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Accessible Tourism: Growing and Enhancing the Market

National Coach Conventions
Summit

27 June 2018

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Introduction

- Methodology
- Objectives
 - Size and potential
 - Drivers/barriers
 - Needs
 - Experience
 - Communication
 - Support business
 - Opportunities









Definition



By disability, we mean 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**.

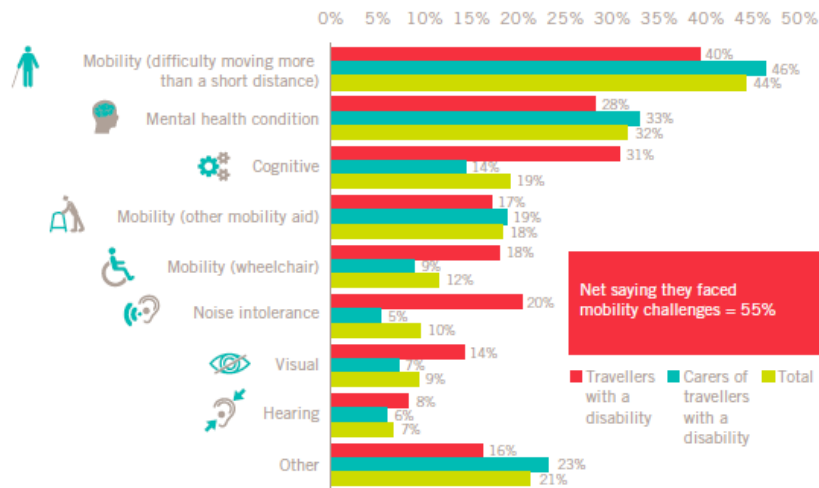
This would include a **condition which is permanent but may vary** in intensity (e.g. MS) or a **long-term temporary disability** (lasting more than 6 months).

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

SIZE	VALUE	POTENTIAL
 7% (1.3 million)	 \$3.2 billion	 \$735 million ▲1%
 14% (3.4 million)	 \$8.0 billion	 \$1.8 billion ▲2%

Understanding the market

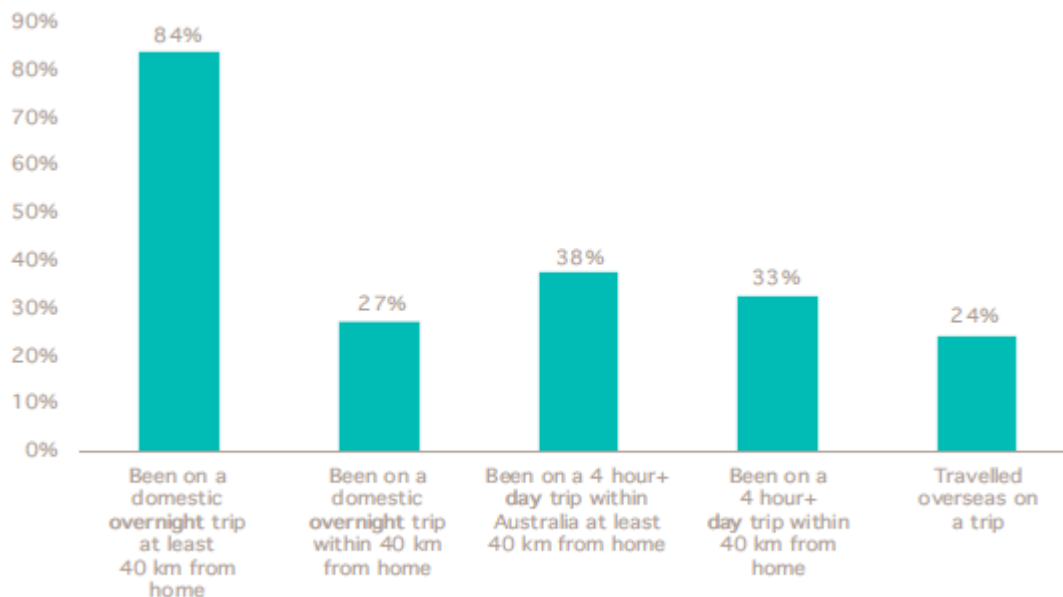
FIGURE 1: NATURE OF DISABILITY FACED



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




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

- Travellers with a disability share many characteristics with the broader traveller population

Purpose 

Motivation 

Tools used 

Activities 

Specific needs of the Market



Information

- Practical
- Prominent



Service

- Attitudes
- Cost



Planning

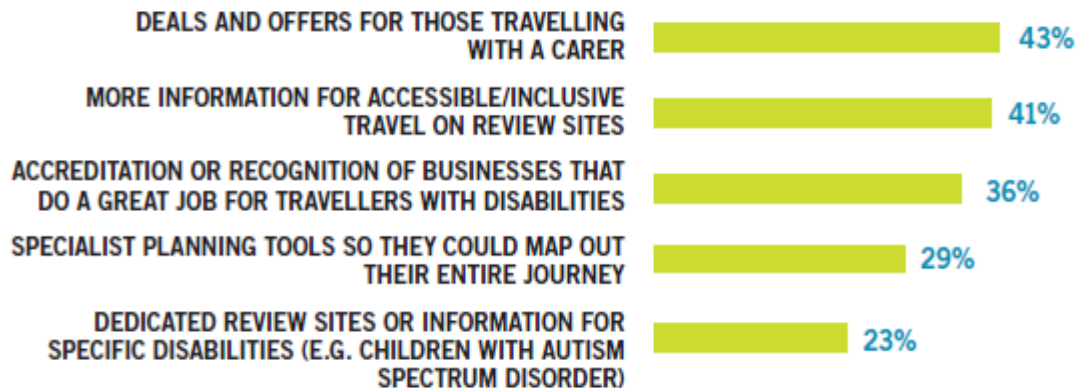
- Expert advice
- Personal



Facilities and transport

- Toilets
- Public transport

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

Growing and enhancing the market

- Consult
- Inspire and educate
- Collate
- Promote
- Build



More information



- www.tra.gov.au
- tourism.research@tra.gov.au
- Statsline 02 6272 6968