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Cariboo Chilcotin Coast  
Tourism Association

Northern BC Tourism  
Association

## ACCESSIBLE TOURISM MARKET RESEARCH SUMMARY

### Background and Methodology

Ipsos Reid was commissioned by 2010 Legacies Now to conduct market and consumer behaviour research to better understand the accessible tourism market. The objectives of this research were to identify the factors that influence behaviour and purchase decisions for travellers with disabilities; and, quantify the size of the accessible tourism market for B.C. The findings in this summary include both qualitative and quantitative research data.

Respondents were 18 years or older, and were a key or joint decision-maker in their household on leisure travel plans and trips. They took one or more leisure trips over the past two years, or were likely to take a leisure trip in the next two years. Mobility respondents used a power or manual wheelchair; hearing respondents were deaf or hard of hearing; and sight respondents were completely blind or had less than 10% vision.

### Travellers who are Deaf or Hard of Hearing

- A key finding for respondents who are deaf or hard of hearing was the need for adequate lighting to assist in communication, at restaurants, destination ports, and hotels.
- Seventy-five per cent of travellers who are deaf or hard of hearing use the Internet as their main source of information to plan a leisure trip, particularly when booking accommodation and transportation.
- When looking to access accessible tourism information, 54% use the Internet in conjunction with friends/family/word-of-mouth.
- Travellers who are deaf or hard of hearing are the least likely to directly contact the business they are hoping to visit. Hotels and attractions are the amenities typically researched prior to arrival at the destination.
- Respondents said there is a lack of technology available for travellers who are deaf or hard of hearing, such as videophones, Electronic Moving Display Signs, and closed-captioning.
- While travellers with vision loss or blindness and travellers with a mobility disability desired improvements in staff training at destination ports, it was more critical for travellers who were deaf or hard of hearing to have auditory announcements and information in visual format, along with TV screens with closed captioning.
- Travellers who were deaf or hard of hearing were the most likely to have no concerns about their trip. In fact, 53 per cent of travellers who were deaf or hard of hearing believed their disability does not affect their travel experience.



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### Travellers with a Mobility Disability

- Among travellers with a mobility disability, the preferred time of year for travelling is during the spring, summer and early fall months, primarily due to difficulties presented in moving through the snow.
- In the qualitative findings, travellers with a mobility disability stated they are unlikely to plan their leisure trip with others; however, this is inconsistent with the qualitative findings, where only 29 per cent indicated they travel alone.
- The primary influence in choice of destination for these travellers is accessibility, which was ranked considerably higher by these respondents than by travellers with vision loss or blindness or travellers who are deaf or hard of hearing.
- Travellers with a mobility disability used the Internet as a key resource to research information to plan a leisure trip and to access information on accessible tourism options.
- These travellers are also the most likely to contact the business directly when looking for information on accessible tourism options.
- For this group of travellers, the hotel is the key amenity researched prior to arrival; and key concerns with the hotel include its level of accessibility and its availability.
- One key improvement sought by travellers with a mobility disability was the addition of staff members at destination ports who are trained to deal with passengers with a mobility disability.
- An important concern for these travellers is that their wheelchair is not damaged or lost upon arrival. During the qualitative phase, travellers with a mobility disability mentioned they generally take tools for fixing their wheelchairs with them when they travel.
- Three-quarters of travellers with a mobility disability believe their disability has an impact on their travel experience.

### Travellers with Vision Loss or Blindness

- In the qualitative phase, travellers with vision loss indicated they were more likely to travel alone, whereas travellers who were blind were more likely to travel with an attendant.
- Seventy-seven per cent of travellers with vision loss or blindness use the Internet as the primary source of information when planning a leisure trip, and 60% use the Internet when looking for accessible options. This is done through the use of a screen reader.
- Although travellers with vision loss or blindness are comfortable using the Internet, they are just as likely to book their accommodation over the telephone as they are online, but are far more likely to book their transportation requirements online than over the phone.



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- In both the qualitative and quantitative phases, travellers with vision loss or blindness stressed the need for adequate lighting. All mentions of adequate lighting generated consistently high ratings of importance across numerous tourism components including hotel rooms, restaurants, retail outlets, airports, and bus terminals.
- Similar to travellers with a mobility disability and who are deaf or hard of hearing, it is important to travellers with vision loss or blindness that destination ports have staff members who are trained to deal with passengers with vision-related disabilities.
- A key finding from the qualitative phase was the need for accurate, tactile signs placed on walls, rather than hanging from the ceiling, and for these signs to be enhanced by adequate lighting. For example, in an airport, such improvements would address two key concerns of these travellers: how to find their ground transportation, and how to get to the baggage carousel.
- Travellers with vision loss or blindness are more inclined to believe that travel advertising is relevant to them, compared to both travellers with a mobility disability or travellers who are deaf or hard of hearing.
- Sixty-one per cent of travellers with vision loss or blindness believe their disability has an impact on their travel experience.

Travellers with accessibility needs make up one of the fastest growing tourism markets. One in eight people worldwide is living with a disability and, in North America alone, people with disabilities spend more than \$13 billion each year on travel. Using this research and making the necessary changes will open B.C. up to these travellers and ensure B.C. is one of the most accessible travel destinations in the world.

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