia, people with disabilities and those who travel with them currently contribute A\$1.5bn of overall tourism spending. The other research that considered economic contribution through a tourism specific methodology has been carried out in the US. It was estimated that the 50 million individuals with disabilities have an annual discretionary income of US\$200bn (Burnett & Bender-Baker 2001). HarrisInteractive Market Research (2003) noted that, of this discretionary income, people with disabilities could spend at least US\$27 billion per year if certain travel needs were met. This is a 100% increase over the current spend of US\$13.6bn on 32 million trips in the previous year. This discovery of unmet demand was supported by Darcy (1998), who found that 74% of people wanted to travel more if their needs were more adequately met in all stages of tourism.

### ***Comparison of the tourism patterns of people with and without disabilities***

The above studies do not provide comparisons with the non-disabled. Woodside and Etzel (1980) established that, on a regional level, households with people with disabilities travelled less than non-disabled households did. Yet, only one country has collected data at a national level to provide a one-time insight into the comparative travel patterns of people with disabilities and the non-disabled at a national level (Darcy 2003b, 2004). This Australian data has shown that people with disabilities travel at lower levels than non-disabled people but that they do not perceive their impairment as the reason for the lower level of travel. The difference in travel patterns can instead be explained by a series of socially constructed constraints experienced by people with disabilities (Darcy 2004).

### ***Role of tourism marketing and the provision of tourism access information***

A major constraint to travel planning is the way tourism marketing and information provision overlooks the needs of people with disabilities (Capella & Greco 1987; Murray & Sproats 1990; Cavinato & Cuckovich 1992; Burnett 1996; Darcy 1998; Turco, Stumbo & Garncarz 1998; Burnett & Bender-Baker 2001; McKercher, Packer, Yau & Lam 2003; Ray & Ryder 2003). People with disabilities identified that travel agents, government tourism marketing authorities and the other sectors did not meet their needs in the way tourism was marketed and, hence, the information that was provided to people with disabilities was inadequate. This affected whether people undertook travel or had adverse experiences while travelling. Burnett (1996) reinforced that people with disabilities relied on alternative sources of information to the non-disabled. This research was reinforced by Tourism NSW (Darcy 1998) and Turco, Stumbo & Garncarz (1998), who identified word of mouth, family and friends, and/or previous experience as the main information sources for people with disabilities. McKercher et al. (2003) investigated the role that travel agents play in travel decision-making and how they failed in their role as facilitators for people with disabilities. All these studies established that the tourism access information that was provided was unreliable or inaccurate. Lastly, Forward (2004) provides evidence that each dimension of disability access and information from different sources and for very different reasons.

### ***Inaccessibility of transport, accommodation, attractions and destination areas***

Marketing and provision of information are closely associated with the subsequent accessibility of transport, accommodation and attractions sectors in providing satisfying tourism experiences. Without knowledge of or access to these sectors of the tourism industry, people with disabilities were constrained in their tourism opportunities and experiences. All studies identified that people decided not to travel or encountered constraints at all stages of tourism (Murray & Sproats 1990; Cavinato & Cuckovich 1992; Darcy 1998; Turco, Stumbo & Garncarz 1998). It is recognised that control of the transport industry and the built environment rests outside of the tourism industry. However, there are many actions that the tourism industry can take to ensure that access is recognised as an important consideration to the sector.

### ***Disability market segmentation***

Tourism textbooks omit people with disabilities as a market segment. While the earlier secondary data studies were motivated to identify disability as a significant market segment, they did so in an unsophisticated manner. The emergence of disability as a consumer group drawing on market segmentation literature has not been a major paradigm in Australia, where welfarism has dominated government discourse and citizenship has galvanised disability advocacy groups. This is not the case in the US where the ADA compliance-based approach to disability rights put tourism industry sectors on notice that this group has to be treated equally in the market (Kazel 1996; Andorka 1999; Worcester 2000; Baumann 2001). Market arguments have had a major impact on US corporate culture. These ideas were developed generally by Reedy (1993) and Burnett (1996) in an information context, and Burnett and Bender-Baker (2001) in a tourism context to provide a market segmentation approach for people with disabilities. Tourism NSW recognised that within disability there were distinct needs based on the dimensions to access of mobility, sensory and communication (Darcy 1998). Burnett and Bender-Baker (2001) linked information provision to preliminary investigations of a market segmentation approach to disability. Their research suggests that the needs of people with mobility disabilities are different to the non-disabled, and that 'severity of disability' may be a valuable market segment identifier. However, in taking direction from senior tourism research (Fleischer & Seiler 2002; Horneman, Carter, Wei & Ruys 2002; Huang & Tsai 2003; Kim, Wei & Ruys 2003; Jang & Wu 2005), it is evident that there is a tremendous degree of potential for greater sophistication within disability market segmentation.

The last three themes that emerged were due to omission rather than inclusion.

### ***Lack of assessment of the introduction of human rights legislation***

A number of US studies and a UK study identified the introduction of human rights legislation as an important event for improving tourism conditions for people with disabilities (Gallagher & Hull 1996; Peniston 1996; Upchurch & Seo 1996; Griffin Dolon 2000; Miller & Kirk 2002; Goodall, Pottinger, Dixon & Russell 2004). It could be argued that while the ADA raised awareness that disability must be considered by tourism concerns, none of the papers assessed the impact on the tourism experiences of people with disabilities. This omission was preliminarily addressed by a UK and an Australian study on the introduction of the DDA on the experiences of people with disabilities (Darcy 2002b; Goodall 2002).

### ***Tourism research founded on medical approaches to disability***

It became apparent that many of the studies were not founded from a disability perspective. Several of the studies made assumptions about people with disabilities. These studies framed disability as a deficit of the individual and, hence, were medical in their orientation. This framing gave the sense that the circumstances facing people with disabilities were the 'natural' outcome of their impairments. While a number of studies focused on the constraints to travel, it was Foggin (2000) who provided a refreshing insight into the role of tourism in the leisure lives of people with disabilities. In particular, she recognised that while change occurred in the tourism patterns of people who traumatically acquired mobility disabilities, it did not change their desire or reasons for travel. In an Australian context, more recent research has been framed using social model conceptualisations that have sought to identify and categorise constraints, as well as providing an explanation of the social relations of accessible tourism (Darcy 2004).

### ***Lack of explanation for the experiences of people with disabilities***

After reviewing the literature on the tourism experiences of people with disabilities, the most notable absence was an explanation for why the experiences of people with disabilities are the way they are. This aspect has received no attention in the literature. It is more intriguing given the consensus that: people with disabilities constitute a significant proportion of the population; the introduction of human rights legislation; and a realisation that the tourism industry sectors have done little to accommodate their needs.

## **Supply Research**

Table 2 provides a summary of Australian-based supply research, and Appendix 1 has a summary table of the overseas research.

**Table 2: Supply research summary**

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 & post IDP & SADP Scales	175 H&T tertiary students 176 employees and trainers from STO	NA

## Overview of Australian Research

The early work of Weiler and Muloin sought to provide an indication as to the responses by tourism providers in Australia and Canada to requests for information for people with disabilities (Weiler & Muloin 1989; Muloin & Weiler 1991). The research showed Australian providers were less responsive and provided less detailed information than their Canadian counterparts. Murray and Sproats (1990) investigated the level of accessibility of the industry and the relative attitude of providers towards people with disabilities in a regional area. There were low levels of access provision within the region but managers demonstrated a positive attitude towards service provision for the group. However, few understood what the requirements for the group were. This finding was reinforced by O'Neill and Ali-Knight's (2000) study, whereas with overseas studies, they received a very low response rate to their survey. This study, together with Darcy's (2000) industry interviews, highlighted a lack of understanding of access requirements and virtually no awareness of the requirements of the DDA. Foggin, Darcy and Cameron's (2003) investigation of the accessibility of 23 NTO websites showed they were not compliant to international standards for people with vision disabilities, and lacked provision for other dimensions of disability. The exceptions to this were the Australian, New Zealand and Japanese web sites that provided basic information for people with mobility disabilities, but were still not compliant to international standards for people with vision disabilities. Lastly, Daruwalla (1999) and Daruwalla and Darcy (2005) provided evidence that disability awareness training does have positive impact on industry workforce attitudes towards a disability. The findings showed that the level of the impact increased from a base where information only was provided to greater impact through video scenarios, through to the greatest level of impact, where training involved interaction with people with disabilities who could be regarded as their peers.

## Summary of Major Research Themes

Over the last 25 years, research into 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:

1. Self-reported assessments of the accessibility of tourism industry product;
2. Interviews that seek to document current tourism industry approaches to people with disabilities;
3. Instruments that review tourism industry attitudes towards people with disabilities; and
4. Assessments of compliance with human rights legislation.

The quantitative studies all had low response rates which may be indicative of 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 ADA in shaping a research agenda. There was a commonality between overseas and Australian research that suggests that there is an undersupply, or constraint of opportunities, for people with disabilities wishing to travel. This undersupply 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 (Darcy 2004). 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.

## Conclusion

The Australian research is limited to the few identified key studies, and while the overseas research was far more extensive, the review has found that there are a series of gaps and omissions that provide fertile ground for demand- and supply-based research into accessible tourism. The other area that the review did not cover was overseas or federal, state and local government policy initiatives addressing accessible tourism. In an Australian context, the STCRC workshop has come together at a time of two significant developments in Australian tourism. First, the recent Nican conference (Packer & Carter 2005b), and second, the significant restructuring of tourism at a Federal level with the establishment of Tourism Australia's niche market initiatives (Tourism Australia 2005b). These two initiatives have provided the momentum and the opportunity to address this significant issue in global tourism (Dwyer 2005). The Tourism White Paper (Commonwealth Department of Industry, Tourism and Resources 2003) and the Tourism White Paper Implementation Plan (Commonwealth Department of Industry, Tourism and Resources 2004) outline the importance of developing uniquely Australian experiences and niche market experiences. Accessible tourism offers the opportunity for all tourists to experience the best of Australia rather than just some tourists.

## Lessons from other market segments

Following on from the conclusion above, and as identified in the introduction, accessible tourism was included on the list of specialised niche markets targeted for development by Tourism Australia. As Table 3 from Darcy (2004) shows, other niche market segments have received significant assistance by the Commonwealth and state governments over the 1990s.

**Table 3: Commonwealth market segment publications**

Segment	Policy, Strategy or Research
Cultural tourism	(Brokensha & Guldborg 1992; Haigh 1994; Coombes & Millar 1998; Foo 1998; Buchanan 1999)
Backpacker	(Pearce 1990; Loker 1993; Australian Tourist Commission 1995a; Commonwealth Department of Tourism 1995a, 1995c, 1995d; Haigh 1995; Buchanan 1998)
Indigenous tourism	(Commonwealth Department of Tourism 1994c; Commonwealth Department of Industry, Science & Resources 2000; Muloin, Zeppel & Higginbottom 2001)
Natural area or ecotourism	(Commonwealth Department of Tourism 1993a, 1993b, 1994a; Manidis Roberts Consultants 1994; Blamey 1995; Commonwealth Department of Tourism 1995b)
Cruise tourism	(Commonwealth Department of Tourism 1995e; Coombes & Millar 1998)
Rural/farm tourism	(Commonwealth Department of Tourism 1993c, 1994b; Australian Tourist Commission 1995b; O'Halloran 2000)
Senior tourism	(Queensland Office of Ageing 1998; Ruys & Wei 1998). Senior tourism was also presented as a major research and policy area for each inbound country of origin and as part of psychographic segmentation for domestic tourism.

While Table 3 lists mainly Commonwealth initiatives, similar strategic segmentation developments occurred in the states. Many of these market segments have now become mainstream tourism considerations. They received substantial assistance in their early development. As Packer and Carter (2005a) (the remainder of this section largely comes from material prepared by Packer and Carter (2005a)) noted, once the potential of the backpacker market was realised in 1993, the Australian Department of Tourism invested AUS\$4million over a four-year period (Loker-Murphy & Pearce 1995) – an initiative that has generated considerable success. The development of the European seniors market was also initiated when the level of unmet demand became obvious to travel providers (Viant 1993).

Issues relating to the low yield of the disability market have often been raised as deterrents to investment in accessible tourism. Similar concerns were expressed regarding the backpacker and seniors markets – labelling them as time-rich yet cash-poor. Even if this is the case, backpackers stay longer at each destination and their overall spend is more, or as much, as other tourists (Lee 2005) – similar travel behaviours to those demonstrated by seniors (Horneman et al. 2002) and travellers with disabilities (Darcy 1998).

Parallels can also be drawn between travellers with a disability and the gay and lesbian market. This group experienced social exclusion for many years and sought travel experiences in destinations where their sexual preference was welcomed and accepted (Holcomb & Luongo 1996; Pritchard, Morgan, Sedgely & Jenkins 1998; Clift & Forrest 1999; Pritchard, Morgan, Sedgely, Khan & Jenkins 2000; Markwell 2002). As social acceptance and visibility has increased, there has been increased demand for specialist services to meet market expectations and needs (Pritchard et al. 1998). Like this market, people with disabilities often find themselves socially marginalised. Legislative changes and increasing visibility are now forcing changes to accessibility and social inclusion.

Being outside of the mainstream tourism industry has presented as an initial problem for each of the markets discussed here. In particular, accurate information dissemination and promotion of suitable services has only occurred when the viability of each particular market was recognised and demand reached a critical mass. Early studies indicated that seniors once relied on word of mouth to identify suitable travel opportunities (Capella & Greco 1987; McGuire, Uysal & McDonald 1988). Newer research highlights the involvement of travel agents and recognises the need for agents to keep up with specialised product knowledge (Kim, Wei & Ruys 2003). Similar experiences are reported for the gay and lesbian market, with initial dependence on word of mouth and promotion in the gay media (Hughes 1997) and a reliance on specialist travel providers (Pritchard et al. 1998). At present, few specialist information and service providers exist for travellers with disabilities. This issue presents as a consistent problem and is perhaps the aspect of market development that requires the most urgent attention.

### Chapter 3

## WORKSHOP METHODOLOGY

### Participative Action Research

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; Taylor 1999; Kitchin 2000; Goodley & Lawthom 2005). Action research has been successfully used in the development of arts and recreation programs, but to this point has not been used in tourism (Lynd 1992; Pedlar, Gilbert & Gove 1994). This project will adopt the Participative Action Research (PAR) methodology. According to Reason (1994), PAR is probably the most widely practiced participative research approach; it emphasises the political aspects of knowledge production.

The PAR strategy aims 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; and
- Value authentic commitment and processes of genuine collaboration.

In PAR research, therefore, the emphasis is on 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. Prior to the workshop, a background briefing paper, based on the Nican conference summary of issues raised and recommendations (Packer & Carter 2005b) was sent to all participants (Appendix A). Workshop participants were asked to read this as a summary of the issues identified by the 120 attendees to the conference, and to think about possible research that could address these issues. The workshop invoked an action research process where three information sessions were held during the day. These sessions were:

- State of research;
- Current Australian practice; and
- Developing a research agenda.

The first two sessions were followed by small group breakout sessions. Each small group (four in all) was selected by the workshop organisers, based on the idea of having a mix of demand, supply and regulation / coordination stakeholders in each group. Each small group was led by a facilitator and had a note-taker external to the group to assist in reporting and documenting the small group discussions. These sessions were recorded using a combination of note-taking and listing of major points on butcher's paper. This method has been successfully used in workshops as a way of summarising the ideas discussed and providing audible and visual feedback to participants as the workshop is progressing. It provides a way to textually clarify the ideas presented and have a consensus that what being is said has been represented adequately in a textual form.

The final session sought to bring together the work of the day firstly by generating a list of research activities and, secondly by providing time and space for individuals to prioritise the list through designation of their three main research priorities. This was done as a single group, where ideas were generated from the floor, represented in a visual textual form and displayed around the room. All effort was made to provide a clear verbal summary of each idea that was written up, as a way to include those members of the audience with a visual impairment.

Finally, the notes and the butcher's paper were collected for verbatim transcription into a Microsoft Word document. The collective document became the data on which the day was analysed, together with the reflections of the academics involved. The participatory nature of the research called for an inductive interpretive approach to data analysis. The workshop notes and the prioritised research questions were examined for key emergent themes. The emergent themes were also grouped together to provide an aggregation to be considered for the development of the research agenda. Appendix 3 presents the prioritised research questions and emergent themes at a midpoint through the analysis. From this position, the workshop notes were then cross-referenced with these emergent themes to provide a foundation to ensure that all ideas were incorporated.

This report was prepared based on this information and on the feedback from the circulation of a draft report to all stakeholders. Feedback was provided over a one-month timeframe, and the draft report was edited to reflect the feedback provided. The participants were then provided with a final copy of the report and offered the opportunity to provide further feedback that could still be incorporated while the STCRC reviewed the report.

## **Limitations**

A limitation of this method is that it is a public method; it is orientated to people with sensory abilities and it does not capture the ideas expressed in the words of the presenter. The other limitation of this method is that the stakeholders in attendance think in terms of problems and issues, when many of the problems and issues are policy- or process-driven rather than research-driven. As such, the organising group recognised that the job of the academics present was to synthesise the problems and issues and to identify those with a substantive research base. It is recognised that the resultant research agenda is an interpretation by the academics of the issues and problems presented by the stakeholders. However, it is hoped that the distribution of the draft report and subsequent feedback from the workshop participants provided a mechanism for overcoming any omissions in this overtly interpretive process.



## Chapter 4

# WORKSHOP FINDINGS

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 sessions of the workshop, 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 like 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. The process for developing the themes involved:

- Beginning with the questions posed in Session 3, identify those questions that were ‘prioritised’ in the final session of the day;
- Reworking the questions to reduce any repetition and then to grouping them into themes;
- Interpreting the questions into research themes and recognising that while other problems and policy issues were identified, they did not necessarily translate into research themes; and
- Analysing the outcomes of Sessions 1 and 2 to provide further detail for each of the themes.

The research themes identified are now presented with a short paragraph 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.

## Information Provision, Promotion and Marketing

First, all sessions of the workshop provided an overwhelming acknowledgement that research into accessible information provision is paramount. The comments on information provision cut across all sectors of the industry and all dimensions of disability. Previous research, complaints cases under the Human Rights and Equal Opportunity Commission, and the anecdotal experiences of people with disabilities all identified the quality, detail and format of provision as significant issues for research (Murray & Sproats 1990; Touche Ross 1993; Darcy 1998; Turco, Stumbo & Garncarz 1998; English Tourism Council 2000; Market and Communication Research 2002; McKercher et al. 2003; Ray & Ryder 2003; European Commission & Westcott 2004; Yau, McKercher & Packer 2004; Williams & Rattray 2005). Yet, while it was recognised that people with disabilities rely on word of mouth information to a far greater extent than industry sources, there has been no research into the preferences for information provision or the testing of alternative forms of information provision. Information provision is the foundation for the industry to develop a more sophisticated approach to the promotion and marketing of accessible tourism. However, until research into the information requirements and preferred formats of people with disabilities is completed, the industry cannot be guided with any certainty as to how to promote and market accessible tourism. The outcome of this research should be piloted for inclusion on the Australian Tourism Data Warehouse (Australian Tourism Data Warehouse 2001). Similar research is being formulated in Europe through the One-Stop-Shop For Accessible Tourism in Europe (2005) and collaborative research links have already been tentatively investigated (Buhalis 2005).

## Dimensions of Disability

Past research and policy has almost exclusively focused on people with mobility disabilities, with only passing reference to people with vision, hearing and cognitive disabilities. The workshop identified the importance of undertaking specific studies on people with vision, hearing and cognitive disability. As both a major US survey (HarrisInteractive Market Research 2003) and an Australian analysis of national secondary tourism data sources demonstrated (Darcy 2003b), there are significant differences in the patterns of tourism participation between these dimensions. The Australian research highlighted that people with vision and cognitive disabilities experienced the lowest level of tourism participation. Yet, this research also showed that people with disabilities did not regard their impairment as the reason for lower participation, but rather identified a series of structural constraints. The lack of recognition of the other dimensions of disability has fostered a belief that people with disabilities are a homogenous group who all have the same access needs and desires for tourism experiences. The workshop, together with the recommendations of the Nican conference (Packer & Carter 2005b), recognises the need for basic research about the lived experiences of people with vision, hearing and cognitive disabilities.

## Market Dynamics and Segmentation

Stakeholders recognised the importance of developing a greater understanding of accessible tourism in terms of magnitude and the dynamics of the market. While there have been some national statistics produced in Australia (Darcy 2003b) and overseas (English Tourism Council 2000; Keroul 2001; HarrisInteractive Market Research 2003) there is still a great deal to understand about the tourism patterns and experiences of people with disabilities. Essential to this is the need for disability to be included within the National Visitor Survey as it has been on two previous occasions, and the need to be included for the first time in the International Visitor Survey. This information will provide a consistent and ongoing understanding of the position of people with disabilities as a component of the overall tourism market, and provide the statistical basis for accessible tourism development within Australian tourism.

Following on from this, and as identified in dimensions of disability (above), there has been no sophistication in understanding market segmentation within disability. As industry participants at the workshop identified, this information is essential for them to base business decisions on. As such, basic questions still need to be addressed, such as 'is disability a market segment or are people with disabilities part of all market segments?' Some overseas studies on the disability market (Burnett & Bender-Baker 2001; Ray & Ryder 2003) and Australian studies into senior tourism (Ruys & Wei 1998; Fleischer & Seiler 2002; Horneman et al. 2002) provide direction for more sophisticated approaches to understanding market segmentation within accessible tourism.

## Total Product Development

As an extension of market dynamics and segmentation, there was a series of discussions in all the workshop groups about the need to move focus from access to understanding the total product experience that people with disabilities were seeking (Foggin 2000; Darcy 2002a; Market and Communication Research 2002; Yau, McKercher & Packer 2004). This integrates well with the establishment of Tourism Australia's (2005b) niche experiences unit, where accessible tourism has been identified as one such niche experience. Central to developing niche experiences are the concepts of universal design or easy living principles, as the foundation to developing accessible tourism products across all sectors of the industry (Preiser & Ostroff 2001). The workshop identified the importance of placing these concepts within accessible destination development through place-based approaches, local *access precincts* and *access trails* as new paradigms for accessible tourism product development. The emphasis of these approaches should be to enhance the experience of people with disabilities to gain a 'sense of place' (Stewart, Hayward, Devlin & Kirby 1998; Hayllar & Griffin 2005) of the destinations visited, rather than the destination choice being a function of reliable access information and known accessible accommodation (Darcy 2004). Each of these approaches offers an opportunity to research and test product development with each dimension of disability. Lastly, the experiential outcome of tourism for people with disabilities may be enhanced through an application of the recreation opportunity spectrum within destination regions (Kliskey 1998; Veal 2002; Wearing & Archer 2003).

## Industry Engagement – Profile, Partnerships and Understanding

The workshop provided evidence of small to medium tourism enterprises that are providing excellent accessible tourism product and services. However, these providers had little profile beyond their existing customer base. Very little work has been carried out to document best-practice cases of accessible tourism providers since 1998 (Office of National Tourism 1998). Further, workshop participants stated that no research has sought to make the business case for accessible tourism. This type of research has been successfully employed to show the business case for diversity management in the US (Harvey & Allard 2005). In this way, the business case research would provide exemplars to promote the business benefits of accessible tourism operations, and would be the type of research output to engage other operators. Part of this is a greater understanding of the market dynamics, but the workshop participants identified that there needs to be research on the flow-on benefits to other users of universally designed accessible tourism. For example, some of the beneficiaries include seniors, families with young children who use prams, and employers, through having safer working environments, which should generate business savings through lower insurance premiums. Examples of this type of research can be found in the transport and Web design sectors (Darcy 2004; Usability by Design 2005).

The one-day workshop, supported by the STCRC, has reinforced the cross-sectoral importance of the accessible tourism market for Australia. The seniors market has already had an impact on the market, and the ageing demographics in Australia, Europe, North America and (particularly) Asia indicate that future markets can only grow. Demographics further indicate that within a short time there will be a blurring between the seniors market and the accessible tourism market. Now is the time to lobby Commonwealth and State bodies to take action. The Commonwealth has initiated the niche market strategy; states should be encouraged to follow-

suit. However, disjointed and uncoordinated action will hamper efforts, lead to duplication of untested initiatives, and to delays in gaining a share in the international market. Strategies to leverage best results might include development and funding of State Accessible Tourism Plans, and coupling research activities with initiatives at Commonwealth and state level through shared funding opportunities (similar to ARC linkage funding) as a component of new initiatives.

Industry engagement had both demand and supply components, where people with disabilities sought to express their needs and wants to providers while the industry expressed a desire to engage with 'one voice' to represent disability needs. Both recognised that substantive actions needed to be undertaken to engage each other in accessible tourism provision. The outcome of the discussions at all sessions of the workshop involved the establishment of a body to galvanise accessible tourism from the external government stakeholders' perspective (supply and demand) and for the need for a government driver of accessible tourism (coordination/regulation). While both these initiatives would require a great deal more discussion, it is recognised that the Commonwealth government has two involvements in this area. First, Nican (2005) is partially funded by the Commonwealth government in the area of information provision for the arts, sport, recreation and tourism. Second, Tourism Australia (2005b) has now established a niche experiences development unit where accessible tourism has been identified as one of the niche experiences, although not as a priority segment (Tourism Australia 2005a). Both organisations have specific charters that may or may not provide the scope to undertake such a task.

The organising group recognise that the establishment of such an organisation is a policy rather than a research consideration, but it was never the less an important finding of the workshop. Strong feedback from the draft report reinforced the need to assist the development of accessible tourism through a designated government driver. While some suggested augmenting the resources of current Commonwealth or state bodies, others suggested the establishment of a new, competitively tendered organisation to galvanise the accessible tourism movement. It was 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. In short, some form of not-for-profit / public / private partnership (NFP-PPP). One person suggested that Keroul, an organisation founded by people with disabilities but operationalised in conjunction with Tourisme Québec and the Ville de Montréal, may be one such model that may warrant further investigation (Keroul 2005).

## Education and Training

The workshop and previous research had identified that the tourism industry generally lacked knowledge of disability issues, the needs of travellers, operators' responsibility under the relevant legislation and their willingness to engage in disability issues (Murray & Sproats 1990; O'Neill & Ali-Knight 2000; Darcy 2002b). Analysis of previous initiatives by Australian government statutory tourism marketing authorities identified that most initiatives stopped at the provision of descriptive information sheets about disability providers, lists of self-identified 'accessible' providers, or replication of this information on websites (Darcy 2004). As a starting point, further research needs to assess the level of knowledge of the industry. It is recognised that this research is problematic due to the industry's sophisticated understanding of protecting corporate image and management camouflaging of what is said and what is done (Ross 1994; Ross 2004). This in part may be attributed to information and understanding of disability and access as a precursor to engagement. As research into disability awareness training shows, information provision should be regarded as a starting point to industry engagement as it has the most superficial level of impact. Research by Daruwalla (1999) provided a foundation for understanding that direct involvement with people with disabilities during training has the greatest level of impact and duration. These findings were operationalised in designing training for an Australian tourism organisation where a degree of cultural change towards disability has resulted in organisational ownership of disability as an industry issue (Daruwalla & Darcy 2005). This research suggests that ongoing engagement of industry with disability consumers, advocates and professionals will result in a sustained change.

## Access to All Sectors of the Tourism Industry

There was a consistent theme in all sessions of the workshop about the need to improve access to all components of the built environment, transport and interpretative services in the tourism sector. The workshop identified that, too often, assumptions were made about what people with disabilities would want to do or could do and, hence, these stereotypes constrain people with disabilities' tourism opportunities. This finding is not confined to the tourism industry, as demonstrated by a 10-year review of the DDA, aptly titled *Don't judge what I can do by what you think I can* (Human Rights and Equal Opportunity Commission 2003). This has led to stereotypes about what people do in a tourism context and, hence, what is regarded as appropriate provision for people with disabilities. This has resulted in constrained opportunities where, for example, a family group where one parent has a mobility disability may not be able to participate in a family activity or watch their child participate in a resort activity because of the design of the environment. An area of research for a case study is the diversity of

people with disabilities' tourism experiences. This would be part of a strategy to educate the industry about the importance of having accessible tourism experiences that are enabling and promote independence, dignity and equity.

While it is recognised that accessing all areas is a legitimate concern of people with disabilities, there is also recognition that a great deal of responsibility for this theme resides with other professionals, industry and government bodies. Further, some industry representatives at the workshop expressed concern about the likely cost of 'having to become accessible'. Yet, under the DDA, there is no provision for retrofitting older buildings or environments, and there is a clause for 'unjustifiable hardship' where the provision of access would be too costly (Human Rights and Equal Opportunity Commission 2003). This is another example of a lack of understanding of the legislated responsibilities that have created apprehension amongst some in the tourism industry. Few have regarded accessible tourism provisions as a competitive advantage. Similarly, the Commonwealth government has contributed to this perception of the extra cost of disability through the Regulatory Impact Statement process for disability standards, where the emphasis is on cost and not broader benefits (Australian Building Codes Board 1998, 2004a). Disability organisations and others (Vintila 1996; Physical Disability Council of NSW 1997; Physical Disability Council of Australia 1999) have called for research to redress this imbalance and undertake social benefit research within the industry sectors (Frisch 1998, 2001; Bagshaw 2003).

As outlined earlier, access to the built environment is governed by the DDA, each state's environmental planning and development legislation, and these call on the BCA and Australian Standards for access and mobility. Improving access to new tourism environments is dependent on the professionals involved in designing, planning and approving development understanding in implementing these legislated provisions. Yet, this finding reinforces the need to research the best practice examples and to develop the business case for accessible tourism so that tourism operators actively seek out and ensure that their investment is accessible and socially sustainable (Walsh 2004). Research in the housing sector has shown that universally designed environments have a low cost differential (Hill 1999; Steinfeld & Shea 2001). In particular, research operationalising universal design principles for the travel and tourism industry needs to document the cost efficiency and extended business benefits to individual businesses, as well as the new paradigms identified in *Total Product Experience* (see above). It is recommended that the industry should become supportive through recognising exemplary accessible tourism provisions and rewarding those providers with a specific category under the annual Australian Tourism Awards. Unfortunately, there are too many examples of winners of Australian Tourism Awards who have little or no provision for access tourism.

## **Chapter 5**

# **PRIORITISED RESEARCH STRATEGY**

The prioritised research strategy is the product of the collaborative workshop sessions, the development of those sessions into research themes and the academic interpretation of those themes based on the literature. The prioritised research strategy is presented under its themed headings, as discussed in Chapter 4, with each bullet point representing a separate research task that should logically develop chronologically within each theme. It is hoped that this process produces a prioritised research strategy that is reflective of the various stakeholder perspectives' of accessible tourism, and provides a basis for undertaking relevant industry research that is informed by sound academic research practice. However, while this strategy presents an articulation of the priorities and direction of research for accessible tourism, it does not present a detailed research plan on how to achieve the research strategy.

The following research areas are put forward as the prioritised research strategy outcome of the workshop:

### ***Information Provision, Marketing and Promotion***

- Determine relevant information requirements, formats 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; and
- 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; and
- Test the effectiveness and dissemination of education strategies to inform industry at all levels.

### ***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; and
- Develop market segmentation studies of disability in tourism.

### ***Total Product Development***

- Operationalise universal design and easy living principles within tourism product development;
- Develop a benefits-based research methodology;
- Test the operationalisation of the above concepts through place-based approaches, local access precincts and access trail development; and
- 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 that incorporates a triple bottom line approach;
- 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;
- Development and funding of State Accessible Tourism Plans;
- Coupling research activities with initiatives at Commonwealth and state level through shared funding opportunities (similar to ARC linkage funding) as a component of new initiatives;

- Establish an accessible tourism organisation/association/lobby group; and
- Investigate 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; and
- Incorporate disability awareness training/curriculum into industry, TAFE and university courses.

### ***Access to All Sectors of the Tourism Industry***

- Reinforces the need for best practice case studies that also investigate the business case for accessible tourism through operationalising the triple bottom line (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; and
- 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.

The next step to assist industry, the STCRC and the government tourism authorities is for a working group of interested participants from the workshop and the broader accessible tourism community to establish briefs for the development of Expressions of Interest for future STCRC-funded projects, and to develop collaborative research projects drawing on other funding sources.

## Chapter 6

# CONCLUSION

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 that they 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 3 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, provides timely expertise and invokes an ongoing policy agenda in the area. While people had suggested 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. In short, some form of not-for-profit / public / private partnership. One person suggested that Keroul, an organisation founded by people with disabilities but operationalised in conjunction with Tourisme Québec and the Ville de Montréal, may be one such model that may warrant further investigation (Keroul 2005).

Lastly, the organising group recognise the potential to commercialise expertise in this area for overseas markets, particularly in the Asia-Pacific region. While there have been a number of initiatives in this region over the last five years, it is recognised that there is a significant development lag that provides the opportunity for the STCRC to commercialise in the areas of information provision, universal design, access auditing, total product experience and consulting to NTOs. The organising group have already undertaken scoping projects in Hong Kong, Vietnam, Thailand, Taiwan, Fiji, Bali and Cambodia. The organising group recognise that the key concepts of access, disability and accessible tourism require an understanding of the different cultural paradigms between eastern and western, and developed and developing nations.



## APPENDIX A: SUMMARY TABLES OF DEMAND & SUPPLY RESEARCH

Study	Origin	Year	Method	Sample	Impairment
Woodside and Etzel	USA	1980	Postal household survey of members of the University of South Carolina Consumer Panel	N=590 households N=60 pwd	Physical Vision Other
Murray and Sproats	Aust	1990	Postal survey	N=93 pwd and family	Not stated
Cavinato and Cuckovich	USA	1992	Survey Interviews	N=32 pwd 2 disability orgs 5 dis service orgs	Not stated
Burnett	USA	1996	Postal membership survey	N=307 pwd N=386 non-disabled	Mobility
Darcy	Aust	1998	Postal membership survey Qualitative feedback	N=2,647 100,000 words	Physical
Turco, Stumbo and Garncarz	USA	1998	Focus groups	N=4 focus groups	Physical Vision
English Tourist Council	UK	2000	Survey Interviews	N=254 N=18	Hearing Sight Mobility
Foggin	Canada	2000	In-depth interviews Ricoeur's narrative approach	N=16 interviews A sub-set of three were selected as being representative	Mobility
Keroul	Canada	2001	Survey Interviews	N=1003	Physical Mobility
Burnett and Bender Baker	USA	2001	Postal readership survey Market segmentation	N=312	Mobility
HarrisInteractive	USA	2002	Interviews (on-line and telephone)	N=1037 534 on-line 503 telephone	Vision Hearing
Market and Communication Research	Aust	2002	Review of 2002 Tourism Queensland study into the nature of the 'disabled' tourism market	NA	All
Darcy	Aust	2002	Mail questionnaires In-depth interviews	N = 2562	<i>'People who identified themselves as being unable to travel independently'</i>
Israeli	Israel	2002	Questionnaire	N=50	Mobility

Darcy	Aust	2003	Secondary data analysis Surveys	Published data weighted to Aust. population estimates; N =12 582; N = 8458; N= 2647	Vision Mobility Hearing Communication
McKercher, Packer, Yao and Lam	Hong Kong	2003	Interviews, group discussions	N=52	Mobility and Vision – focus on relationship between travel agents and people with disabilities
Ray and Ryder	USA		Focus group, survey (in person or mail return), participant observation	N = 4 (focus group participants) N = 93 surveys	Mobility
Gladwell and Bedini	USA	2004	Interviews	N = 13 carers	Carers travelling with physically impaired people
Hunter – Jones	UK	2004	Interviews	N = 25 patients at the Young Oncology Unit at Christine Hospital NHS Trust Manchester	Cancer and related issues
Shaw and Coles	UK	2004	Administered survey (phone)	N = 24 N = 6 (Initial Pilot Study to test survey design)	Not stated
Forward	Aust	2004	Mail questionnaire	N=10 N=30	Vision Mobility
Yau, McKercher and Packer	Hong Kong	2004	Interviews, focus groups (x9)	N = 52 (focus groups) N = Not stated (interviews)	Vision Mobility
	USA Int	2005	Written responses to four questions	N = 23	Mobility
<b>Transport Research</b>					
Faulkner and French	Aust	1982	Game simulation interview & 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

(Source: Darcy 2004)

# Supply research summary

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	Mobility
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	Mobility
Murray and Sproats	Aust	1990	Access audit Interviews	23 motels audited 8 resort managers 8 NPWS managers	Not stated
Smith	USA	1992	Survey of employing people with disabilities	72 hotels and restaurants	Physical Hearing / Vision
Cavinato and Cuckovich	USA	1992	Interviews	2 tourism organisations 12 travel agents	Not stated
Touche Ross	Euro	1993	Survey	80 facility and service providers	NA
Ross	USA	1994	Survey Interviews	Destination marketing managers	NA
Gallagher and Hull	USA	1996	Telephone survey	8 cruise lines	Mobility Vision / Seniors
Upchurch and Seo	USA	1996	Survey of accommodation providers	488 establishments 32% response rate	Not stated
WADSC	Aust	1997	Think tanks of TI leaders	4 sectors	General
Almon-Hamm	USA	1997	Not stated (only 24 page preview available on-line)	N = 171 transit operators (beliefs concerning blindness measured using 'Belief about Blindness Scale')	Vision
Daruwalla	Aust	1999	Pre- and post-testing of disability awareness interventions via individual and societal awareness scales	175 TAFE and University students enrolled in hospitality and tourism courses	NA
O'Neill and Ali-Knight	Aust	2000	Interviews Survey	20 industry 73 establishments	All
Goodall	UK	2002	NA	NA	All

Miller and Kirk	UK	2002	Mail out survey	210 tourism companies and tourism boards	Vision
Foggins, Darcy and Cameron	Asia Pacific	2003	Literature review, questionnaire, web-based search	26 member countries	All
Goodall, Pottinger, Dixon and Russell	UK	2004	NA	NA	All
Rains	Brazil	2004	Conference forums, site visits and action planning	NA	All
Daruwalla and Darcy	Aust	2005	Observation; intervention through videos, role play and contact with disabled people	175 university students enrolled in hospitality and tourism courses 176 employees and trainers from state tourism organisations	NA

(Source: Darcy 2004)

## **APPENDIX B: BACKGROUND BRIEFING PAPER FOR THE WORKSHOP ON ACCESSIBLE TOURISM ISSUES**

### ***Issues to Consider (reprinted with permission from the authors)***

Packer, T. and Carter, M. (2005). *Out of the Blue! Valuing the disability market in tourism*. Report of the 5<sup>th</sup> National Nican Conference, Perth, 20-22 September 2004. Perth: Curtin University of Technology. pp. iii-vi

### ***Key imperatives for change***

In a recent survey of Disability, Ageing and Carers conducted by the Australian Bureau of Statistics, one in five people reported having a disability (Australian Bureau of Statistics 2004). In a 1998 survey of the Australian travelling public, 11% of respondents identified themselves as having a disability or long-term health problem and reported they had been on holiday in the past month (cited in Darcy 2000, p. 159). One in ten holiday-makers represents a significant share of the overall tourism market – and it is feasible that more people with disabilities would travel regularly if accessible facilities and services were commonplace.

With these findings in mind, financial, human rights and legal imperatives demand the adoption of accessible tourism principles and practices to benefit the whole community.

The Tourism White Paper Implementation Plan 2004 prepared by the Australian Government Department of Industry, Tourism and Resources identifies six key areas that require action to ensure we are able “to capture, maintain and grow Australia’s future international and domestic tourism market”. Key strategy areas are:

- Building Reputation (BR)
- Enhancing Research and Statistics (ERS)
- Encouraging Sustainability (ES)
- Lifting Capability (LC)
- Improving Access (IA)
- Increasing Collaboration (IC)

Specific strategies to “capture, maintain and grow” the accessible tourism market are not included in the Implementation Plan. In this report, the links between conference recommendations and specific White Paper strategies are identified by strategy initials (i.e. BR represents Building Reputation) placed after each recommendation. This is done to emphasise that accessible tourism is a legitimate tourism market that must be integrated and developed using the same mechanisms used for building other segments of this strong and vibrant industry. The magnitude of the accessible tourism market makes it part of the mainstream – and as with all markets, has unique characteristics that must be understood before it can be effectively developed and promoted.

### ***Conference recommendations:***

- Actively promote the value of the accessible tourism market to tourism industry to develop support for accessible tourism principles and practices (ES)
- Encourage people with disabilities to become actively involved in advocating for improved services including appraising tourism facilities, conducting access surveys and becoming directly involved in industry training (BR/ES/LC/IC)

### ***Information quality and dissemination***

- Improve access to information by assisting government and community organisations to develop quality accessible tourism resources (BR/LC)
- Foster exchange and networking re experiences and practices between intergovernmental agencies (IC)
- Expand the Australian Tourism Data Warehouse to include comprehensive information relating to accessible tourism (BR/IA)
- Improve ease of discovery and access to regularly updated information and fact sheets (including “Travel in Australia for People with Disabilities”) available at Tourism Australia’s website (IA)

### ***Provision of facilities and service***

- Mandate universal design concepts in the development of new tourist facilities and provide incentives for tourism operators to provide accessible holiday destinations (LC/IA)
- Ensure National Tourism Accreditation System includes standards relating to accessible tourism that go beyond physical access, including training related to attitudes and quality service for all sectors of the tourism market (ES/IA)
- Improve staff training and education to include attitude, knowledge and skill development required to relate appropriately to people with disabilities (LC)
- Include people with disabilities and related service provider organisations in the development, promotion and monitoring of accessible tourism (LC)

### ***Market research***

- Extend mandate of Tourism Cooperative Research Council (CRC) to include accessible tourism (ERS)
- Encourage research specific to the accessible tourism market through established higher education programs (ERS/LC) and research scholarships
- Compile completed research into a single resource and actively promote to tourism associations and tourism industry (BR/ES)

### ***Building accessible pathways***

- Promote programs such as the “Beyond Compliance” program and provide further incentives for tourism operators to participate and ensure Australia can be actively promoted as an accessible tourism destination (BR)
- Provide incentives for local government and tourism associations in regional areas to provide accessible facilities and implement accessible tourism practices (LC)
- Provide incentives to government, corporate and community organisations, and private tourism providers to work collaboratively to link and combine accessible pathways (IC)

### ***The way forward***

The Nican conference was successful in bringing together people with disabilities, and the disability and tourism sectors to focus on the rapidly increasing need for more accessible tourism opportunities.

If positive outcomes are to be generated for accessible tourism in Australia, all sectors involved in providing facilities and services for people with disabilities will need to make a proactive commitment to finding the way forward. The networks established at the conference, as well as the recommendations in this report, provide a solid foundation for future initiatives. Steps that can be taken include:

#### ***Government sector***

- Heeding the financial, human rights and legal imperatives identified by conference delegates
- Taking a leadership role in bringing together key local, regional and national stakeholders to address accessible tourism issues
- Providing incentives to assist in the implementation of conference recommendations

#### ***Tourism sector***

- Re-evaluating the size of the accessible tourism market
- Developing effective responses and strategies to capture this market
- Cooperating with government and disability sectors to maximise accessible tourism opportunities and realise the potential of this rapidly expanding market

#### ***Disability sector***

- Continuing to actively demand that the rights of all people with disabilities be recognised
- Continuing to encourage people with disabilities to travel and support accessible tourism opportunities
- Working in partnership with government and tourism sectors to ensure people with disabilities, their families and carers, have equitable access to tourism opportunities

***University/research sector***

- Embarking on quality research and dissemination of information regarding the potential value of this market
- Advocating for the Sustainable Tourism - Cooperative Research Council (CRC) to include accessible tourism in its current research agenda

Accessible tourism in Australia will only become a mainstream reality with demonstrated commitment and support from all concerned. We must work together to maximise the potential of our accessible tourism industry.



## APPENDIX C: WORKSHOP SESSION 3 QUESTIONS GENERATED AND VOTES

Question	Votes
<b>Partnerships</b>	
How do we develop partnerships with industry to adopt universal design and easy living principles/philosophies for the built environment, information etc.?	10
How can we engage with industry/state associations to ensure that we have access to sufficient information/support to fix the issues identified? What is their motivation?	8
What are the messages that would get industry on board to providing accessible tourism?	1
<b>Market Dynamics</b>	
How can we access research to quantify the shape of the market? Current market post 2000 Who? When? What? How?	7
\$ What is the economic impact and benefits of increased accessibility to the industry and individuals?	6
<b>Information</b>	
How do we get information out of Australian Tourism Data Warehouse to make it useful for people with disabilities and accessible tourism? What is essential information? In what format? How can providers/consumers access it?	9
What models exist to design information provision for tourist with disabilities?	
How do we tell each other? How do we tell the rest of the world?	
<b>Representation</b>	
Is it time a for a reference/representative group for accessible tourism?	9
How do you coordinate all of the organisations representing people with disabilities to speak with one voice?	
Representative Group? What industries have been successful in lobbying for Govt/community support or financial assistance? Any Associations? Planning & lobbying	2
<b>Constraints and Barriers</b>	
What are the aspects of travel/tourism that are the most problematic to accessible tourism experiences?	5
<b>Education and Training</b>	
How do we involve educators in the process? What components are included in training courses? What should be included? Include: universal design/leisure lifestyle	2
The need for an Awards process to reward exemplary providers of accessible tourism	2

What needs to be communicated to train and educate international agents about accessible tourism products in Australia?	
<b>Architecture, Design and Planning</b>	
Repackaging of accessibility? Accessible room = room of choice for all. Others to benefit? Families with prams, people with temporary disabilities etc	3
How close are we to the goal (ideal)?	2
What can be done to improve aesthetic design so that there is not a stigma attached to 'disabled rooms'? How do we find explanations that demonstrate the aesthetics of easy living? Role of Architects	2
Is “accessible” to people with disabilities “inaccessible” to those without?	
How can we ensure that major event planners include all the features requested?	
<b>Statistics/Knowledge Management</b>	
Why don't we have disability questions included in the NVS (National Visitors Survey)?	2
What is the competition doing internationally?	1
What do we already know? Is it all in one place?	
<b>Total Product</b>	
How do we take “place” based approach? How does local accessible tourism/universal design impact on local communities? Total Experience - Front door entry, Not second best	3
What is best practice (good)? Database of best practice	2
Are there things we can learn from the development of other niches?	
<b>Coordination</b>	
How do we get transport, accommodation and attractions to work together?	1
How do we include arts/sports/other activities in accessible tourism understanding?	1

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## GLOSSARY

### **accessible tourism**

*Accessible tourism* is 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)). The definition is inclusive of the mobility, vision, hearing and cognitive dimensions of access.

### **access precincts**

*Access precincts* are places or spaces that are inclusive of people with mobility, vision, hearing and cognitive disabilities and have been universally designed to maximise equitable, dignified and independent use. The concept of a continuous pathway is extended by access precincts to incorporate those areas linking public and commercial service providers, and the common domain (Darcy 2003a).

### **continuous pathway**

A *continuous pathway* is 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, stairwell or turnstile, revolving door, escalator or other impediment which would prevent it being negotiated by people with a disability (Standards Australia 2001, p.8).

### **disability**

*Disability* is a complex set of *social relationships* imposed on top of a person's impairment due to the way society is organised. Hence, disability is the product of the social relationships that produce *disabling barriers* and *hostile social attitudes* that exclude, segregate and oppress people with disabilities and deny them their rights of citizenship. The social model regards disability as the product of the social, economic and political relationships (*the social relations*) rather than locating it as the fault of an individual's embodiment. This approach to disability separates impairment from the social relations of disability (Oliver 1990) (cited in Darcy 2004, p.10)

### **easy access markets**

*Easy access markets* are any segment within the tourism market that prefers accessing tourism experiences with ease. This may include seniors who may prefer walking up a gentle ramp rather than tackling a large number of stairs. People with a disability, including those with physical and sensory disabilities, will find it easier to access tourism facilities where there is a continuous pathway, tactile surfaces and clear signage (Tourism New South Wales 2005).

### **universal design**

*Universal design* is the design of products and environments to be usable by all people, to the greatest extent possible, without the need for adaption or specialised design. The intent of the universal design concept is to simplify life for everyone by making products, communications, and the built environment more usable by more people at little or no extra cost. The universal design concept targets all people of all ages, sizes and abilities (Center for Universal Design 2003).

## **AUTHOR**

### **Dr Simon Darcy**

Simon Darcy is a Senior Lecturer and Research Director of the School of Leisure, Sport and Tourism, Faculty of Business at the University of Technology, Sydney. He teaches subjects including environmental planning, public policy, diversity management, and research methods across the School's undergraduate and postgraduate programs. Simon has published chapters in books and journal articles on leisure and tourism participation patterns, environmental planning of tourism developments, appropriate use options for natural and heritage areas, and access planning. His professional background is in planning and research, where he has been involved in a range of research and consultancy projects for all levels of government and the private sector. Simon's PhD investigated the tourism experiences of people with disabilities, and sought an explanation for their experiences through an analysis of government tourism marketing authorities and accommodation sector practices and the related discourses. His body of work surrounding accessible tourism over the last decade has gained national and international recognition. Further, he has been actively involved in changing tourism practice through his positions as a board member of Nican, as a member of the Commonwealth Government's Office of National Tourism's Steering Committee on accessible tourism and as a member of the NSW Transport Minister's Accessible Public Transport Forum. More recently he was involved in assisting the BTR to reformulate the disability module for the 2003 National Visitor Survey.



The Sustainable Tourism Cooperative Research Centre (STCRC) is established under the Australian Government's Cooperative Research Centres Program. STCRC is the world's leading scientific institution delivering research to support the sustainability of travel and tourism - one of the world's largest and fastest growing industries.

## Research Programs

Tourism is a dynamic industry comprising many sectors from accommodation to hospitality, transportation to retail and many more. STCRC's research program addresses the challenges faced by small and large operators, tourism destinations and natural resource managers.

**Areas of Research Expertise:** Research teams in five discipline areas - modelling, environmental science, engineering & architecture, information & communication technology and tourism management, focus on three research programs:

**Sustainable Resources:** Natural and cultural heritage sites serve as a foundation for tourism in Australia. These sites exist in rural and remote Australia and are environmentally sensitive requiring specialist infrastructure, technologies and management.

**Sustainable Enterprises:** Enterprises that adhere to best practices, innovate, and harness the latest technologies will be more likely to prosper.

**Sustainable Destinations:** Infrastructural, economic, social and environmental aspects of tourism development are examined simultaneously.

**Postgraduate Students:** STCRC's Education Program recruits high quality postgraduate students and provides scholarships, capacity building, research training and professional development opportunities.

**THE-ICE:** Promotes excellence in Australian Tourism and Hospitality Education and facilitates its export to international markets.

## Commercialisation

STCRC uses its research network, spin-off companies and partnerships to extend knowledge and deliver innovation to the tourism industry. STCRC endeavours to secure investment in the development of its research into new services, technologies and commercial operations.



## Australia's CRC Program

The Cooperative Research Centres (CRC) Program brings together researchers and research users. The program maximises the benefits of research through an enhanced process of utilisation, commercialisation and technology transfer. It also has a strong education component producing graduates with skills relevant to industry needs.

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