Attitudes and Experiences of Tourism Operators in Northern Australia toward People with Disabilities

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ABSTRACT

The last decade has seen an increasing interest in disability, access and tourism. This has culminated in the emergence of a body of work on 'accessible tourism'. Disability and access have been the subject of a great deal of government regulation and coordination through building codes, awareness training and, through state-based tourism marketing authorities, and policy engagement. Yet, the supply side perspective of industry responses to this consumer group has been under researched (Darcy & Pegg, 2011). This study seeks to redress this omission through examining the attitudes and experiences of tourism operators. The area chosen to the study is Queensland, Australia using in-depth interviews which were conducted with 32 tourism operators across five major regional tourism locations in Queensland, Australia. The interviews investigated the level of engagement with the consumer group, their motivations for catering for the group and reported their experiences with the service provision to the group. The results of the study showed that while the macro policy environment is conducive to having an accessible built environment, transport and service sector, the level of engagement by the tourism industry is still left to an ad hoc process of trial and error by individual operators. In comparison to decades of the past, tourism operators are now making significant efforts to make their products and services more accessible for people with disability. However, most operators noted that there is still a weak demand from the accessible tourism market and with a low recognition of their existing product offerings.

Key Words: people with disabilities; accessible tourism; tourism operators; accessible accommodation; accessible transport; attitudes; customer service

INTRODUCTION

Traditionally, people with disability (PwD) have been overlooked, or in some cases totally ignored as an important market within the travel and tourism industry (Stumbo and Pegg, 2005; Dwyer & Darcy, 2011). Yet, tourism has the potential to improve the quality of life of individuals with disabilities as it does for all community groups (Shi, Cole & Chancellor, 2012). By improving travelling opportunities, PwD experience greater leisure satisfaction and ultimately contribute to a better quality of life (Card, Cole & Humphrey, 2006).

A great deal of renewed focus on disability and tourism has been placed on the travel needs of PwD because of the growing awareness that 650 million or 16% of the world population has a disability. As Figure 1 shows, there is a strong relationship between ageing and disability where people acquire mobility, vision, hearing and cognitive disabilities as part of the ageing process (World Health Organization & World Bank, 2011). Figure 1 shows that there is a high degree of disability amongst women but the gendered relationship of disability and tourism remains largely unexamined. By 2050 the number of PWD is expected to double to over 1.2 billion people with population aging being both an eastern and a western phenomenon (World Health Organization, 2007).

FIGURE 1 ABOUT HERE

Table 1 presents data from the most current sources about the numbers of PwD and their relative proportion to the overall population in 25 countries. While the numbers of PwD are relatively self-explanatory, the radical differences between the proportions of PwD by country bring up a number of issues about the way that disability data have been previously collected. First, in many countries across the globe no data on disability is collected. While most people would regard this type of data collection as standard practice by countries, many are only just beginning to undertake the collection of census information. Second, the way disability is measured varies between countries where those having a medical based impairment approach have much lower levels, while those adopting socially constructed disability definitions have higher numbers of disability. Third, disability has a cultural context where people may not wish to identify as having a disability. There is a relatively high degree of identification in Western developed nations and a lower degree of identification in developing nations.

TABLE 1 ABOUT HERE

The United Nations adopted the *International Convention on the Rights of Persons with Disabilities* in 2006 that recognises their right to citizenship in all areas of life including tourism, as specified in Article 29. Yet, legislation itself does not guarantee the rights of PwD or that industry sectors develop inclusive approaches to these groups (Grady & Ohlin, 2009). However, what is interesting is that the major tourism generating regions from around the world all have a significant population of PwD. While economic studies have shown that PwD have financial constraints compared to the general population, those who are employed have disposable income similar to the general population (World Health Organization & World Bank, 2011) and tourism is part of that disposable spend (Dwyer & Darcy, 2011).

Many papers have established the connection between disability, tourism and accessible tourism markets. Yet, few studies have examined in detail the spending patterns of the group. Reedy's (1993) seminal book drew attention to the 43 million Americans with disability and their market power. The Open Doors Organisation was the first to examine the market power with their figures that estimated that PWD contributed $US127 billion to the economy each year with $US13 billion accounting for travel and tourism expenditure (Harris Interactive Market Research, 2005). In Europe it has been estimated that PWD contribute €80 billion in tourism expenditure (Buhalis, 2005). Most work has concentrated on domestic tourism from an inbound perspective, of which 7% to 8% of inbound tourists have a disability and make a direct contribution to the GDP of the country that they are visiting (Darcy, 2003; HarrisInteractive Market Research, 2005). Van Horn (2012) provided detailed tourism expenditure patterns across the US travel and tourism industry based on the Open Doors data. Similarly, Dwyer and Darcy (2011) examined the Australian National Visitor Survey data in comparison to non-disabled people, which showed higher spending on the accommodation sector. Their study showed that PWD already contributed $4.8 billion or 11% of the overall expenditure on tourism in Australia.

In Australia, the tourism industry has been slow to recognise the business potential of this segment. The *Disability Discrimination Act* was introduced in 1992 and has created pressure on the Australian tourism industry to offer equal service quality to PwD (Darcy & Taylor, 2009). Given the requirements of this legislation, as well as the potential size of the accessible tourism market, national and state tourism marketing agencies are becoming more aware of the economic potential of tourists with disabilities. Accordingly, national tourism agencies have attempted to improve the suitability of Australian regions as potential holiday destinations for PwD (Cameron, 2008). Despite their efforts, there is still no systematic approach to collecting and disseminating accessible tourism information. There have been some notable exceptions with a variety of government, not-for-profit and commercial providers using innovative approaches to cater for this group (Darcy, Cameron, & Schweinsberg, 2012; Darcy & Dickson, 2009; Darcy, Cameron & Pegg, 2010). However, the attitude of most service providers still remains a significant problem for the industry (Bizjak, Knezevic, & Cvetreznik, 2010; Darcy & Pegg, 2011; Daruwalla & Darcy, 2005; Schitko & Simpson, 2011)

The main aim of this paper is to investigate the ways that tourism operators are attempting to capture the potential of the accessible tourism market, the relative success of their actions and their attitudes towards the group. In addition, this study explores the motivations and experiences of tourism operators who are catering for people with physical disabilities.

LITERATURE REVIEW

Disability, accessible tourism and market estimates

The term accessible tourism has been used to describe as an emerging area of academic study and industry practice. Previous studies have mainly focussed on the experiences of PwD while travelling, without any real articulation of the defining elements of the field. More recently, Darcy and Dickson (2009) have attempted to define accessible tourism as a nexus to universal design where access is not isolated to disability, but is more broadly linked to people's bodily states over their lifespan. This provided the opportunity to be far more inclusive of a broader group of people who benefit from access provisions. These ideas further developed by Buhalis & Darcy (2011, p10-11),

> Accessible tourism is a form of tourism that involves collaborative processes between stakeholders that enables people with access requirements, including mobility, vision, hearing and cognitive dimensions of access, to function independently and with equity and dignity through the delivery of universally designed tourismproducts, services and environments. This definition adopts a whole of life approach where people through their lifespan benefit from accessible tourism provision. These include people with permanent and temporary disabilities, seniors, obese, families with young children and those working in safer and more socially sustainably designed environments.

In Australia, four million people or approximately one in five people (19%) reported that they have a disability (Australian Bureau of Statistics, 2009). The statistics have also shown a strong causal relationship between ageing and disability, where the rate of disability increases due to age, with almost six out of every ten people aged 70 years and older stating that they had a disability. The combination of seniors and PwD create a powerful argument for the tourism industry to develop inclusive practices for future competitive advantage. In the Australian context, only 11% of domestic tourism and 7% of inbound tourism has been directly attributed to accessible tourism (Dwyer & Darcy 2011).

Most of the previous studies have concentrated on the demand side, while research on the supply side has been largely ignored. Darcy (2010) wrote in support of this, "The tourism industry have largely ignored the inclusion of PwD and accessible tourism products and services within mainstream development and planning unless they have been required to be compliant through human rights and building code violations" (2010, p. 5). As a result, this paper will focus on supply side issues that have been largely ignored in the research literature, with the following research questions being developed to help guide the study outcomes:

1. To what extent are products and services of tourism operators seen to be accessible for PwD?
2. What are the main reasons why tourism operators offer accessible tourism products and services?
3. How satisfied are tourism operators with the generated business success of their accessible tourism products?
4. What benefits and advantages do tourism operators experience when seeking to attract the accessible tourism market?

METHODS

Sample selection and size

The population for this study was owners or managers of tourism operations in Queensland, Australia where the sample was drawn in two stages: 1. Systematic sampling by using the Tourism Queensland databank that had previously identified tourism businesses that either had facilities for PwD, were wheelchair accessible, or in some other way catered for PwD; 2. Convenience sampling also occurred using referrals from industry as the research progressed. The first stage allowed researchers to obtain information in regard to the category, location and size of the various operators enabling the most appropriate sample units for the study to be chosen. The initial contact was by an email written by Tourism Queensland to provide support for the research project and to enhance the credibility of the project with industry. This resulted in an increased willingness of the contacted individuals to participate in the project.

Once contact was made, operators also provided further convenience sampling by referring the researchers to others who were known to offer accessible tourism products and services to PwD. The combination of systematic and convenience sampling (Jennings, 2010; Zikmund, 2003) provided a list of owners or managers from the four categories of tourism operators - accommodation, tours, attractions and transport operators. The accommodation sector contained a far larger population size than the other categories and because of this, 21 firms offering accommodation services were chosen for the study. In addition, five tour operators, three attraction operators and three transport operators were also interviewed, making an overall total of 32 tourist operators. Overall, five interviews were conducted in Brisbane, two at the Gold Coast, 13 in Cairns, one in Port Douglas and 11 in Hervey Bay in Queensland, Australia.

Data Collection Method

This study used a qualitative research methodology as the most appropriate for identifying the full range of issues, views and attitudes that individuals had regarding a specific issue (Jennings, 2010; Veal, 2011). The use of semi-structured interviews also guaranteed the collection of detailed and exhaustive information on the respondent's experiences, attitudes and opinions. This also enabled the interviewers to pose follow-up questions to clarify queries and to ensure that detailed responses were obtained on specific issues (Jennings, 2010; Leedy & Ormrod, 2001). Jennings (2010) suggested that the interview should begin with a grand tour question setting the context for the interview so as to make interviewees feel comfortable. As a result, a global question was created that asked, *"What role do PwD play in your business?"*. In addition, the researchers developed a list of topics that were linked to the research questions that helped to focus the interview. The list contained four major topic areas that were discussed in the interviews:

- The importance of PwD to the operator's business.
- The services and products that targeted PwD.
- The motivations to offer accessible products and services for PwD.
- Success factors in catering for PwD.

The interviews took the form of a conversation that permitted the interviewee to talk with relative freedom about different topics (Collins & Hussey, 2003). Great care was taken to ensure that the same questions were asked of all interviewees, with the interview varying between 30 and 120 minutes. Prior to the interview, the interviewees were asked to read and sign a consent form that explained the aims of the project as well as the role of the interviewees. In addition, the researcher asked permission to record the interview. All interviews were conducted in English and the conversations were digitally recorded.

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Pilot Study

Before conducting the study, the researcher administered a pilot study of the semi-structured interviews with a convenience sample of three grey caravanners to test the completeness and validity of the research questions and topics. The interviewees were encouraged to add additional comments and suggestions about the format of the interview. Minor adjustments were made to the prompt list after additional aspects relevant to the study had been identified. For instance, several questions were rephrased using less specialised vocabulary to ensure that all respondents would be able to understand the question.

Data Analysis

A final total of 32 interviews were conducted, recorded and transcribed into text documents. As a first step in analysing the collected data, the researchers created focussed summaries for each of the interviews. According to Riddick and Russell (2008), focused summaries contain several major themes that emerge in an interview as well as a short list of questions based on the notes. As a result, focused summaries helped the researcher to identify frequently emerging themes at an early stage of the fieldwork. As a second step, open coding or qualitative coding was used to organise and focus the collected qualitative data from the interviews. The researchers used an eight-step process which was suggested by Tesch (1990) as a means of analysing the qualitative data for this study. The researchers utilized an Excel Spread Sheet to collect the information which was then allocated to the respective categories. This procedure helped the author to identify connections and relationships between the different categories and responses within each category. After finalising the eight-step analysis process, the researcher focused on interpreting the emerged key themes and relations between major data categories into relevant theories and concepts.

RESULTS

Importance of the Accessible Tourism Market

As reflected in Table 1, 17 of the 32 respondents (53%) believed that their customers with disabilities represented less than 1% of their customers. The remaining respondents estimated that the segment made up between 1 and 2% of their businesses, while four interviewees thought that the segment accounted for between 3 to 5% of their total turnover. Given that the ABS identifies that 20% of the Australian population identify as having a disability, this suggests an underrepresentation of people with disability in the markets of those in the study. Darcy (2002; 2003) identified that only 1% of PwD identified that their impairment was a barrier to their travel and that other structural constraints were the major reasons the nontravel, this suggests that a series of structural issues may be affecting PwD access to this business enterprises.

TABLE 2 ABOUT HERE

Accessibility of Accommodation Facilities

All accommodation providers stated that they offered accessible facilities for PwD which were not only limited to rooms, but also included public areas such as restaurants, reception and recreation facilities. In terms of rooms, the level of accessibility varied significantly between the different providers. All hotels that belonged to international chains and most large hotels in the four to five star categories stated that they complied with the existing regulations. On average, 1% of the rooms were accessible however they were only equipped for wheelchair users as specified by Standards Australia (2001). These rooms were usually fitted with lower light switches and benches, higher desks and beds as well as accessible bathrooms with open showers and railings. However, all rooms were the standard room size which in some cases negatively impacted on the manoeuvrability of wheelchairs. Smaller hotels and motels with up to 30 rooms provided accessible rooms but these were usually less well equipped than the larger, international hotel chains. Only one motel had correctly designed accessible rooms that had been especially built to meet the needs of wheelchairs users.

Accessibility of Transport

Although the numbers of accessible train stations in Queensland have increased over the last few years, only approximately 20% of train stations were found to be accessible. Many of these stations have been equipped with lifts, ramps, tactile surfaces along the platform and electronic devices that have helped to support route planning for vision impaired and physically disabled guests. Furthermore, links between some of the railway stations and major attractions and specific destinations had been improved by the installation of accessible bus links.

A taxi operator who was a respondent stated that only 16 of the 131 vehicles available were accessible for wheelchair users. All these vehicles were vans that had the last row of seats removed and were fitted with a hydraulic lift at the back of the van. He stated that his company had regularly been increasing the number of accessible cabs over the last 15 years. In addition, car rental companies had vehicles with hand controls were now available for self-driving customers with disabilities.

Accessibility of Tours

Four out of the five tour operators who participated in the study were marine tour operators. Two of them had accessible vessels that allowed PwD to access and participate in the majority of activities offered on board. Almost every section of their boats was accessible for wheelchairs, including an accessible toilet in each of the boats. One of these vessels was also equipped with a lift that enabled PwD to enter the water and snorkel or swim depending on the severity of their disability. The other two operators used boats which were several years old, and were difficult to access by wheelchair due to poor access via the jetty. A total of 15 (47%) of the respondents stated that staff played a crucial role in supporting the increased level of accessibility of their facilities. However, none of the operators offered specific training for their employees.

Reasons for Operators to offer Accessible Tourism Products and Services

The necessity to comply with legal requirements was identified by more than half of the accommodation providers as their main motivation in catering for PwD. Similarly, managers of hotels that belonged to international chains stated that their company culture and statuary regulations was an important reason for the implementation of their policies. Another important motive was their goal to increase their potential customer base by providing access for potential customers with special needs, such as PwD, elderly people and families with young children. However, only one manager of a large hotel saw a business opportunity that specifically catered for people with physical impairments. He stated,

> "With the extension of life expectancy in the western world, you will see more older and aged people and you will also see more PwD…there is no need for them (PwD) to be a lesser potential customer than any other one. That is sometimes misjudged by some of my peers".

Smaller accommodation providers and tour operators also admitted that assisting PwD to use their services was personally rewarding and motivating. Three of the marine tour operators identified a passion to encourage PwD to experience the Great Barrier Reef, and was of great importance to them. As one of the marine tour operators stated,

> "I don't think that there is a big potential. My passion for that is rather for the destination … everybody should be able to experience the reef. We had a guy who broke his back nine years ago and he had never been in the water since then. He said we changed his life. These people are very appreciative. That motivates the crew".

Level of Success of Accessible Tourism Products and Services

Accommodation

The occupancy rate of specially designed accessible rooms for PwD was described as low, with answers regarding the frequency of usage of these facilities varying between "very infrequently", "once a month" or "once a fortnight". A total of 15 of the 21 operators stated that it was only on very rare occasions that all accessible rooms were rented out at the same time to PwD. All respondents stated that they were more likely to rent out accessible rooms to non-disabled people when the facility had reached 100% occupancy.

In terms of the return on investment, all general managers of the larger hotels stated that they considered the availability of accessible rooms as, "facilities that a large hotel needed to have" and, "obligatory due to the regulations". Several managers stated that providing good facilities for PwD had a positive influence on the hotel’s image and reputation and was seen as an additional feature to promote. As one manager of a large hotel stated,

> “It is a bonus for your hotel, not a disadvantage. I don’t know how much it would be to include such a room structurally I mean… honestly it does add to your hotel instead of taking away. Except those very few people who had an issue with being in a disabled room it just brings you additional business”.

Transport

Large scale investments had been made in Queensland to increase the accessibility levels of both trains and railway stations. Although limited, these improvements were mainly funded by the government, and as such did not involve extra costs for commercial providers. The taxi providers were very satisfied with the return on the money that they had invested on the purchase of accessible taxi vans for the use of local PwD. When the vehicles were not requested by PwD, they were also used to transport non-disabled people and were also attractive for the leisure and tourism market because of the increased capacity to take large groups of people up to 11 as well as luggage and other equipment.

Tours

Only two of the four marine tour operators offered truly accessible services. One of the owners had recently made a major investment by buying a new vessel that was fully accessible and were very satisfied as they now catered for a broader customer base that included a wheelchair users as well as a noticeable group of seniors who required mobility assistance. These seniors who had mobility issues generally came as part of family groups. The services of the two remaining marine tour operators stated that they required higher levels of staff support to assist PwD to undertake trips and as a result, the number of PwD using their services was very limited. Due to the inaccessibility of their vessels, staff had to manually assist wheelchair users to gain access to the vessel and the water. This created a series of occupational health and safety issues with lifting and other matters

Benefits gained from catering for PwD

Most of the providers indicated that increased accessibility had helped to open up this market segment to PwD. Additionally, two thirds of respondents stated that elderly people, people with temporary injuries and families with little children had also benefited from improved access. A total of 11 of the 32 participating operators felt that they had benefited from positive word of mouth within the accessible and grey market. Furthermore, 20% of the respondents recognised that their guests with disabilities were often accompanied by other people who were their carers, family members or friends who would not have used the operator's facilities if PwD had not been provided with accessible facilities in the first place.

Participants who represented hotels with conference facilities considered that the accessible facilities were crucial when successfully quoting for conferences and conventions. Mathew stated, "If you can't cater for PwD, you are not considered as a venue. This is especially the case for the venue selection for conferences of government bodies. Having these facilities is a must". Furthermore, seven respondents, who were mainly tour operators or small scale accommodation providers, stated that they regarded catering for PwD as *'morally rewarding'*, *'motivating'* and *'interesting'*. Three respondents remarked that their staff *'received a thrill out of helping people'*. All four marine tour operators were very positive about the opportunity to help PwD to experience the reef and marine life and found it particularly rewarding to watch the positive reactions of visitors with disabilities to the great variety of marine environments.

DISCUSSION OF RESULTS

RQ 1. To what extent are products and services of tourism operators in Queensland accessible to PwD? Tourist operators reported a range of different views about the levels of accessibility of facilities and services. Accommodation services of most of the four and five star hotels and resorts were found to be better, as they had altered the height of furniture and fittings such as light switches and door handles to cater for PwD. In contrast, many of the accessible rooms of motels in one to three star categories had only the most minimum modifications in regard to door widths, ramps over steps and the installation of accessible showers. Newer properties had to conform to uniform accessibility regulations due to the introduction of the Disability Discrimination Act (1992) and Australian Standards 1428 for access and mobility (2001).

In terms of accessibility to transport in Queensland, comments that were made suggested that rail transport had improved over the last seven years, however only 20% of all train stations in Queensland were found to be accessible. Most of these improvements have occurred in the main cities, while many small regional destinations are still unreachable by train. Accessible taxis and vans as well as accessible hire cars were found to be popular and frequently used alternatives to public transport.

For marine tour operators, the level of accessibility of their services depended to a large extent on the structural design of the vessel. In particular, vessels that had been built more than 10 years previously were inaccessible to PwD, as sections of these boats were connected by stairs and lacked accessible toilets. Consequently, the accessibility of the vessel was dependent on the provision of staff support for tourists with disabilities. Several were reluctant because of the workplace health and safety regulations and legal requirements. Research shows that specific staff training decreased the risks of inappropriate staff behaviour toward customers with disabilities however none of the providers provided their employees with specific training to interact with PwD (Bizjak, Knezevic, & Cvetreznik, 2010; Darcy & Pegg, 2011; Daruwalla & Darcy, 2005; Schitko & Simpson, 2011).

RQ 2. What are the main reasons why tourism operators offer accessible tourism products and services? The most frequent response was the stated need to comply with government regulations such as the DDA or the Australian Standards legislation. Respondents who worked for international hotel chains stated that their company rules and culture were significant motivators to improve accessibility of their facilities. Operators who worked in the conference and convention business area further indicated that accessible facilities had become a crucial factor when attracting increased business. Consequently, these hotels provided accessible facilities in order to remain competitive in the conference market.

Although approximately 50% of the operators hoped to increase their customer base by providing accessible facilities, it was generally agreed that catering specifically for PwD had very little impact on the organization’s business success. Improved accessibility only represented a competitive advantage when it attracted not only PwD, but also elderly people and/or families with strollers and prams. Furthermore, financial support by City Councils or the State Government was also identified as an additional motivation to assist operators to improve their accessibility levels.

Surprisingly, results showed found that emotional and personal factors were a common motivation for improvements in accessibility. Small operators in particular often found it morally rewarding and motivating to cater for people with physical disabilities. Some operators had family members or friends with a disability and were already sensitised to the needs of PwD.

RQ 3. How satisfied are tourism operators with the generated business success of their accessible tourism products? For the majority of participating operators (77%), PwD generally represented only a very small percentage of their total customers. Occupancy rates of accessible rooms and patronage by PwD to take accessible tours and attend attractions were generally described as low. Accordingly, expectations and dependence on support from this market segment was seen to be limited. Although several of the tour operators stated that they would like to see more PwD using their accessible facilities, the weak demand of this market segment did not really represent a major problem for most. For the large operators, compliance with legal regulations was an unquestioned obligation. Consequently, the feasibility of their resulting investment in accessible facilities was usually not questioned. In contrast, small scale operators were more sceptical about the regulations because they were already facing lower occupancy rates.

RQ 4. What benefits and advantages do tourism operators encounter when seeking to attract the potential of the accessible tourism market? Comments from tourism providers indicated that providing accessible products and services for PwD not only has the potential to open up this market segment, but other niche markets as well such as people with a temporary disability, the grey market, and the young family market. This has helped to create additional business and was considered as a clear benefit of offering accessible facilities. The industry observations support the National Visitor Survey disability module that was the basis for Australian market estimates of the group (Darcy 2003; Dwyer and Darcy, 2011).

Furthermore, other benefits included positive word of mouth within the disability community as well as strong customer loyalty that cannot be underestimated. Positive word of mouth is considered one of the most cost-effective tools to win new customers (Bowen & Shoemaker, 1998; Darcy, 2010). With the increased efforts in investment that companies had to make to retain their current customers, the high degree of customer loyalty that PwD often developed toward operators represents a further benefit (Duffy, 1998; Darcy, Cameron & Pegg, 2010). In addition, some intangible benefits were identified by small scale operators who noted that catering for PwD was morally rewarding and had a positive motivating effect on their staff.

CONCLUSION

This study provided an analysis of the supply side of the tourism market for travellers with disabilities in Queensland. The findings indicated that accessibility to public transport facilities and to tourist attractions in Queensland had significantly improved which had reduced the financial burden for many travellers with disabilities.

Tourist operators were found to be making significant efforts to increase their products and services to be more accessible for PwD. This was because firstly, regulations such as the DDA have dictated the level of accessibility that tourism facilities must conform to. As regulations are more strictly enforced, it is placing increased amounts of pressure on tour operators to comply with these regulations. Secondly, the size of the investment and the structural design of existing facilities were identified as significant problems that often limited the ability of operators to make their products or services to be fully accessible for PwD. The possibility of improved accessibility by increased staff support is limited because of government workplace health and safety regulations. Motivators to improve accessibility include the greater availability of financial support for operators, as well as for personal and emotional reasons.

Furthermore, this study found that tourism operators could benefit by tailoring their products and services to the specific needs of PwD. That is, the increased customer loyalty of this segment as well as positive word of mouth communication within the disability community was seen to be important. While various industries such as the airline industry have had to develop costly customer loyalty schemes to increase the loyalty of customers, strong customer loyalty has been found to be an intrinsic characteristic of the accessible tourism market.

The experiences of the majority of participating tourism operators testified that there are still problems in catering for the accessible tourism market. Most respondents noted that there was still a weak demand from the accessible tourism market and a lack of awareness of existing product offerings. It was suggested that minimising the differences between accessible and standard rooms in terms of visual design and location, increased the satisfaction of non-disabled guests as well as guests with disabilities.

Recommendations for Tourism Providers

The results have shown that the current approach of most operators is to target accessible tourism products to the accessible tourism market has not been successful. Accordingly, target groups need to be defined more broadly so that they embrace various segments with similar needs such as people with disabilities, seniors and young families with strollers and prams.

In addition, instead of focusing too much attention on the functional needs of people with disabilities, product developments need to emphasise the similar needs that people with disabilities share with non-disabled guests. There is no sound reason for instance why accessible bathrooms should not have a pleasant visual design in terms of colour and shape. In order to increase flexibility, extra fittings such as railings and shower seats could be installed in all bathrooms. Associated to this is a need to avoid negative labelling such as “disabled” rooms and to consider more progressive nomenclature such as “easy access” or “accessible” rooms that might be more appealing to nondisabled guests.

In accordance with strategic approaches marketing, accessible products need to market to a broader target audience. Unlike other tourist groups that the operators targeted, none of the operators had undertaken any specific tourism information collation, marketing, promotion or distribution to PwD or the associations that represent them. The operators relied on PwD to somehow find their products and services without the requisite information, marketing promotion or distribution that operators normally undertake when targeting tourists generally. This is a significant oversight by the industry. Yet, operators cannot be harshly criticised as there has been a lack of leadership by tourism industry associations, state tourism marketing authorities and Tourism Australia.

Future Research

While the exploratory qualitative nature of this study enabled the researchers to generate new insights into the operators’ perspective of tourism for PwD, a subsequent quantitative study would help to consolidate the validity and reliability of these findings. The next step would be to undertake a quantitative study using a larger and geographically well distributed sample of tourism providers throughout Australia. This would offer the opportunity to test the findings of this study and examine geographic variations based on metropolitan and regional considerations, state-based approaches given the Australian Federal system of government and examine the effect of any programs put into place to assist tourism operators.

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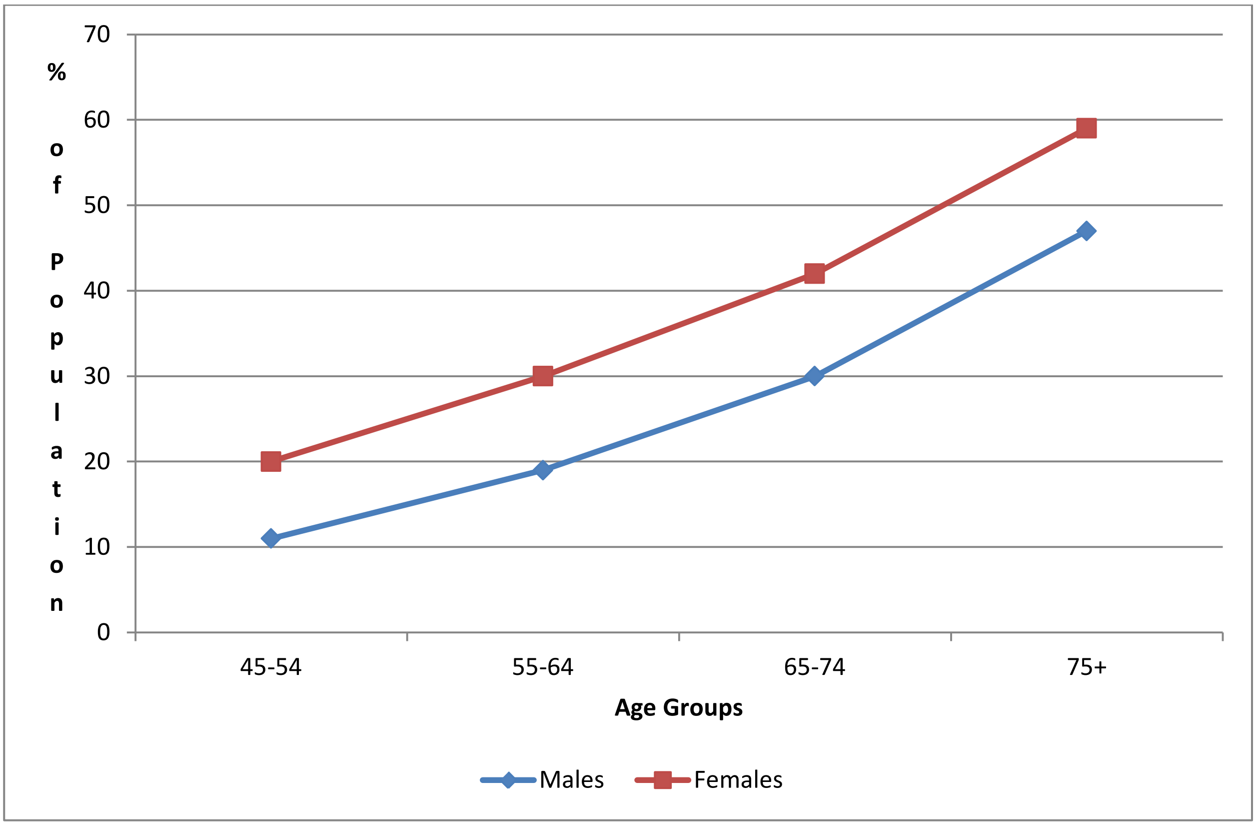
Figure 1: Proportion of People with Disability by Age Cohort



Source: Figure derived from data in The World Health Organisation and World Bank, 2011.

Table 1: Population and Proportion of People with Disability by Country

Country	PwD '000	PwD %
China	66.1	5%
India	53.7	5%
USA	52.7	20%
Germany	14.2	17%
Pakistan	11.3	3%
UK	10.8	19%
Turkey	9.1	12%
France	9.0	15%
Bangladesh	8.1	6%
Japan	6.6	5%
Vietnam	5.3	6%
Canada	4.7	16%
Italy	4.4	8%
Australia	4.0	20%
Spain	3.9	10%
Netherlands	2.9	19%
Indonesia	2.3	1%
Rep. of Korea	2.1	5%
Portugal	1.8	18%
Sweden	1.5	17%
Belgium	1.3	13%
Finland	1.2	23%
Thailand	1.1	2%
Philippines	1.0	1%

Sources: Table derived from data from ESCAP 2008; USAID 2009; WHO & World Bank 2011.

Table 2. Importance of the Accessible Tourism Market for Tourism Operators

Operator Category	% of Business represented by PwD	Number of Operators
Accommodation	<1%	12
	1-2%	4
	3-5%	2
	10%	1
	'small'[a]	2
Tours	<1%	3
	5%	1
	>90%	1
Attraction	<1%	2
	1-2%	1
Transport	4%	1
	>95%	1
	'considerable'[a]	1

[a] Respondents could not quantify