Braille House

Making Tourism Accessible for Visitors who are Blind or have Low Vision

BUSINESS CASE

The Business Case – In Detail

Market Potential: What Does the Data Say About Tourists with Disabilities?

Tourism analysts are increasingly realising that accessible tourism offers an economic opportunity by tapping into a market that is already large and set to grow further. "It is a misconception that people with a disability do not travel. In fact, their travel aspirations are very similar to the general population and although it's true that the unemployment rate for people with a disability is higher than that for the general population, many people with disability have jobs and disposable income[1]... Studies have also underlined the 'multiplier effect' – many people, especially those with a disability, do not travel alone – which means that if a business cannot cater for a person with a disability, they actually lose the business of, on average, two to four people in total.[2]

Tourism Research Australia as presented in 2022 to the *Asia-Pacific Economic Corporation (APEC) Tourism Access and Inclusion: Best Practice Guidelines for Tourism MSMEs in APEC* [3] (based on Tourism Research Australia 2017)[4] indicated that:

- ✓ The accessible travel market in Australia is already larger than the much-vaunted Chinese inbound market and is growing more quickly.
- ✓ 14% of the Australian population (c 3.4 million people) have need of accessible tourism experiences.
- ✓ 289,000 Queenslanders with a disability took at least one domestic day or overnight trip.
- ✓ 14% of the accessible tourism market in Queensland is for people with a vision disability.

Economic Impact: Research tells a compelling story for visitors who are blind and low vision

- ✓ Annual expenditure by tourists with a disability (excluding overseas visitors) in Australia is estimated at A$3.2 billion (US$2.3 billion). Using a multiplier effect of 2.5 to account for other members of the travel party, the true value of the sector is approximately A$8 billion (US$5.8 billion). [5]
- ✓ The estimated spend by travellers with a disability in the state of Queensland was A$781 million (US$561 million), while that for the travel party was A$1.9 billion (US$1.4 billion), or 10% of the total domestic travel spend.[6]

- ✓ Based on the above data, if 14% of the accessible tourism market is for people with a vision disability[7] and in total Australian tourists with a disability spent around $781 million in Queensland, then 14% of $781 million =
  $109 MILLION market potential from blind and low vision tourists in Queensland

- ✓ Further, based on the above data, with the average travel party size for those with a disability around 2.5 persons, and a resulting $1.9 Billion being spent in Queensland, then 14% of $1.9 Billion =
  $266 MILLION market potential from blind and low vision tourists and their travel party in Queensland

Blind and low vision tourists are underserved and therefore present market potential. These travellers represent a significant and growing segment of the tourism market.

- There are a number of people in Australia who are blind and have low vision (with family and / or support workers) who are not traveling but would likely travel with certain industry improvements to accommodation, transport and current technologies.[8] Factor in these yet to travel potential tourist and the economic possibilities are staggering.

- Accessible facilities can encourage longer stays, resulting in more spending on accommodations, dining, and attractions.

- Positive experiences can lead to repeat visits, fostering customer loyalty. *"More than four out of five people are saying, 'I am going to come back.' So you get this customer, and once you've got them for a long, long time, they are going to be key as customers. So, the dollar that you get is going to keep giving over that lifetime value of a customer... Getting in now really positions you to capture that loyal market before other people start to do it. But as this sector gets recognized, that window is going to close. ... The opportunity to stand apart here is truly, truly enormous."* [9]

Social Benefits

Making tourism more accessible is a social obligation.

- Demonstrating commitment to accessibility fosters goodwill and promotes a more diverse and inclusive society.
- Destinations that cater to all visitors tend to have a better reputation, attracting more tourists.

Many hospitality venues, accommodation facilities and tourist destinations already do have a willingness to engage with and learn from people with a disability. With blind and low vision visitors there is often recognition by venue operators of barries faced and a preparedness to work towards solutions, however not necessarily the knowledge needed to progress. So essentially all too often there is a preparedness to provide equitable and accessible facilities to all, together with a willingness to invest and engage. This mindset is a fantastic starting point, and this package of resources will assist business to progress to the next level of action, to complement the continued and growing accessibility effort of the Queensland State Government.

Meeting Your Legal Requirements

People with disability have the same desires and needs as each one of us, which is respect and dignity. Our built environment needs to be safe, equitable and provide dignified access to goods and services. Most people with disability aspire to independence and life as an equal in our society. By adopting the principles of 'inclusiveness' and 'accessibility for all', people can remove the mindsets and stereotypes of 'special' or 'separate', or seeing people with disability as 'an object of pity' or a 'burden on society'.

Tourism and hospitality are service oriented and, as such, the industry must become more inclusive by providing tourism products and services such as accommodation and facilities that are accessible... Many people with disability do not experience what Queensland has to offer because of a lack of suitable accessible accommodation and other inclusive activities.

The Queensland Anti-Discrimination Commission is a strong advocate for a society that is 'inclusive, fair and equitable'.

Kevin Cocks AM, Commissioner Anti-Discrimination Commission Queensland (2017) [10]

Improving access to your business will assist you to fulfill your legal obligations and anti-discrimination responsibilities. In Australia, inclusive of Queensland, according to law, customers with disabilities should be able to access your goods or services just like any other customer. Customers with disabilities may file a discrimination complaint under state anti-discrimination legislation or the federal Disability Discrimination Act if they are unable to enter your building or utilise your goods or services. Making your company easier to get to will probably make it safer for both customers and employees, which may have an impact on your obligations for public liability and workplace safety. Making your establishment more accessible is also likely to make it safer for both patrons and employees and could have an effect on your public liability and workplace safety responsibilities.

For further information on your legal responsibilities and anti-discrimination obligations refer to:

- the Australian Human Rights Commission website, notably Disability Rights / Disability Discrimination and Disability Standards and Guidelines
- The Australian Human Rights Commission, A Quick Guide to Australian Discrimination Laws
- The Australian Government's Department of Social Services National Standards for Disability Services
- The Queensland Human Rights Act 2019 - Summary
- Queensland Legislation Anti-Discrimination Act 1991 (Reprint Current from 1 March 2023)
- The Queensland Government Disabilities Service Plan

Competitive Advantage

Market differentiation where you cater for blind and low vision visitors can provide your business with a competitive edge. Being a destination that caters to this section of the community can set a location apart from competitors. As an example, accessible venues attract events and conferences focused on disabilities, further boosting tourism.

What is Required to Realise the Potential?

Accessibility for blind and low vision visitors has the potential to create a good deal of positive experience and a lot of value in travel. Realising the potential requires ambition and a different way of thinking to address key challenges. There are a number of key pillars that sustain a systematic support for accessibility needs. *The Sage Seven TM* identifies the top seven from numerous guidelines:

1. "*Be Accessible* – All trip components should have minimal accessibility barriers.

2. *Show Accessible* – Clear, detailed accessibility information should be publicly available so disabled travellers can decide for themselves if their accessibility needs will be met.

3. *Talk Accessible* – Staff should be trained on how best to serve disabled customers.

4. *Lead Accessible* – The CEO should communicate an accessibility vision with near-term targets and adequate resources.

5. *Market Accessible* – Marketing to disabled travellers should be active, welcoming, and targeted.

6. *Involve Accessible* – People with disabilities should be involved in decisions about accessibility.

7. *Standardize Accessible* – Accessibility features should be standardized across products, across the industry, and across borders." [11]

The Next Steps

Once tourist destination operators realise that the inclusive tourism market for blind and low vision visitors is good for business and is essentially only an extension of good customer service, the next steps are important. Beneficial is assisting businesses identify what they currently have, what the possibilities are, some barriers and gaps that they can improve upon and how they can literally create that welcoming environment. Continuing to access this package of resources, or toolkit, will guide hospitality venues, accommodation facilities and tourist destinations with logical, easy to navigate next steps. This Business Case information forms the first part of these resources.

Additional available resources / tools / information includes:

- *Self-Assessment Access Audits*. These refer to, for example, facilities, staffing, procedures, and customer experience. The audits will assist venues to establish areas where no adjustments are required, where potential minor adjustments are needed, where adjustments should be undertaken in the medium term however which do not require renovation, or where adjustments are required during renovation or redevelopment. Ultimately this will inform business planning for the short, medium and long term, through the identification and establishment of development and improvement goals.

- *Case Studies* of accommodation facilities, hospitality venues and tourism or event destinations that have engaged with the *Self-Assessment Access Audits*

- Sample process for *Enhancing Venue / Destinations Business Planning Through Access*

- *Resources, e.g.*
  - Glossary
  - Meeting a person with vision loss
  - Examples of supportive and unsupportive design

- Sample Scripts for the likes of websites, phone messages, welcoming visitors who are blind or have low vision
- Tips for sourcing providers of materials / equipment / staff training

➢ Practical ideas / resources for *Marketing and Communication* to assist venues to actively publicise their support of and investment in visitors who are blind or have low vision, including making this information accessible.

Conclusion

Catering to blind and low vision visitors in tourism destinations is not just a moral obligation but a sound business decision. Making your tourism business more accessible does not necessarily require expensive infrastructure upgrades. Yet, it can lead to increased revenue, positive social impact, and a competitive edge in the tourism industry. Businesses can play a vital role in transforming travel for people blind and low vision visitors by investing in accessibility and innovative approaches to inclusion. By embracing accessibility, destinations can create a more welcoming and inclusive environment, ultimately benefiting everyone who visits.

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[2] Heng, M. (2022a) *Tourism Access and Inclusion: Best Practice Guidelines for Tourism MSMEs in APEC APEC Tourism Working Group*, p. 10. Available at: https://www.apec.org/docs/default-source/publications/2022/4/tourism-access-and-inclusion-best-practice-guidelines-for-tourism-msmes-in-apec/222_twg_tourism-access-and-inclusion.pdf.

[3] Heng, M. (2022a) *Tourism Access and Inclusion: Best Practice Guidelines for Tourism MSMEs in APEC APEC Tourism Working Group*. Available at: https://www.apec.org/docs/default-source/publications/2022/4/tourism-access-and-inclusion-best-practice-guidelines-for-tourism-msmes-in-apec/222_twg_tourism-access-and-inclusion.pdf.

[4] *ACCESSIBLE TOURISM IN VICTORIA AND QUEENSLAND JANUARY 2018 SUMMARY 2 DESTINATION VISITOR SURVEY: ACCESSIBLE TOURISM IN VICTORIA AND QUEENSLAND* (2018) *Tourism and Events Queensland*. Available at: https://teq.queensland.com/content/dam/teq/corporate/corporate-searchable-assets/industry/research/special-reports/Accessible-tourism-in-Queensland-and-Victoria.pdf?redirect=research-and-insights/economics-and-specialised-reports/accessible-tourism.

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[8] *Your Guide to the Accessibility Self-Assessment Module*. (2018). [Factsheet] Queensland Tourism Industry Council and the Australian Tourism Industry Council Your Guide to the Accessibility self-assessment module (windows.net)

[9] Childs, C. (2022a) *Tourism Access and Inclusion: Best Practice Guidelines for Tourism MSMEs in APEC APEC Tourism Working Group*, p. 11. Available at: https://www.apec.org/docs/default-source/publications/2022/4/tourism-access-and-inclusion-best-practice-guidelines-for-tourism-msmes-in-apec/222_twg_tourism-access-and-inclusion.pdf.

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