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**TOURISM
RESEARCH
AUSTRALIA**

ACCESSIBLE TOURISM IN VICTORIA AND QUEENSLAND

SUMMARY

JANUARY 2018



INTRODUCTION

Tourism Research Australia, in partnership with Tourism, Events and Visitor Economy branch of the Victorian Government, and Tourism and Events Queensland, commissioned a study into accessible tourism in Victoria, Queensland and Australia. The research was conducted between April and August 2017. This document is a summary of the research undertaken by MyTravelResearch.com. If you require more detail on the methodology and sources used, please contact tourism.research@tra.gov.au for the full research report.

With an estimated 20% of Australian adults having a disability or long-term health condition¹, and an ageing population, the disability sector is set to grow². By 2050, it is estimated that nearly one-quarter of the population will be aged 65 or over. In 2015, five million people had long-term health conditions in Australia and this is also predicted to grow. Although the Australian Bureau of Statistics' 2015 Survey of Disability, Ageing and Carers suggests that people over 54 are healthier than previous generational cohorts, the overall growth in the ageing population in both volume and longer life expectancy is expected to lead to greater numbers of travellers who may need extra assistance.

This report provides an understanding of the current situation and potential of Australia's domestic tourism market for accessible travel, including the:

- current size and future potential of the market for accessible tourism, especially for Victoria and Queensland
- drivers of, and barriers to, accessible tourism
- needs of travellers with a disability and those who travel with them
- 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
- most effective communication channels to reach this audience including the role of advocacy in travel for this segment
- best ways to support businesses to become (more) accessible
- opportunities to grow the market.

The study used the following definition for 'disability':

An on-going condition, requiring special care, that substantially inhibits a person's ability to participate effectively in activities, or perform tasks or actions unless they have aids or support.

This would include a condition which is permanent but may vary in intensity (e.g. multiple sclerosis) or a long-term temporary disability (lasting more than 6 months).

A person with a disability might face special needs when travelling, in accommodation, and in using other tourism services.

VALUE AND SIZE OF THE SECTOR

- There is a sizeable, growing and diverse range of travellers with accessibility needs. For simplicity, in this report they are referred to as a sector. Eighty-four per cent of travellers with a disability or their carers³ have taken an overnight trip as defined in Tourism Research Australia's National Visitor Survey (NVS), that is, an overnight trip at least 40 kilometres from home. Around one-quarter have also taken overnight trips closer to home. Approximately three-quarters of those with a disability travel, with more people stating they would like to if the products or technologies existed to enable/support their travel. The following estimates are based on the domestic market only, therefore do not include estimates of international travellers and spend.



¹ National Visitor Survey, Tourism Research Australia, year ending March 2017

² Australian Bureau of Statistics, Survey of Disability, Ageing and Carers 2015

³ Note that all references to travel behaviour by carers specifically relates to travel they have taken with the person they care for unless otherwise stated.

AUSTRALIA

- An estimate of the size of the current accessible tourism sector for overnight and/or day trip travel is around 1.3 million individuals, or 7% of the total Australian adult population. However, as many people with a disability travel with others, especially when they need to travel with a carer, a multiplier of 2.45 (overnight) or 2.62 (day trips) needs to be applied. By this measure, 14% of the Australian population (an estimated 3.4 million people) has need of accessible tourism experiences and services for an overnight and/or day trip.
- An estimate of annual expenditure by tourists 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). Again, the multiplier of those travelling with a person with a disability means the true value of the sector could be as high as \$8.0 billion.

VICTORIA

- Travellers with a disability who had taken at least one domestic trip (overnight and/or day trip) represented 7% (349,000) of Victoria's adult population.
- When considering the average travel party size was 2.24 for a Victorian resident with a disability (including adults caring for a child with a disability), this represented 12% (784,000) of Victoria's total population.
- Estimated spend for travellers with a disability was \$680.1 million (approximately 4% of total domestic spend in Victoria), of which 80% was overnight spend.
- Estimated spend for the travel party (including the person with a disability) was \$1.7 billion (approximately 10% of total domestic spend in Victoria), of which 79% was overnight spend.

QUEENSLAND

- Travellers with a disability who had taken at least one domestic trip (overnight and/or day trip) represented 8% (289,000) of Queensland's adult population.
- When considering an average travel party size was 2.28 for a Queensland resident with a disability (including adults caring for a child with a disability), this represented 13% (657,000) of Queensland's total population.
- Estimated spend for travellers with a disability was \$781.0 million (approximately 4% of total domestic spend in Queensland), of which 84% was overnight spend.
- Estimated spend for the travel party (including the person with a disability) was \$1.9 billion (approximately 10% of total domestic spend in Queensland), 84% of which was overnight spend.

There are a number of Australians with a disability (including adults caring for a child with a disability) who are not currently travelling, but who would likely travel with certain industry improvements (in accommodation, transport, current technologies). The potential of this sector is approximately \$735 million (an additional 1% in spend). When travel party is factored in, this comes to \$1.8 billion, or an additional 2% in spend for the travel party (including the person with a disability).

Although people with a disability generally have lower incomes than the average for the population as a whole, not all need to be considered as low income. More than one-quarter of those who identified as having a disability were in the top two income categories (disposable income above \$900 per week)⁴.



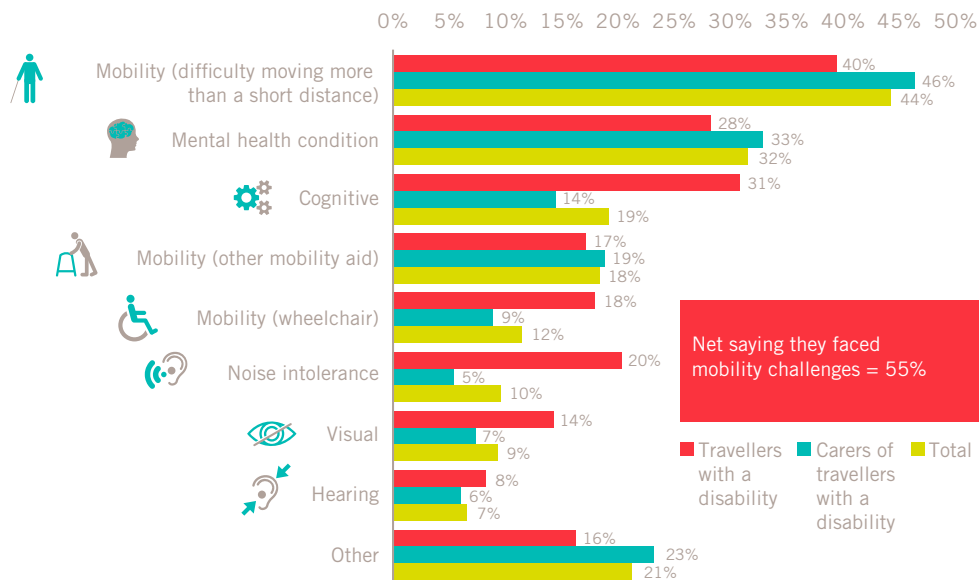
⁴ Source: Australian Bureau of Statistics. Cross referenced the 2015 Survey of Disability, Income and Carers with the Survey of Income and Housing

UNDERSTANDING THE ACCESSIBLE TOURISM MARKET

The research highlighted that the profile of travellers with a disability is diverse:

- Many people with a disability may face multiple challenges with a high overlap between mental, cognitive and physical conditions. For example, 24% of people with a mobility issue requiring a wheelchair or scooter also had difficulty with memory, learning or understanding, while 13% had difficulty hearing.
- Conditions range from requiring very high levels of support to 'hidden disabilities' that require support in less obvious ways.
- Mobility issues were the most common type of disability identified in this study, with 55% reporting difficulty with mobility in some way.

FIGURE 1: NATURE OF DISABILITY FACED

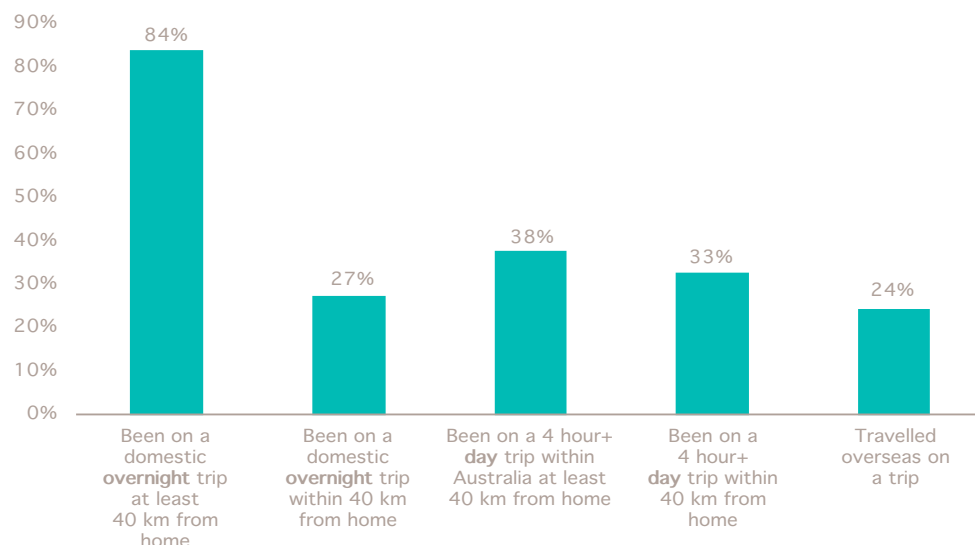


Source: Quantitative survey question: D3 What is (or are) the nature of the disability (or disabilities)
Base Total n = 1,406: n = 1,001 Travellers with a disability n = 405 Carers of travellers with a disability
Note Unweighted data.

* Multiple responses possible

- There is substantial opportunity to better utilise existing assets to meet the needs of those with mobility issues (e.g. hotel rooms could have more categories beyond the standard 'fully accessible'). Within this diverse sector, there are also many opportunities to meet the needs of specific groups. For example, Wi-Fi is vital to those travelling with children with Autism Spectrum Disorder to an even greater extent than for most travellers, as interacting with phones and tablets is an important tool in helping to manage a change in environment using entertainment.
- Short (single night trips or day trips) and/or local trips (within 40 kilometres of home) are major growth opportunities, potentially because it's easier to get there, less planning is required, and/or more is known about the area (and therefore less information searching is needed). This could also be an opportunity for those who find travel 'so stressful it's not worth it' or 'just too hard' (23% and 22%, respectively).
 - Intrastate travel forms a significant part of the accessible tourism market and provides a cost effective local option that might be easier to navigate, given the level of organisation that some disabilities require prior to a trip.
 - Day trips to iconic locations close to home would be particularly engaging for those with very high support needs.
 - In common with Australians in the general population, most travel by people with disabilities and their carers is for leisure (travel for holiday, and to visit friends and relatives (VFR) combined), with holiday being the largest motivator. However, VFR is also important and VFR hosts are a key conduit for information about what to do in the destination.
 - Importantly, respondents noted that knowing the layout of the VFR accommodation helped with planning the travel, and resulted in a less stressful trip. This highlights that accommodation providers could be offering more information on their website that shows layout and helps the traveller determine if this is suitable for them and/or the best accommodation options for their needs.

FIGURE 2: TYPES OF TRIPS TAKEN IN THE PAST TWO YEARS



Source: Quantitative survey question: S3 In the past two years have you done any of the following please select all that apply
Base n = 1,406 Note: Carers only included trips with the person they cared for

"The biggest gaps in the information provided by a lot of accommodation properties is what 'ACCESS' really means. As explained earlier, they say they are disabled friendly but do they really know what this really means? ACCESS means different things to different people with disabilities." Male, Traveller with a disability, aged over 55, Regional Queensland

"Attending a football match is a something [my son] enjoys. We go together. As I go as his carer it is cost effective for us both to attend." Female carer, 35-54, Son with Down Syndrome, Melbourne

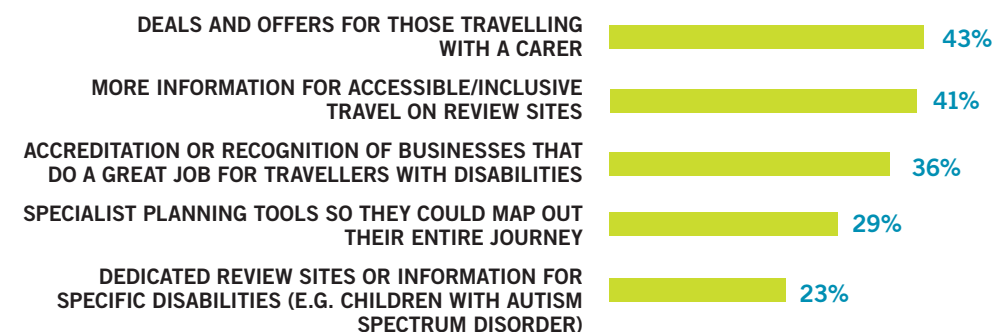
"I get some information on travel destinations from 4WD magazines – if the location is reasonable [sic] accessible or looks attractive to my sons and I, we visit that location. We prefer locations away from the crowds. Male, over 55, Carer for son with cognitive difficulties and profoundly deaf, Regional Queensland

■ Travellers with a disability share many characteristics with the broader traveller population:

- Many of the key tools they used in the travel decision-making were the same. Internet search was the number one tool used by travellers with and without a disability when purchasing travel services, with word-of-mouth second. Building trust and reputation in this sector could use the same approaches, if not exactly the same content, as any other sector.
- Reconnection and unwinding are core needs for all Australian travellers, and this was just as true for travellers with a disability. Approximately 40% of travellers with a disability sought to meet those needs through either more active, or more emotionally and/or intellectually stimulating experiences.
- Although travellers with a disability did slightly fewer activities, many of the experiences they participated in matched those of the broader traveller population: eating out, visits to the beach, and nature and cultural experiences.
- Overall, they tended to stay in the same types of accommodation and visit the same destinations as the broader population.



FIGURE 3: RESPONDENTS' TOP 5 PRIORITIES FOR IMPROVING TRAVEL



Source: Quantitative survey question: DT6 Here are some potential improvements or additional products that could be offered to travellers with a disability. Base = 1,406

SPECIFIC NEEDS OF THE MARKET

Despite the similarities to the general population, there were some important differences and specific needs. Travellers with disabilities had a strong tendency to manage the stresses and uncertainties of travel by returning to destinations they knew well. Consequently, they appeared to have a higher incidence of repeat visitation and were loyal customers.

INFORMATION

Travellers with a disability need more support in planning their experiences if they are to travel as much as they wish to, and for it to be an enjoyable experience, rather than a stressful one. Overall, more detail in the information that is currently provided was the highest priority for travellers with a disability, particularly for those with limited mobility. While this primarily related to digital sources such as websites and review sites, it could also refer to information anywhere travellers look including in destination (e.g. on tours).



They **need information** that is:

- **related to their disability**
- **easy to find and absorb** – this specifically relates to accessible tourism information which is often not prominently displayed and is often very complex
- **well structured**
- **relatable** – when choosing accommodation, attractions or experiences, including a range of images that cover a breadth of disabilities would help the potential traveller feel they were choosing an option that they can be a part of.

Specifically:

- 18% of respondents said that they thought information provision was the number one priority to drive accessible tourism – the highest number of overall mentions
- 41% wanted information contained on review sites like TripAdvisor that were relevant to travellers with specific needs



- 36% said that it would be great to have accreditation that shows businesses that have made the commitment to accessible travel
- 23% wanted specialised review sites for their needs
- 19% would like case studies that ‘encourage’ them by showing what is possible.



In addition, priorities for **improvement** included:

- more **practical information** (e.g. location of toilets), with 86% rating this as important
- more **prominent information** on tourism and transport websites (83% for both).

PLANNING

- Forty per cent of respondents stated that ‘not knowing what to expect’ was a barrier to travel, highlighting the benefit of more and/or **more detailed information** being available for trip planning.
- They need more **expert advice** at the planning stage if they are to convert to visitation. Disability forums, peak bodies for their disability, specialist travel agents and even [National Disability Insurance Scheme](#) co-ordinators are all used at the active planning stage.
- There was a preference for **personal contact** to answer specific queries (although this could increasingly be handled via BOTs - computer programs designed to simulate conversation with human users, especially over the Internet). Specifically, the research highlighted a strong preference to connect with a business or destination personally, either by phone or email.
- Traditional travel agents with a **strong service ethic** could also be important in driving conversion, particularly for older travellers and those who have lower support needs. Many clients had low expectations, so this advice could expand their interest and create demand for new products. Travellers with a disability find it hard to be inspired when they don’t know what is possible.



SERVICE

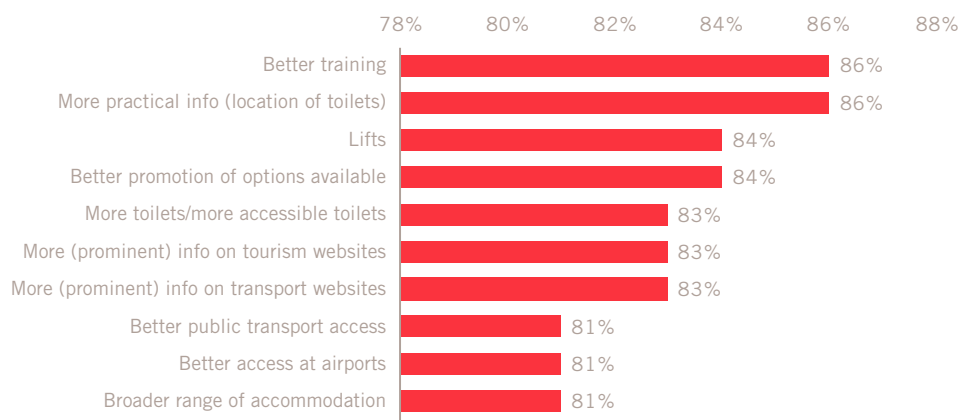


- There were still many challenges with regard to the attitudes and understanding from both tourism and hospitality staff and those of the public towards travellers with a disability. This was especially a challenge for younger travellers with a disability, and for those with 'hidden disabilities' who required support in less obvious ways. Conversely, quality of service by staff was a key driver for recommendation across all travel categories.
- Cost was very important for many travellers with a disability, as many need to travel with a carer which makes costs higher. Assistance with these costs (including potentially via the [National Disability Insurance Scheme](#)) or via special deals for those with a carer, would assist with removing barriers to more travel.

FACILITIES AND TRANSPORT

Respondents rated the following priorities for improvement as important:

FIGURE 4: TOP 10 PRIORITIES BY IMPROVEMENTS⁵



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%).

Source: Quantitative survey question: DT10. Please rate the importance of improvements in the following areas. Single response per row and randomise list. Base Total n = 1,406

⁵ Top ten ranked by net importance (extremely important and important)

GROWING AND ENHANCING THE MARKET

Building on the opportunity for accessible tourism is a multi-faceted task, categorised below by stage. All key stakeholders have a role to play in the process:

- **Consult** – this should be the foundation of driving accessible tourism. It should ensure that what is offered is built on a rich understanding of what travellers with disabilities want and need. This is a responsibility for all parties, but government and destination management offices can take a lead, as they have the resources and skills to undertake projects or guide others.

"I really think [destination management offices] have a key role to play. Because they can bring it all together. It's no use having a fabulously accessible hotel if you can't get to the end of the road because there are no pavement ramps."
Accessible tourism consultant

- **Inspire and educate** – ensure that the industry has an understanding of the potential of this sector and is provided support on how to start targeting it. Government, destinations and peak bodies should all have a role in driving this. Further, many travellers with a disability have low expectations of what is available, while their aspiration for travel is high. The task here is to encourage them to explore and test their boundaries. Peak bodies and service providers can play a strong role here, as can individual operators.

"A lot of people don't clearly understand what accessibility is. What is accessibility? You know what it's not.... Too easy to use the word without really understanding."
Specialist tour provider

"You may not be able to do everything. But have a look at what you can do. Often there are small things that you can do"
Accessible tourism consultant

- **Collate** – bringing the experiences together to provide a holistic offering in some key destinations will help the traveller plan and navigate their trip. Government, peak bodies in both the tourism and disability sectors, and service providers can all potentially play a role to help identify new areas of experience and product development or supporting infrastructure. Governments can work with the sector in a number of ways, including improving accessibility standards in the industry and developing infrastructure that considers the complete user experience.

“Good information on what they require so they can plan so it will be positive experience. Engaged with Travability, providing images, moving away from things are ‘accessible’ to defining accessibility: what does that mean? Describe what is there in detail, so they can decide” Recreation/ Government

- **Promote** – many travellers are not aware of what is on offer, therefore, it is important to promote what is available to generate demand. The information needs to be easy to find, well-structured and provide the opportunity to delve further for planning and to build confidence in the experience/trip. This is the responsibility of individual businesses and destinations.

“If people don’t know it is there they won’t come. People need to know what is on offer” Specialist tour operator



- **Build** – while not the highest priority for now, new infrastructure needs to be the subject of ongoing focus. Ensuring that any new infrastructure employs universal design principles will make widening this opportunity more cost effective in the future. This is a cross-industry responsibility.

METHODOLOGY

This research is based on a combination of desk research, qualitative and quantitative research conducted between April and August 2017, and National Visitor Survey data (quarter and year ending March 2017, from Tourism Research Australia). The qualitative research covered both key stakeholders (including service providers, disability specialists, key destinations and airports) and consumers (face-to-face and online). In order to make the research as inclusive as possible, both people with a disability and carers were included. A small proportion of the study included non-travellers with a disability to understand whether a larger potential market existed beyond current travellers. The quantitative research covered n = 1,001 travellers with a disability, and n = 405 carers of travellers with a disability.

Travability Pty Ltd, Tourism Events and Visitor Economy branch of the Victorian Government, and Tourism and Events Queensland, provided expert advice on design, contacts, analysis and reporting.

