

VISITOR ACCESSIBILITY IN URBAN CENTRES



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ABSTRACT

The research project was sponsored by the STCRC NSW state node to examine visitor accessibility in urban areas. Visitor accessibility encompasses all tourism markets including seniors and people with disabilities who have been identified as the accessible tourism market. It is recognised in the literature that there are significant barriers that constrain the tourism experiences of the group. As determined by the Industry Reference Group (IRG) the precinct study area was the main Sydney tourism precinct that incorporated:

- the transport hub from Central to Circular Quay
- East and West Circular Quay
- The Rocks
- Royal Botanic Gardens
- Sydney Harbour environs and Sydney Harbour National Park
- Manly Ferry, Manly boardwalk and North Head Lookout.

The overall approach was founded on a combination of destination management, the experience economy and a geographic hierarchy of accessible tourism that sought to provide the market with a 'sense of place'. A secondary objective was to estimate the economic contribution of tourists with a disability using the Australian Tourism Satellite Account. For the accessible destination experiences a template was developed to address these conceptual ideas. While the project's basis can be found in the relevant building codes and Australian standards for access and mobility, this project sets itself apart by focusing on accessible destination experiences rather than the individual facilitators of access. Quite simply, what are the accessible destination experiences that are quintessentially Sydney?

The methodology was informed by universal design, the experience economy and the geographies of disability, which sought to understand how people experienced space and place. The preliminary work involved access/management information system reviews of stakeholders within the precinct area, in-depth interviews with key informants, review of other potential experience providers discovered by the interviews and further snowballed interviews. Upon completion, a list of possible experiences was identified that had the potential to provide tourists with disabilities a sense of the Sydney experience. The experiences were then access audited, observed and participants observed to validate their selection. Eighteen accessible destination experiences were then developed through the approach outlined that brought together the 'sense of place', relevant access information, the enablers of tourism experiences and relevant photographs. All of these experiences already existed within the precinct areas. No new product development could be undertaken given the tight timeframe of this research project. However, scope exists to provide a blueprint for developing this approach in other precinct areas and to develop new accessible destination experiences.

The research resulted in four major outcomes that benefit industry stakeholders and travellers. First, the economic modelling of the market segment provides a sound understanding of the contribution of the accessible tourism market to the economy. Second, the review of information and facilities provision helps industry stakeholders understand the need of travellers with a disability, and suggests how such provision can be improved. Third, the accessible destination experiences and the Web portal developed are a first of its kind developed to be compliant to international standards of Web accessibility. The experiences offer quality access information to anyone who is planning to visit Sydney. Fourth, the Web portal provides an opportunity for collaborative marketing and branding through *Sydney for All*. The research team envisage that the study methodology and approach can be replicated in other destination contexts, and that the one-stop portal concept can be extended to a state and national level.

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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.

Simon Darcy
1 March 2008

EXECUTIVE SUMMARY

Understanding the broader issues of visitor accessibility is paramount to positive visitor experiences. Importantly, visitor accessibility is interrelated to each of the triple bottom line indicators—economic, environmental and social. However, the challenges associated with ensuring that people can freely move within and between urban environments must be fully understood before access can be effectively planned and managed across these three areas. Visitor accessibility encompasses all tourism markets including seniors and people with disabilities who have been defined through previous accessible tourism research. There are significant structural barriers that may constrain the experiences of this group in urban centres. With this in mind, the aim of the research project is to evaluate and assess urban tourism environments, including urban national parks, in the context of universal design principles. This research project incorporates all sectors of the tourism industry present within designated precincts that facilitate the ‘essence of experience’.

Key Objectives:

- Provide a framework for assessing access related considerations for all visitors to urban environments
- Utilise the framework to audit key urban attractions
- Evaluate existing wayfinding systems to consider whether they create barriers to movement in and around urban environments
- Estimate the economic contribution of the accessible tourism market
- Make recommendations on accessible tourism to key stakeholders in urban centres.

Background Literature and Project Philosophy

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 1988–2003. There is also a significant relationship between ageing and disability, where a person is 14 times more likely to have a disability by the time they reach age 65 than they were as a four year old. Australia has an ageing population and the numbers and proportion of older people in Australia is growing dramatically. These demographic trends are 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 with there being significant implications for global tourism. Despite the significant numbers of Australians and people from overseas that have disabilities—600 million worldwide—there has been very little Australian research or policy that has sought to systematically engage with disability in a tourism sense.

The relationship between disability and ageing is undoubted and 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 that addresses the disability and seniors markets can benefit from the principles of universal design. 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.

The literature reviewed the nexus between disability and ageing, a definition of accessible tourism, the accessible tourism market, accessibility and the built environment, the geography of disability, destination management, the experience economy and other approaches to accessible destinations. The review has further informed the direction of the research from the research agendas outlined in Chapter 1. Firstly, the research should be guided by the three principles of independence, equity and dignity to create enabling accessible destination experiences. The Commonwealth and State Government have recognised the market nexus between disability and ageing where there is a need to create niche experiences that go beyond the current accessibility focus on building compliance and access audits. To develop experiences based on the three underlying principles of accessible tourism, an understanding of universal design and the experience economy need to be placed in context to destination management processes. Importantly, the focus must be on those experiences that are regarded as part of the destination's ‘sense of place’. For this to be successfully developed and implemented, the destination must have knowledge management responses that allow individuals to make informed decisions for their access needs.

Methodology

This research adopted an action research strategy. The overall approach was informed by universal design, the experience economy and a geographic hierarchy of accessible tourism, based on individual facilitators, access precincts and accessible touring routes. A management information systems audit was conducted. In addition, primary data were collected by means of in-depth interviews with industry stakeholders, observation and participant observation. As determined by the IRG the precinct study area is the main Sydney tourism precinct that incorporates:

- the transport hub from Central Station to Circular Quay
- East and West Circular Quay
- The Rocks
- Royal Botanic Gardens
- Sydney Harbour environs & Sydney Harbour National Park
- Manly Ferry, Manly boardwalk and North Head Lookout.

Key Findings

The key findings can be split into two major areas:

1. Economic Contribution
2. Accessible Destination Experience

Economic contribution

In Australia in 2003–04, it is estimated that tourists with a disability:

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

Accessible destination experiences

The methodology identified 18 accessible destination experiences:

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

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

All experiences included are those that domestic and international tourists and day-trippers would seek out during a visit to Sydney. They are accessible destination experiences that are quintessentially Sydney. Most visitors would seek information about those experiences either before they travel to Sydney or before they attempt to visit the attraction. The internet is identified as a growing source of information and the vast majority of Sydney's experiences benefit from internet-based accessing of their information. Information availability, detail and accuracy can be a significant constraint to travel. It is the way in which information is conveyed, which can present a constraint. Website accessibility is critical to inclusive organisational practice. For example, font sizes, font colours, contrast, page backgrounds and page design can all present a barrier to people with a vision impairment. Further, even if the content and the accessibility are sound, locating the access information can be a barrier particularly where there are no collaborative outlets for accessible destination experiences.

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

Conclusion

This scoping project has broken new ground in accessible tourism through accessible destination experience development. Where previous work on accessibility has focused on individual enablers—transport, accommodation, attractions, wayfinding and industry attitudes to disability—this research project has gone to the essence of why people travel to destinations in the first place—to experience the ‘sense of place’. Whether people have access requirements or not they should be able to have the same ‘sense of place’ as anyone else travelling to an area. Yet, no research has focused on this aspect of accessible tourism. The research offers five major opportunities for benefits to stakeholders and travellers with disabilities:

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

Project Potential and Future Extension Project

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

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

STCRC has the opportunity to contribute to an innovative approach of an only recently recognised market segment area. The accessible tourism market has been recognised in Europe, by UNESCAP and the United States as having significant potential. For example, the European Commission's research on the One-Stop Shop for Accessible Tourism Europe (OSSATE), *Europe for All* was that the outcome of the OSSATE research and the European Network for Accessible Tourism (ENAT) provide an insight to developing a national approach to accessible tourism in Australia. Similarly, the ASEAN countries with the facilitation of UNESCAP had held a

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

Chapter 1

INTRODUCTION

Understanding the broader issues of visitor accessibility is paramount to positive visitor experiences. Importantly, visitor accessibility is interrelated to each of the triple bottom line indicators—economic, environmental and social. However, the challenges associated with ensuring that people can freely move within and between urban environments must be fully understood before access can be effectively planned and managed across these three areas. The urban tourism focus has been pursued stemming from the original Research Agenda for Accessible Tourism and the notion of Total Product Development through local access precincts (Darcy 2006). Visitor accessibility encompasses all tourism markets including seniors and people with disabilities who have been defined as the accessible tourism market. However, there are significant barriers that may constrain the tourism experiences of the group in urban centres. With this in mind, the aim of this research project is to evaluate and assess urban tourism environments, including urban national parks, in the context of universal design principles. This research project incorporates all sectors of the tourism industry present within designated precincts that facilitate the essence of destination experience.

Objectives

The objectives of the research project were to:

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

Context

This research project was instigated as a STCRC NSW State Node Project with direct support from:

- Tourism and Transport Forum
- Tourism New South Wales
- New South Wales National Parks and Wildlife Service—Department of Environment and Climate Change.

Figure 1 shows the precinct area that was determined by the Industry Reference Group (IRG). The study area is comprised of the main Sydney CBD tourism precinct that incorporates:

- the transport hub from Central Station to Circular Quay
- East and West Circular Quay
- The Rocks
- Royal Botanic Gardens
- Sydney Harbour environs and Sydney Harbour National Park
- Manly Ferry, Manly boardwalk and North Head Lookout.

Figure 1 Precinct area



Source: Google Earth 2007

STCRC Research Agenda for Accessible Tourism and Urban Tourism

The research project takes direction from the STCRC report 80053 *Setting a Research Agenda for Accessible Tourism* (Darcy 2006), which identified total product development as a major area for research. Secondly, the research project is part of a broader STCRC urban tourism research agenda that focuses on the destination experience within urban tourism precincts (Darcy 2002; Edwards, Griffin & Hayllar 2006; Foggin 2000; Market and Communication Research 2002; Yau, McKercher & Packer 2004). The Chapter 2 literature review will not provide an in-depth investigation of accessible tourism or urban tourism as they have been extensively covered in these two reports. The major themes of total product development, industry engagements and access to all sectors of the tourism industry are briefly reviewed as the context for the research project.

Total product development

The accessible tourism research agenda identified the need to develop total product experiences (Darcy 2002; Foggin 2000; Market and Communication Research 2002; Yau, McKercher & Packer 2004). This integrates well with the establishment of Tourism Australia's (2005a) 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). These concepts need to be integrated within accessible destination development through place-based approaches of the geographic hierarchy of accessible tourism: accessible infrastructure; precincts and destination areas; accessible destination experiences within those areas; and the linking together of the previous hierarchy into accessible touring routes. The emphasis of the hierarchy should be for people with disabilities to experience a 'sense of place' (Hayllar & Griffin 2005; Stewart, Hayward, Devlin & Kirby 1998). As previous research has shown, people with disabilities have chosen destinations not for the experiences on offer, but as a function of reliable access information and known accessible infrastructure (Darcy 2004). Each level of the hierarchy offers an opportunity to research and test product development with each dimension of disability. The experiential outcome of tourism for people with disabilities may be enhanced through an application of two recreational models, first, the recreation opportunity spectrum (Kliskey 1998; Veal 2002; Wearing & Archer 2003) to the experiences on offer and second, the concept of challenge by choice as

developed through outdoor recreation (Carlson & Evans 2001; Haras, Bunting & Witt 2005; Kluge 2007). The testing of these models requires collaboration with industry to understand the importance of developing experiences for the group.

Industry engagement – developing collaboration

There is evidence of many enterprises providing excellent accessible recreation and tourism services. However, these providers had little profile beyond their customer base. Very little work has been carried out to document best-practice cases of accessible recreation and tourism providers since 1998 (Culyer 1997; Office of National Tourism 1998). Within the precinct area, current accessible destination experiences will be reviewed from all sectors of the tourism industry and other relevant sectors (arts and recreation). It was noted that there is a need for a government driver of accessible tourism to provide opportunities for collaboration so as those who are providing accessible destination experiences have an opportunity to collaboratively leverage these opportunities for the accessible tourism market. This requires a level of industry engagement to bring together suppliers to work in a collaborative fashion with destination managers and the State Tourism Organisations.

Access to all sectors of the tourism industry

The accessible tourism agenda called for the need to improve access to all components of the built environment, transport and interpretative services in the tourism sector. Too often assumptions were made about what people with disabilities would want to do or could do and hence, these stereotypes constrain tourism opportunities. This finding was not confined to the tourism industry as a 10-year review of the Disability Discrimination Act (1992) [Comm] (DDA) demonstrated and was 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. Direction is needed to promote the importance of having accessible tourism experiences that are enabling and promote independence, dignity and equity (Darcy 2006).

While it is recognised that accessing all sectors of the industry 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, industry representatives 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 benefits (Australian Building Codes Board 1998, 2004a). Disability organisations and others (Physical Disability Council of Australia 1999; Physical Disability Council of NSW 1997; Vintila 1996) have called for research to redress this imbalance and undertake social benefit research within the industry sectors (Bagshaw 2003; Frisch 1998, 2001, 2004).

A note about language

In taking direction from Darcy's (2002) discussion about the importance of language in disability studies, this paper uses person first language. 'The power of language is overwhelming' (Corbett 1996, p. 2) and as Corbett explains, language has a significant influence on attitudes and perceptions, and hence policy and practice. The term 'people with disabilities' is a general term that is accepted when discussing disability in Australia (Hume 1994) and in most Western countries. It places the emphasis on the person first and foremost and the disability, whatever that may be, second. It does not separate the terms, only placing an order to their use. However, as Darcy (2002; 2004) acknowledges, Oliver (1990) and others deliberately use the term 'disabled persons' as a powerful signifier, indicating that the disabling nature of society produces 'disabled people'. The person first approach to the language of disability has been reinforced internationally with the recently constituted UN *Convention on the Rights of People with Disabilities* and the *International Day for People with Disabilities* (United Nations 2007). To reflect these enabling language practices, tourist with a disability will be used.

Chapter 2

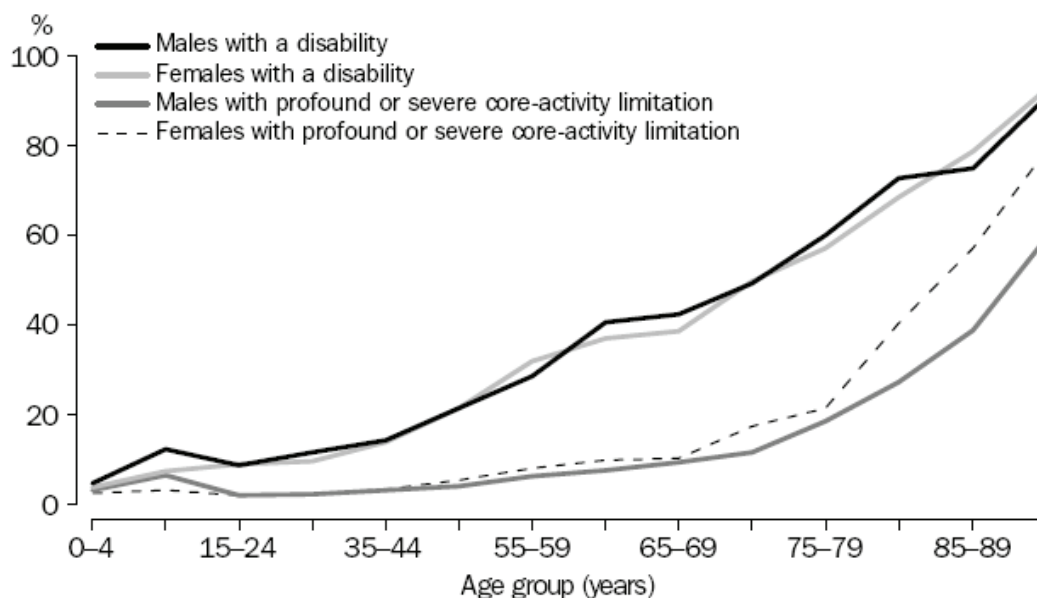
CONTRIBUTING RESEARCH CONCEPTS

This chapter presents a brief background to the area by first outlining the relationship between disability, ageing and tourism. Second, it reviews the development of easy access markets and accessible tourism, and places these in context to universal design. Third, the chapter overviews disability and built environment legislation that shapes accessible tourism environment. Last, the chapter reviews relevant research involving the geography of disability, accessibility of tourism environments, accessibility of urban environments and destination management models for understanding the accessibility of environments.

Disability, Ageing and Tourism

The Australian Bureau of Statistics (ABS) (2004) shows 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 1988–2003. As Figure 2 shows, there is also a significant relationship between ageing and disability where a person is 14 times more likely to have a disability at age 65 than they are as a four-year-old (ABS 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 (Altman 1975; World Health Organisation 2007a). These trends have considerable implications for global tourism (Dwyer 2005). There are significant numbers of Australians and people from overseas that have disabilities, 600 million people worldwide (Fujiura & Rutkowskikmitta 2001). The World Health Organisation (WHO) has reflected concerns of ageing with the recent release of *Global Age-friendly Cities: A Global Guide* (2007a). The guide offers directions for urban planners, but also instils accountability through providing a checklist that older citizens can use to ‘monitor progress towards more age-friendly cities’ (WHO 2007b). Despite statistical evidence and advances in urban planning, there has been very little Australian research or policy that has sought to systematically engage with disability and tourism (Darcy 2004).

Figure 2 Disability rates by age and sex, 2003



Source: ABS (2004, p.6)

Defining 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

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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 people will be an increasing number of people with disabilities and people 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 (Hilt & Lipschultz 2005; Mackay 1997; McDougall 1998; Moschis 2000; Muller & Cleaver 2000). 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 Easy Access Market for accessible tourism (Commonwealth Department of Industry Tourism and Resources 2003; Tourism Australia 2005; Tourism New South Wales 2005).

The Commonwealth Department of Industry, Tourism and Resources (2003) has identified people with disabilities and seniors as an emerging market area and Tourism Australia (2005a) 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 together the stakeholders to collaboratively develop a research agenda for disability and tourism.

Accessible tourism is not defined in any of the government documents. A 2005 STCRC funded workshop was held to develop an agenda for accessible tourism, which proposed a working definition for *accessible tourism*. The definition was:

... 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 (Darcy 2006, p.4).

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 adaptation 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).

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). The *Designing for the 21st Century III* 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). Together with the previously mentioned WHO (2007a), momentum has developed placing accessible tourism firmly on the global tourism agenda. In many countries, the framework for developing accessible tourism or implementing universal design can be found in the building codes and the accessibility standards. Yet, this is not a case for all countries particularly in the developing world. The next section of the report briefly reviews the Australian context of the built environment legislation for access and mobility.

Market size and economic contribution

Globally there are over 600 million people with disabilities (Fujiura & Rutkowskikmitta 2001; Mercer & MacDonald 2007), equating to about 10% of humanity. Approximately 20% of the Australian population, or four million people, identify as having a disability. Of these people 520 000 have a mobility disability, 480 000 are blind or vision impaired and 1 million are deaf or hearing impaired (ABS 2003). The numbers of people with disabilities are set to increase due to the ageing of the population. WHO (2007a) state that by 2020 there will be

1.2 billion people over 60 years of age. The 'greying' of the population has been well documented by the ABS, identified by Tourism Research Australia as a market opportunity (Tourism Australia 2005b) and is a phenomenon that affects all of our major inbound markets. These trends have considerable implications for global tourism (Dwyer 2005).

Reedy's (1993) seminal book on marketing to people with disabilities was the first to use the powerful population estimate of 43 million Americans to gain the attention of the US business sector. Similarly, Touche Ross (1993) and Keroul (1995) used estimates of disability in the European and Canadian populations to argue the market potential of the group. The first Australian market study was undertaken by Darcy (1998) where he estimated travel by individuals with disabilities was worth \$AUS473 million, or their group travel was valued at \$AUS1.3 billion. Darcy's (1998) study differed from earlier work by introducing empirical data on travel patterns of the group undertaken in the previous 12 months. His study was modelled on the Bureau of Tourism Research's domestic and international visitor surveys, and applied this to national survey data on the rates of disability in the Australian community (ABS 1993).

Burnett and Bender Baker (2001) drew attention to the discretionary income of these groups through nationally collected data. It was not until 2002 and 2005 that the US accessible tourism market used a commissioned market research study by the Open Doors Organisation, which collected travel patterns of people with disabilities. Through these figures it was estimated that people with disabilities contribute \$US127 billion to the economy each year with \$US13 billion directly attributed to travel (Harris Interactive Market Research 2005). Similarly, Neuman and Reuber's (2004) estimated German tourists make a €2.5 billion contribution to the economy where the European Union countries' OSSATE research estimated that tourists with disabilities contribute €80 billion to the economy using gross demand estimates (Buhalis, Michopoulou, Eichhorn & Miller 2005). From an inbound perspective, it has been estimated that 7–8% of international travellers have a disability and it is this group who directly contribute to increased Gross Domestic Product (GDP) to the economy (Darcy 2003b; Harris Interactive Market Research 2005).

To this point, the only method that has been used is gross demand with the addition of applying specifically collected travel patterns. These methods are rudimentary, not based on expenditure patterns and are not regarded as valid or reliable by economists (Dwyer, Forsyth & Spurr 2004). This research project offers the opportunity to draw on the expertise of well-regarded tourism economist Professor Larry Dwyer to utilise the Tourism Satellite Accounts (Dwyer, Deery, Jago, Spurr & Fredline 2007).

Disability access 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, two disability standards had a significant impact on tourism. The first is the Disability Standard for Accessible Public Transport (Commonwealth Attorney General's Dept. 2005) that stipulates the levels of accessibility for public transport. The second is more recent where the Australian Building Codes Board (2004a) has entered into a process with the Commonwealth Attorney General's Dept. and the Human Rights and Equal Opportunity Commission (2004) (HREOC) 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 Dept. 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 2004b; Gleeson 1999a, 1999b; Swain, Finkelstein, French & Oliver 1993).

Within context to this research project, the urban tourism precinct is an established area that contains significant historical, cultural, heritage and built environments (e.g. the Rocks, the Sydney Opera House) and outdoor environments (e.g. Sydney Harbour and the Royal Botanic Gardens). The DDA is not retrospective legislation and has significant clauses for 'unjustifiable hardship'. This research project will seek to build on accessible destination experiences available within the precinct and provide a way of reinterpreting environments to provide an enabling accessible tourism experience. To do so, direction will be taken from best practice in:

- city accessibility (Aslaksen et al. 1997; Gleeson 2001; Goldsmith & PRP Architects (Firm) 2000; Hall & Imrie 2001; Imrie 1996; Sawyer & Bright 2004)

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- disability studies and the geographies of disability (Abberley 1987; Oliver 1990, 1996) (Chouinard 1997; Chouinard & Grant 1995; Cormode 1997; Crouch 2000; Golledge 1996; Hahn 1986; Imrie 1996, 2000; Kitchin 1998, 2000a; Wilton 1999)
- historic buildings (Goodall, Pottinger, Dixon, & Russell, 2005; Goodall & Zone, 2006; Human Rights and Equal Opportunity Commission, 2007; Martin, 1999)
- outdoor environments (Environment Canada Parks Service 1993; Griffin Dolon 2000; Sport and Recreation Victoria 1997; U.S. Architectural and Transportation Barriers and Compliance Board (Access Board) 2005)
- information provision and Website design (Environment Canada Parks Service, 1993; Griffin Dolon, 2000; Sport and Recreation Victoria, 1997; U.S. Architectural and Transportation Barriers and Compliance Board (Access Board), 2005).

The outcome should empower people with disabilities to make informed decisions about whether accessible destination experiences are appropriate for their access and mobility needs. This short overview of the disability discrimination and built environment legislation frames the process for developing accessible tourism. Further, this research can take direction from the city accessibility, disability studies and the geographies of disability literature and research to incorporate the empowerment of people with disabilities within urban environments.

In the Australian context, the Physical Disability Council of NSW (2007) (PDCN) inherently understands the socio-spatial elements discussed by this body of literature that they articulate through the concept of citizenship. Citizenship is the relationship between the built environment, transport, employment, attendant care, equipment, leisure and tourism that are at the 'core of what it is to be human' (Hutchison 1997). Both PDCN and Hutchinson (1997) recognise that citizenship rights can only be expressed when people with disabilities have access to all components of social participation. This involves employment, public transport, the built environment and psychological manifestations of access to produce functioning social spaces. They recognise that powerful social institutions must be changed to be inclusive of disability within their organisational cultures. Tourism is a right of citizenship and tourism institutions need to be inclusive of people with disabilities, and seniors, as part of the accessible tourism market.

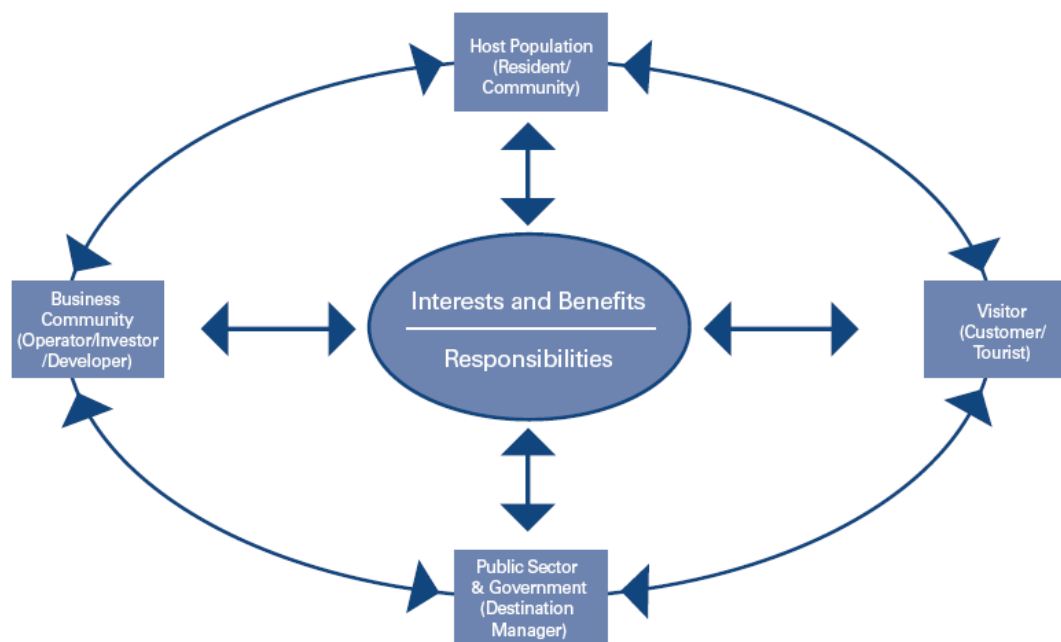
TNSW stakeholder based destination management approach

The earlier elements in this chapter need to be incorporated within the tourism planning approach of the Local and State Government in New South Wales (NSW). The stakeholder based destination management approach is set within TNSW’s role as a government tourism authority with responsibility for:

- planning—policy formulation, management of infrastructure, resources and development
- promotion—promotional marketing of destinations
- coordination—coordination of government agencies (both horizontally and vertically) that have control of tourism resources, for example, agencies for air transport.

Tourism New South Wales’ (TNSW) (2002) *Towards 2020 Masterplan* outlined their destination management approach to tourism planning. The *Masterplan* was formulated using a stakeholder approach, which emphasised the balancing of interests and responsibilities of various stakeholders. As shown in Figure 3, the stakeholders are: (1) host population, (2) business community, (3) the government and (4) visitors. TNSW has a revised *Masterplan* in draft form (Tourism New South Wales 2008). It is understood that the broad direction is for tourism to have an increased contribution to sustainable development through effective partnerships and quality visitor experiences.

Figure 3 Framework for destination management adopted by Tourism NSW



Source: Tourism New South Wales (2002)

Within the Masterplan, accessible tourism market was identified in the following way:

... comprises people who require easy access to transport, facilities and attractions—people with a disability and seniors, the fastest growing group of people in Australia. To assist tourism operators to tap into this market workshops and training programs will be conducted in local tourism areas in conjunction with local access committees to educate the industry on making their tourism facilities more accessible (Tourism NSW 2002, p. 36).

As Appendix 1 shows, this type of research would be regarded as fitting within the ‘building a sustainable destination’ phase of Tourism NSW (2005). The New South Wales Government utilises a whole of government approach to tourism and disability. As such, the *Masterplan* discusses the liaison between TNSW and the NSW Department of Ageing Disability and Home Care, which requires TNSW’s operations to be cognizant of the NSW Disability Policy Framework (2002). The only other entry about accessible tourism or disability in the *Masterplan* had to do with NSW Waterways maintaining the main tourist wharves on the harbour, which included access for people with disabilities.

Ritchie and Crouch’s destination competitiveness and sustainability

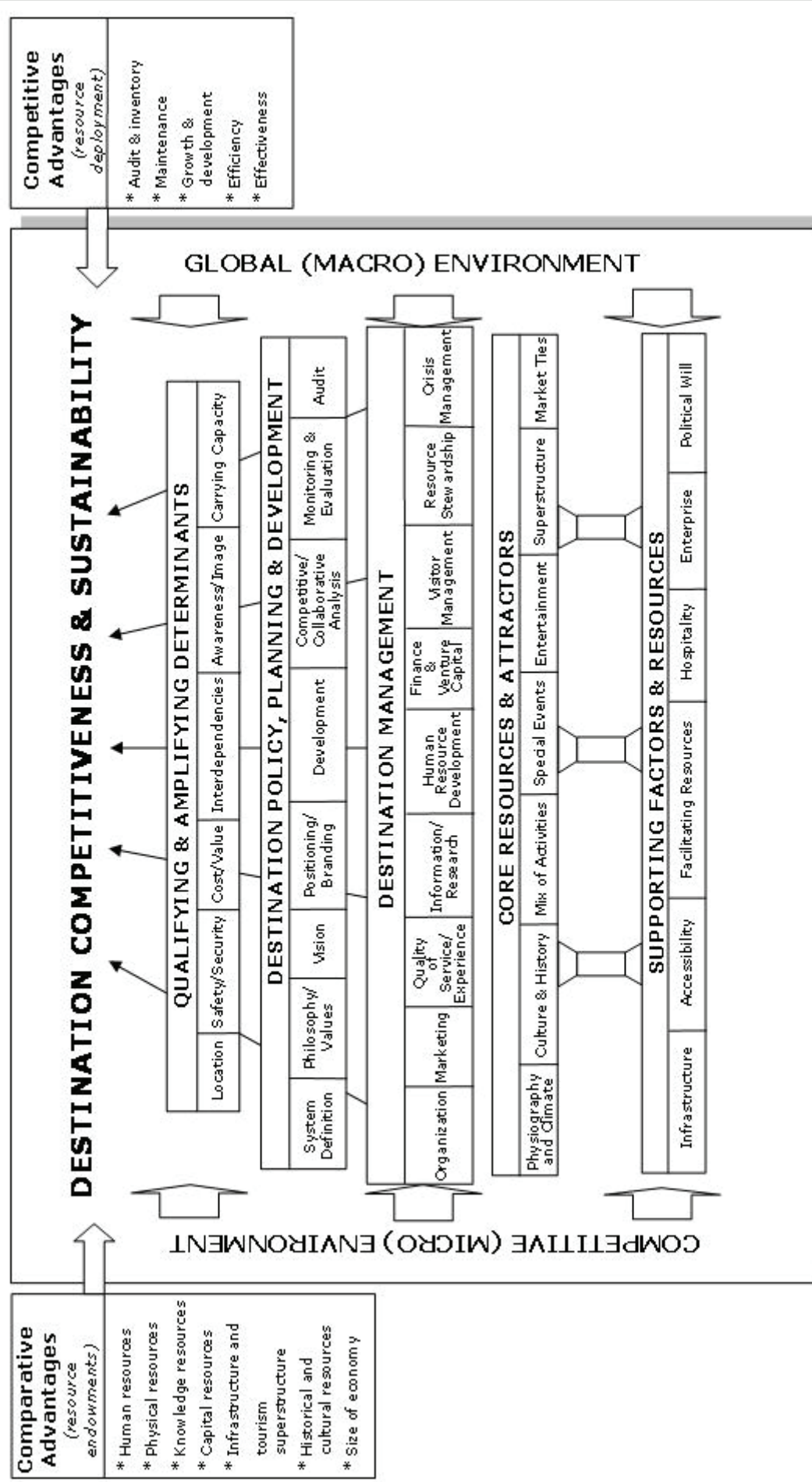
In addition to the TNSW approach to Destination Management (Tourism New South Wales 2002), Ritchie and Crouch (2000, 2001 & 2003) offer another destination management model. The Model of Destination

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Competitiveness & Sustainability (Ritchie & Crouch 2003, p. 63) is widely recognised by tourism researchers and by WTO, and is presented in Figure 4. Ritchie, Crouch and Hudson (2001) propose that the measure of a tourism destinations competitiveness and sustainability is a blend of two dimensions:

the actual success of the destination as measured by the contribution which tourism makes to enhancing the sustainable well-being of destination residents; plus the extent to which the foregoing level of success has been achieved through an effective deployment of destination resources (Ritchie, Crouch & Hudson 2001, p. 4)

Figure 4 Ritchie & Crouch's Destination Competitiveness and Sustainability Model



Source: (Ritchie & Crouch 2000; Ritchie & Crouch 2003)

The authors suggest that five sets of factors contribute to destination competitiveness and sustainability. The factors are set out in the model, and Ritchie and Crouch discuss them in the following order:

1. Core resources and attractors—factors motivating tourists to visit
2. Supporting factors and resources—those characteristics that support the development of the tourist industry
3. Destination policy, planning and development—creation of an environment where sustainable tourism can flourish
4. Destination management—activities carried out to support and maximise outcomes for the four other factors of the model
5. Qualifying and amplifying determinants—defining of the scale, limit or potential of the destinations competitive capacity, which are beyond the control of the tourism sector.

(Ritchie & Crouch 2003).

Application of Destination Models in the Accessible Tourism Context

Both TNSW framework and Ritchie & Crouch's model can be applied in the accessible tourism context. The TNSW approach involves four groups of stakeholders: the host population, industry, government and visitors, including visitors from the four major dimensions of access needs. The five sets of factors outlined by Ritchie et al. (2001) are a broad model of destination competitiveness and sustainability, yet, are aptly applied to an accessible tourism context. Accessible tourism essentially replicates 'core resources and attractors' and the extent to which the four remaining factors incorporate the principles of independence, equity and dignity within destination management approaches impacts on the realisation of accessible destination experiences. To date only Darcy (1997, 2003) and Ernawati and Sugiarti (2005) have examined precinct and destination management approaches to accessible tourism.

Experience economy

As an extension of quality experiences, 'sense of place' and Hayllar and Griffin's (2005) work on the essence of experiencing urban tourism precincts, this section briefly examines the seminal ideas put forward regarding the experience economy as a foundation for developing accessible tourism experience. The emerging experience economy represents a significant shift in production from the goods to service economy (Berridge 2007; Pine & Gilmore 1998). The key determinants between experiences and services are that:

- experiences are meant to be memorable
- experiences should engage us in a personal sense
- experiences are created, they do not exist on their own
- experiences require sophistication to engender a dollar value (Berridge 2007).

Pine and Gilmore (1998) position experiences as the fourth progression of economic values, with the previous established order of progression being the extraction of commodities, the making of goods, the delivery of services and now, the staging of experiences (p. 98). It is important to note the shift in understanding of experience, that rather than being an ancillary part of a good or service, it is important to position experience as the central component of purchasing goods and services with the purpose to provide a unique distinction from other goods or services (Berridge 2007). The experience is central, with the servicescape the backdrop to where the performance takes place (Bennett & McColl-Kennedy 2003).

Pine and Gilmore (1998) outline the four quadrants that epitomise experiences. Figure 5 is composed of two axes acting as continuums. The horizontal continuum represents customer participation. At one end of the continuum, participants are passive, meaning that their presence does not affect the performance of the experience at all. At the opposite end, participants are active, meaning that their participation explicitly affects the performance of the experience. The vertical continuum represents connection to the environment. At one end of the continuum, the relationship is absorbing in that the individual is positioned in the experience as an observer, contrasting to immersion, in which the individuals immerse themselves socially and spatially within the experience.

Figure 5 The four realms of an experience



Source: Pine & Gilmore (1998)

Pine and Gilmore's (1998) Four Es of experience are characterised as:

- entertainment—passive absorption, such as watching television, attending a concert
- educational—active absorption, such as attending a class or lesson
- escapist—active immersion, such as acting in a play or climbing a mountain
- esthetic (sic)—passive immersion, such as visiting the mountain, but not climbing it.

The ultimate experience is the intersection of all four experiences.

The creation of experiences involves the balancing of key elements of tangible goods, intangible services and memorable experiences, but recognition that experience is an individual interaction and therefore no two people will have the same experience (Pine & Gilmore 1998). With reference to the earlier discussion regarding 'Disability Access and Built Environment Legislation', to realise Pine and Gilmore's (1998) ultimate experience within accessible tourism, tourism organisations need to consider more than simply physical access requirements. Development and provision of accessible destination experiences should be underpinned by a holistic and experiential approach, promoting a whole of community enjoyment.

Berridge (2007) offers an extended perspective of the experience economy, outlining six Ds of experience positioning, in delivering the experience to the consumer:

- **detail** the balance between what experience is promised and what can be delivered
- **depict** or specify those groups whose needs will be met by the experience
- **delineate** or outline the exact benefits that can be expected from the experience
- **decide** on the desired image participants should have of the experience
- **design** the experience to meet the above points
- **demonstrate, deliver and delight** by providing an experience that is consistent across the first five Ds (Berridge 2007, pp. 131–135).

Berridge (2007) outlines that within a leisure and tourism context, the experience begins 'from the moment information is acquired' about the particular activity. The six Ds outlined above emphasise the importance of presenting accurate information and messages to tourists. As outlined by other projects currently being undertaken, a significant complaint by tourists with disabilities is that information they seek regarding their specific accessibility needs through various resources is often inaccurate, or incorrect. This has significant impacts on accessible tourism experiences for the individual and group travellers.

The significance of the Experience Economy theory is that responsibility is placed with the experience creators to act as enablers of positive experience. Implications for the tourism context are that a series of enablers must be put in place by destination managers for tourists with disabilities to immerse themselves in the accessible destination experience. For the most part, however, these enablers are not provided for people with disabilities through access provisions. Instead, there is no responsibility taken by government departments or the tourism industry to develop knowledge management that integrates the needs of people with disabilities. The result, as documented by numerous studies (see Darcy 2006), is that people with disabilities are left to discover their own path and to create their own experiences with the inadequate information systems provided by government and the tourism industry.

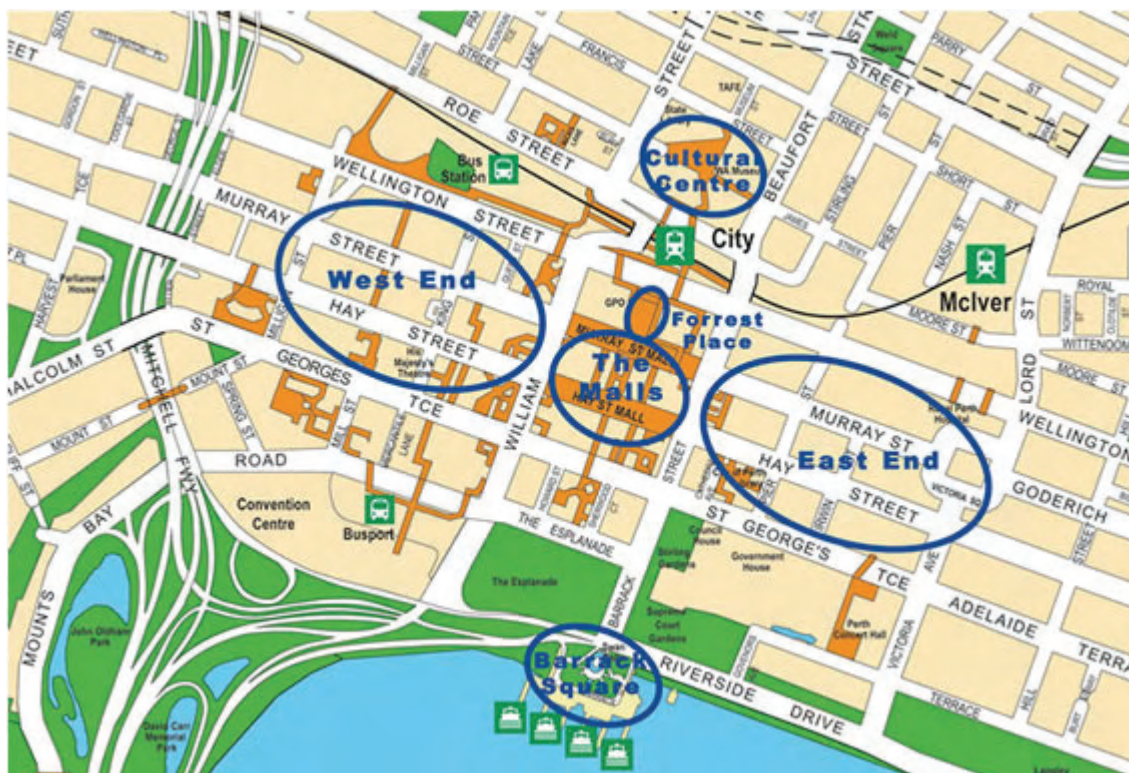
Australian and overseas approaches to accessible destinations

A great deal of Australian and overseas research approaches and government responses to accessible tourism have rightly focused on the infrastructure of access with little emphasis on destination experience. This has included access to attractions, hotel rooms, air travel, para-transit, day tours, hospitality provision, leisure activities and travel agents. The best recent examples of these approaches is Europe for All (Europe for All 2007) and the European Network for Accessible Tourism (European Network for Accessible Tourism 2007) (ENAT), which are both acting in coordinating, facilitating, marketing, branding and educative roles to encourage industry and national responses to accessible tourism. These organisations are the product of *Tourism for All in Europe* that has been operating since 1990. The program has been coordinated by the European Commission that also provided significant funding, which resulted in a great deal of policy and research to rationalise the outcomes across the European Union countries. The approach is an example of best practice for other cooperative national tourism bodies (e.g. ASEAN) and national tourism organisations.

The STCRC *Setting a Research Agenda for Accessible Tourism* (Darcy 2006) identified the importance of providing accessible tourism experiences that reflect destination experiences that the rest of the community experience. Two commercial access guides offer direction for developing 'a sense of place' to destination areas. They are Cameron (2000) and Fodors (1996), which provide a sound foundation to access infrastructure that people base destination choice on, but goes further to present key experiences that are at the foundation of the destination marketing for the regions. They do so by integrating key access considerations within a 'Lonely Planet' or 'rough guide' style. People that have used these guides suggest that they are successful because tourists do not have to do all of the intricate planning and research themselves, and they are that confident in the reliability of the information, that they do not have to think about access and can concentrate on their holiday.

A number of Western Australian initiatives focused on local government areas incorporate many elements that provide an excellent foundation for visitors to areas. Two examples include *Guestability* and *You're Welcome*. First, *Guestability* is a program initiated by the Independent Living Centre to educate the industry to understand the needs of people with disabilities (Harrop 2004). Second, *You're Welcome* is a Website that identifies *Clusters* in Perth shown in Figure 6, and provides an examination of access features and suggests must see attractions (City of Perth 2007). Lastly, both initiatives incorporate resources for industry but neglect to promote the excellent tourism and hospitality disability awareness training package *You can make a difference to customer service for people with disabilities* (Disability Services Commission (WA) 2000).

Figure 6 City of Perth 'Clusters'



Source: City of Perth 2007

Conclusion: Philosophy of Project

This chapter has reviewed the nexus between disability and ageing, a definition of accessible tourism, the accessible tourism market, accessibility and the built environment, the geography of disability, destination management, experience economy and other approaches to accessible destinations. This chapter has further developed the direction of the research agendas outlined in Chapter 1. The research should be guided by the principles of independence, equity and dignity to create enabling accessible tourism experiences. The Commonwealth and State Governments have recognised the market nexus between disability and ageing. However, as the *White Paper* suggests there is a need to create niche experiences that go beyond the building compliance and access audits.

Developing experiences based on the three underlying principles of accessible tourism, an understanding of universal design and the experience economy need to be placed in context with destination management processes. Importantly, the focus must be on those experiences that are regarded as part of the destination's 'sense of place'. For this to be successfully developed and implemented, the destination must have knowledge management responses that allow individuals to make informed decisions for their access needs. The next chapter puts forward a methodology to operationalise a destination experience approach to accessible tourism, that is, accessible destination experiences.

Chapter 3

METHODOLOGY

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

- economic contribution
- accessible destination experiences.

The methods used for each will now be outlined.

Economic Contribution

As outlined in Chapter 2, the previous market estimates on accessible tourism in Australia was last undertaken in 1998 (Darcy 1998). The main method used for economic modelling of accessible tourism in Australia and overseas has been gross demand estimation with the addition of applying specifically collected travel patterns about people with disabilities. These methods are rudimentary, not based on expenditure patterns of tourists and are not regarded as valid or reliable by economists (Dwyer et al. 2004). This research project offered the opportunity to draw on the expertise of tourism economist Professor Larry Dwyer of the STCRC Centre for Economics and Policy Analysis to utilise the Tourism Satellite Accounts (Dwyer et al. 2007). A number of steps and associated data sources required to accomplish the task are outlined in Table 1.

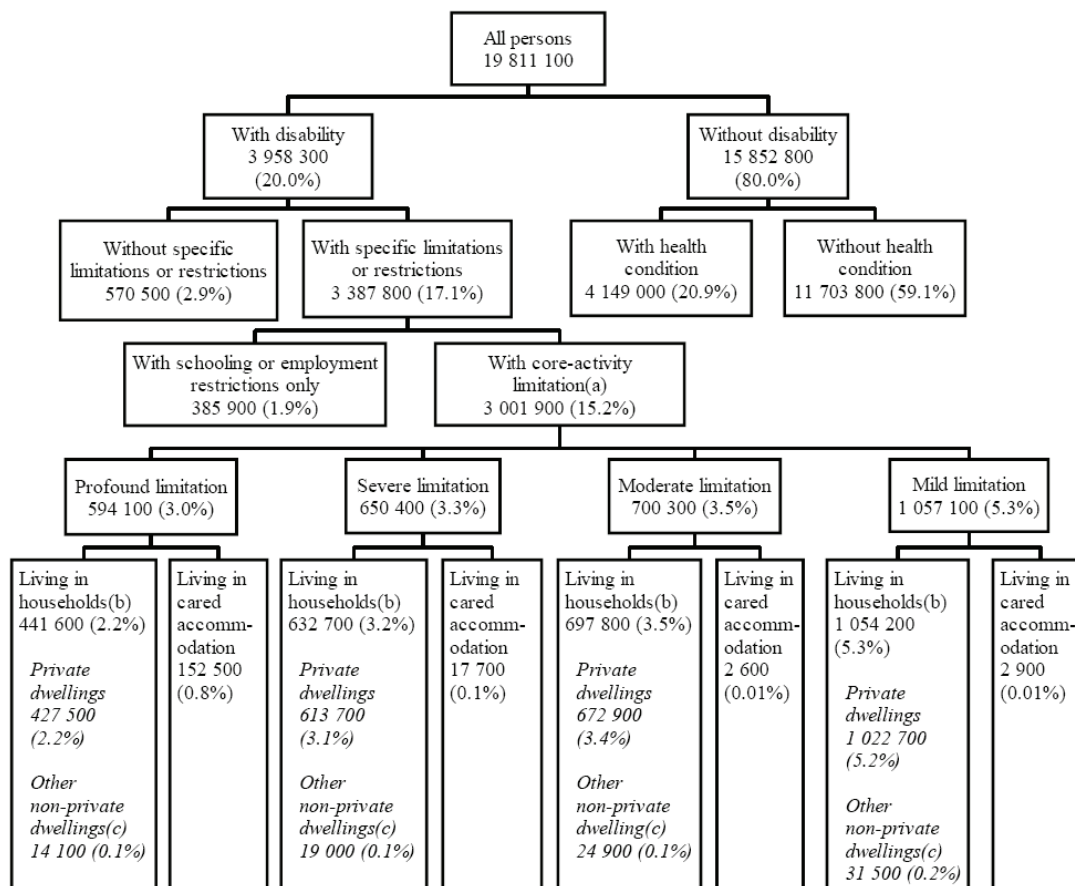
Table 1 Steps and data sources for economic modelling

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

- **Step 1:** utilised the most recent ABS (2004) *Disability and Ageing and Carers* survey. Figure 7 illustrates the numbers and proportion of the Australian population with and without disabilities.
- **Step 2:** updated the ABS (2004) statistics to the ABS (2007) Australian population estimates.
- **Step 3:** drew on the Tourism Satellite Accounts to provide the baseline contribution of tourism to the economy
- **Step 4:** utilised the National Visitor Survey, which included a disability module in 1998 and 2003, to undertake expenditure analysis in aggregate and on the goods and services that they purchased. Tourism Research Australia provided the data in SPSS format.
- **Step 5:** used the data from Steps 1–4, in association with the Australian Tourism Satellite Account, to convert the expenditure data into estimated contribution in respect of key economic variables such as Gross Value Added (GVA), Gross Domestic Product (GDP) and employment.

The summary findings are presented in the body of the report.

Figure 7 Australians with and without disabilities



(a) Includes 1 373 500 persons with core-activity limitations and schooling or employment restrictions
 (b) 'Living in households' comprises all private dwellings and non-private dwellings apart from cared-accommodation.
 (c) Other non-private dwellings comprise non-private dwellings apart from cared-accommodation.

Source: ABS (2004, p.4)

Research Design for Accessible Destination Experiences

This part of the research broadly adopted an action research process (Zuber-Skerritt 1996). Action research is particularly appropriate in working with stakeholder groups to produce shared knowledge. Further, action research has been identified as an empowering practice to use with individuals with disabilities or advocacy groups of people with disabilities (Clear & Horsfall 1997; Duckett & Fryer 1998; Goodley & Lawthom 2005; Kitchin 2000; Taylor 1999). Action research has been successfully used in the development of arts and recreation programs but its use has been limited in tourism (Lynd 1992; Pedlar, Gilbert & Gove 1994). It has proved invaluable in the study of accessibility of cities where stakeholder groups need to gain an understanding of each other's perspective and work together to bring about successful interdisciplinary policy outcomes (Kitchin 2001). As such, this research project adopted the Participative Action Research (PAR) methodology. According to Reason (1994), PAR is probably the most widely practiced participative research approach where it emphasises the political aspects of knowledge production. The three objectives of the PAR strategy are to:

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

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

From a disability perspective, as reviewed in Chapter 2, to create enabling accessible destination experiences the research is guided by the principles of:

- Independence
- Equity
- Dignity

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

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

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

The foundation for accessibility can be found in the Australian Standards for Access and Mobility, which defines the concept of a ***continuous accessible path of travel (accessway)*** as:

An uninterrupted path of travel to or within a building, providing access to all required facilities. NOTE: For non-ambulatory people, this accessible path does not incorporate any step, stairway, turnstile, revolving door, escalator or other impediment which would prevent it from being safely negotiated by people with disabilities (Standards Australia 2001, p. 8).

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

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

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

The research was designed in four phases outlined below.

Phase 1: review

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

Phase 2: stakeholder collaboration

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

The above precinct is deemed a ‘quintessential Sydney’ accessible day trip experience that would be open to all Sydneysiders (disabilities and seniors) to test as well as people from outside of Sydney who are undertaking overnight stays.

For people to make decisions about whether a destination area is appropriate for their access needs there are a number of ‘enablers’ that need to be present. ‘Enablers’ facilitate accessible tourism experiences and are those key elements that afford the prospective traveller confidence to make an informed decision to travel. Information about the enablers needs to be provided as a foundation to travel planning. The key enablers in a destination area include:

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

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

Phase 3: determine quintessential accessible destination experiences

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

Phase 4: Web portal

- Determined best practice Web accessibility based on W3C & WAI protocols
- Constructed and tested Website
- Presentation to stakeholders
- Launch of live site
- Provision for feedback on the accessible destination experiences and the usefulness of the experience to consumers.

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

Data collection instruments

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

- Access audit/Management Information Systems:
 - Audit using accredited access auditors through the ACAA (www.access.asn.au) and directed by a combination of the generic and specific contemporary best practice (Cameron 2000; City of Melbourne 2006; Villamanta Publishing 1997). Disability Action Plans and relevant official documents of individual organisations were reviewed so as to not replicate previous work and provide a realistic time frame and consideration of the budget of the project.
- Semi-structured interviews with key precinct stakeholders:
 - The interviews were designed to elicit the interviewee's ideas and opinions regarding issues, innovations, constraints, enablers and possible solutions to accessibility in their precincts and/or attractions. This provided in-depth knowledge of how key providers manage accessibility within their precincts. This method allowed the researchers to explore unexpected facts or attitudes in relation to accessibility.
 - An ongoing snowballing approach was used where interviews identified new possibilities of accessible infrastructure, enablers and accessible destination experiences.
- Online survey evaluation
 - Evaluation of the precinct information and the accessible destination experiences needs to be built into the Web portal. This would be achieved through an optional link to an online survey powered by Survey Monkey. This online survey sought respondents' views about the usefulness of the accessibility information in their planning for and undertaking, recreational and tourism activities in urban precincts. This evaluation served as an ongoing research opportunity for precinct stakeholders enabling them to improve and update the quality of information they provide to the accessible tourism market. It can only be included once the information is made live to the general public.
 - A combination of the disability advocacy organisations, Council of the Ageing and the online discussion list Ozadvocacy would be used as a sampling frame.
- Observation research of precinct areas:
 - This involves both participant observation and unobtrusive observation of tourist behaviour in public spaces to monitor how people engage with an area, space or place within urban precincts. The latter enabled the researchers to better understand how people with disabilities use their surroundings including products and services. This observation involved the researchers photographing people's behaviour such as the directions they take or are forced to take (as a consequence of constraints) and browsing behaviour. Various locations were randomly visited at different times. Inferences and judgment were made by the researchers regarding the observed behaviour of people following 'continuous pathways'.

Participant observation was done at the following sites:

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

Data analysis

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

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

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

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

Ethics

This research project has been approved by UTS HREC: Urban Tourism Program Ethics Approval, clearance number 2006-165P.

Chapter 4

SUMMARY OF ECONOMIC CONTRIBUTION

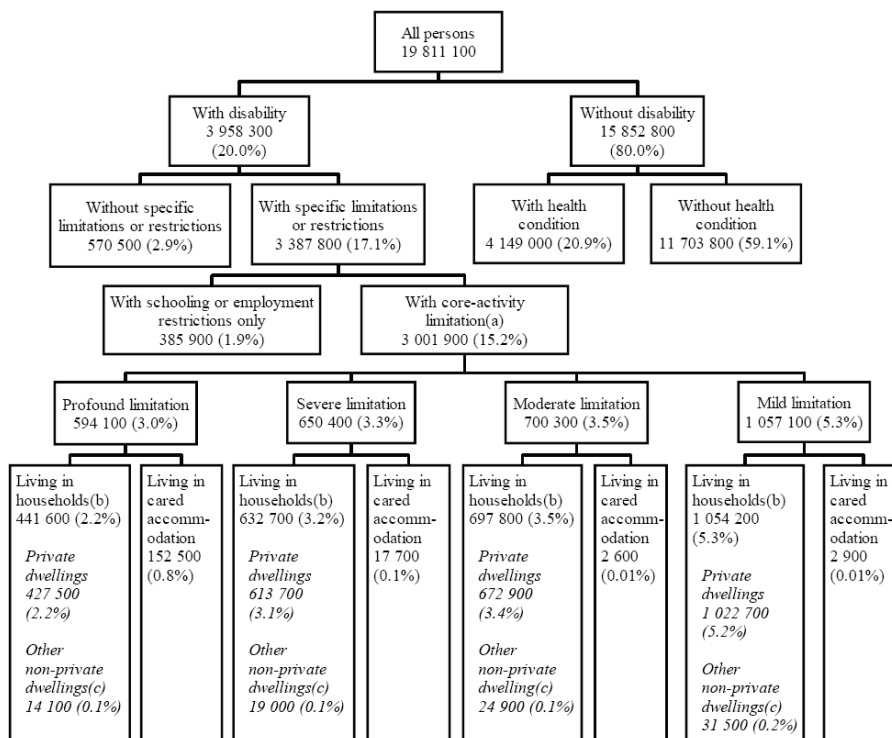
This chapter presents the summary findings for the economic contribution. The importance of including economic modelling within the research project is that rudimentary market estimates of accessible tourism in Australia were undertaken a decade ago (Darcy 1998). These estimates used a basic gross demand approach without having any detailed understanding of the expenditure patterns of the group. Further, while more detailed work has been undertaken in the US (Harris Interactive Market Research 2003, 2005) and Europe (Buhalis et al. 2005; Neumann & Reuber 2004) these continued to employ gross demand estimates rather than any form of sophisticated economic modelling. First, a brief overview of the data gathered from each of the steps used in the methodology will be presented. Second, the summary findings of the economic modelling are presented, including the expenditure associated with tourists with disabilities and the economic contribution to tourism through Gross Value Added, Tourism Gross Domestic Product and Direct Tourism Employment.

Step 1: Australians with Disabilities—Disability Ageing and Carers Survey 2003

The Disability and Ageing and Carers survey presents the most recent statistics on disability and ageing within the Australian population (ABS 2004). Figure 8 illustrates the numbers and proportion of the Australian population with and without disabilities. Further, the figure provides a breakdown of the level of core activity restriction of those identifying as having a disability on a spectrum of limitation from without to profound. What needs to be recognised is that the framework for collecting these figures is based on the International Classification of Impairments, Disabilities and Handicaps (ICIDH) (WHO 1997) and although the WHO had moved towards a bio-psychosocial approach (WHO 2001) most national systems of data collection have retained the medical classification system of ICIDH.

To comprehend the statistics requires an understanding of the terminology of impairment, disability and dimensions of access. As discussed in Chapter 2, a person's impairment is conceptualised as the embodiment of the individual that within the statistics is referred to as the individual's limitations. Whereas *disability* is defined as 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 impairment (embodiment). This approach to disability separates impairment from the social relations of disability (Oliver 1990 cited in Darcy 2004, p.10).

Figure 8 Australians with and without disabilities



(a) Includes 1 373 500 persons with core-activity limitations and schooling or employment restrictions
 (b) 'Living in households' comprises all private dwellings and non-private dwellings apart from cared-accommodation.
 (c) Other non-private dwellings comprise non-private dwellings apart from cared-accommodation.

Source: ABS (2004, p.4)

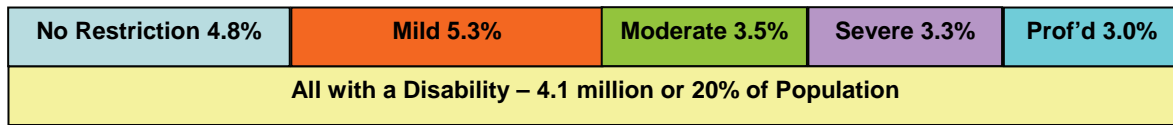
A social or citizenship approach would suggest the statistics in Figure 8 could be better expressed as the level of support needs an individual requires for social participation. This re-conceptualisation of limitation to a social, economic and political issue focuses on supporting an individual through the creation of enabling environments and attitudes for social participation. As outlined within the ABS statistics the major area of support needs include: a) schooling/employment; or b) core activities including meal preparation; property maintenance; housework; transport; paperwork; health care; cognition or emotion; communication; mobility and self care.

Further, as described by Darcy (1998) the support needs of people need to be seen in context of the dimension of access to facilitate social participation. The most common dimensions of access described in the literature include:

- mobility
- sensory—hearing
- sensory—vision
- cognitive/learning/communication
- environmental sensitivities (including asthma, chemical etc).

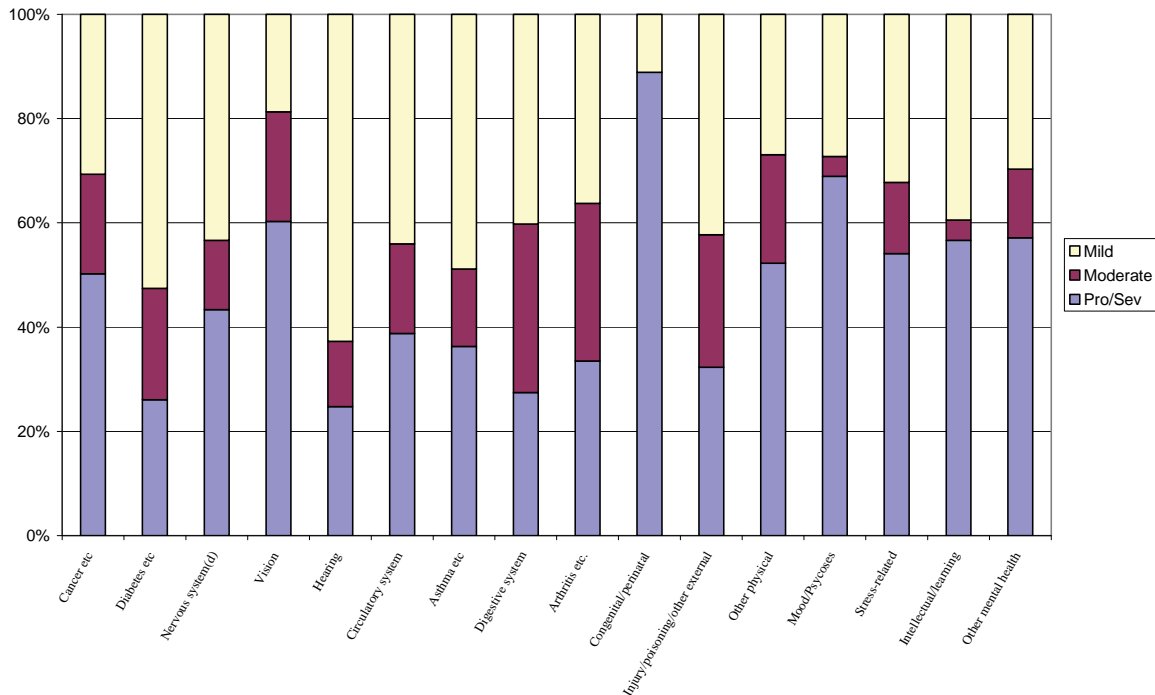
The dimensions of access provide a focus for enabling social participation. The complexity of understanding the market includes recognising that the individual's impairment may mean that an individual has multiple dimensions of access, which require multiple levels of accessibility for social participation. For example, a person with an impairment like cerebral palsy may have a mobility dimension and use a wheelchair or crutches; they may also have a communication dimension through an associated speech impairment for which they use a communication board. Depending on their level of independence with personal care, they may also travel with an attendant. This person requires an accessible physical environment as well as assistant technologies and social policy inclusions. This person's access requirements are different to a person with arthritis who has a basic requirement for a continuous pathway that includes handrails to assist in weight bearing, seats to provide a resting area, universal handles on doorways and taps to assist with reduced dexterity. As Figure 9 and Figure 10 demonstrate, of those identifying as having a disability there is a reasonably even proportion of level of support needs.

Figure 9 Level of support needs within the disability cohort



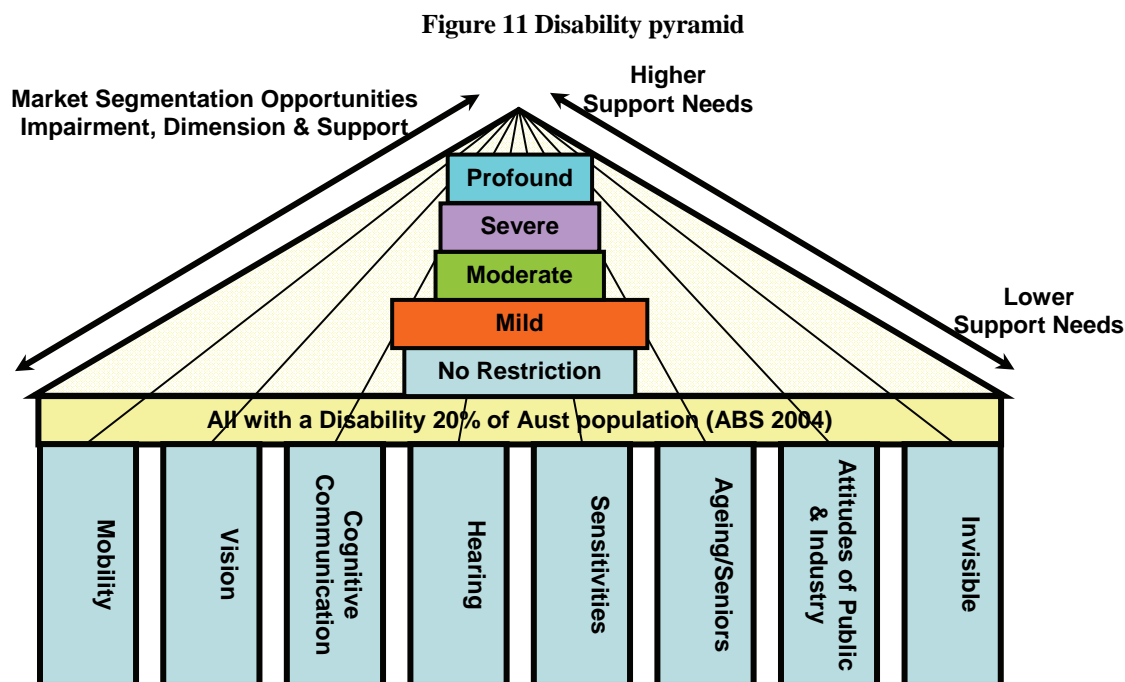
Source: Darcy (2003) adapted from Buhalis et al. (2005) with ABS (2004) data

Figure 10 Level of support needs by impairment



Source: Darcy (2003) adapted from Buhalis et al. (2005) with ABS (2004) data

Apart from demonstrating the potential market size of the group, the ABS data provides a sophisticated understanding of the market through what Buhalis et al. (2005) described as the disability pyramid. Figure 11 illustrates an adaptation of the disability pyramid concept, based on a scaled representation of the support needs identified in the ABS (2004) statistics. The shape may be more like a set of irregular Lego blocks than a 'pyramid' with each dimension of access as a 'pillar' supporting the efforts of citizenship. The pillars have been extended to specifically refer to the relationship between ageing, seniors and disability as well as understanding that some disabilities are invisible. Invisibility refers to those people who do not have any external signifiers of their disability, for example, a person with learning disabilities is unable to be identified visually where a wheelchair user or a blind person with a guide dog can be visually identified as having a disability. While there is a focus on the dimensions of access, one of the most significant constraints identified across disability studies is the attitudes of non-disabled people and the industry towards people with disabilities.



Source: Darcy (2003) adapted from Buhalis et al. (2005) with ABS (2004) data

Step 2: Updated Population Estimate to the 2007 Figures

Step 2 updated the ABS (2004) statistics to the ABS (2007) Australian population estimates, where the Australian population had increased to 20.6 million.

Step 3: Tourism Satellite Account's Estimation of Contribution of Tourism to the Economy

Step 3 drew on the Tourism Satellite Accounts to provide the baseline contribution of tourism to the economy. This was regarded as the most valid and reliable source of tourism's contribution to the economy. The TSA 2003/2004 was used as the best available data for disability, ageing and carers, and the National Visitor Survey disability module. The economic contribution attributed to tourism from the TSA is broken down into:

- Overnight \$AUS40.9bn
- Day trips \$AUS12.0bn
- Inbound \$AUS20.5bn
- Outbound \$AUS3.6bn.

Step 4: National Visitor Survey Expenditure Patterns

Step 4 utilised the National Visitor Survey, which included a disability module in 1998 and 2003, to undertake expenditure analysis in aggregate and on the goods and services that tourists with a disability purchased. Tourism Research Australia provided the data in SPSS format so that further statistical work could be undertaken. Part of the statistical work was to provide a comparison between people with disabilities and the general population.

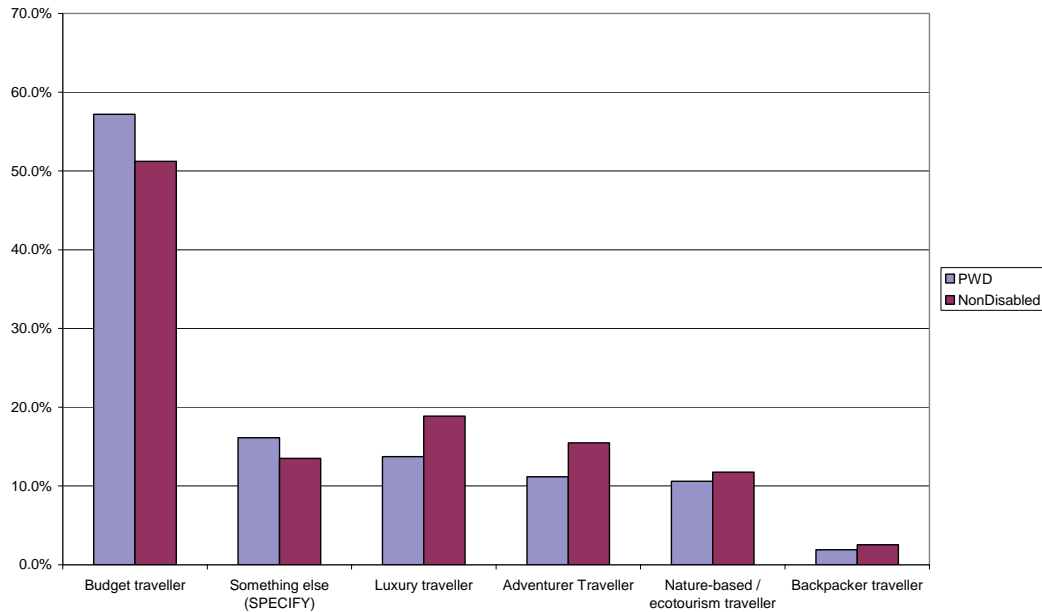
The Commonwealth Government's *White Paper* identified accessible tourism as part of its niche experiences. However, very little is known statistically about the accessible tourism market. Some limited ad hoc studies had been carried out on mainly people with mobility disabilities (Darcy 1998; Murray & Sproats 1990). More recently there have been a number of studies that have investigated the experiences of people across the spectrum of disability groups (Access For All Alliance (Hervey Bay), Inc 2006; Darcy 2004; Market and Communication Research 2002). However, only one paper drew on the National Visitor Survey that included the disability module in 1998 (Darcy 2003b). Since that paper, the more recent *National Visitor Survey* 2003 data became available for analysis. This chapter draws on the expenditure of those people that identified as having a

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disability. Some comparative analysis between those identifying as having a disability and the non-disabled will now be presented as a lead in to the TSA estimates.

Figure 12 shows the major market segments identified by the National Visitor Survey (2003) and presents the comparison between disability and the non-disabled. It shows that people with disabilities (referred to as PWD in Figure 12) are part of every market segment with variation between the segments. People with disabilities make up a higher proportion of budget travellers and something else, and make up notionally smaller proportions of luxury, adventure and nature based travellers. Moreover, when a person with a disability travels on an overnight trip, they are in a group of 3.8 people. Not to accommodate the person with a disability means that you are missing out on the business of the whole group, and not just that of the individual.

Figure 12 Market segment comparison—disability and non-disabled



Source: NVS 2003 (n=20080)

As Table 2 and 3 demonstrate, based on the NVS expenditure data people identifying as having a disability had the following patterns of expenditure for overnight and day trips.

Table 2 Pattern of accessible tourist consumption (overnight)

Pattern of Domestic Tourist Consumption	Percentage
Taxis (including to/from airport)	0.81
Airline fares	9.95
Organised tours/side trips	1.33
Car hire costs (rental, leasing)	2.01
Fuel (Petrol, diesel)	12.60
Vehicle maintenance or repairs	0.99
Other long distance transport costs (train, coach, ship etc.)	0.77
Other local transport costs (bus, train, tram, ferry etc.)	0.60
Accommodation (can include food e.g. breakfast if included)	21.62
Takeaways and restaurant meals	14.83
Groceries etc for self-catering	6.77
Alcohol, drinks (not already reported with food above)	4.08
Shopping, gifts, souvenirs	11.59
Entertainment, museums, movies, zoos etc.	2.44
Horse racing, gambling, casinos	1.33
Conference fees	1.64
Education, course fees	0.41
Purchase of motor vehicles or any other major equipment	1.78
Other (phone, postage, medical expenses, repairs, dry cleaning etc.)	5.45
	100%

Source: Purchasing pattern percentages from NVS (2003).

Table 3 Pattern of accessible tourist consumption (daytrips)

Pattern Of Day-tripper Consumption	Percentage
Package (e.g. transport and show)	0.12
Taxis (including to/from airport)	0.20
Airline fares	0.86
Organised tours/side trips	0.36
Car hire costs (rental, leasing)	0.07
Fuel (Petrol, diesel)	22.07
Vehicle maintenance or repairs	0.54
Other long distance transport costs (train, coach, ship, etc)	0.58
Other local transport costs (bus, train, tram, ferry, etc)	0.69
Takeaways and restaurant meals	15.16
Groceries etc for self-catering	8.06
Alcohol, drinks (not already reported with food above)	3.55
Shopping, gifts, souvenirs	31.36
Entertainment, museums, movies, zoos, etc	2.55
Horse racing, gambling, casinos	1.61
Conference fees	0.57
Education, course fees	0.01
Purchase of motor vehicles or any other major equipment	2.18
Other (phone, postage, medical expenses, repairs, dry cleaning, etc)	9.41
	100%

Source: Purchasing pattern percentages from NVS (2003).

It should be noted that no pattern of expenditure data is available for inbound or outbound travellers with disabilities. However, it was decided that for the purpose of modelling expenditure for these groups, their expenditure patterns would replicate that of overnight travel shown in Table 2. The next section presents the estimates of economic contribution based on this data

Step 5: Estimating the Economic Contribution

Step 5 used the data from Steps 1–4, in association with the Australian TSA to convert the expenditure data into estimated contribution in respect of key economic variables such as Gross Value Added (GVA), Gross Domestic Product (GDP) and employment. We distinguish tourists with a disability who are (1) inbound (international) visitors and (2) domestic visitors. Domestic visitation can be further divided into overnight visitation and day-trippers.

We have estimated the expenditure data associated with tourists with a disability for each of these markets. Given the paucity of data related to expenditure by people with disabilities we use a combination of a ‘top down’ and ‘bottom up’ approach to estimating the economic contribution made by the accessible tourism market.

Overnight visitation

Scenario 1: As set out in Appendix 2 Table A1, the NVS data indicates that 11 % of all people who took overnight trips in 2003 identified themselves as having a disability (Bureau of Tourism Research 2003). Applying this figure to the national TSA data for domestic overnight tourism we derive a figure of \$4822.390 million for expenditure associated with overnight tourism by people with disabilities. This information is set out in Table 4. We refer to the 11% scenario for overnight visitation as Scenario 1. This expenditure does not include expenditure by other members of the travel party.

Scenario 2: The number of people with disabilities in Australia is estimated to be 20 per cent of the population (Australian Bureau of Statistics 2004). Based upon the 2007 population estimates, this implies that the potential number of tourists with disabilities who may travel domestically is 4 134 880 (Australian Bureau of Statistics 2007). Only a proportion of these people do in fact travel and only a proportion are overnight tourists. As set out in Appendix 2 Table A1, the NVS data indicates that 22 per cent of people with disabilities recall taking a trip in the past three months (Bureau of Tourism Research 2003). However, this does not inform us as to how many trips were taken. People can make multiple trips and no information is provided on this. Accordingly, it seems appropriate for us to use the very same procedure as used in the TSA, that is, a pro rata method of allocation. Thus, assuming 20% of the population comes under the definition of having a disability one might expect that (other things equal) 20% of all overnight tourism would be by people with disabilities. Since the national TSA (ABS 2006) indicates that for 2003–2004 overnight visitor expenditure in Australia was \$40 924.006 million then 20% of this is \$8767.982 million. This scenario represents the maximum expenditure associated with overnight tourists with a disability as it assumes they have the same travel behaviour as the total population.

Day trips

As set out in Appendix 2 Table A2, the NVS data indicates that 13.3 per cent of all daytrips were taken by persons identifying as having a disability. Assuming that people with disabilities spend the same amount as other day-trippers we estimate day-tripper expenditure by persons with a disability as 13.3 per cent of total daytrip expenditure for Australia (\$12.007 billion). This comes to \$1 596 931 400 for the year 2003–04.

Table 4 shows the breakdown of expenditure using the data from the NVS (2003). The main expenditure item is shopping items (souvenirs etc.) at 31.36 per cent, followed by fuel (22.07%), which obviously mostly covers petrol expenses for car use on the day trips, and thence takeaway and restaurant meals (15.16%). These are the three sectors that gain most sales revenues from day-tripper tourists with a disability, accounting for just under 70 per cent of day-tripper expenditure on either scenario.

Outbound tourism

The national TSA for 2003–2004 indicates that outbound tourism was \$3269.0 million. As set out in Appendix 2 Table A3, the NVS data indicates that the proportion of tourists with disabilities among all outbound travellers from Australia was 6.8 per cent. Thus, it is estimated that expenditure associated to outbound travellers with disabilities is \$222.92 million. No data is available on the expenditure patterns of outbound travellers who have a disability. Data on expenditure patterns for all outbound travellers was estimated by the STCRC in its construction of TSA for Australia 2003–2004 (STCRC 2007). In the absence of other data this expenditure pattern was used to allocate outbound tourism by travellers with a disability to the expenditure items as shown in Table 4.

Inbound tourism

While Australia has very detailed data on inbound tourism expenditure unfortunately there is no data available on either the numbers of inbound tourists who have a disability nor their expenditure in Australia. An assumption was made that the proportion of tourists with disabilities who visit Australia is unlikely to be less than 6.8 per cent of all inbound visitation. This figure is also consistent with the proportion of tourists with disabilities who travel from Australia to international destinations (outbound). Further, this is consistent with the most recent US figures that suggest 7 per cent of Americans with disabilities travel overseas each year (Open Doors Organization 2005). In 2003, inbound tourism injected \$20.5bn into Australia. Assuming for present purposes that tourists with disabilities spend 6.8 per cent of the total amount of expenditure in Australia by international tourists, their expenditure is estimated to be \$1.394bn. In the absence of any further data it was also assumed that their spending pattern conformed to the average for all tourists to Australia. Data on this is available from TRA and used by the STCRC in its development of TSA (STCRC 2007) for Australia. Estimated expenditure by inbound tourists with a disability in total and by expenditure item is also shown in Table 4. Table 4 presents a summary of the expenditure of tourists with disabilities to overnight, day-tripper, outbound and inbound travel; that constitute the accessible tourism market.

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Table 4 Expenditure by tourists with a disability, 2003/04, \$m

Expenditure	DAY	OVN(1)	OVN(2)	OUTBOUND	INBOUND	TOTAL(1)	TOTAL(2)
Travel agency and tour operator services	1.003	63.501	115.457	4.649	27.726	96.880	148.835
Taxi fares	4.338	38.676	70.319	2.831	13.915	59.761	91.404
Long distance passenger transportation	32.029	511.844	930.626	37.473	552.547	1133.892	1552.674
Motor vehicle hire and lease	1.518	95.970	174.492	7.026	31.703	136.217	214.739
Accommodation services	0.000	1032.277	1876.867	75.574	254.040	1361.891	2206.481
Takeaway and restaurant meals	328.844	708.082	1287.422	51.839	183.834	1272.599	1851.938
Shopping (including gifts and souvenirs)	680.246	553.379	1006.144	40.513	252.574	1526.713	1979.478
Local area passenger transportation	15.348	28.650	52.091	2.097	28.983	75.078	98.519
Repair and maintenance of motor vehicles	11.714	47.269	85.944	3.461	1.884	64.328	103.002
Fuel (petrol, diesel)	478.731	601.603	1093.824	44.044	24.170	1148.547	1640.768
Food products	174.833	323.245	587.718	23.665	145.435	667.178	931.652
Alcoholic beverages and other beverages	77.005	194.805	354.192	14.262	71.670	357.743	517.129
Motor vehicles, caravans, boats etc.	47.288	84.990	154.527	6.222	18.311	156.810	226.348
Recreational, cultural and sports services	69.107	194.805	354.192	14.262	48.130	326.304	485.691
Gambling and betting services	34.923	63.501	115.457	4.649	21.240	124.314	176.269
Education	0.217	19.574	35.589	1.433	232.382	253.606	269.621
Actual and imputed rent on holiday houses	0.000	0.000	0.000	0.000	39.130	39.130	39.130
Other tourism goods and services	204.117	260.216	473.121	19.051	102.328	585.712	798.616
Total	2161.260	4822.390	8767.982	353.052	2050.002	9386.704	13332.296

Note: OVN (1) refers to scenario 1 (disabled OVN expenditure is 11% of total OVN); OVN (2) refers to scenario 2 (disabled OVN expenditure is 20% of total OVN). Total (1) is total figure using OVN (1) and Total (2) is total figure using OVN (2)

Purchasing patterns

NVS data is available on the purchasing patterns of tourists with a disability in respect of both overnight tourists and day-trippers (Bureau of Tourism Research 2003). This information was essential in allocating disability expenditure to relevant industries to estimate its economic contribution (see below). NVS data categorises tourist expenditure as (1) paid during the trip, (2) paid before and/or after the trip and (3) paid for by an employer. For present purposes, since our interest is in total expenditure, the expenditure data was aggregated. The percentage allocations are reflected in the proportions of the expenditure items for overnight visitors and day-trippers. See Tables 2 and 3 which provide an itemised breakdown of the total expenditure of overnight tourists with disabilities for 2003. These percentages were applied to estimate the total expenditure allocated by overnight tourists with disabilities to individual products and services.

The main expenditure item for tourists with a disability is accommodation (16.5%), followed by shopping (14.8%), takeaway and restaurant meals (13.90%) and fuel (12.3%). These are the sectors that gain most sales revenues from tourists with disabilities, accounting for around 57 per cent of overnight tourism expenditure for tourists with disabilities.

Outlined in Table 4, the figure of \$8767.982 million for overnight tourism for travellers with a disability may be regarded as a 'maximum'. It assumes that people with disabilities have the same travel patterns for overnight visitation as the rest of the population. This figure provides a 'maximum' value for overnight tourism by tourists with disabilities and sets the potential to which stakeholders might aspire to if tourism experiences are to be accessed by people with disabilities to the same degree as the rest of the population. We refer to the 20% scenario as Scenario 2.

We believe that these two scenarios reflect an 'actual' or 'best estimate' scenario and a 'maximum' scenario. Knowing the maximum potential for tourists with a disability market is a useful indicator of possible lost opportunities to the tourism industry by not putting sufficient strategies in place to facilitate more tourism from this market.

Expenditure Associated with Tourists with a Disability

To this point we have estimated the expenditure associated with tourists with a disability in Australia for 2003–2004. In summary:

Scenario 1

Overnight tourism	\$4822.390 million
Day-tripper tourism	\$1596.000 million
Outbound tourism	\$222.290 million
Inbound tourism	\$1394.000 million
TOTAL Scenario 1	\$8034.680 million

Scenario 2

Overnight tourism	\$8767.982 million
Day-tripper tourism	\$1596.000 million
Outbound tourism	\$222.290 million
Inbound tourism	\$1394.000 million
TOTAL Scenario 2	\$11 980.000 million

Contribution to Tourism Gross Value Added

Contribution to Tourism GVA is the best available measure of the contribution of any tourism market to the tourism industry and the economy. Table 5 shows the contribution to Gross Value Added of each of the separate markets for disabled tourism and also in total. The overall contribution to Gross Value Added is \$3075.523 million (Scenario 1) or \$ 4580.219 million (Scenario 2).

VISITOR ACCESSIBILITY IN URBAN CENTRES

Table 5 Contribution to tourism GVA by tourists with a disability, 2003/04, \$m

Industry	DAY	OVN(1)	OVN(2)	OUTBOUND	INBOUND	TOTAL(1)	TOTAL(2)
Travel agency and tour operator services	0.430	36.856	67.010	1.699	10.943	49.927	80.082
Taxi transport	1.277	15.416	28.029	0.711	3.772	21.176	33.789
Air and water transport	10.762	166.271	302.312	7.663	121.648	306.344	442.385
Motor vehicle hiring	0.590	50.521	91.856	2.329	11.349	64.788	106.124
Accommodation	0.000	518.253	942.280	23.890	86.728	628.872	1052.898
Cafes, restaurants and food outlets	63.441	184.990	336.347	8.526	32.659	289.616	440.973
Clubs, pubs, taverns and bars	19.515	56.905	103.465	2.623	10.046	89.090	135.650
Other road transport	2.185	33.750	61.364	1.555	24.692	62.183	89.797
Rail transport	1.171	18.095	32.900	0.834	13.239	33.339	48.144
Food manufacturing	18.026	45.133	82.060	2.081	13.808	79.048	115.976
Beverage manufacturing	9.582	32.825	59.681	1.513	8.212	52.131	78.988
Transport equipment manufacturing	4.841	14.695	26.719	0.677	1.526	21.740	33.763
Other manufacturing	67.263	94.567	171.940	4.360	17.224	183.414	260.787
Retail trade	181.277	254.863	463.386	11.750	46.421	494.310	702.833
Casinos and other gambling services	4.099	10.094	18.352	0.465	2.296	16.954	25.213
Libraries, museums and arts	8.533	32.573	59.223	1.501	5.473	48.080	74.730
Other entertainment services	8.147	31.102	56.548	1.434	5.225	45.908	71.355
Education	0.110	13.520	24.582	0.623	109.143	123.395	134.457
Ownership of dwellings	0.000	0.000	0.000	0.000	21.757	21.757	21.757
All other industries	162.625	228.640	415.708	10.541	41.645	443.450	630.519
Total	563.875	1839.069	3343.765	84.774	587.806	3075.523	4580.219

Total Contribution to Tourism Gross Value Added

Comparing our results with estimates of the contribution of Tourism to GVA we find that tourism by people with a disability ranges between \$ 3075.523 million (Scenario 1) and \$4580.219 million (Scenario 2), or 10.47% and 17.39% of Tourism GVA, indicating its importance as a tourism market. The contribution of each market type to Tourism GVA is as follows:

Scenario 1

Overnight tourism	\$1839.069 million
Day-tripper tourism	\$563.875 million
Outbound tourism	\$84.774 million
Inbound tourism	\$587.806 million
TOTAL Scenario 1	\$3075.523 million

Scenario 2

Overnight tourism	\$3343.765 million
Day-tripper tourism	\$563.875 million
Outbound tourism	\$84.774 million
Inbound tourism	\$587.806 million
TOTAL Scenario 2	\$4580.219 million

VISITOR ACCESSIBILITY IN URBAN CENTRES

The four most important sectors in terms of the contribution to Tourism GVA of tourists with a disability were:

- accommodation 21%
- retail trade 16%
- air and water transport 10%
- cafes and restaurants 9%
- (non-tourism industries) 14%

Taken together, the five sectors comprised about 70 percent of the overall contribution to Tourism GVA by tourists with a disability.

Contribution to Tourism GVA by Tourists with a Disability by Type of Market

The five sectors that make the largest contribution to Tourism GVA from tourists with disability are set out below (with percentages).

Overnight	Day-tripper	Outbound	Inbound	Total
Accommodation 28%	Retail trade 32%	Accommodation 28%	Education 19%	Accommodation 21%
Retail trade 14%	Other manufacturing 12%	Retail trade 13%	Accommodation 15%	Retail trade 16%
Cafes, restaurants 10%	Cafes, restaurants 11%	Cafes, restaurants 10%	Retail trade 8%	Air and water trans 10%
Air, water transport 9%	Clubs, pubs, taverns 3%	Air, water transport 9%	Cafes, restaurants 6%	Cafes and restaurants 9%
Non-tourism 9%	Non tourism 29%	Non-tourism 12%	Non-tourism 7%	Non-tourism 14%

Contribution to Tourism GDP

Table 6 sets out the contribution that tourists with a disability make to Tourism GDP. As noted, Tourism GDP is tourism gross value added plus taxes paid less subsidies received on tourism related products as these are reflected in prices that visitors actually pay. Taxes on tourism products include the Goods and Services Tax (GST), wholesale taxes and excise duties on goods supplied to visitors. Tourism GDP will generally have a higher value than tourism value added. Tourism GDP is a satellite account construct to enable a direct comparison with the most widely recognised national accounting aggregate, GDP.

Table 6 Contribution to tourism GDP by tourists with a disability, 2003/04, \$m

	DAY	OVN(1)	OVN(2)	OUTBOUND	INBOUND	TOTAL(1)	TOTAL(2)
Tourism GVA (i)	563.875	1839.069	3343.765	84.774	587.806	3075.523	4580.219
Net taxes (ii)	236.551	485.920	883.491	22.399	64.775	809.645	1207.217
Tourism GDP (i)+(ii)	800.426	2324.989	4227.256	107.173	652.581	3885.168	5787.435

In sum, the contribution of tourists with a disability to Tourism GDP is:

Scenario 1

Overnight tourism	\$2324.989 million
Day-tripper tourism	\$800.426 million
Outbound tourism	\$107.173 million
Inbound tourism	\$652.581 million
TOTAL Scenario 1	\$3885.168 million

Scenario 2

Overnight tourism	\$4227.256 million
Day-tripper tourism	\$800.426 million
Outbound tourism	\$107.173 million
Inbound tourism	\$652.581 million
TOTAL Scenario 2	\$5787.435 million

Tourism GDP in Australia totalled \$35262.0 million in 2003–04 (Australian Bureau of Statistics, 2007). Thus the contribution to Tourism GDP by tourists with disabilities is estimated to range between 11.01% (Scenario 1) and 18.26% (Scenario 2) of total tourism GDP in Australia.

VISITOR ACCESSIBILITY IN URBAN CENTRES

Contribution to Direct Tourism Employment

Table 7 shows the contribution to Direct Tourism Employment of each of the separate markets for tourists with a disability and also in total.

Table 7 Contribution to Direct Tourism Employment by tourists with a disability, 2003/04, '000

Industry	DAY	OVN(1)	OVN(2)	OUTBOUND	INBOUND	TOTAL(1)	TOTAL(2)
Travel agency and tour operator services	0.0071	0.6080	1.1054	0.0280	0.1805	0.8236	1.3210
Road transport and motor vehicle hiring	0.0618	1.3147	2.3903	0.0606	0.5804	2.0175	3.0931
Air and water transport	0.0848	1.3094	2.3806	0.0604	0.9580	2.4124	3.4837
Accommodation	0.0000	10.0944	18.3534	0.4653	1.6893	12.2489	20.5080
Cafes and restaurants	1.0933	3.1880	5.7963	0.1470	0.5628	4.9911	7.5994
Clubs, pubs, taverns and bars	0.4938	1.4399	2.6181	0.0664	0.2542	2.2543	3.4325
Rail transport	0.0074	0.1139	0.2070	0.0052	0.0833	0.2098	0.3029
Manufacturing	0.9789	1.8633	3.3879	0.0859	0.4150	3.3431	4.8676
Retail trade	5.1793	7.2818	13.2396	0.3357	1.3263	14.1231	20.0809
Casinos and other gambling services	0.0519	0.1278	0.2323	0.0059	0.0291	0.2146	0.3191
Libraries, museums and arts	0.1376	0.5254	0.9552	0.0242	0.0883	0.7755	1.2053
Other entertainment services	0.1872	0.7145	1.2991	0.0329	0.1200	1.0546	1.6392
Education	0.0022	0.2673	0.4859	0.0123	2.1575	2.4393	2.6580
All other industries	1.8015	2.5328	4.6051	0.1168	0.4613	4.9124	6.9847
Total tourism employed persons	10.0867	31.3809	57.0562	1.4465	8.9060	51.8201	77.4954

The contribution of each market type to Direct Tourism Employment is as follows:

Scenario 1

Overnight tourism	31 381 jobs
Day-tripper tourism	13 659 jobs
Outbound tourism	2297 jobs
Inbound tourism	13 097 jobs
TOTAL Scenario 1	51 820 jobs

Scenario 2

Overnight tourism	57 055 jobs
Day-tripper tourism	13 659 jobs
Outbound tourism	2297 jobs
Inbound tourism	13 097 jobs
TOTAL Scenario 2	77 495 jobs

The total contribution of tourists with a disability to Direct Tourism Employment is 51 820 jobs (Scenario 1) and 77 495 jobs (Scenario 2). Direct Tourism Employment in Australia totalled 448 700 jobs in 2003–04 (Australian Bureau of Statistics, 2007). Thus the contribution to Direct Tourism Employment by tourists with disabilities is estimated to range between 11.55% (Scenario 1) and 17.27% (Scenario 2) of total Direct Tourism Employment in Australia.

Table 4 indicates that tourists with disabilities create jobs in all sectors of the economy. The sectors that most benefit from job creation are:

- retail trade 27.8%
- accommodation 22.0%
- cafes and restaurants 9.5%

That is, just under 60% of the jobs sustained by tourists with a disability are in these three sectors.

Conclusion

In Australia in 2003–04 it is estimated that tourists with a disability:

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

Importantly, what the lower and upper economic estimate demonstrates is that there is a latent demand, with the market having the potential to grow to meet the demand if the barriers to participation are removed. Previous research in Australia and overseas has shown that the market experiences significant constraints above and beyond the general population. If government, the industry and the advocacy sector can develop universal and inclusive strategies to create a more enabling tourism environment, then the market potential can be realised.

Chapter 5

PRECINCT FINDINGS

This chapter presents the findings of the preliminary fieldwork reviewing the major stakeholders within the precinct. The fieldwork sought to review the disability and access inclusions of the major landholders and attractions. The outcome of the chapter is a list of potential accessible destination experiences. The fieldwork included:

- review of major stakeholder management information systems including interviews
- review, interview and observation of precinct organisations and attractions
- review of access and mobility maps
- identification of accessible destination experiences.

Primary data was collected from the following organisations:

- Accessible Arts
- Art Gallery of NSW
- Bus and Coach Association NSW
- Captain Cook Cruises
- City of Sydney
- Disabled Hire Vehicles
- IDEAS
- Manly Council
- Mawland Quarantine Station
- Metro Transport Sydney Pty Ltd
- Ministry of Transport
- National Parks and Wildlife Service
- NICAN
- NSW Department of Environment and Climate Change
- NSW Department of Transport and associated transport providers
- ParaQuad, NSW
- Royal Botanic Gardens and The Domain
- Sydney Harbour Foreshore Authority
- Sydney Opera House
- Sydways
- Taxi Council of NSW
- Tourism and Transport Forum
- Tourism NSW
- Tourism Research Australia
- Vision Australia.

Major Stakeholder Organisations Review of Management Information Systems and Interview

The designated precinct area together with the IRG provided the foundation for determining the major stakeholder organisations to be included within the review. As discussed in the methodology, a snowball approach was used to identify accessible destination experiences. The major stakeholder organisations included in the preliminary review of Management Information Systems and follow-up interviews were:

- NSW National Parks and Wildlife Services
- Sydney Harbour Foreshore Authority
- The City of Sydney
- Royal Botanic Gardens and The Domain.

Table 8 provides a one-page summary of the management information systems and interview review of organisations' access and disability practices. The organisational names appear on the left-hand column with the analysis focusing upon 11 criteria that were developed from the research.

The 11 criteria can be clustered into six categories. First, each of these categories will be briefly reviewed given the dearth of strategic approaches to access and disability outside of the major stakeholders. Second, Table 8 is featured. Third, each of the major stakeholders systems and processes are outlined in detail prior to identifying the accessible destination experiences.

Disability action plans

Disability Action Plans (DAPs) provide a key strategic approach to addressing the provision of access available under the DDA. Any organisation which formulates a DAP is protected against disability discrimination complaints where those complaints reflect an access issue identified within the DAP. Effectively, HREOC encourages organisations to undertake the planning process of a DAP by providing an incentive of protection (HREOC 2007a). The major stakeholders, who have a disability action plan, are: City of Sydney, SHFA, Sydney Opera House, NPWS and City Rail (MoT).

Web access compliance

Web Access Compliance refers to designing and building Websites for access. A statement to this effect may appear on the organisational Website identifying W3C or Bobby compliance to international standards of Web accessibility. Most Websites are not compliant to the international standards for accessibility for people with vision impairments. International standards suggest that Website design can be developed using universal design principles to maximise use by people of all abilities. HREOC has worked with a number of industry bodies developing accessible Websites. The growing reliance of organisations on internet-based communication and information systems requires the inclusion of access in the design phase (HREOC 2002). Only one major stakeholder offers a Website with accessibility compliance: City of Sydney.

Enablers to access

An organisation's Mobility or Access Map is a map of a precinct/organisational responsibility that identifies mobility, vision, hearing or communication features. The most common inclusions are a continuous path of travel, accessible toilets and accessible parking. Seven organisations had developed mobility or access maps. Mobility and Access Maps will be discussed latter in this chapter. Significant advantages would be provided to consumers and tourists if responsible organisations were to develop a single comprehensive map.

Dimensions of access

The literature review identified that a great deal of accessibility focuses on physical access to the built environment and mobility. The research agenda on accessible tourism identified the importance of developing a greater understanding of the other dimensions of access. While there was a reinforcement of physical access to the built environment and mobility, the notable exceptions were cultural and heritage institutions, which have worked with Accessible Arts to develop sound physical access provisions and cutting edge sensory experiences. For example, the provision of hearing loops within auditoriums, the availability of a guide dog rest areas and signed or interpretive displays.

Tours or product experiences

While the Enablers and Dimensions of Access categories provide an indication of whether accessible infrastructure exist, *tours* or *products* or *experiences* are an extension of these principles that involves universally or specifically designed experiences inclusive of mobility, vision, hearing or cognitive dimensions of access. For example, the Sydney Opera House offers a specifically designed backstage tour for people with mobility disabilities in recognition of the relative inaccessibility of areas of the facility.

Marketing

Marketing refers to whether organisations generically or specifically target people with mobility, vision, hearing or cognitive access needs beyond the basic provision of access information. Research has shown that while organisations may comply with the requirements of legislation and provide access, many do not document, present, promote or market their accessible features generically or specifically. For example, the Art Gallery of New South Wales Art Website encourages people with hearing impairments or who are deaf to contact the organisation by its TTY or email so that further information can be sent out about the Auslan interpreted tour. In a tourism sense, there is a great deal to be gained by developing collaborative marketing efforts between these organisations.

Table 8 Management information of an organisations' access and disability practices

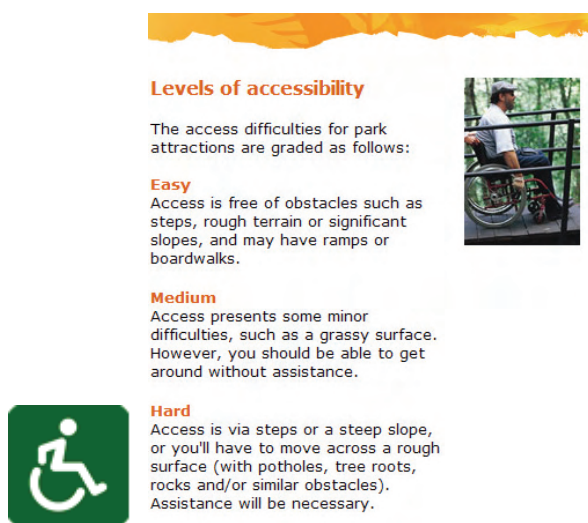
Categories	DAP	Web Access Compliance	Enablers of Access					Dimensions of Access				Tours or Products or Experiences	Marketing		
			Mobility Access Map @	Accessible Parking spaces	Accessible Toilets	Accessible Transport	Vision \$	Hearing \$	Other Disability Contacts	^					
Organisations		*													
City of Sydney	✓	✓	✓	✓	✓	✓	✓	✓	✓	x	x	✓	x	x	~
Sydney Opera House	✓	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Royal Botanic Gardens	x	x	✓	✓	✓	✓	✓	✓	✓	x	x	x	x	x	x
Museum of Contemporary Art	x	x	✓	✓	x	✓	✓	✓	✓	x	x	✓	✓	x	x
SHFA/The Rocks	✓	x	✓	✓	✓	✓	✓	✓	✓	x	x	✓	x	x	x
The Rocks Discovery Museum			✓		✓										
Customs House	x	x	x	x	✓	✓	✓	✓	✓	x	x	x	x	x	x
Justice & Police Museum	x	x	x	✓	✓	✓	✓	✓	✓	x	x	(✓)	x	x	x
NSW Art Gallery	x	x	✓	✓	✓	✓	✓	✓	✓	x	x	✓	✓	✓	✓
Sydney Theatre Company	x	x	x	x	✓	✓	✓	✓	✓	x	x	x	x	x	x
Manly Council	x	x	✓	✓	✓	✓	✓	✓	✓	x	x	✓	x	(✓)	(✓)
Sydney Ferries	x	x	x	x	x	x	x	x	x	x	x	x	N/A	x	x
City Rail	✓ MoT	x	✓ MoT	✓	✓	✓	✓	✓	✓	✓	✓	✓	N/A	x	x
Sydney Buses	x	x	x	N/A	N/A	N/A	N/A	N/A	x	x	x	x	N/A	x	x
NSW Taxi Service	x	x	x	N/A	N/A	N/A	N/A	N/A	x	x	x	x	N/A	x	x
Metro Transport	x	x	x	x	x	✓	✓	✓	✓	✓	✓	✓	x	x	x
NSW BCA	✓	x	NA	NA	NA	NA	Na	NA	NA	x	x	x	NA	NA	NA
DECC NPWS	✓	x	?	✓	✓	✓	✓	✓	✓	x	x	x	x	✓	✓

A brief review of the four major stakeholders is now provided.

National Parks and Wildlife Services NSW

The Department of Environment and Conservation National Parks and Wildlife Service (NPWS) Website includes a link that summarises the access and mobility features of parks that are 'suitable' for people in wheelchairs (NPWS 2007). This resource is an evolution of two earlier access guides (NPWS 1989; 1995) and a previous version of the Website information (NPWS 2005). The parks and reserves are located in seven regions in NSW: Central NSW, Hunter and Mid North Coast, New England Tablelands, Northern Rivers, Outback NSW, South Coast and Highlands, Sydney and surrounds. The list serves as a centralised source of information. However, the description of the accessibility of features/facilities is brief and the major accessibility categorisation uses the loosely defined terms of 'easy', 'medium' and 'difficult'. Figure 13 outlines the explanations provided.

Figure 13 Levels of accessibility





Levels of accessibility

The access difficulties for park attractions are graded as follows:

Easy
Access is free of obstacles such as steps, rough terrain or significant slopes, and may have ramps or boardwalks.

Medium
Access presents some minor difficulties, such as a grassy surface. However, you should be able to get around without assistance.

Hard
Access is via steps or a steep slope, or you'll have to move across a rough surface (with potholes, tree roots, rocks and/or similar obstacles). Assistance will be necessary.



(NPWS 2007)

It is suggested that while there is an arguable logic to the approach of developing the classification system, the classification system has similar issues to accommodation room classification systems in that they take complex detailed information and present it in a simplified form. It may not be practically useful for potential visitors with mobility needs when planning their trips. While the task of access auditing all National Parks and Wildlife Service holdings is a substantial task, the overall philosophy of the urban accessibility research project of identifying key experiences and providing a level of information that would allow individuals with disabilities to make informed decisions about the experience, would seem worthwhile for the organisation to pursue. Further, other approaches may provide direction for incorporating the best features of:

- Building Codes of Australia/Australian Standards (Sport and Recreation Victoria 1997; Standards Australia 1992, 2001; Villamanta Publishing 1997)
- access and mobility maps (Krause & Reynolds 1996)
- pedestrian mobility and access plans (Roads and Traffic Authority NSW 2007)
- the recreation opportunity spectrum (Boyd & Butler 1996; Clark & Stankey 1979; Kliskey 1998; Smith & Lipscombe 1999; Stankey 1982).

The outcome would be to produce a template for providing information on which people could make informed decisions based on their needs. There are also a number of overseas publications that provide further direction for this exercise (Environment Canada Parks Service 1993; U.S. Architectural and Transportation Barriers and Compliance Board—Access Board 2002a, 2002b, 2005). It would be sensible for this research project to identify one or two of NPWS iconic parks and provide a prototype template for inclusion on the NPWS Website. North Head look out, Bobbin Head picnic area, West Head look out, or the recently refurbished Blue Mountains National Parks sites, would be suggested (NSW DEC 2006). These would then be promoted during National Parks week (October each year) with a feedback loop built into the National Parks Website.

VISITOR ACCESSIBILITY IN URBAN CENTRES

Strategically DECC and NPWS have devised two plans: *NPWS Disability Action Plan* (2003) and *Living Parks—A Sustainable Visitation Strategy* (2006) respectively. The DAP outlines strategies to be implemented between 2003 and 2006 with a view of six longer-term outcomes:

1. equitable physical access for people with disabilities
2. positive and inclusive community attitudes
3. capacity of staff members to provide quality customer service to PWD
4. accessible communications with PWD
5. equitable employment in NPWS
6. accessible customer feedback procedures (NPWS 2003).

Living Parks offers a framework for managing the sustainable and culturally appropriate use of parks (2006). One of the proposed policies is to provide ‘equitable opportunities for all to enjoy NSW parks, including people with disabilities’ (p.16). To this end, NPWS will provide ‘good quality, culturally sensitive information that helps people to make decisions about their visit’ (p.16). Such information will include access requirements and disabled access. The principle of universal accessibility will be applied.

In conjunction with the Sydney branch field staff, three possible accessible destination experiences were put forward:

- North Head Lookout
- Fort Denison
- North Head Quarantine Station.

The City of Sydney

The City of Sydney (CoS) provides a broad spectrum of ageing, disability, and access information. This information can be broadly categorised as either *services for residents* who are ageing or have a disability, and *residents/visitor access information*. While the information relating to services for residents who are ageing or have a disability may seem irrelevant for tourists with disabilities, upon closer inspection it contains an outline of recreation and swim centres that may be of interest to anyone visiting Sydney. Unfortunately none of the generic venue and facility information contained specific information on disability or access.

The specific *Disabled Access* information is divided into four main groupings: transport; accessible CBD parking spaces; CBD access and mobility maps; and other sources of disability information (City of Sydney 2007a). The access and mobility maps (City of Sydney 2003a), which are reviewed in detail later, provide a sound basic coverage of the CBD and Circular Quay and include information covering audible crossings, dangerous directional gradients (for example, steeper than 1:14), compliant and non compliant kerb cuts, accessible ATM/phones, TTY’s, accessible automatic or unisex public toilets and easy access train stations.

The transport section provides links to the major public transport providers (bus, rail, ferries, taxi and monorail) and adds value by providing information about accessible bus stops, monorail stops and designated secure taxi ranks. Parking within any CBD is always problematic and the CoS provides a map of the 86 designated accessible parking spots. Apart from these parking spots, people are able to park in metered or signed parking spaces beyond one hour if they are holders of the Roads and Traffic Authority Mobility Parking Scheme permit. However, the issues surrounding the Roads and Traffic Authority Mobility Parking Scheme are well documented and anyone coming to the city on a regular basis must be realistic about the possibility of having to pay commercial rates at car parking stations if they are to guarantee an accessible parking spot.

The CoS Website was the only Website reviewed that recognises the importance of Web accessibility for people who are vision impaired or blind and seeks to comply with W3C International Accessibility Guidelines. However, the level of compliance is rudimentary at best and does not provide people with vision impairment with an equality of access to Web based material. The Website also provides some excellent tourist information and self guided tours but these do not include access related information.

Lastly, the CoS has a Disability Action Plan (2003b) that provides a strategic approach to organisational disability and access issues. Nine action priority areas are identified:

- physical access in the public domain
- physical access in city-owned buildings
- promoting positive community attitudes
- training staff; information about services
- employment with council
- complaints procedures
- access to council services
- development approvals.

Both the DAP and the access map are being reviewed with a new version available in 2008.

In conjunction with the Sydney branch field staff, three possible accessible destination experiences were put forward:

- Hyde Park
- Customs House
- State Library.

Sydney Harbour Foreshore Authority – The Rocks

The Sydney Harbour Foreshore Authority (SHFA) is the relevant authority for The Rocks historic precinct as well as a number of other significant landholdings relevant to tourism around Sydney Harbour. The SHFA has a strategic commitment to provisions for people with disabilities through the *Plan for People with Disabilities* (SHFA 2003), which has a half-year reporting requirement, the most recent being December 2007 (SHFA 2007). While there are significant access issues within any historic precinct, the half-yearly reports document the ongoing upgrading of SHFA venues and common domain access. The overall plan prioritises future access upgrades and provides a deep commitment to accessibility. The SHFA Website (www.shfa.nsw.gov.au/) contains the strategic document and the six monthly plans.

The Rocks Discovery Museum is an excellent example of incremental upgrading to access. The Museum had only recently been upgraded to include mobility accessibility. This included the installation of a lift, widening of doorways and a continuous pathway removing a number of internal steps that previously obstructed access. The Website has been upgraded to offer details regarding accessibility for wheelchairs or strollers within the FAQs (Frequently Asked Questions) section of the Website (The Rocks Discovery Museum 2007). The short explanation outlines the best approach to access the building from the ground level.

More detailed information about wayfinding around the precinct can be found in *The Rocks Disability Access Map* (SHFA 2005), which was produced by SHFA and is downloadable from its Website. The map shows accessible and non-accessible pathways, where to find parking, toilets, lifts and services such as ATMs, TTY telephones, taxis and bus stops. Visitors are advised that the topography and unique built environment of The Rocks make it a challenging landscape to navigate for people with disabilities. Some of the most useful information provided on the map includes access routes, estimated travelling time between points, locations of accessible toilets and lifts and opening/operating hours. A SHFA helpline number is listed and additional contacts for sources of disability information are included on the map.

A principle that the authority upholds is 'to ensure all visitors have reasonable access to, and within, its areas of care, primarily The Rocks and Darling Harbour' (SHFA 2005). The principle is governed by the *Disability Services Act 1993* and forms part of the 'whole of government approach' adopted by the NSW Government. The Authority points out that delivering a positive visitor experience within its precincts is equally important as complying with the law. With regards to The Rocks specifically, the retail Website provides a sound introduction to 'accessibility' within the precinct (SHFA 2008). SHFA has developed a number of its own tours, while they are currently not accessible; plans are in place to develop accessible versions of the tours.

A commercial operator, *Self Guided Walking Tours*, developed an accessible tour designed for people with mobility disabilities. The Website provides a commercial product called *The Rocks Self Guided Walking Tour*. It comprises a series of MP3 recordings that can be downloaded at a cost of AUD\$10. The audio files describe a walking tour, which lasts for about two hours and comprises directions, stories and historic anecdotes covering life in The Rocks as it developed.

The possible accessible destination experiences put forward are:

- The Rocks Discovery Museum
- Museum of Contemporary Art
- Sydney Visitor Centre
- Self Guided Walking Tours.

Royal Botanic Gardens & the Domain

The Royal Botanic Gardens Trust (RBGT) provides a wonderful environment for visitors to the Sydney CBD. As evidenced by Figure 14, the sheer size of the gardens, provides challenges for people from all dimensions of access (RBGT 2007a). There is very little information provided on the Website about accessibility beyond the accessible pathways identified on the downloadable access map. The access provisions outlined with the map include:

- accessible entrance gates
- wheelchair accessible toilets
- accessible indoor venues
- accessible outdoor venues
- wheelchair hire
- accessible parking.

The gardens play an important role within the precinct as they act as a link between East West Circular Quay, the Sydney Opera House and the Art Gallery of New South Wales. In undertaking wayfinding between these areas a series of issues arose with respect to the continuous pathway, signage and determining the most efficient routes. These issues will be discussed in more detail in the section on mobility and access maps.

A free guided tour is offered daily in the gardens. While the tour makes no mention of whether it is suitable for the needs of people with disabilities, participant observation revealed that it is manageable for people with mobility disabilities. Wheelchair users should be confident in booking the tour as it occurs wholly on paved pathways in sections of the gardens which are near level. Friendly and knowledgeable volunteer guides are more than willing to accommodate specific needs or requests. This tour and a number of other gardens' offerings have the potential to be developed for sensory interpretation (e.g. herb garden).

An audit report commissioned by the RBGT and prepared by the Independent Living Centre NSW (Independent Living Centre NSW 2004) identified and detailed constraints to accessing the site. The Botanic Gardens Trust (RBGT 2006) states its intention of 'implementing Government policy initiatives such as EEO, EAPS and the Disability Policy Framework to ensure that discrimination in access to employment, services and facilities is eradicated'. Plans to implement those initiatives and a schedule of works based on the audit report are not available (RBGT 2006). However, interviews with the managers for access and venues, along with the field visit observations provided further insights to the organisation's approach to accessibility.

The gardens is a significant location for special events and the special event guidelines placed an onus on event organisers to consider how the needs of 'the disabled' are going to be provided for (RBGT 2007b). These guidelines coincide with the development of a number of new indoor venues, which have become very popular with corporate event organisers. This initiative together with the major outdoor events of New Year's Eve, Cinema in the Gardens and Australia Day celebrations have positioned the gardens well in providing for people with disabilities on special event days. For the outdoor events, inclusions for people with disabilities wishing to participate are set aside as part of the operations planning process.

The accessible destination experiences put forward are:

- Cadi Jam Ora First Encounters
- Mrs Macquarie's Chair
- Royal Botanic Gardens Guided Tour
- Passive and educational recreation setting.

Figure 14 Royal Botanic Gardens access pathways map



Source: RBG 2007a

Precinct Organisations and Attractions

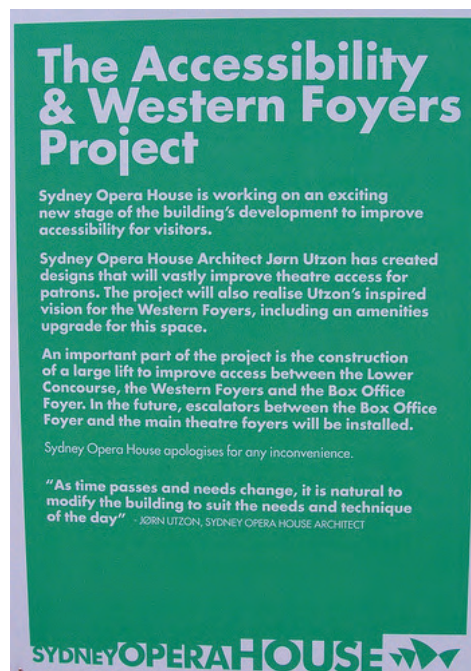
The major stakeholders with responsibility for governance of the precinct area have been outlined in the first part of this chapter. This section reviews a number of other organisations within the precinct and attractions put forward through the above review and identified in the interview process. Where appropriate, management information systems together with online resources are reviewed. The organisations and attractions include:

- Sydney Opera House
- The Art Gallery of New South Wales
- Museum of Contemporary Art
- Sydney Theatre Company
- Customs House
- Dendy Quays Cinema
- Captain Cook Cruises
- Sydney Whale Watching
- Sydney Ferries
- Sydney Buses
- City Rail
- Monorail and Light Rail
- Sydney Fish Markets
- The Garrison Church
- Manly Council.

Sydney Opera House

The Sydney Opera House online access information is comprehensive. Information is divided into six sections: getting to the house, getting around the house, access to venues, access to restaurants, accessible services, and access information in alternative formats (Sydney Opera House 2007a). A downloadable *access guide* offers additional access information (Sydney Opera House 2007b). In the past, the Sydney Opera House could be described as a hostile environment for people with disabilities, limited access and some venues offering less than the requisite number of designated seats under Australian standards. However, there has been a noticeable change in the access culture over the last three years. This has coincided with a major renovation, reflecting a return to the original architect's initial vision. In the past, an attitude existed that the heritage significance of the building excluded it from 21st century access provisions. This attitude has significantly changed. Figure 15, states, 'As time passes and needs change, it is natural to modify the building to suit the needs and techniques of the day' (Jørn Utzon, Sydney Opera House Architect).

Figure 15 Sydney Opera House accessibility upgrade



Source: Research photo

Online information includes an access map, public transport and accessible parking and information on an accessible shuttle bus which operates between Circular Quay and the Opera House for people with mobility disabilities or who are frail and/or aged. There is recognition that significant access barriers exist depending on the venue within the Opera House that the visitor is attending. Based on the venue, visitor access may be unassisted, or with staff assistance. The Sydney Opera House Access Guide defines unassisted as visitors accessing venues without staff assistance and instead independently utilising accessible ramps for visitors with wheelchairs (Sydney Opera House 2007b). Further, the access guide defines staff assistance as 'a staff member will accompany you whilst travelling independently until a lift is reached gaining access to required venues within the Opera House'. The access guide stipulates that 'staff are happy to provide customers with basic assistance, however they are unable to lift or carry customers for safety reasons' (Sydney Opera House 2007b, p.17). If such assistance is required, the access guide recommends that a designated carer accompanies visitors, and this carer will require ticketed seating (Sydney Opera House 2007b p.17). However, The Sydney Opera House does not offer discounted tickets for carers or attendants.

The Sydney Opera House has an *Access Strategic Plan 2005–2008* (Sydney Opera House 2005) that has six priority areas: physical accessibility, promoting positive community attitudes, training of staff, information about services, employment, and feedback procedures (Sydney Opera House 2005). The scheduled building works funded by the NSW Government, are addressing the major physical access issues. With a total budget of \$38 million (Sydney Opera House 2007a) renovations are scheduled for completion in 2009. These include a 40-person Bennelong Lift, which will provide access to the Bennelong Restaurant. Two escalators are to be constructed, connecting the Lower Concourse, Western Foyers and Box Office Foyers with the Concert Hall and Opera Theatre Southern Foyers. The effect of these changes will create a more independent, dignified and equitable environment for people with disabilities.

The Sydney Opera House offers specific experiences for people with mobility disabilities or multiple disabilities. The backstage tour (called Access Tour), is an adaptation of the backstage tour that the general public can take. It makes use of the lift system to provide a continuous pathway of access for those on tour. The tour is offered daily at 12:15 p.m., however, it is not publicised in the same area as the other tours. Disability events such as Club Wild, an inclusive music and dance ability event, and AART.BOXX, an exhibition celebrating International Day of People with Disabilities (early December) are hosted at the Sydney Opera House. People with all dimensions of access needs are encouraged as both participants and performing artists in what is regarded as a celebration of disability pride.

The stand-out accessible destination experiences are the Access 'Lift' Tour and booking for any of the performances including the sensory performances offered by the Sydney Theatre Company (see below).

Sydney Theatre Company

Sydney Theatre Company (STC) is the premier theatre company in Australia, established in 1978. The company presents an annual twelve-play program at its home base The Wharf at Walsh Bay, the new Sydney Theatre and is the resident theatre company of the Sydney Opera House. The STC Website provides brief information on access to venues in Wharf 1 (Sydney Theatre Company, accessed 6 Feb 2008a) and Wharf 2 (Sydney Theatre Company, accessed 6 Feb 2008b). Customers are advised that access to the Wharf is staff-assisted and requests should be made in advance. Special services are available to patrons with hearing and vision impairments. Details about these services are not provided on the Website but published in the seasonal program. Hearing enhancement systems and headsets are available in all STC theatres. Some performances are captioned, where the on-stage dialogue is shown on a specially designed LED display in real time. Selected performances are interpreted in Auslan sign language. Patrons with vision impairments may request front row seats at the time of booking. There are some shows with audio description relayed via infrared headsets. Touch tours of the stage are held before the show to help capture the feeling, atmosphere and action during the performance. Guide dogs are welcome in the auditorium and an aisle seat can be arranged. The staff will also explain any stage effects that might affect the dog's comfort.

The Art Gallery of New South Wales

The management of The Art Gallery of New South Wales (Art Gallery) has made significant efforts to include people with sensory disabilities in experiences available at the Art Gallery. Physical access is constrained by the historic and heritage nature of the building and perceptions about altering heritage buildings.

The Website contains brief information on physical access including information on parking, ramp access, lifts, and borrowing wheelchairs (NSW Art Gallery accessed 6 Feb 2008a).

The programs and facilities provided are as follows:

- free Auslan-interpreted tours offered on the last Sunday of each month. Employing registered Auslan interpreters, the tours are designed for both hearing-impaired and hearing visitors. Visitors explore the Gallery in an engaging, informative and fun way through a different theme each month
- every Wednesday, the Art Gallery is open for extended hours. Selected *Art After Hours* events are Auslan interpreted throughout the year. Audio-induction loop and portable FM-transmitter system are also available
- access programs are available for children with an intellectual disability.

In addition to programs for the hearing impaired, there is also a program for people with vision impairment called 'In Touch at the Gallery'. 'In Touch' is a free guided sensory tour where selected sculptures and objects are available to be explored through touch (NSW Art Gallery, accessed 6 Feb 2008b), tours must be booked two weeks in advance. Clayton Utz became the Gallery's first corporate Access Partner with the launch of the *Access Plan* (NSW Art Gallery 2007).

Museum of Contemporary Art

The Museum of Contemporary Art (MCA) is dedicated to collecting, exhibiting and interpreting contemporary art from across Australia and around the world. It has a continually changing program of exhibitions offering new and inspiring ideas to visitors.

Access information offered on the Museum's Website is limited. The Museum claims to be committed to making its programs and services accessible to all visitors. The type of information provided online includes the location of street level access, accessible parking, TTY number and wheelchair lending for people with temporary disability or who are frail aged (Museum of Contemporary Art, accessed 6 Feb 2008b). The MCA operates programs for youth with specific needs called Bella—Art Education for Students with Specific Needs. As stated on the Website:

Bella offers free art making workshops in a fun and nurturing environment to groups of young people aged 5–18 years old with specific needs or disadvantage. Student groups with physical, intellectual, behavioural, and sensory disabilities, or who have little or no access to museums due to financial or social disadvantage, can benefit from the Bella experience (Museum of Contemporary Art, accessed 6 Feb 2008a).

Bella is free for all participants, but advance bookings are essential (Museum of Contemporary Art, accessed 6 Feb 2008a).

Customs House

The Customs House falls under the control of the Sydney City Council. It is a heritage building located opposite Circular Quay, providing a free public space where visitors can relax, meet, access information, read free newspapers, eat and drink. The building is also home to the Customs House Library, the City of Sydney's premier general lending library. The ground floor features a giant model of the Sydney CBD, which is embedded beneath a glass floor. Cafés and a bar are located on the ground floor while on the roof top level is restaurant Café Sydney where diners can enjoy spectacular views of the harbour. The Customs House Website offers limited information regarding accessibility. It informs visitors of the location of the accessible entrance, and that lifts for wheelchairs and 'disabled toilets' are available (City of Sydney 2007b).

Dendy Opera Quays

The Dendy Opera Quays Website has limited information in respect to access, except for the following quote '... stylish decor and wheelchair access to all three cinemas' (Dendy 2008a). However, the Dendy Opera Quays offers lift access to the cinemas, integrated seating for wheelchair users, accessible toilets and induction hearing loops. Seniors feature as a target market with discount concession ticket rates and a seniors club with greater discount benefits and special morning tea on Wednesdays and Thursdays (Dendy 2008b).

The Garrison Church

The Garrison Church is located outside the formal Rocks precinct, but it is a primary historic tourist attraction. The church Website proclaims that 'The church has wheelchair accessibility via the car park and then the north west door' (The Garrison Church 2007). However, until negotiated as an outcome of this project the north-west door was kept locked. A change to operating procedures now sees the north-west door unlocked upon the church opening each morning. No longer are special procedures needed for wheelchair users to enter the church. The change in operating procedure has been complemented by the Website use of the international wheelchair symbol to provide a visual cue denoting access.

Captain Cook Cruises

Captain Cook cruises has developed an *Accessibility for People with a Disability Policy*, which is downloadable on its Website (Captain Cook Cruises 2007). The company has identified the wharves and cruise vessels which offer the best combination of access. Most of the vessels are built with a storm or flood step, which must be negotiated when accessing the vessel. This makes it very difficult for wheelchairs, and in particular motorised wheelchairs, to access the vessel. The most accessible vessel is the MV Sydney 2000. A ramp or gangway takes guests from the wharf into the show deck. The show deck is fully enclosed. The vessel has no flood step, and does have an accessible male and female toilet.

True Blue – Sydney Whale Watching

Sydney Whale Watch does not offer any information on its Website in respect to access (Sydney Whale Watching, accessed 6 Feb 2008). However, the True Blue offers excellent wheelchair access via a short arched gangway to overcome the flood step and leads to an undercover deck. There is ample circulation space on board but no accessible toilets. The duration of the trip is approximately four hours. Whale watching is seasonal, taking place between April and November each year.

Sydney Ferries – Manly Ferry

Sydney Ferries Corporation (SFC) indicates on the Web site that all of its fleet is wheelchair accessible, and 20 or 'approximately half of the wharves we use are also accessible' (Sydney Ferries 2007). Wharf access is dependent upon the floating pontoon to provide level access to the vessels. Some of the larger vessels have their own foldout ramps, which deploy to the wharves. Some of the smaller vessels and the river cats are accessed via an arched gangway provided at each accessible wharf. The Website then goes on to detail in tabular form those ferry routes where the wharves offer access. The Circular Quay to Manly Ferry route utilises the largest of the ferries that also has a wheelchair accessible toilet.

Manly – Manly Council

Sydney Ferries feature a ferry trip from Circular Quay to Manly. It is appropriate to include the Manly local government area as a further precinct to explore upon disembarking. Manly Council's Aged and Disabled division's role is to consult with and support senior citizens, people with disabilities and their families, as well as professionals working with them (Manly Council 2007a). They provide information on services and programs, oversee the development through the Home and Community Care Program (HACC) and give support to local senior groups. From a tourism perspective, the Website provides a number of resources that are useful for visitors to the area. These include:

- a list of public accessible toilets;
- Manly CBD access map (Manly Council 2007b)
- accessible parks and reserves (Manly Council 2005), which contains access maps to 15 recreational areas in Manly and outlines the features, access routes and facilities available in each area.

The Manly Access Committee has been an active group and catalyst for significant change to access in the local government area over many years. While Manly is included largely as an area of interest in transit to the NPWS attraction, which is the North Head Look Out, the research group strongly recommend that the area be considered as a future precinct area. Some suggested destination experiences include:

- the beachfront restaurants and hotels
- Manly Art Gallery
- Manly Aquarium
- the excellent harbour and beachfront promenades.

Monorail/Light Rail and the Sydney Fish Markets

The Monorail and Light Rail offer easy access to the aged, families with prams and people with a disability. As the Website states, 'All the Monorail stations have lift access and the Light Rail stations have either ramp or lift access. It is very easy to get both on an off the Monorail with flat platform access and the comfortable cabins provide access for prams and wheelchairs' (Metro Monorail 2007). The Sydney Fish Market Website does not offer any advice in respect to access despite the venue providing a very accessible destination experience. An accessible path of travel is available throughout the venue, access toilets are provided, access to retailers and a lift conveys patrons to the cooking school. Further, the SFM is accessible by Light Rail and dedicated access parking is provided.

Other public transport within the precinct area

The preceding discussion in this chapter only identified specific transport used within an accessible destination experience. A review of the Ministry of Transport and the other major public transport providers within the precinct area was undertaken as part of examining tourism enablers. This included:

- Sydney Ferries
- Sydney Buses
- City Rail
- Wheelchair accessible taxi system
- NSW Bus and Coach Association daytrip operators

In travelling within the precinct, 'almost 50 percent of Sydney buses are wheelchair accessible and all-new buses brought into the fleet will all be wheelchair accessible' (State Transit Authority, accessed 6 Feb 2008). Yet, this also recognises that over 50 percent of buses are not wheelchair accessible including the tourism specific **Sydney Explorer**. City rail has a section on its home page linking to its policy for rail travel for people with disabilities and a travel planner is provided to check the accessibility of individual stations (City Rail 2007). The major stations of Central, Town Hall, Wynyard and Circular Quay all provide wheelchair access to varying degrees. Further, the stations include 'enhanced facilities such as lifts, ramps, continuous handrails, plasma screens, hearing loops, wheelchair accessible toilets and portable platform-to-train ramps'. Ground surface tactile indicators are installed on most platforms.

The Sydney CBD is well served by taxis and one of the better-served areas by wheelchair accessible taxis. The system dispatches 93 percent of jobs within 30 minutes using a variety of approved vehicles (NSW Ministry of Transport, 2007). However, it is recognised that the system has some significant shortcomings (Folino, 1999; Human Rights and Equal Opportunity Commission, 2002) particularly with respect to what drivers perceive as 'short jobs'.

Access Maps and Mobility Maps

Access Maps or Mobility Maps are a very important wayfinding source of information in Australia. They convey critical access information to residents and travellers. Mobility Maps are also used where there is a need to communicate access information to stakeholders. They have been employed by universities to identify the continual path of travel (Standards Australia 2001) at a campus, (for example, University of Technology, Sydney, Australian National University, University of Queensland, University of Wyoming), municipal bodies (City of Melbourne, Singapore, Japan) and tourist attractions and theme parks (Warner Bros.). It is not surprising that Mobility Maps tend to be produced where a precinct or large area needs to be accessed. Mobility Maps tend to communicate three essential components of access information for a given geographic precinct area:

- accessible pathways
- accessible parking
- accessible toilets

There is no national standard format (or content) so there is significant variation between maps. One guide to making mobility maps had been developed by the Local Government and Shires Association New South Wales, *A Guide for making a Mobility Map* (Krause & Reynolds 1996). This guide was the conduit for most local government central business districts developing mobility maps during the 1990s. An alternative format has been developed by Ausway, the publisher of street directories Melway, Sydway and Brisway. Brisbane City Council promotes this style of mobility map, and the City of Melbourne (City of Melbourne 2007) updated its map, making it available free of charge with an access guide *Accessing Melbourne*, created to coincide with the 2006 Melbourne Commonwealth Games (City of Melbourne 2006).

Access Maps should offer critical information to a traveller, which can include a variety of information, including:

- accessible pathways
- accessible parking
- accessible toilets
- accessible entry points
- audible traffic signals
- ATM's
- TTY Phones and public telephones
- gradients (colour coded convey degree and direction)
- railway entrances
- major taxi rank
- public seating and rest stops
- accessible drinking fountains
- inaccessible entries and inaccessible wheelchair routes.

Mobility Maps can be available in hard copy, downloadable, in Braille and alternate formats and sizes. This research covered essentially the one precinct area involving three major landholders as well as individual facility managers/operators. All employed a variety of different icons and wayfinding techniques as shown in Table 9. In addition, four very different Mobility Maps are available from:

- SHFA
- City of Sydney
- The Royal Botanic Garden
- Sydney Opera House.



































Table 9 demonstrates that it is important for any area trying to promote itself as a destination to have a single wayfinding map (or series of maps) to the precinct area. There are several reasons for this. First, they are most convenient for the user. Second, they allow the area to develop its own entity or branding. Third, they offer attractions and businesses an opportunity to collaboratively market their accessible destination experiences to the accessible tourism market.

Given the size of the precinct, a number of other factors need to be considered in the formulation of Mobility Maps. For example:














- the distances involved in the precinct and hence scale
- identification of the most direct continuous route including gradient considerations
- the walking time of a senior tourist
- the physical size and format of the map.

VISITOR ACCESSIBILITY IN URBAN CENTRES

Table 9 Comparative analysis of mobility or access map inclusions

Attributes	City of Sydney	Sydney Opera House	Royal Botanic Gardens	The Rocks	Manly Council	City Rail	Ministry of Transport	Melbourne Mobility Map
Continuous Pathway								
Kerb Ramps								
Gradient or Slope								
Accessible Lifts								
Information Point								
Parking Stations								
Accessible Automated Public Toilets								
Accessible Toilets – City sites and attractions								
Accessible Toilets – Recreation and community centres								
Accessible Train Stations								
Accessible Buses								
Taxi Ranks								

VISITOR ACCESSIBILITY IN URBAN CENTRES

Attributes	City of Sydney	Sydney Opera House	Royal Botanic Gardens	The Rocks	Manly Council	City Rail	Ministry of Transport	Melbourne Mobility Map
Audio Crossing Signals								
ATM								
Wheelchair Accessible ATM								
Public Phone								
Wheelchair Accessible Phone/Bus Shelter Phone								
TTY								
Assisted Hearing Systems								
Blind / Low Vision								
Tactile Tiles								

Accessible Destination Experiences

People with disabilities are able to make choices about their access needs. Destinations should provide access information to assist that decision-making. The research project did not seek to ‘certify’ accessible and inaccessible experiences. The precinct-based approach called for a far more flexible understanding of access as it relates to common domain and public areas. No Australian standard exists for constructing these areas, although some have relevance to individual parts of an environment, but direction can be found through; Sport and Recreation Victoria, the United States access board and Parks Canada. These prescriptive guidelines provide an informed understanding of accessible environments. However, the danger in seeking an urban access utopia via standards is the risk that tourists with disabilities would only experience a sanitised experience of Sydney and may miss out on the quintessential experiences. Once identified, the accessible tourism destination needed to be experienced and assessed. As discussed in Chapter 2 and 3, this was based on the Building Codes of Australia referenced Australian Standards for Access and Mobility. The research team made a strategic decision to focus on accessible destination experiences rather than strictly access auditing the experiences.

The philosophy of the research project was based on providing people with independent, dignified and equitable experiences. It was premised that as a scoping research project no product development could occur within the six-month period and that the research project would adopt a destination management approach. Within this approach, the research team developed extensive collaborative relationships with key stakeholders in the precinct. The research team specifically asked the stakeholders to go beyond their Websites, management information systems and their rigid understanding of access to consider what would be regarded as quintessential experiences of Sydney. It was in this spirit that stakeholders attempted to provide an experiential focus to their activities that would enhance the tourism experiences of those visiting.

The researchers sought to gather information that would assist people in making an informed decision about whether the experiences met their access needs. If the experiences were deemed to provide a workable level of access for a particular dimension, the experience was further reviewed through participant observation and further interviewing. The approach adopted the following process:

1. ‘audit’ the accessibility of the experience
2. assess the nature of the experience
3. determine the dimension of access
4. evaluate the relevance of Website and management information on the experience
5. document the key elements of access, along with photographic evidence—some 600 photos held on the www.flickr.com site
6. critique the experience/site constraints and possible innovations/solutions
7. write up the experience using a ‘street wise travel guide’ approach (Lonely Planet/Rough Guide).

The Sydney accessible tourism destination experiences that were identified are listed in Table 10.

Table 10 Identified accessible destination experiences

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

In reviewing Table 11 it is apparent that most of the experiences are only appropriate for one dimension of access, with some being appropriate for two and a number of experiences being appropriate for all dimensions of access.

Assessing Access Provisions, Constraints and Solutions

Once the enabling information was identified, the focus shifted to the particular attractions. As shown in Table 11, the focus on the particular destination experience sought to identify the access provisions that facilitated the experience, the relative constraints to other dimensions of access and possible solutions or innovations that the organisations might like to consider for future development. For each of the experiences, a review of current practice was provided to the organisation.

After identifying the destination experiences, the research team reviewed the destination experiences through undertaking further interviews, product reviews and participant observation. In this chapter, Table 11 provides a summary of the organisational limitations and strategies to move towards accessibility before presenting an example of an accessible destination experience template. The full set of the accessible destination experiences can be found in Appendix 4.

Table 11 Attraction and experience facilitators, constraints and innovations

Experience / Organisation	Access Provisions	Constraints	Innovations & Solutions
Accessible Rocks Rolling Tour (mobility) <i>Self-guided walking tour</i>	Communication—Internet Map—accessible path of travel Audio down load utilises access infrastructure Identifies barriers	Natural environment, rough pavements, cobblestones & gradients	Expanded access map for access toilets & cafes Potential for sensory trail.
The Rocks Discovery Museum <i>SHFA</i>	Physical access Ramps Access Lift	Visual & hearing impairment Access information	Tactile experiences Audio & portable transmitters Teletext/subtitling—videos Communication—Internet
Historic insight into Sydney <i>The Garrison Church</i>	Communication—Internet Physical access	Visual & hearing impairment	Tactile experiences Audio & portable transmitters
Access 'Lift' Tour (mobility, vision, seniors) <i>Sydney Opera House</i>	Communication - Internet - Access Guide Braille/Altern. formats Assisted hearing systems Induction hearing loop Portable FM receivers Audio descriptions TTY Contact	Physical access \$38m in refurbishments	Communication
Sensory Interpreted Performances (SOH and Walsh Bay Theatre) <i>Sydney Theatre Company</i>	Communication—Internet Access Parking & Access toilets Hearing Induction LED readouts, captions, Auslan interpretation Touch tours, Guide Dog positioning Staff awareness/training	Theatre & environment Performers with disabilities	Strategic—develop access
Cruise Sydney Harbour - Guided Lunch, Dinner or Coffee! <i>Captain Cook</i>	Communication— Internet Audio commentaries (Whale Watching, MV Sydney 2000) Physical access - Gangways to vessels - Access toilets (MV Sydney 200)	Natural environment	Sensory - Tactile information and opportunity - Hearing assistance
Experience / Organisation	Access Provisions	Constraints	Innovations & Solutions
Cadi Jam Ora First Encounters Display (mobility, hearing) <i>RBG</i>	Communication—Internet Access map—parking, toilets & access points Tour flexibility Tactile dimension Physical access	Natural environment Undulating site	Expanded access map Sensory - Expand tactile information - Hearing assistance tours
Mrs Macquarie's Chair - Iconic View <i>RBG</i>	Communication—Internet Access map—parking, toilets & access points Tactile dimension Physical access	Natural environment Undulating site	Expanded access map Sensory - Expand tactile information - Hearing assistance
Gardens' Guided Tour <i>RBG</i>	Communication—Internet —Access map—parking, toilets & access points Tour flexibility Tactile dimension Physical access	Natural environment Undulating site	Expanded access map Sensory - Expand tactile information - Hearing assistance tours

VISITOR ACCESSIBILITY IN URBAN CENTRES

After Hours Auslan Tours (deaf) <i>NSW Art Gallery</i>	Auslan Interpreted tours 'In Touch' program Induction hearing loop Portable FM receivers Communication—Internet Physical access Toilets & lifts	Physical access Segregated entrance	Strategic - formal entry - parking capacity
Art Gallery and Restaurant <i>Museum of Contemporary Art</i>	Physical access—auto door (George St), ramps (Circular Quay) Access toilet TTY phone	Information Sensory Impairment	Communication—Internet available for people with vision impairment Programs for Sensory impairment
Manly Ferry Trip (All) <i>Sydney Ferries</i>	Physical access	Natural environment—land sea interface	Hearing Assistance
North Head Lookout Scenic Sydney Harbour <i>DECC NPWS</i>	Communication—Internet Physical access - Parking - Pathway	Natural site	Sensory - Tactile information and opportunity Strategic - Quarantine Station - Physical & Sensory
Fort Denison (Pinchgut) <i>DECC NPWS</i>	Communication—Internet	Natural site	Sensory Tactile and sensory opportunity information
Sydney Whale Watching <i>True Blue</i>	Physical Access to vessel	Natural environment	Sensory Tactile and sensory Hearing assistance opportunity information
Accessible Cinema <i>Dendy Cinema Opera Quays</i>	Physical Access Lift, toilet, seating Hearing induction	Information	Communication—Internet Subtitling films
Seafood Sydney! <i>Sydney Light Rail & the Fishmarkets</i>	Physical Access Lift to cooking school Toilet, seating	Working seafood market	Sensory Tactile and sensory Hearing assistance opportunity information
Customs House Public Exhibition, Meeting & reading Space <i>City of Sydney</i>	Communication—Internet Physical Access—ramp, TGSIs Toilets, lift, screen reared (in Library) & stair lifter	Historic Building (but this hasn't impacted on making it accessible)	

Source: Research Findings

Enablers

As outlined in Chapter 2, for people to make decisions about whether a destination area is appropriate for their access needs there are a number of ‘enablers’ that need to be present. The key enablers included in the research for the precinct area were:

- accessible transport at the tourism destination region
- accessible parking
- accessible toilets
- accessible wayfinding information.

Wayfinding information and parking were specifically reviewed as part of the access maps. Accessible toilets are also included as part of these maps but were also identified as a specific source of the geographic information system intranet-based information. Outside of transport used as part of the accessible destination experiences, all major public transport providers within the precinct area were reviewed. These enablers formed part of the mock Web portal.

Mock Web portal

A mock Web portal was produced by the research team and presented as a concept to the IRG and stakeholders. The Web portal site map included:

- [Home](#)
- [Things to do in Sydney](#)
 - Arts and culture
 - [Art Gallery of New South Wales](#)
 - [Museum of Contemporary Art](#)
 - [Customs House](#)
 - [Dendy Opera Quays](#)
 - [Sydney Opera House](#)
 - [Sydney Theatre Company](#)
 - [The Rocks Discovery Museum](#)
 - [The Garrison Church](#)
 - Outdoors
 - [Royal Botanic Gardens](#)
 - [North Head Lookout](#)
 - [The Rocks Self Guided Walking Tour](#)
 - On the harbour
 - [Manly Ferry](#)
 - [Cruise Sydney Harbour](#)
 - [Fort Denison](#)
 - [Sydney Fish Market](#)
 - [Whale Watching](#)
- [Getting around Sydney](#)
 - [Access maps](#)
 - [Transport](#)
 - [Accessible toilets](#)

The mock Web portal concept was strongly supported by the IRG and stakeholder groups. In particular, it was commented that:

- the Web portal provides a tourism outlet for the accessible experiences that are outside of their current market
- the Web portal provides a collaborative marketing opportunity for organisations providing good quality accessible experiences
- the research project has provided external recognition for the access work of the organisations.

Conclusion

All experiences included are those that domestic and international tourists and day-trippers would seek out during a visit to Sydney. They are accessible destination experiences that are quintessentially Sydney. Most visitors would seek information about those experiences either before they travel to Sydney or before they attempt to visit the attraction. The internet is identified as a growing source of information and the vast majority of Sydney's experiences benefit from internet-based access of their information. Information availability, detail and accuracy can be a significant constraint to travel. It is the way in which information is conveyed, which can present a constraint. Website accessibility is critical to inclusive organisational practice. For example, font sizes, font colours, contrast, page backgrounds and page design can all present a barrier to people with vision impairment. Further, even if the content and the accessibility are sound, locating the access information can be a barrier particularly where there are no collaborative outlets for accessible destination experiences.

Chapter 6

OUTCOME SYDNEY FOR ALL WEB PORTAL

An unexpected and unanticipated outcome of this research is the *Sydney for All* Website. The research team realised the information gathered during the research and interview phases of this project could be made available to prospective visitors to Sydney. A ‘dummy Website’ was created to show the stakeholders how the information could be stored, presented and accessed. The stakeholders recognised the potential of the ‘dummy Website’ with TNSW volunteering to develop the concept further as a Web portal. This chapter provides a bullet point outline of the Web Portal development of *Sydney for All*. The title *Sydney for All* was chosen by TNSW and acknowledges the work of OSSATE and Europe for All as a model of best practice.

While not originally part of the research project or the commitment of stakeholders, Tourism New South Wales committed an Information Technology project officer to develop the Web portal. A great deal of work involved ensuring that the Web portal would be compliant to the international standards on accessibility—W3C (see HREOC 2002). This project has provided the IRG a greater understanding of the requirements of establishing accessible tourism information systems in Australia. The following is a summary of the major considerations with establishing *Sydney for All*. The Web portal development was a project within itself together with the communication protocols of TNSW.

Goals

The following goals drove the development process:

- providing the researched access information employing the internet as a delivery method
- making the Website accessible to the International standards and Australian best practice. This was achieved with the assistance of Vision Australia
- having the Website hosted by a recognised and reputable tourism authority
- not imposing significant cost upon the research funding in developing the Web portal.

Process

In developing Website accessibility, the following factors affected the process:

- audience needs
- international accessibility guidelines
- assistive technology, for example, screen readers, contrast
- testing methods both national and international
- review of existing accessible Websites by:
 - identifying the feature set
 - reworking the researched content to reflect the information in a more ‘Web focused’ manner—TNSW utilised the services of their copy editors for this purpose
 - designing and developing—static mock-ups and working prototype—TNSW employed a technical officer for this part of the project.

Audience Needs

Many and varied factors and impairments can affect a person’s experience of a Website, such as:

- vision impairment
- hearing impairment
- age-related conditions
- cognitive disabilities
- motor impairments.

Specific access issues

Examples of the types of access issues are as follows:

- inability to see graphics
- problems distinguishing between colours

- difficulty hearing audio or video
- the need to navigate through the Website using a keyboard or voice recognition software, instead of using a mouse
- the need to employ the use of a screen reader with speech synthesiser or refreshable Braille display, screen magnifier, text-only browser or voice browser
- problems reading and understanding large amounts of text.

Making a Website Accessible

The Website design can address each of these issues, making the content accessible in the following ways:

- by providing text alternatives to graphics, audio and video
- by not relying on mouse clicks alone i.e. avoiding navigation bars
- by making it suitable for screen readers
- by making the content readable i.e. font, background, contrast, and provide graphical alternatives to complex text.

International Guidelines

A set of international guidelines explains in detail how to address these issues:

- World Wide Web Consortium (W3C) is an International body that develops specifications, guidelines, software and tools for Internet/Web developers
- one activity of the W3C is the Web Accessibility Initiative (WAI)
- WAI produces and refines a set of Web Content Accessibility Guidelines
- the draft version of the Website was tested for compliance by Vision Australia which has expertise in accessible Web development
- the Website was designed to comply with the highest level of accessibility criteria possible.

Technical Issues

The development of accessible Websites is not all that different from other Websites, they add another layer of complexity. Best practice for all Website design is to separate the structure from the presentation:

- structure
- content
- the information and its storage
- how the information is organised and displayed onscreen
- meaningful HTML tags
- presentation
- hover text
- cascading style-sheets (CSS).

Technical challenges

One Website must present information in multiple ways. This creates certain technical issues:

- extra coding to create the different colour schemes, layout and text sizes
- extra testing to make sure it reads and presents well in all versions.

The Website needs to be cross-browser compatible:

- different internet browsers interpret the code differently
- need additional code or 'workarounds' to make it work in each browser.

In the final Web portal, three-column layout was technically challenging:

- keeping the information in a logical order
- cross-browser issues—min-width and max-width.

Outcome

The outcome of this process was the development of a Web portal that offers a degree of accessibility equal and often better than that offered by the destination experience. The Website enables visitors to easily determine what access provisions have been made at a destination and whether those access provisions are appropriate for an individual's needs. A timetable has been set for the launch of the Website, which includes an evaluation instrument to assess the consumer perspective of the destination experiences. The accessible destination experiences have been completed, reviewed and verified by the stakeholders. A site map of the Web portal is provided in Appendix 3.

The Website front page is provided in Figure 16 as a guide to the look and feel of the portal. The Website address is <http://www.sydneyforall.com/index.html>

Figure 16 Web portal front page <http://www.sydneforall.com/index.html>

[Skip to content](#) | [Change text size](#) | [Change contrast](#) | [Print this page](#)

Sydney For All

Sydney is an exciting, colourful and vibrant city where it's easy to get out and about. You can tick off all the city's icons – the World Heritage-listed Sydney Opera House, Sydney Harbour and the Sydney Harbour Bridge. You can also discover less well known attractions, all within a short distance of Circular Quay.

There are plenty of attractions that are easy to visit if you have a disability or require assistance with access. Pre-planning your visit will help you enjoy a visit to Sydney at any time of the year.

Things to do in Sydney

Find out the inside story on accessible Sydney experiences around Circular Quay and the harbour. Discover the colonial heritage of The Rocks, be inspired by museums and art galleries, catch a ferry to Manly and enjoy the panoramic views from Sydney Harbour National Park.

Arts and culture

Enjoy Sydney's vibrant theatres, galleries and performing spaces which offer a range of accessible tours and programs.

[Art Gallery of New South Wales](#)
Explore the Art Gallery of New South Wales and discover a treasure-trove of artistic and culinary excellence framed by magnificent views of Sydney Harbour.

[Sydney Opera House](#)
Visit the Sydney Opera House to see a performance, sip on a cocktail overlooking the harbour or take a backstage tour.

[View more Arts and Culture experiences](#)

Outdoors

With a near-perfect climate, beautiful gardens and interesting neighbourhoods to explore, you can get a taste of the

How to use this website

This website is designed to be accessible to everyone. You can adjust the text and colour contrast to suit your needs:

- Change the text size
- Change the contrast

Learn more about [how to use this website](#)

Symbols used in this website

Universal icons will help you decide which attractions provide the appropriate level of access.

- Mobility access is available offering a clear path of travel throughout the venue including an accessible toilet
- A clear path of travel throughout the venue for those who are blind or have low vision
- Hearing loop or audio induction loop is available
- Audio description is available
- Auslan sign language interpretation is available
- Text captions provided for audio content

Key Features of the Web Portal

1. W3C and WAI compliant
2. Clearly defined icons of the dimensions of access
3. Website optimised for different text sizes
4. Website optimised for high contrast
5. Alt-text (hover text) descriptions of each graphic
6. Pages are printable for each accessible destination experience
7. Content is compliant to TNSW guidelines.

Consumer Feedback Loop

An integral part of the Web portal is a consumer feedback loop. This is based on a short online survey provided through Survey Monkey. It is essential that the survey be seen as part of the University based research process and separate to the Web portal. Within the Web portal an explanation of the research process and the role of consumer feedback is provided before consumers are taken to the survey site. The survey Website seeks to evaluate user's experiences of:

- the accessible destination experiences
- their perception of the accessibility of the experiences for their access needs
- whether improvements to the experiences could be made
- the usability of the Sydney for All Web portal
- whether improvements could be made to the Sydney for All Web portal.

Conclusion

As a scoping project, this report has been written at a time of operationalising the *Sydney for All* Web Portal. It must be emphasised that opportunity for consumers to provide feedback on the conceptual design of the content and accessibility of the Web portal is essential so that it meets the needs of the group that it targets. As such, the testing of the ideas put forward in this report requires a period of time to allow consumers to provide the necessary feedback required (to be determined once the Web portal has been launched).

Chapter 7

CONCLUSION

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

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

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

Project Potential and Future Extension Project

The research team has been working with Tourism Australia (Jacqui Tully) and each of the State Tourism Organisation’s representatives on the accessible tourism task force to develop an Australian wide approach to accessible tourism information provision. This research project has contributed significantly to an understanding of the requirements for developing accessible destination experiences. Australia is well positioned to be at the forefront of developing accessible tourism market opportunities through not only this research project but a series of other research projects and initiatives. These are:

- Australian urban tourism research agenda (Edwards, Griffin & Hayllar 2006)
- research agenda for accessible tourism (Darcy 2006)
- the economic modelling of accessible tourism outlined in this report
- information needs for accessible tourism accommodation
- business case studies on accessible tourism
- understanding the experiences of tourists with vision impairment
- the Western Australian *You're Welcome* Program
- the Accessible Alpine Tourism Project.

The STCRC has the opportunity to contribute to an innovative approach of an only recently recognised market segment area. The accessible tourism market has been recognised in Europe, by UNESCAP and the United States as having significant potential. For example, the European Commission’s research on the One-Stop Shop for Accessible Tourism Europe (OSSATE), Europe for All that was the outcome of the OSSATE research and the European Network for Accessible Tourism (ENAT) provide an insight to developing a national approach to accessible tourism in Australia. Similarly, the ASEAN countries with the facilitation of UNESCAP had held a series of initiatives to develop a cooperative approach to accessible tourism since 2000. It is suggested that there would be synergies to collaborate with Tourism New Zealand on developing an Australasian approach to accessible tourism given that both countries are long haul destinations. Further, both countries use an identical set of standards for access and mobility, which are the basis for understanding the accessibility of the built environment.

The priority areas to develop accessible tourism in Australasia are listed below.

Seven Priority Areas for Developing Accessible Tourism

As stated in the Research Agenda for Accessible Tourism, the seven priority areas to develop accessible tourism:

- 1. Information Provision, Marketing and Promotion**
 - determine relevant information requirements, format and presentation preferences for each dimension of disability across each sector of the tourism industry
 - test the validity or otherwise of rating systems and alternative information formats for tourism accommodation
 - pilot the outcomes of the above for inclusion on the Australian Tourism Data Warehouse
 - establish collaborative projects with OSSATE and other accessible tourism information projects in other parts of the world.
- 2. Dimensions of Disability**
 - understand the different tourism requirements of people based on hearing, vision and cognitive dimensions of disability.
- 3. Market Dynamics and Segmentation**
 - establish a commitment to ongoing collection of domestic and international data sources that include a disability module
 - undertake analysis of the size and role of accessible tourism within Australian tourism;
 - develop market segmentation studies of disability in tourism.
- 4. Total Product Development**
 - operationalise universal design and easy living principles within tourism product development
 - test the operationalisation of the above concepts through place based approaches, local access precincts and access trail development
 - understand the diversity of experiences of people with disabilities through an application of the recreation opportunity spectrum to industry sectors.
- 5. 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
 - establish an internal government driver of accessible tourism through cooperative Commonwealth and State Government Tourism Minister's Council
- 6. Education and Training**
 - extend information provision to interactive industry based disability awareness training that is tested using recognised Australian/international scales
 - undertake disability awareness training with a key industry group to provide the basis for ongoing industry engagement
 - incorporate disability awareness training/curriculum into industry, TAFE and university courses.
- 7. 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
 - 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.

GLOSSARY

accessible destination experiences

Accessible destination experiences take direction from universal design principles to offer independent, dignified and equitable experiences that provide 'a sense of place' within the destination region for people with access requirements (Darcy et al. 2008).

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 Olympic Coordination Authority (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).

citizenship

Citizenship is 'the ultimate expression of a person's commitment to the nation' (Millett, cited in Meekosha & Dowse 1997, p. 49). However, within the disability context, citizenship is fraught with complications including power, politics and exclusionary practices of people who do not fit the norm. Contemporary citizenship exercises inclusion of active, productive citizens and emphasises democracy and civil society, but excludes passive receipt of social and welfare rights (Meekosha & Dowse 1997).

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 defined as 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 impairment (embodiment). This approach to disability separates impairment from the social relations of disability (Oliver 1990 cited in Darcy 2004, p. 10).

easy access markets

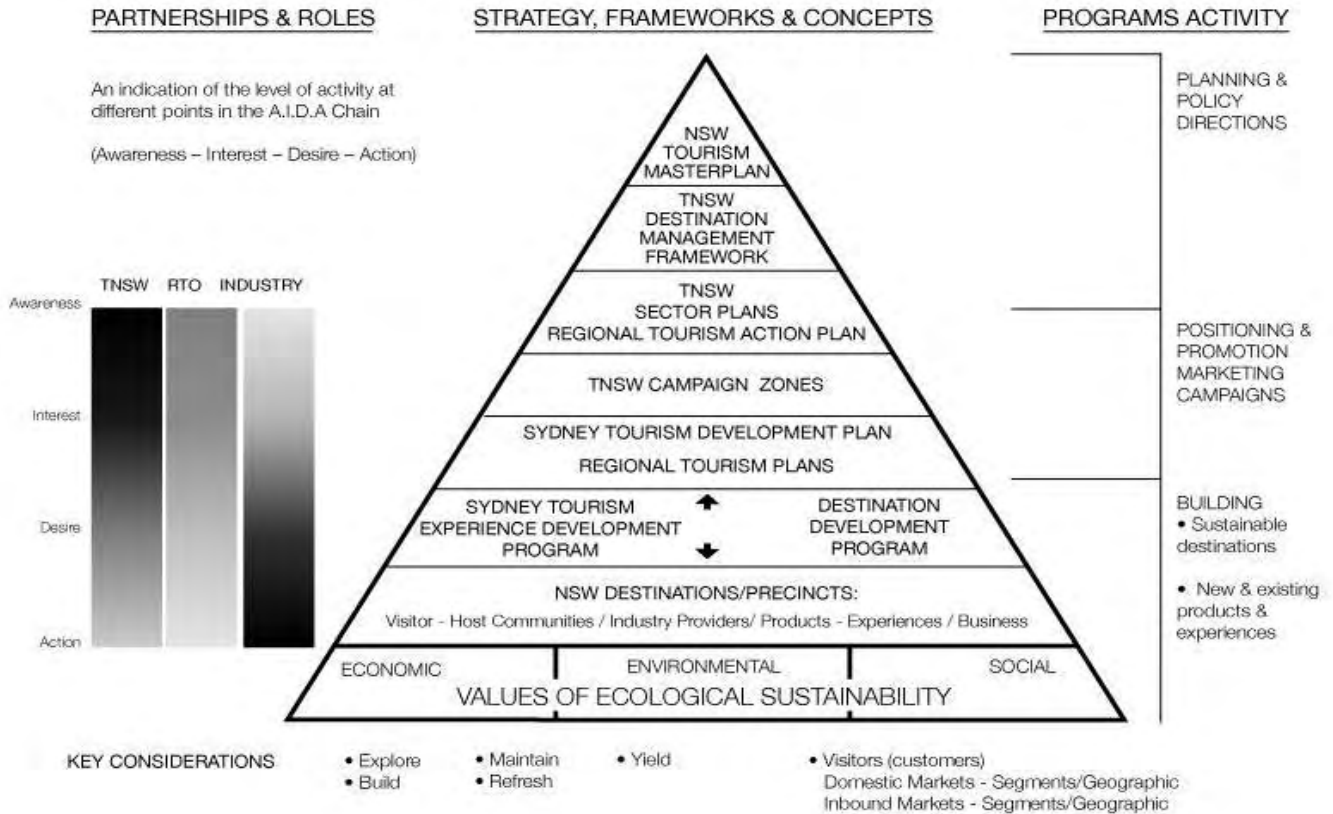
Any segment within the tourism market that prefers accessing tourism experiences with ease. This may include seniors who may prefer walking up a gentle ramp rather than tackling a large number of stairs. People with a disability, including those with physical and sensory disabilities, will find it easier to access tourism facilities where there is a continuous pathway and tactile surfaces and clear signage (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 adaptation or specialised design ... The intent of 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).

APPENDIX 1: TNSW 2005 BUILDING SUCCESSFUL DESTINATIONS

BUILDING SUCCESSFUL DESTINATIONS



APPENDIX 2: ECONOMIC CONTRIBUTION TABLES

Table A1 People with disabilities taking an overnight trip in last 28 days

			WHETHER RESPONDENT HAS A DISABILITY			Total
			Yes	No	Refused	Yes
HAD OVERNIGHT TRIP IN LAST 28 DAYS	Yes (at least one in-scope trip)	Count	0	3823	23	4314
		% within HAD OVERNIGHT TRIP IN LAST 28 DAYS	10.8%	88.6%	.5%	100.0%
		% within WHETHER RESPONDENT HAS A DISABILITY	22.1%	27.8%	13.9%	26.9%
	No	Count	1651	9947	142	11740
		% within HAD OVERNIGHT TRIP IN LAST 28 DAYS	14.1%	84.7%	1.2%	100.0%
		% within WHETHER RESPONDENT HAS A DISABILITY	77.9%	72.2%	86.1%	73.1%
Total		Count	2119	13770	165	16054
		% within HAD OVERNIGHT TRIP IN LAST 28 DAYS	13.2%	85.8%	1.0%	100.0%
		% within WHETHER RESPONDENT HAS A DISABILITY	100.0%	100.0%	100.0%	100.0%

Source: NVS 2003—had overnight trip in last 28 days * whether respondent has a disability cross-tabulation

Table A2 People with disabilities taking a day trip in last 7 days

			WHETHER RESPONDENT HAS A DISABILITY			Total
			Yes	No	Refused	Yes
HAD DAYTRIP IN LAST 7 DAYS	Yes (at least one in-scope trip)	Count	309	2009	9	2327
		% within HAD DAYTRIP IN LAST 7 DAYS	13.3%	86.3%	.4%	100.0%
		% within WHETHER RESPONDENT HAS A DISABILITY	14.6%	14.6%	5.5%	14.5%
	No	Count	1810	11760	155	13725
		% within HAD DAYTRIP IN LAST 7 DAYS	13.2%	85.7%	1.1%	100.0%
		% within WHETHER RESPONDENT HAS A DISABILITY	85.4%	85.4%	94.5%	85.5%
Total		Count	2119	13769	164	16052
		% within HAD DAYTRIP IN LAST 7 DAYS	13.2%	85.8%	1.0%	100.0%
		% within WHETHER RESPONDENT HAS A DISABILITY	100.0%	100.0%	100.0%	100.0%

Source: NVS 2003—had daytrip in last 7 days * whether respondent has a disability cross-tabulation

VISITOR ACCESSIBILITY IN URBAN CENTRES

Table A3 People with disabilities taking an outbound trip in last 90 days

			WHETHER RESPONDENT HAS A DISABILITY			Total	
			Yes	No	Refused	Yes	
HAD OUTBOUND TRIP IN LAST 90 DAYS	Yes (at least one in-scope trip)	Count	57	776	4	837	
		% within HAD OUTBOUND TRIP IN LAST 90 DAYS	6.8%	92.7%	.5%	100.0%	
		% within WHETHER RESPONDENT HAS A DISABILITY	2.7%	5.6%	2.4%	5.2%	
	No	Count	2063	12993	161	15217	
		% within HAD OUTBOUND TRIP IN LAST 90 DAYS	13.6%	85.4%	1.1%	100.0%	
		% within WHETHER RESPONDENT HAS A DISABILITY	97.3%	94.4%	97.6%	94.8%	
	Total		Count	2120	13769	165	16054
			% within HAD OUTBOUND TRIP IN LAST 90 DAYS	13.2%	85.8%	1.0%	100.0%
			% within WHETHER RESPONDENT HAS A DISABILITY	100.0%	100.0%	100.0%	100.0%

Source: NVS 2003—had outbound trip in last 90 days * whether respondent has a disability cross-tabulation

APPENDIX 3: WEB PORTAL SITE MAP

<http://www.sydneyforall.com/index.html>

This sitemap will assist you in navigating your way through the information included in this Web site.

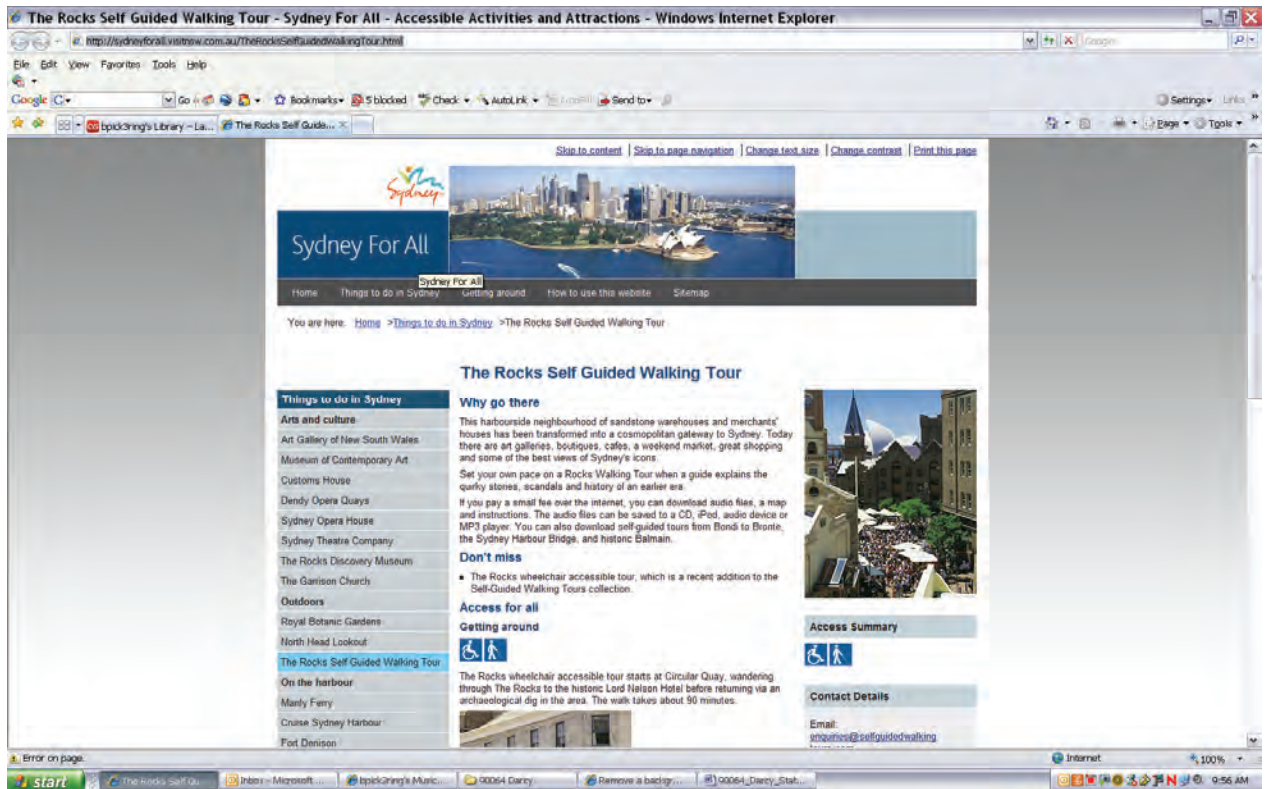
- [Home](#)
- [Things to do in Sydney](#)
 - Arts and culture
 - [Art Gallery of New South Wales](#)
 - [Museum of Contemporary Art](#)
 - [Customs House](#)
 - [Dendy Opera Quays](#)
 - [Sydney Opera House](#)
 - [Sydney Theatre Company](#)
 - [The Rocks Discovery Museum](#)
 - [The Garrison Church](#)
 - Outdoors
 - [Royal Botanic Gardens](#)
 - [North Head Lookout](#)
 - [The Rocks Self Guided Walking Tour](#)
 - On the harbour
 - [Manly Ferry](#)
 - [Cruise Sydney Harbour](#)
 - [Fort Denison](#)
 - [Sydney Fish Market](#)
 - [Whale Watching](#)
- [Getting around Sydney](#)
 - [Access maps](#)
 - [Transport](#)
 - [Accessible toilets](#)
- [About this Website](#)
 - [Research project and stakeholders](#)
 - [Contact us](#)
 - [Tourism NSW](#)
 - [Copyright](#)
 - [Privacy](#)
 - [Disclaimer](#)
- [How to use this Website](#)
 - [Change text size](#)
 - [Change contrast](#)

APPENDIX 4: MOCK ACCESSIBLE DESTINATION EXPERIENCES

The following are the accessible destination experiences completed by the research team prior to the Tourism New South Wales revision for their in-house style. Apart from the textual elements, the accessible destination experiences were complemented by photographs documenting the accessible features or constraints to the experiences. Some 750 photographs were taken over the course of the research project. Please see the Website for the presentation of the experiences <http://www.sydneyforall.com/index.html>

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

EXPERIENCE 1: ACCESSIBLE ROCKS ROLLING TOUR



EXPERIENCE 2: THE ROCKS DISCOVERY MUSEUM



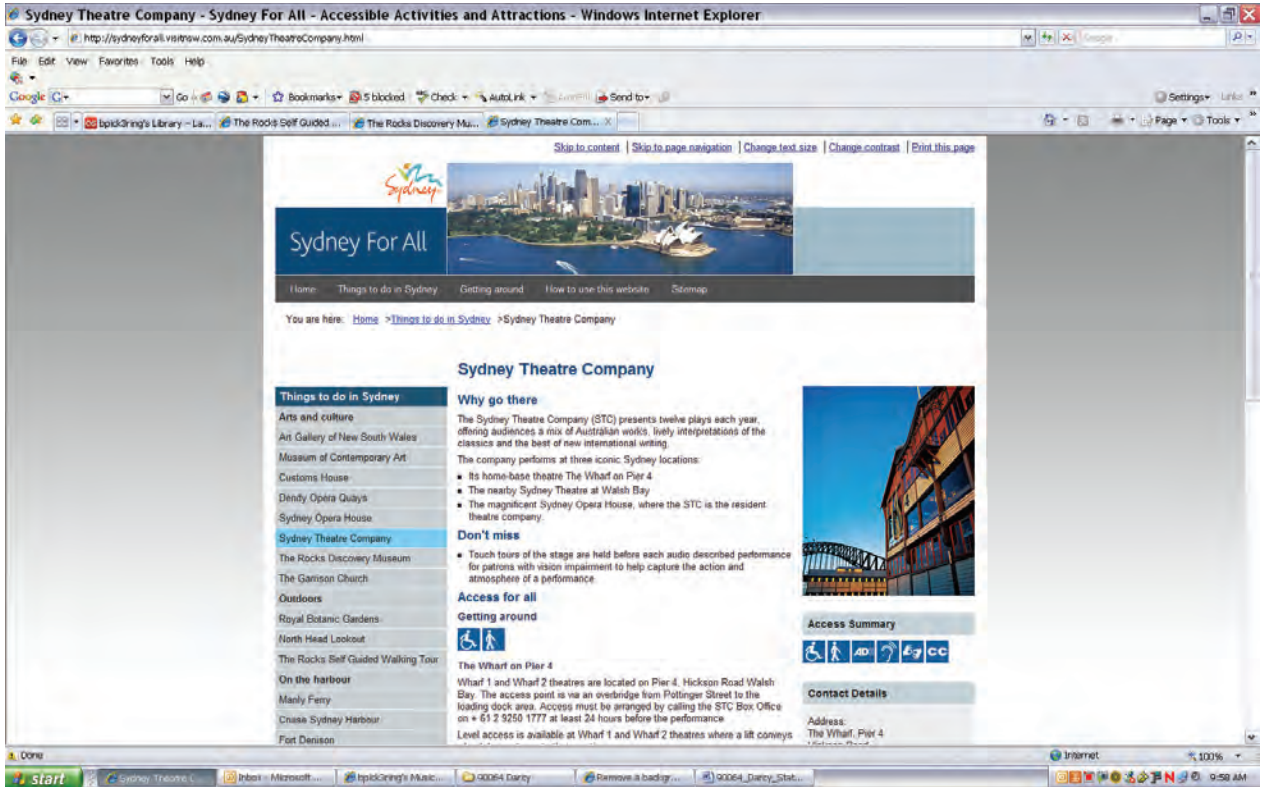
EXPERIENCE 3: THE GARRISON CHURCH



EXPERIENCE 4: SYDNEY OPERA HOUSE ACCESS 'LIFT' BACKSTAGE TOUR



EXPERIENCE 5: SYDNEY THEATRE COMPANY SENSORY INTERPRETED PERFORMANCES

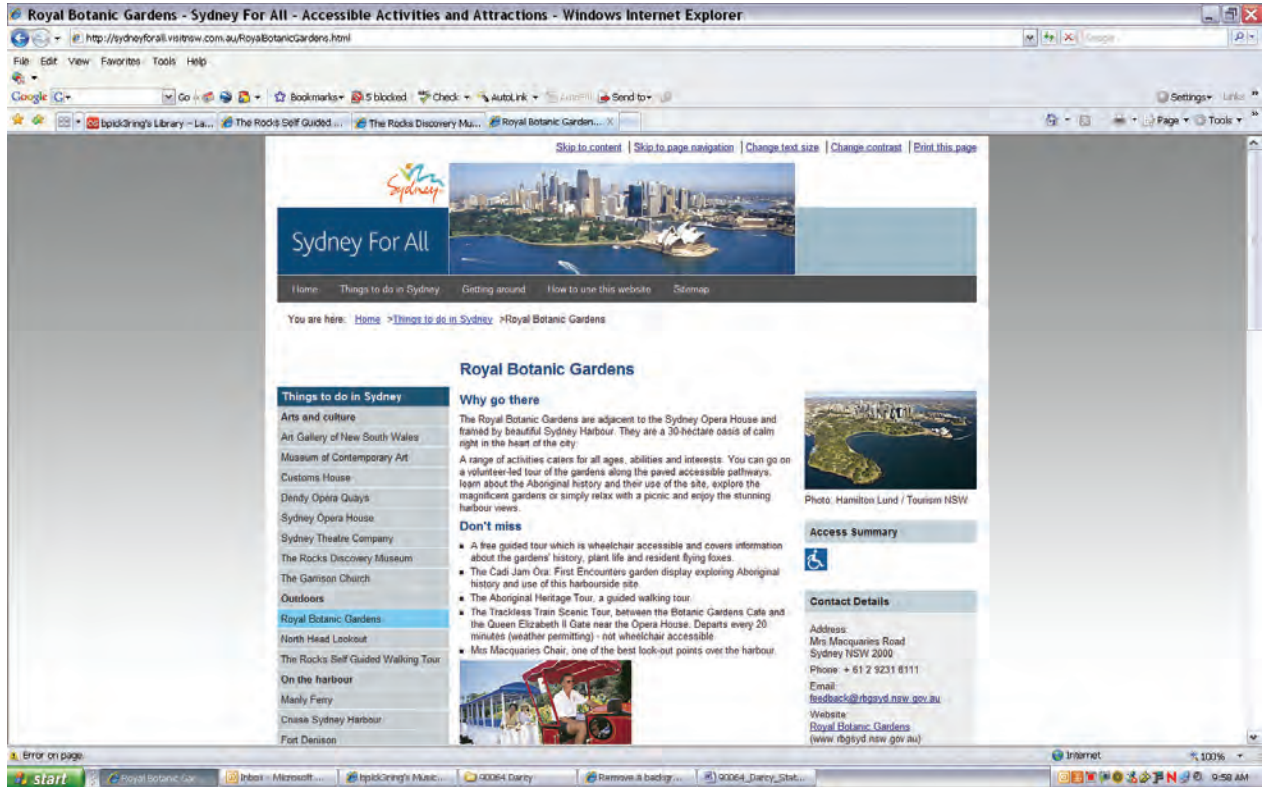


VISITOR ACCESSIBILITY IN URBAN CENTRES

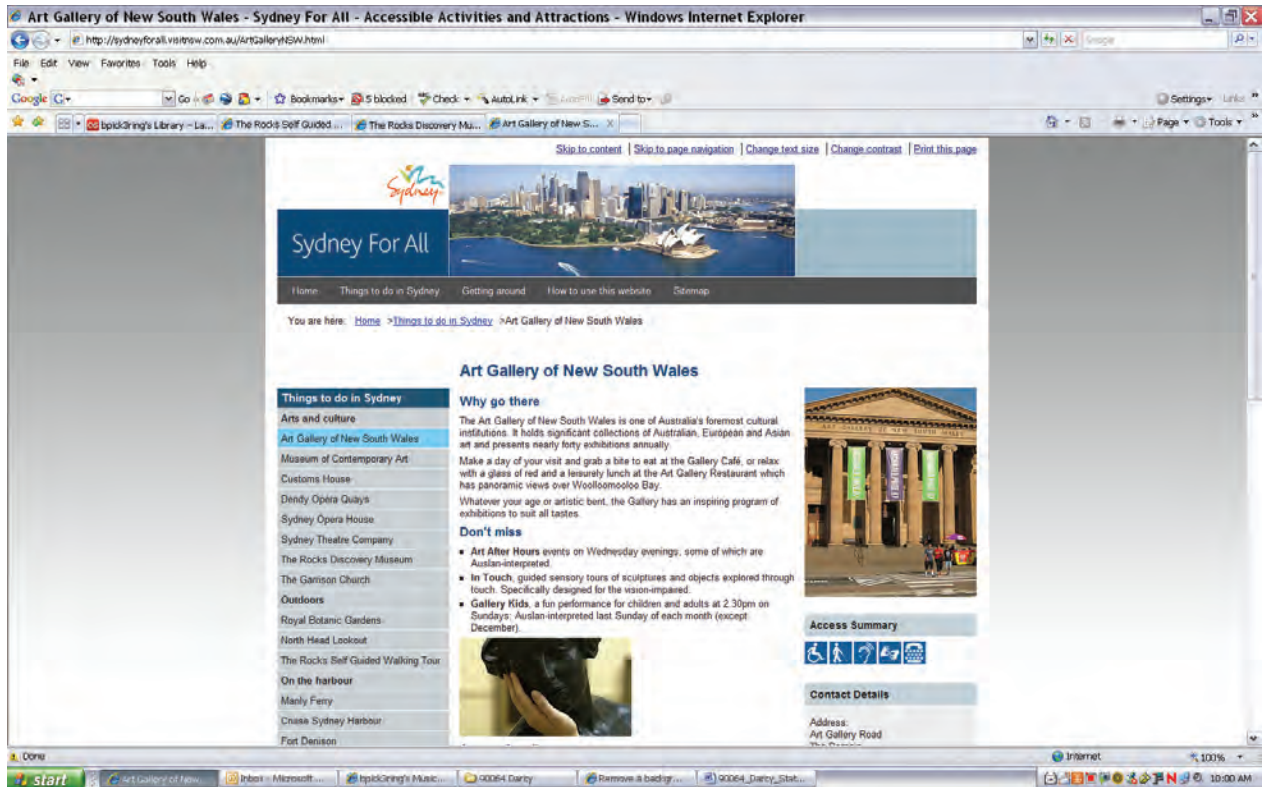
EXPERIENCE 6: RBG CADI JAM ORA FIRST ENCOUNTERS

EXPERIENCE 7: RBG MRS MACQUARIE'S CHAIR

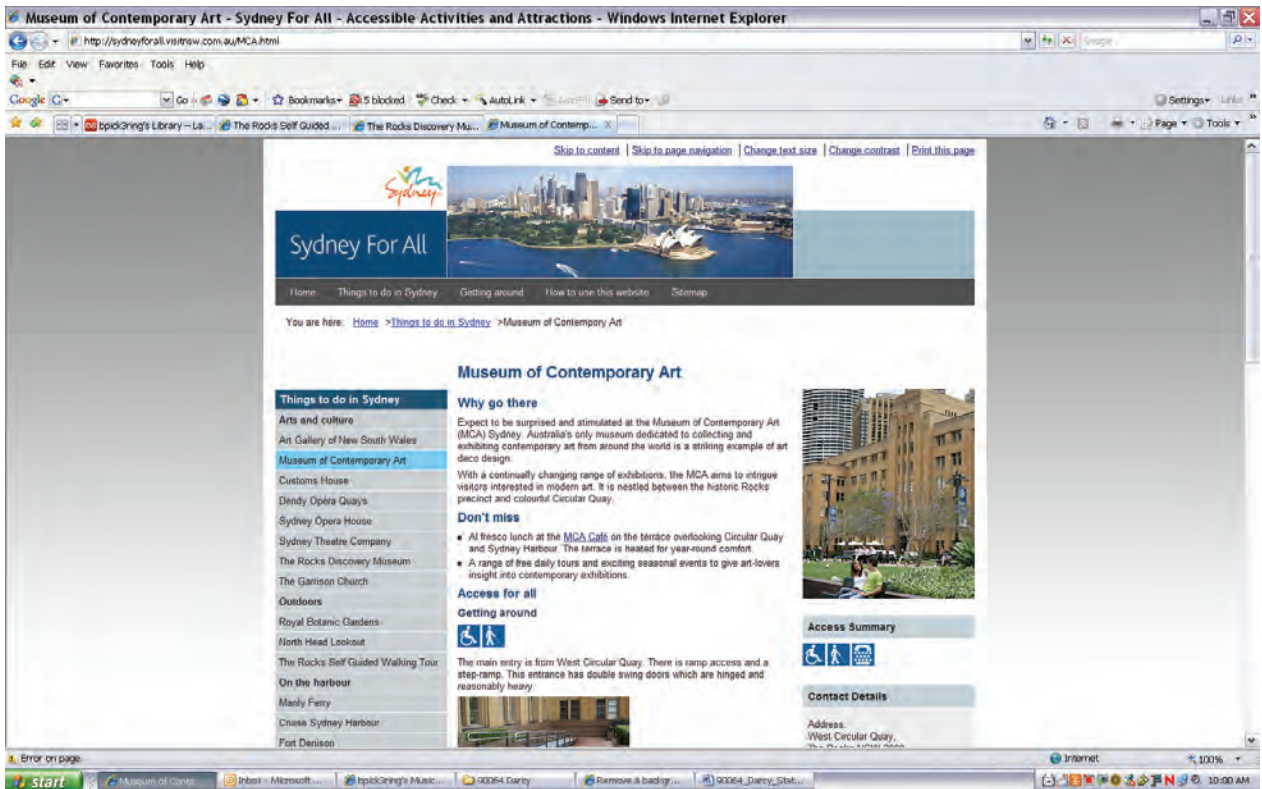
EXPERIENCE 8: RBG GENERAL GUIDED TOUR



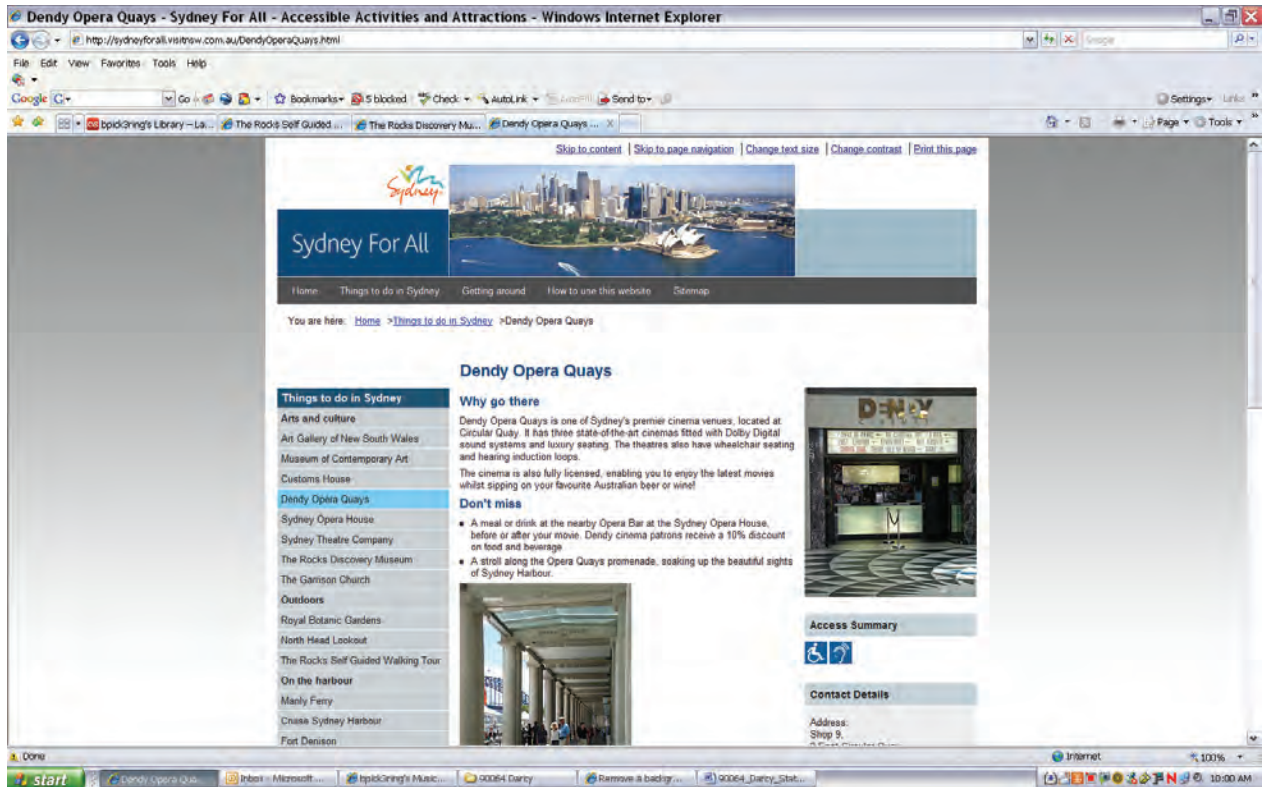
EXPERIENCE 9: NSW ART GALLERY AFTER HOURS AUSLAN TOURS



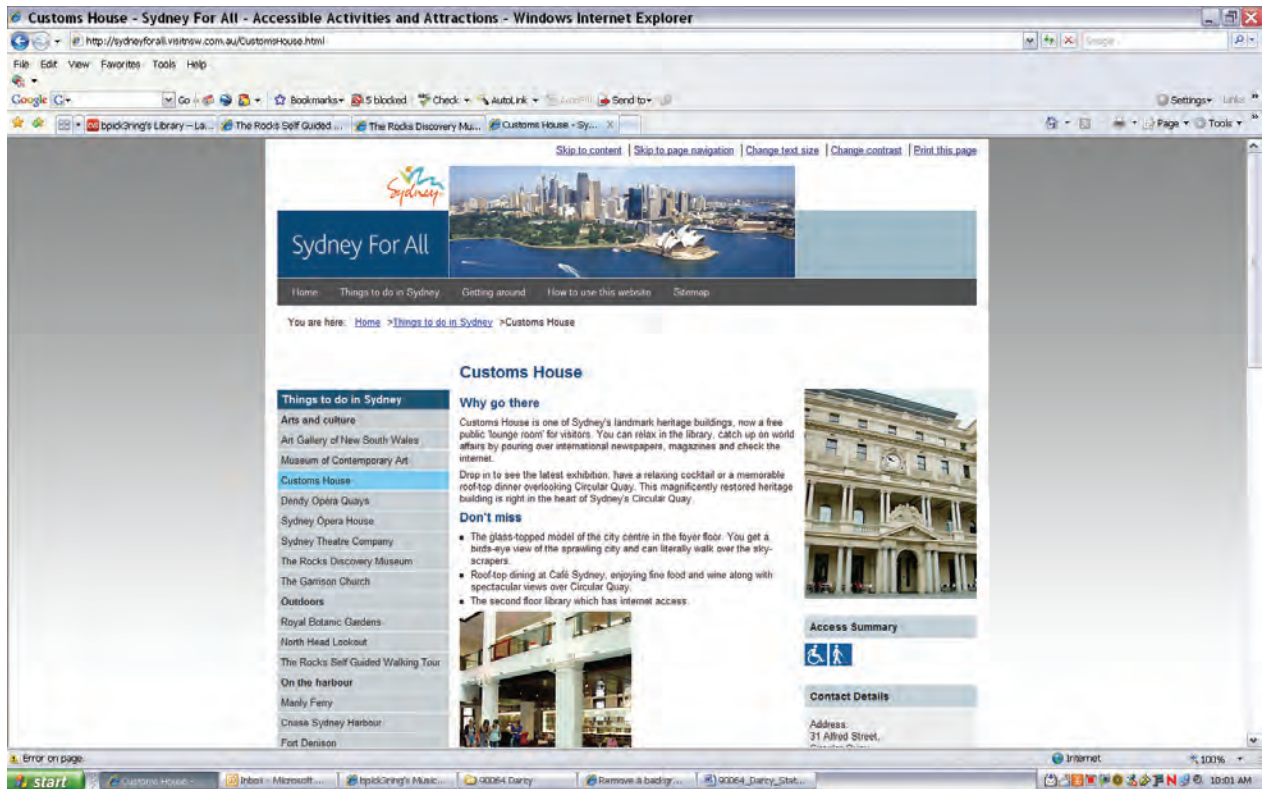
EXPERIENCE 10: MUSEUM OF CONTEMPORARY ART—GALLERY & RESTAURANT



EXPERIENCE 11: DENDY CINEMA OPERA QUAYS ACCESSIBLE CINEMA



EXPERIENCE 12: CUSTOMS HOUSE EXHIBITION, MEETING & READING SPACE



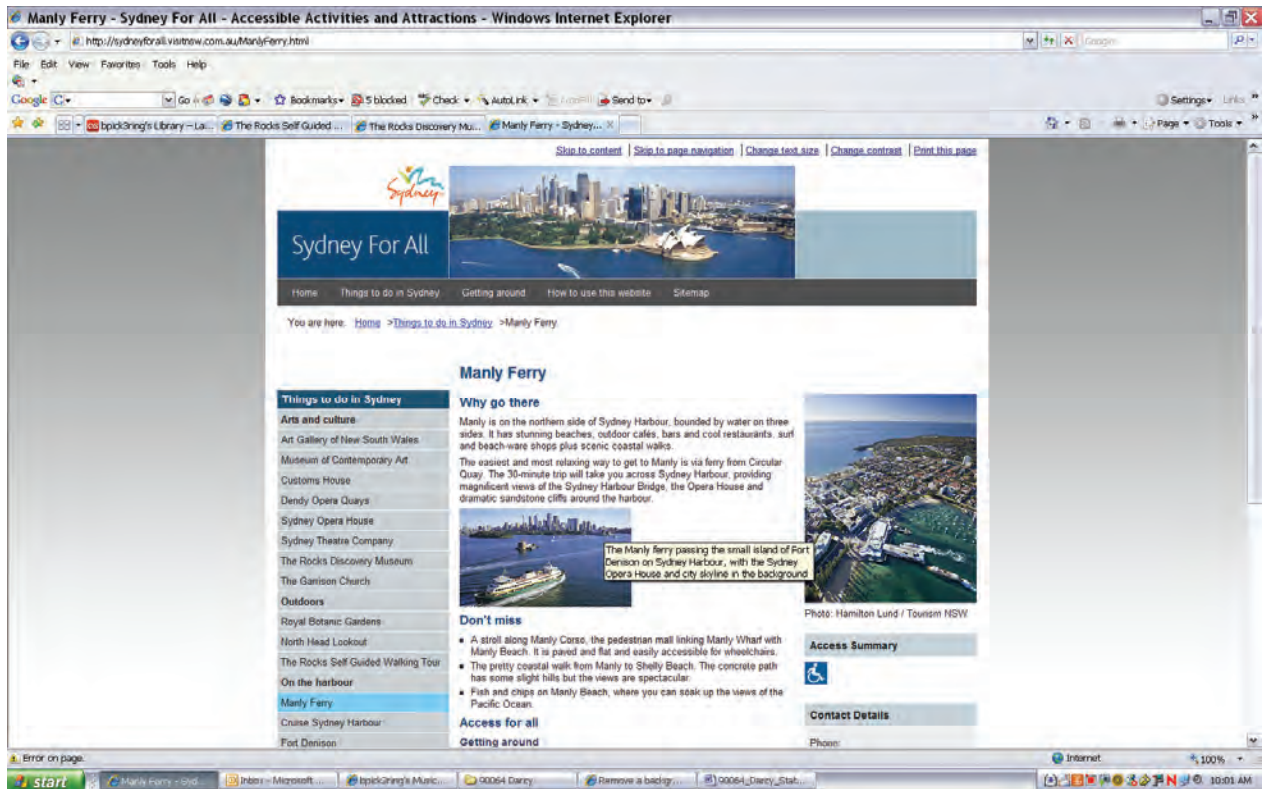
EXPERIENCE 13: CAPTAIN COOK SYDNEY HARBOUR CRUISE



EXPERIENCE 14: TRUE BLUE WHALE WATCHING

The screenshot shows a Windows Internet Explorer browser window displaying the website 'Whale Watching - Sydney For All'. The browser's address bar shows the URL 'http://sydneyforall.visitnsw.com.au/WhaleWatching.html'. The website header features the 'Sydney For All' logo and a navigation menu with links for 'Home', 'Things to do in Sydney', 'Getting around', 'How to use this website', and 'Site map'. Below the header, a breadcrumb trail reads 'You are here: Home > Things to do in Sydney > Whale Watching'. The main content area is titled 'Whale Watching' and includes sections for 'Why go there', 'Don't forget', 'Access for all', and 'Getting around'. A sidebar on the left lists various 'Things to do in Sydney' categories such as 'Arts and culture', 'Outdoors', and 'On the harbour'. An image of a whale breaching is shown on the right side of the page. The browser's taskbar at the bottom shows several open applications, including 'Whale Watching', 'Inbox - Microsoft...', 'IpikOring's Music...', '00064 Darcy', and 'Remove it backgr...'. The system tray shows the time as 10:01 AM.

EXPERIENCE 15: MANLY FERRY TRIP



EXPERIENCE 16: NPWS NORTH HEAD NATIONAL PARK SCENIC LOOKOUT

The screenshot shows a web browser window displaying the 'Sydney For All' website. The page title is 'North Head Lookout - Sydney For All - Accessible Activities and Attractions'. The browser's address bar shows the URL: <http://sydneyforall.visitnsw.com.au/north-head-lookout.html>. The website features a 'Sydney For All' logo and a navigation menu with links for Home, Things to do in Sydney, Getting around, How to use this website, and Signup. A breadcrumb trail indicates the current location: Home > Things to do in Sydney > North Head Lookout. The main content area is titled 'North Head Lookout' and includes sections for 'Why go there', 'Don't miss', 'Access for all', and 'Getting around'. A sidebar on the left lists various 'Things to do in Sydney' categories such as Arts and culture, Museums, and Outdoors. An 'Access Summary' section with a wheelchair icon is also present. The browser's taskbar at the bottom shows several open applications and the system clock indicating 10:02 AM.

EXPERIENCE 17: NPWS FORT DENISON—PINCHGUT

The screenshot shows a Windows Internet Explorer browser window displaying the 'Sydney For All' website. The address bar shows the URL: <http://sydneyforall.visitnsw.com.au/FortDenison.html>. The page features a 'Sydney For All' logo and a navigation menu with links for Home, Things to do in Sydney, Getting around, How to use this website, and Sitemap. A breadcrumb trail indicates the current location: Home > Things to do in Sydney > Fort Denison.

The main content area is titled 'Fort Denison' and includes a 'Why go there' section. This section contains two paragraphs of text:

Fort Denison, a rocky island in the middle of Sydney Harbour, is one of the most famous historic landmarks in Sydney. Originally used as a place of punishment for convicts in colonial Sydney, it was later transformed into a fort in the mid-1800s to protect the city from potential invasion.

Fort Denison became part of Sydney Harbour National Park in 1992. Today you can enjoy stunning harbour views and tour the historic Martello Tower and other colonial buildings. A café serves brunch and other meals in a premier harbourside location.

Sydney Harbour National Park's [guided heritage tours](#) are offered daily departing from Circular Quay. A regular ferry service from Circular Quay and Darling Harbour is available to visitors not on a tour.

 Below the text are two images: one showing a view of the fort on the water and another showing historical cannons. To the right of the text is a 'Photo: Hamilton Lund / Tourism NSW' credit. Below the images are sections for 'Access Summary' (with a CC icon) and 'Contact Details' (listing a phone number: +61 2 9247 5033 heritage).

On the left side of the page, there is a 'Things to do in Sydney' sidebar menu with categories like Arts and culture, Outdoors, and On the harbour, with 'Fort Denison' highlighted under the 'On the harbour' category.

EXPERIENCE 18: SYDNEY LIGHT RAIL & SYDNEY FISHMARKETS

The screenshot shows a Windows Internet Explorer browser window displaying the Sydney For All website. The address bar shows the URL: <http://sydneyforall.visitnsw.com.au/SydneyFishMarkets.html>. The page features a navigation menu with links for Home, Things to do in Sydney, Getting around, How to use this website, and Sitemap. A breadcrumb trail indicates the current location: Home > Things to do in Sydney > Sydney Fish Market.

The main content area is titled "Sydney Fish Market" and includes the following sections:

- Things to do in Sydney:** A sidebar menu listing various activities such as Arts and culture, Museums of Contemporary Art, and Outdoors.
- Why go there:** A paragraph describing the market as an authentic fisherman's market with fresh seafood.
- Don't miss:** A list of key experiences, including the early morning seafood auction and a behind-the-scenes tour.
- Access for all:** A section with an accessibility icon and text stating that the Light Rail station is across a paved section of the railway tracks with an access ramp.
- Access Summary:** A box containing accessibility icons for wheelchair access and a person with a white cane.
- Contact Details:** A section for the Sydney Fish Market address.

The browser's taskbar at the bottom shows several open applications, including Microsoft Word and Internet Explorer, with the system clock displaying 10:02 AM.

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Dr Simon Darcy is an Associate Professor and Research Director in the School of Leisure, Sport and Tourism at the University of Technology, Sydney. Simon's research and teaching expertise is in sport, tourism and diversity management. He has been the recipient of Australian Research Council, Sustainable Tourism Cooperative Research Centre and United Nations research grants and is currently investigating organisational responses to accessible tourism, sports management practices and protected area visitor management systems. All Simon's research is industry linked with the private sector, third sector or government organisations. His body of work on accessible tourism over the last decade has gained national and international recognition. Simon has been actively involved in changing tourism practice through his positions as a board member of Nican, a member of the Commonwealth Government's Office of National Tourism's Steering Committee on accessible tourism and a member of the NSW Transport Minister's Accessible Public Transport Forum. Simon is professionally accredited with the Planning Institute of Australia and the Association of Consultants in Access Australia.

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Bruce has a spinal injury following a swimming accident in 1976 and uses a manual wheelchair for his mobility. He has a Bachelor of Economics Degree (1980) and Post Graduate Diploma of Data Processing (1981). He has worked in Corporate Finance during the 1980's while he achieved Certified Practising Accountant (CPA) status (1986). 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 EAA (1995 and 2000) and published *Accessing Melbourne* (2001). He is active in promoting the concept of 'Accessible Tourism' having spoken at the Prime Ministers Gold Medal Access Awards (1999), several conferences and appeared on numerous television and radio programmes. He also represented Tourism New South Wales at the Disability with Attitude Conference Feb 2001. Until May 2001, Bruce was an Executive Committee Member of Travellers Aid Society, a charitable group based in Melbourne providing a range of services to stranded travellers and people with disabilities. 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 and works as a consultant to the travel industry and is an Accredited Member of the Association of Consultants in Access Australia.

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Emma recently completed her PhD at the University of New South Wales, specialising in tourism policy and politics in Southeast Asia. She also has a Bachelor of Arts degree with First Class Honours in Hotel & Catering Management, and a Master of Philosophy degree in Tourism Management, both from the Hong Kong Polytechnic University. She has received several research awards including the Tourism and Hospitality Education Travel Grant from the International Centre of Excellence, the Young Tourism Strategist of the Year Award from Pacific Asia Travel Association, and the University International Postgraduate Award from UNSW. Prior to her teaching and research career, she worked in hotels in France and the United States.

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Larry Dwyer PhD is Qantas Professor of Travel and Tourism Economics at the University of New South Wales, Australia. Larry publishes widely in the areas of tourism economics, management and policy, with over 150 publications in international journals, government reports, chapters in books, and monographs. He has been awarded numerous research grants to contribute to tourism knowledge. Larry maintains strong links with the tourism industry at international, national, state and local levels. Larry also has undertaken an extensive number of consultancies for public and private sector tourism organisations within Australia, and for international agencies, including the United Nations World Tourism Organisation. He is a member of the International Advisory Board of the Business Enterprises for Sustainable Tourism Education Network (BESTEN), coordinator of the Sustainable Destinations research program of The Sustainable Tourism Cooperative Research Centre in Australia, a member of the STCRC Centre for Tourism Economics and Policy and a member of the Standards of Excellence Assessment Panel of THE-ICE (International Centre of Excellence in Tourism and Hospitality Education). Larry is a founding member and Vice President of the International Association for Tourism Economics, and is an appointed member of the Editorial Boards of sixteen international tourism journals. In May

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Alana Thomson is a STCRC PhD scholar within the School of Leisure Sport and Tourism at the University of Technology, Sydney. Alana is a Leisure Management Graduate from UTS, and her first class Honours studies engaged an in-depth analysis of third sector sports programming for Aboriginal and Torres Strait Islander youths. Alana's current PhD research focuses on mega sport events within the urban context. Alana contributed to this technical report through literature reviews, management of data, stakeholders and editing at various stages. Alana is a student member of Meetings and Events Australia.

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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.

Introduction

The STCRC has grown to be the largest, dedicated tourism research organisation in the world, with \$187 million invested in tourism research programs, commercialisation and education since 1997.

The STCRC was established in July 2003 under the Commonwealth Government's CRC program and is an extension of the previous Tourism CRC, which operated from 1997 to 2003.

Role and responsibilities

The Commonwealth CRC program aims to turn research outcomes into successful new products, services and technologies. This enables Australian industries to be more efficient, productive and competitive.

The program emphasises collaboration between businesses and researchers to maximise the benefits of research through utilisation, commercialisation and technology transfer.

An education component focuses on producing graduates with skills relevant to industry needs.

STCRC's objectives are to enhance:

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