



DISABILITY TOURISM

A disability is the functional consequence of an impairment (any loss or abnormality of psychological, physiological or anatomical structure or function). To be classified as a disability, limitations or restrictions to normal functioning must be likely to last for a period of at least 6 months.

The number of Australians with a disability is on the increase, particularly as our population ages.

In 2002, Tourism Queensland conducted a review of current research to gain a better understanding of the disability tourism market. Specific objectives of conducting the review were to:

- Develop a market profile of the disability sector in Queensland;
- Provide information on what people with a disability are looking for in a tourism experience;
- Identify any product gaps; and
- Identify core issues that confront both the operation and development of tourism businesses targeting people with a disability.

Market Insight

- In 1998, 3.6 million people in Australia had a disability (19% of the total population). A further 3.1 million had an impairment or long-term condition that did not restrict their everyday activities. Of those with a disability, 87% (3.2 million) experienced specific restrictions in core activities, schooling or employment.¹
- In 1998, approximately one in five Queenslanders had a disability and just over one third of Queenslanders with a disability had a profound or severe activity restriction.²
- An estimated 3.7 million trips per year are taken by individuals with a physical disability, totalling to some 29.8 million nights.³
- The average size of travel group for people with a disability is 4.1 people.³
- There is a myth that the disability market does not spend because of income restraints. The disability market does have some income restraints but tends to travel on a level comparable with the rest of the population.⁴
- The total amount spent by all people with a disability on their last holiday adds to approximately \$472 million Australia wide.³

Please note that all information pertaining to type of experience sought, activities, accommodation and length of experience pertains to Australian travellers only. No research is currently available on this for the international market.

Type of Experience Sought

Relaxing and a change from their regular routine are the key drivers to taking a holiday for people with disabilities. Visiting friends and relatives, to attend a sporting event and to sightsee are other key motivators to taking a holiday.⁵

Specific Destination Requirements

- When evaluating whether or not to visit a destination, the following factors are assessed:
 - The overall accessibility of the destination
 - Presence of low gradients (flat)
 - Access to smooth walkways/paths (no stairs)
 - Accessibility of public transport (low floor buses, accessible train platforms and trains)
 - Things to do and see – and how accessible these are
 - Accessibility of dining and shopping outlets
 - Accessibility of attractions
 - Accessibility of pubs, bars and nightclubs (including the provision of accessible toilets)

- Whether accessible accommodation is available
- Availability of disability aids at the destination – eg: hire car facilities, taxi services, carers, equipment and supplies.

Each of these factors is important, however the best walkways, public transport and accessible accommodation is of little interest to people with disabilities if there is nothing to do and see at the destination.⁶

- Beachside destinations are visited but are generally less attractive to people with disabilities due to problems getting in and out of the water and moving around in the sand. Some also find the heat difficult to cope with and therefore find cooler hinterland areas more appealing than coastal areas.⁵
- “Newer” destinations, such as modern Australian capital cities (Perth and Adelaide are mentioned) are considered more accessible than older destinations where little to no attention has been paid to providing access (eg: some older parts of Sydney).⁵

Activities⁵

Activities enjoyed and participated in by disabled tourists include:

- Relaxing/getting away from everyday routine
- Enjoying scenery/sight seeing
- Walking (rolling)
- Restaurants, cafes, bars, pubs (provided there are accessible toilets)
- Shopping (provided they can enter and move around the shop)
- Visiting theme parks and other tourist attractions (provided they can participate)
- Nature/national parks
- Fishing
- Sport
- Clubs, casinos
- Concerts and shows (with accessible seating where their partner or friend can sit with them).

Accommodation⁵

The most popular forms of accommodation for wheelchair bound travellers are **hotels** and **motels**, followed closely by staying with **friends and relatives**. People with a disability who are not wheelchair bound are most likely to stay with friends and relatives, followed by hotels and motels.³

MAIN TYPE OF ACCOMMODATION ³	WHEELCHAIR %	OTHER %
Hotel/motel (4-5 star)	21.5	14.5
Hotel/motel (2-3 star)	18.5	15.5
Private Hotel or Guesthouse	2.9	3.8
Rented house or flat	7.3	5.6
Own holiday house or flat	2.5	2.1
Friends/relatives house/flat	28.4	42.0
Other	19.0	16.5

The booking process for accommodation by disabled persons varies:

- To ensure availability some will book up to 6 weeks in advance
- Some book just before arrival or wait until they arrive and can inspect the room (varies)
- Booking methods used include direct contact with accommodation provider, travel agent and the Internet (limited).

In order to secure a room that is truly accessible most travellers will source accommodation options listed as accessible and/or phone to investigate the actual level of accessibility of the room.

The following are some of the basic points that need to be considered when addressing accessibility:

Car Parking

- Have wide car parks, preferably undercover
- Ensure car parks are close to room or unit
- Allow for high clearance (necessary for the automatic lifting of wheelchairs)
- Ensure car parks are on a level service rather than a slope.

Access to the Unit/Room

- Ensure there are no stairs leading up to the front door of the room/unit
- Ensure level surface outside room door to enable access
- Ensure doorways are wide enough for wheelchair access.

Bathroom Access

- Equip toilets and showers with grab rails
- Provide shower seats
- Use non-slip surfaces
- Ensure doorways are wide enough for wheelchair access.

Many people with disabilities book their accommodation direct so accommodation providers need to be aware of the type and detail of information required by people with disabilities.

Transport⁵

Transport is a crucial component of travel for people with a physical disability. Much of the Australian **public transport** system has limited accessibility, significantly reducing transportation options for people with a physical disability

The most common form of transport used by people with disabilities is **driving their own car**. This is the most cost efficient and convenient as it provides transport that they can use once at their destination.

Planes are also used, and are generally considered to be relatively comfortable. On the smaller regional planes, however, people with disabilities often have problems with toilet access. The main reason people with disabilities do not fly more often or choose to drive rather than fly is *expense*. Driving is more cost efficient on two counts; driving is less expensive than an airfare, and also means that the traveller does not have the cost of hiring a vehicle or paying for taxis at the destination.

Catching the **train** (with some putting their car on the train) is also common with most modern trains being wheelchair accessible, and the railway staff being considered helpful.

Domestic Main Transport to Reach Destination³

TRANSPORT TO DESTINATION	ALL %	WHEELCHAIR %	OTHER %
Plane	15.9	16.8	14.2
Bus/coach	3.7	2.5	5.9
Private vehicle	59.8	54.0	67.3
Private vehicle modified	11.3	17.6	3.1
Rented or hired vehicle	0.6	0.6	0.6
Rented or hired vehicle modified	0.1	0.2	0.1
Train	5.1	3.4	7.5

Once **at the destination**, the range of transport options which may be accessed depends on the nature of the destination itself, location of accommodation, leisure activities, budget of the individual etc. Not surprisingly, 77% of people use a **private or modified vehicle**. The range of other transport used is varied, including **pedestrian access** (24%), **taxis** or special purpose taxis (11%), **buses/coaches** (8%), **hire vehicles** (5%) and **boats** (4%).³

Travel Party³

There is a myth that the disability market tends to travel in large groups and is therefore too difficult for the average establishment to cope with. The majority of people with physical disabilities actually travel

with between two to five people in their group. There is, however, a small percentage of groups sized seven people and over (8%), with group sizes extending up to 100.

On average, 80 to 90 percent of all travel by people with a disability is with a partner and/or carer and/or family and friends.

TRAVEL GROUP TYPE	ALL%	WHEELCHAIR %	OTHER %
Self	9.2	9.0	9.7
Partner	27.9	27.6	27.6
Friends/relatives	29.1	29.9	27.5
Parents and children	18.7	17.0	21.4
Business associate	1.0	.8	1.1
Parents/children & other friends/relatives	4.5	4.0	5.5
Couple with other adults (no children)	.6	.3	1.0
Specific disability purpose	2.7	3.6	1.2
Organised group	3.5	3.8	3.6
Other	3.0	4.0	1.4

Information Sources⁵

One of the biggest issues for people with disabilities in regards to tourism is securing accurate and reliable information about their accommodation. Many have been given inaccurate advice in the past and are therefore wary of publications for people with disabilities. To increase the credibility of publications, the following should be considered:

- A reference to the standard or definition applied to achieve the label “accessible”
- Applying the Australian Standard in assessing accessibility
- Using people with a disability to assess the area – and reference their involvement in the guide.

The types of information people with a disability may look for includes:

- Transport services
- Equipment suppliers (to assist in reducing the amount of equipment that needs to be transported to the destination)
- Personal care services (to assist those who need assistance either on a full time or part time basis – can provide cost savings if people don’t have to pay for their own carer to travel with them)
- Infrastructure services
- Floor plans for accommodation options

This provision of this type of information is likely to encourage visitation or consideration of Queensland as a holiday destination.

People with a disability also look for the same types of information that people without a disability utilise when selecting holiday destinations, including:

- A description of the area – including local attractions, things to do and see, shopping and eating
- Pictures of scenery, tourist attractions, accommodation and people enjoying themselves
- Accommodation options
- Maps of the city area including details of toilets, shopping parking, libraries cinemas and parks.

Demographic Profile

- The proportion of Australian males and females with a disability is similar (around 19%), however it varies across age groups. Males have similar or higher rates across all age groups except of those aged 80-84 years. In particular, disability rates for males are markedly higher for those who are young (0-14 years) or approaching older age (60-79 years).⁷
- In Queensland in 1998, there were 360,000 males and 326,700 females with disabilities. Males accounted for 52.4% of all people with disabilities and 52.7% of all people who were restricted by their disability. Males were also more likely than females to indicate they were not restricted by their disability, representing 50.8% of all people who were not restricted by their disability.⁸

People with a core activity restriction: Level of core activity restriction by age group, Queensland, 1998⁸

LEVEL OF CORE ACTIVITY RESTRICTION	0-4 YEARS	5-14 YEARS	15-24 YEARS	25-64 YEARS	65 & OVER	TOTAL **
Profound/Severe	*4000	28,500	11,700	99,100	84,700	227,900
Moderate	-	*3,600	7,600	74,800	41,500	127,500
Mild	-	*4,900	11,100	84,900	69,400	170,500
TOTAL	*4000	37,000	30,400	258,800	195,600	526,000

* subject to high sampling variability

** totals may differ from the sum of components due to rounding

- In Queensland in 1998, an estimated 195,000 people with disabilities aged 15 to 64 years and living in households were employed and 36,200 people with disabilities were unemployed.⁸
- The median weekly income in Australia for people aged 15 to 64 years living in households was \$360 in 1999, but for those with a disability it was \$210. Within this group, people restricted by a sensory impairment averaged \$250 a week and those restricted by an intellectual impairment, \$170 per week.⁷
- In Queensland it was estimated, according to 1999 data, that 7% of people with disabilities lived in non-private dwellings such as hospitals, hostels and nursing homes.
- The other 93 percent of people with disabilities lived in private dwellings, with four out of every five living with other people.⁸

Barriers⁵

- Perceptions of Queensland as having associations with the sun and the sand can be a negative for people with disabilities. Queensland has many desirable cooler and non-beach destinations and the promotion of such destinations would be particularly appealing to the disability tourism market.
- The following concerns apply specifically to air travel and may act as a barrier to people with a disability travelling by air:
 - No accessible toilets on smaller regional planes
 - Being pushed around without due care
 - Being seated too far away from toilets
 - Being left in the airline's temporary wheelchair
 - The handling of their own wheelchair
 - Delay getting their wheelchair back after the flight has landed
 - Wheelchair failing to arrive at the destination.
- For interstate people, particularly Victorian, South Australian and Western Australian residents, the distance to travel to Queensland is often too far to drive. Flying is therefore the best option, and whilst flying itself is not necessarily a barrier, cost is. This includes not only the cost of airfare, but also transport once at the destination. For those travelling with carers, the costs are doubled, as the carer's fare, accommodation and meals must also be provided.
- Most people with a disability say that they have had to pay a premium to stay in accommodation that is set-up for people with disabilities. They have experienced room rates that are more expensive than the standard room rates, often because the accessible room is classed as a "suite". This is considered to be discriminatory.
- Many people with disabilities are on relatively low incomes, which can make cost a barrier to travel.

Opportunities

- The demographics of Australia are changing. We have an ageing population that is increasingly affected by disabilities. These people are retiring at a younger age and living longer. They are not necessarily wheelchair bound and want to enjoy life to the maximum despite their physical restriction.³

- The majority of Australia's inbound markets are sourced from nations with ageing populations.³
- Providing accessible tourism facilities and services opens the door to a large and growing market. While wheelchair users appear to comprise of a small number of the overall people with a disability, design and planning that incorporates the needs of this group will be good design and planning for other markets. Effectively many people will benefit from these provisions including the ageing population, parents with prams, and employees as it incorporates good design practice for a range of occupational health and safety requirements.³
- Queensland has a great range of accessible tourism product, but the problem has been getting information about it to people who need it. Tourism Queensland has a very comprehensive guide for disabled tourists in the Accessible Queensland publication which includes information on a range of services such as equipment hire, personal care, transport and infrastructure. Information is listed by region and maps are included.⁹

Marketing Tools ⁵

- The promotion of accessible attractions that people with disabilities can actively participate in is essential in order to capture the disability tourism market.
- Reliability or accuracy of the information about accommodation is of utmost importance to people with disabilities. Many have experienced being given inaccurate advice in the past and are therefore wary of publications for people with disabilities. Ways to increase the credibility of publications include:
 - Referencing the standard or definition applied to achieve the label "accessible"
 - Applying the Australian Standard in assessing accessibility
 - Using people with a disability to assess the area – and reference their involvement in the guide.
- Packages that include transport and accommodation and perhaps some entry to attractions are appealing to people with a disability.
- The inclusion of transfers or hire cars at reduced rates is also appealing.
- When developing packages it is essential that they be priced at the mid or budget end of the market.
- Ensuring that people with a disability are not charged a premium for staying in accessible accommodation could assist in creating good will and help attract people with a disability to an establishment.
- Consider advertising in a guide specifically tailored for travellers with a disability, such as:
 - Accessible Queensland Guide
 - ATB Toowoomba Guide
 - Access Friendly Noosa
 - Easy Access Australia
 - The Wheelie's Handbook of Australia

Other Considerations³

The following access issues need to be considered for operators catering to the disability tourism market.

Physical Access

Physical access involves those people with mobility disabilities who require the use of a wheelchair or walking aids. They require the provision of paths, ramps, lifts, handrails, clear directional signs, kerb cuts, circulation room, wide doorways, lowered counters and telephones etc.

Sensory Access

Sensory access involves those people with hearing or sight disabilities. They require the provision of tactile signs and labels, tactile markings or visual cues at changes in levels of flooring, audio cues for lifts and lights, and hearing augmentation-listening systems etc.

Communication Access

Communication access involves those people who have difficulty with the written word, a vision, speech or hearing impairment or who are from other cultures. They may require the provision of TTY (telephone typewriters), access to information in a variety of media, non-verbal signs or posters in plain English documentation or in other community languages for example.

¹ Disability, Ageing and Carers, Summary of Findings 1999.

² One in Five Queenslanders has a Disability, 1999 (www.abs.gov.au - April 2002)

³ Tourism and People with Physical Disabilities, Simon Darcy, May 1998.

⁴ www.mangolagoon.com.au - April 2002

⁵ People with Disabilities – A Market Research Report, MCR, December 2001.

⁶ Disability Focus Groups Research Report, MCR, December 2001.

⁷ Disability, Ageing and Carers, Summary of Findings 1999 (www.abs.gov.au)

⁸ www.disability.qld.gov.au/publications/profile99.pdf - April 2002

⁹ Tourists with Disabilities - A Target Market (www.tq.com.au/issue04/1news/n08a.htm - April 2002).

Further Information

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