Understanding and exploring the potential of Accessible Tourism in Australia

Presented at the 4th Australian Universal Design Conference

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Presented by Nicole Healy, Tourism Events and Visitor Economy branch (Victorian Government)

Research

- In 2017 Tourism Research Australia commissioned a study into accessible tourism in Victoria, Queensland and Australia.
- This was in partnership with Tourism, Events and Visitor Economy branch of the Victorian Government and Tourism and Events Queensland.
- The research was undertaken by MyTravelResearch.com.
- The research was conducted between April and August 2017, with the report released in January 2018 and remains the last significant research conducted for Australia.
- Prior to this the last main research on Accessibility for Australia was released in 2007 by Simon Darcy.

Research objectives

The current size and future potential of the market for accessible tourism, especially for Queensland and Victoria

The drivers of and barriers to Accessible Tourism

The needs of travellers with a disability and those who travel with them

The experience delivered including during the planning phase both as a measure of satisfaction and to identify new areas for experience and product development or supporting infrastructure

The most effective communication channels to reach this audience including the role of advocacy in travel for this segment

Identify the best ways to support businesses to become (more) accessible

Explore opportunities to grow the market

Stakeholders interviewed

- Destinations:
  - Destination Melbourne
  - Gold Coast Tourism
- Specialist consultants:
  - Chris Veitch
  - Inclusive Tourism
- Recreation/Government:
  - Parks Victoria
- Service providers that offer or support travel experiences:
  - Yooralla
  - YMCA Escapes
  - Traveller's Aid Melbourne
- Travel companies:
  - Club Mates Travel
  - Leisure Options
- Airport:
  - Melbourne Airport
  - Australian Airports Association
  - Shannon Airport (Ireland)

The size of the Australian market

- Travellers with a disability who have taken a domestic trip (daytrip and/or overnight) represent **7% (1.3 million)** of the Australian adult population.

- When taking into consideration an **average travel party size of 2.5** for a person with a disability (including adults caring for a child with a disability) living in Australia, this represents **14% (3.4 million)** of the total population.

- Estimated spend for travellers with a disability (both overnight and day) based on NVS data would be around **$3.2 billion** annually (of which $2.7 billion is overnight spend and $546 million is day trip spend).

- Estimated spend for travel party along with this person is **$8.0 billion** (approximately **10% of total domestic spend** in Australia).

The size of the Victorian market

- Travellers with a disability who have taken a domestic trip (daytrip and/or overnight) represent **7% (349,000)** of the Victorian adult population.

- When taking into consideration an **average travel party size of 2.2** for a person with a disability (including adults caring for a child with a disability) living in Victoria, this represents **12% (784,000)** of the total Victorian population

- Estimated spend for travellers with a disability is **$680m** (approximately 4% of total domestic spend in Victoria), of which **80%** was overnight spend.

- Estimated spend for travel party along with this person is **$1.7 billion** (approximately **10% of total domestic spend in Victoria**), of which **79%** was overnight spend.

Latent demand: potential for the Australian market

- The potential of those with a disability[1] not currently travelling, however likely to with industry improvements[2] is an additional **1% in spend (approximately $735 million)**

- When factoring in travel party this comes to **$1.8 billion: an additional 2% in spend**

[1] - Including adults caring for a child with a disability.
[2] - Industry improvements include in accommodation, transport and current technologies.

Nature of disability – overlap between disabilities

Nature of disability	Visual	Difficulty with memory, understanding or learning	Intolerance to noise or other cues	Mental health condition	Mobility requiring a wheelchair or scooter	Mobility requiring another form of mobility aid	Hearing	Difficulties walking or moving more than a short distance	Other (please specify)
Visual (not corrected by glasses or contact lenses)	100% ↑	18% ↑	9%	6% ↓	14%	10%	21% ↑	9%	7%
Difficulty with memory, understanding or learning	36% ↑	100% ↑	43% ↑	23% ↑	24%	15%	29% ↑	16% ↓	15% ↓
Intolerance to noise or other cues (eg. Autism Spectrum Disorder)	9%	22% ↑	100% ↑	14% ↑	7%	5% ↓	10%	6% ↓	6% ↓
Mental health condition	20% ↓	39% ↑	45% ↑	100% ↑	14% ↓	17% ↓	26%	21% ↓	24% ↓
Mobility requiring a wheelchair or scooter	17%	14%	8%	5% ↓	100% ↑	16% ↑	22% ↑	15% ↑	4% ↓
Mobility requiring another form of mobility aid	20%	14%	9% ↓	10% ↓	25% ↑	100% ↑	16%	28% ↑	7% ↓
Hearing (that cannot be corrected by hearing aids)	15% ↑	10% ↑	7%	5%	13% ↑	6%	100% ↑	8%	5%
Difficulties walking or moving more than a short distance	41%	38% ↓	26% ↓	29% ↓	56% ↑	67% ↑	52%	100% ↑	27% ↓
Other (please specify)	16%	16% ↓	13% ↓	16% ↓	7% ↓	8% ↓	15%	13% ↓	100% ↑

How to read: Numbers are column %s e.g. 36% of those with a visual disability (first column) also have difficulty with memory, learning or understanding (second row).
Items coloured blue and with an upwards arrow are higher than average for the total market; items in pink and with a down arrow are lower than the average.
D3 What is (or are) the nature of the disability (or disabilities) < tempTraveller : you face> OR < tempCarer : the person you care for face>?
Base n = 1406 Source: Quantitative Research, Unweighted data, Multiple choice

Understanding the accessible tourism market

Accessible means different things to different people
Give them information to make their own assessment

- Some find travel:
  - 'so stressful it's not worth it' (23%)
  - 'just too hard' (22%).
- Opportunity to utilise existing assets to meet the needs of those with mobility issues as well as other specific needs.
- Trips closer to home might provide opportunities, with:
  - less planning required (if just a daytrip), and/or
  - more known about the area (and less information pre-trip needed).
- VFR accommodation helped with planning the travel, as the layout may already be familiar and helped to alleviated the stress of a trip.

Top Activities undertaken (overnight trips)

- There is generally high overlap between activities for travellers with and without a disability in terms of top activities
- Top 5 ranked are the same for both groups:
  - Eat/dine out (62% of travellers with a disability)
  - Visit family or friends (53%)
  - Go to the beach (26%)
  - Sightseeing (25%)
  - Pubs, clubs, discos (23%)
  - Go shopping for pleasure (25%)

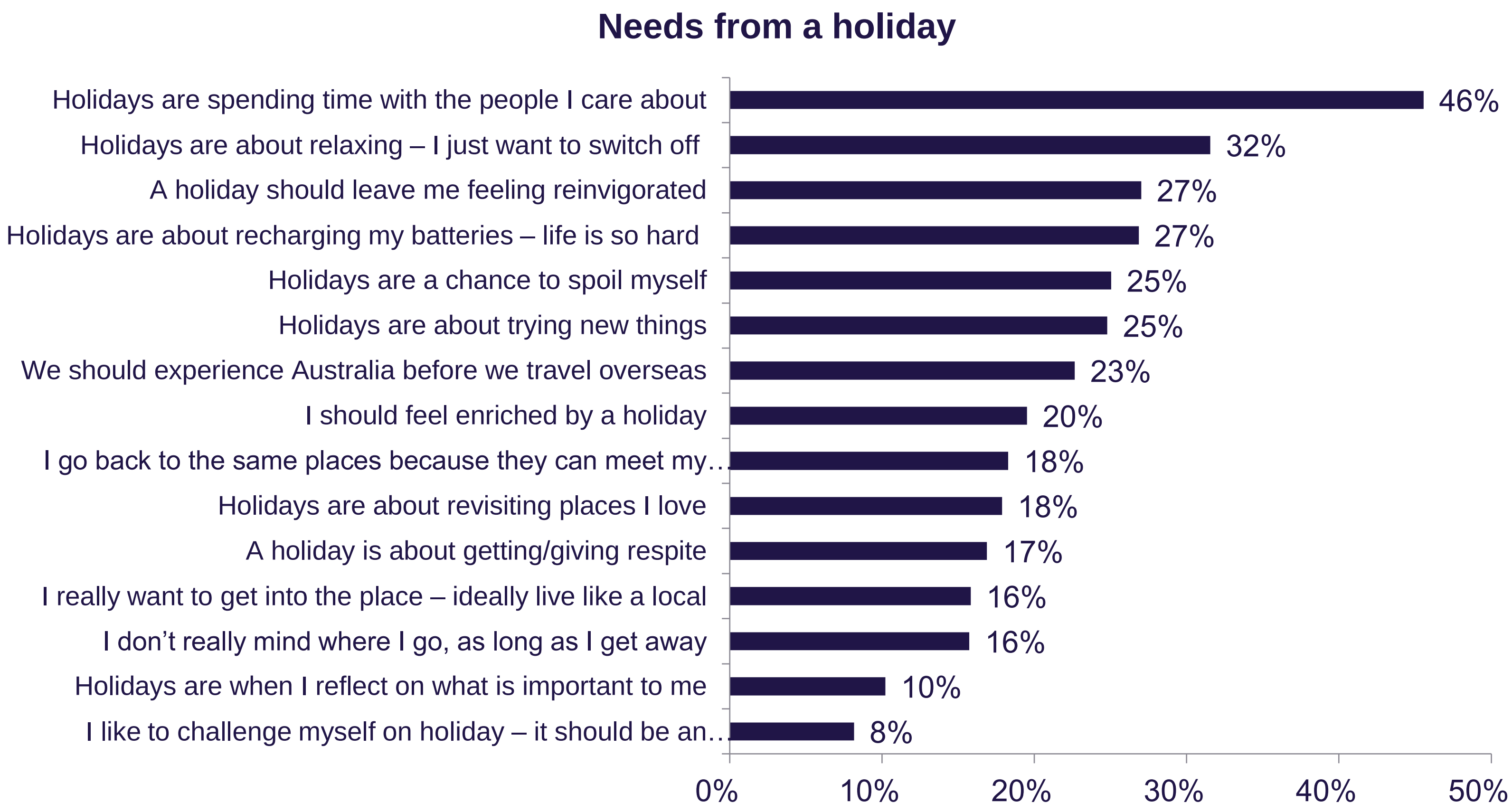
  Higher for those identifying with a disability
  Higher for those not identifying with a disability

- Other popular activities include visiting national parks, bushwalks, visiting markets, picnics or BBQs, fishing, visiting museums/art galleries and daytrips

Source: Tourism Research Australia, National Visitor Survey, March 2017 quarter
Sample size n = 29,164 of whom n = 7,288 identified as a disability

Reconnection, relaxation and rejuvenation are key needs from a holiday

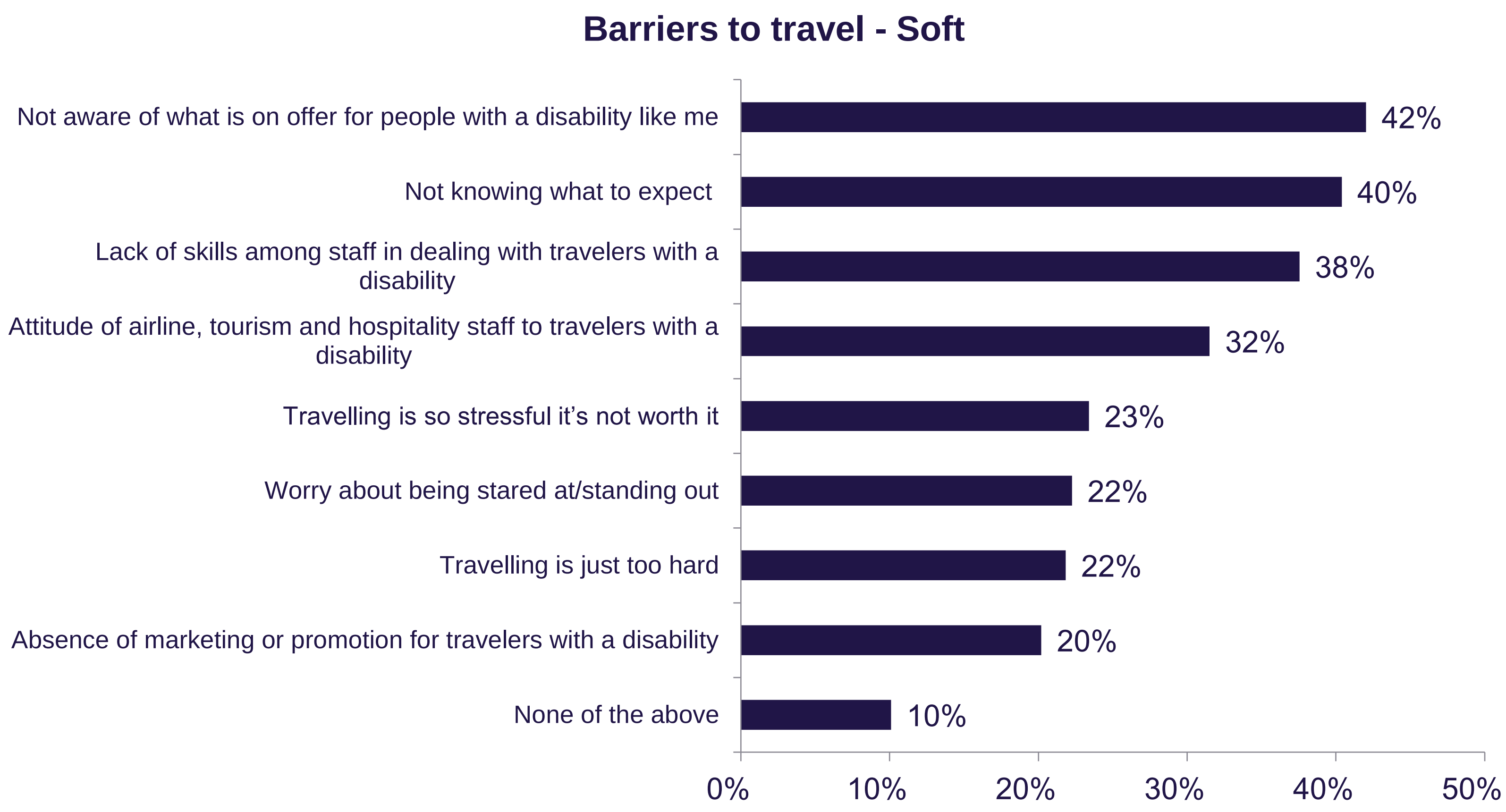
Drivers of a holiday



DT4 ...Below are some motivations for a holiday, trip or a break, please select up to 4 that really matter to you Base n = 1,406

Lack of awareness and uncertainty prevent travellers with a disability travelling more

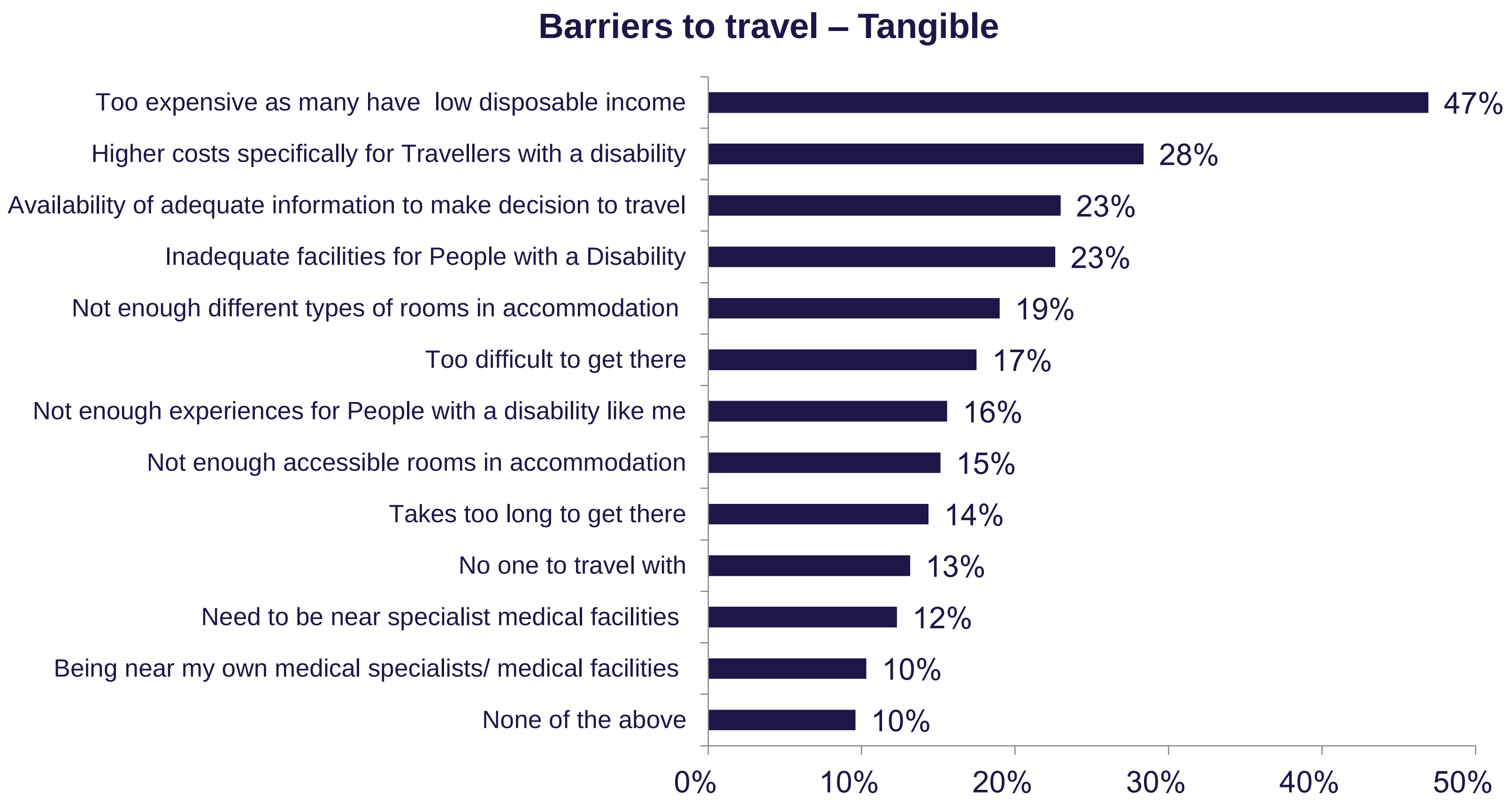
Soft barriers to travel



B1 Here are some issues that travellers with a disability have told us...
Please select up to 3 of the MOST SIGNIFICANT BARRIERS from your point of view Base n = 1,406

Costs are the highest barrier, with lack of information and insufficient product also important

Tangible barriers to travel



B2 Here is another set of more practical barriers to travel... select up to 3 of the MOST SIGNIFICANT ones Base n = 1,406

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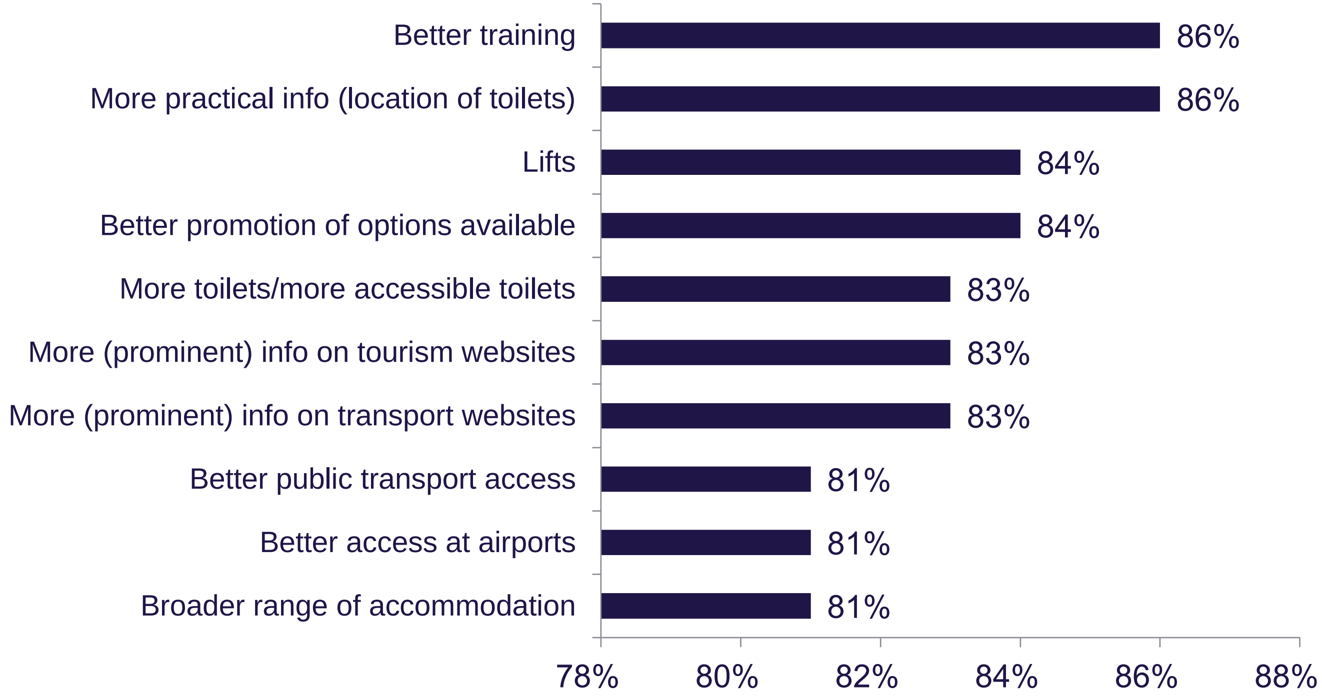
Specific needs of the market

Facilities – top priorities ranked by net importance for improvements:

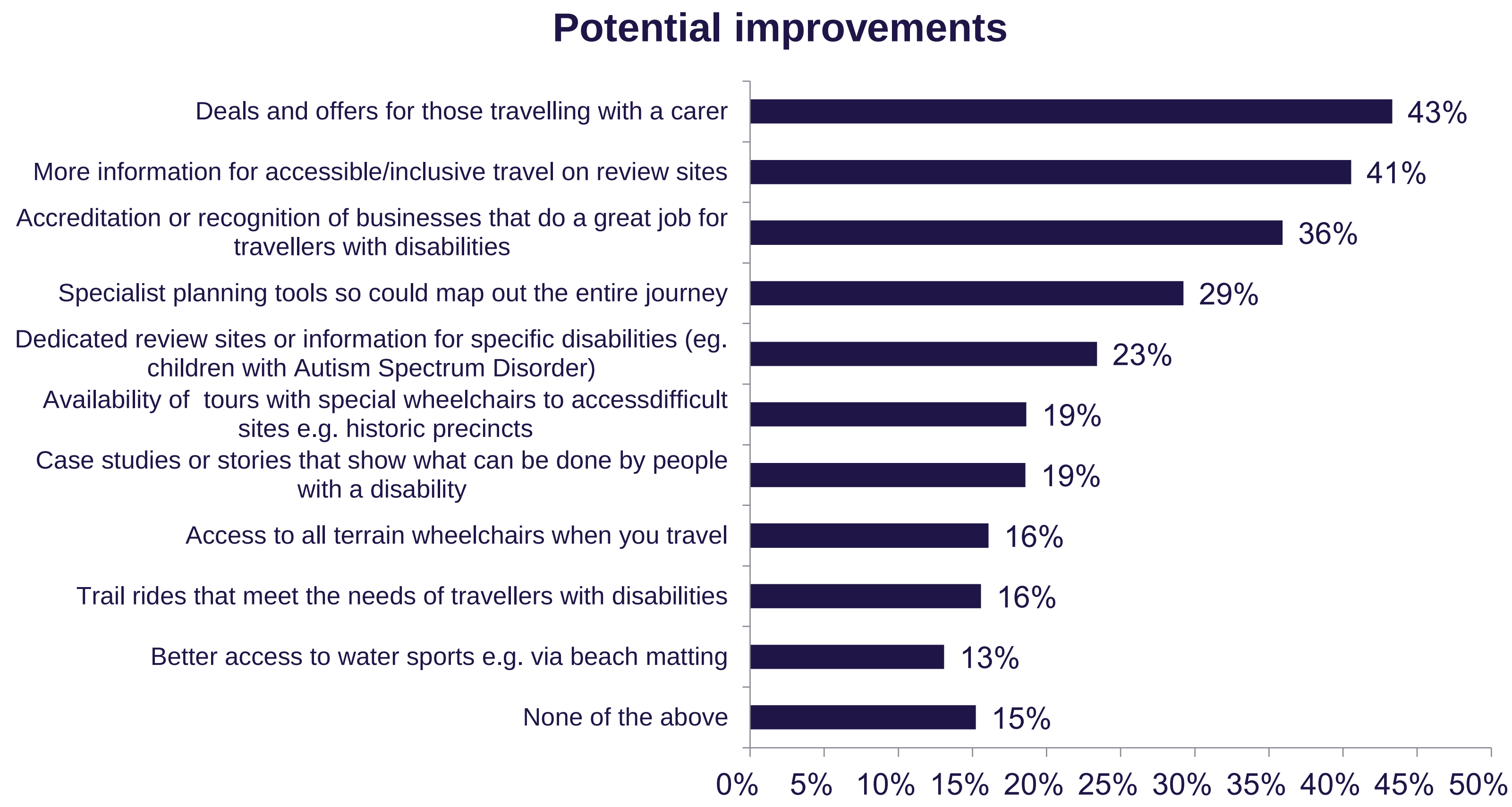


The next 5 factors mentioned included: Better access at places like beaches (69%), Better access to aircraft e.g. eagle hoists (65%), More changing facilities (59%), Access to free Wi-Fi (57%) and Access to fast Wi-Fi (53%).

DT10. Please rate the importance of improvements in the following areas. Single response per row and randomise list. Base n = 1,406.
Top ten ranked by net importance (extremely important and important)

Reflecting the barriers, better deals for carers and (more in-depth) information to enable travellers with a disability to plan with confidence are the most important things

Most important new products and services



DT6. Here are some potential improvements or additional products that could be offered to travellers with a disability. Please select the 3 that are most relevant to your needs Base n = 1,406

Research reach so far…

1. Research presented by Carolyn Childs to stakeholders involved in the research - Invest Victoria, PTV, DHHS, Parks Vic, Austrade and Destination Melbourne (October 2017)
2. Victorian Tourism Research Group (February 2018)
3. Internal Staff forum (1 October 2018)
4. Parks Vic staff (February 2018)
5. Visitability working group, hosted by Destination Melbourne (November 2017)
6. Accessible Tourism Masterclass workshop, run by Destination Melbourne (May 2018)
7. Bendigo workshop (June 2018)
8. Visit Ballarat workshop (24 October 2018)
9. Tourism Australia webinar (30 October 2018)
10. Accessibility Tourism Masterclass Accommodation sector (30 April 2019)
11. Monash University graduate research students (May 2018)
12. William Angliss staff and students (26 September 2018)
13. William Angliss Tourism Market Research students (30 March 2021)

QUESTIONS?

CONTACT DETAILS

TOURISM EVENTS AND VISITOR ECONOMY BRANCH
SENIOR RESEARCH OFFICER:
NICOLE.HEALY@ECODEV.VIC.GOV.AU (03) 9653 9861

MANAGER INDUSTRY SUPPORT:
PAUL.ALBONE@ECODEV.VIC.GOV.AU (03) 9653 9752

A COPY OF THE DETAILED REPORT

Tourism.research@tra.gov.au
https://www.tra.gov.au/research/view-all-publications/all-publications/destination-visitor-survey-results/strategic-regional-research-reports/**accessible-tourism-victoria-queensland**

Research was conducted by MyTravelResearch.com for Tourism Research Australia, in partnership with Tourism, Events and Visitor Economy branch, Victorian Government and Tourism and Events Queensland

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