Inclusive Tourism: Economic Opportunities

Institute for Public Policy and Governance

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TABLE OF CONTENTS

Executive summary		**1**
Overview		1
Purpose of this report		1
Demonstrating the economic opportunities		1
Australian Government policy enablers		4
Summary		4
1	**Project background**	**5**
1.1	Overview	5
1.2	Outline of document	5
1.3	Project background	5
1.4	Research gaps and limitations	6
2	**Defining key concepts and terms**	**7**
3	**The market for inclusive tourism**	**9**
3.1	Overview	9
3.2	The Australian market	10
3.3	International markets	18
4	**Case studies**	**25**
4.1	Overview	25
4.2	Australian case studies	25
4.3	International case studies	30
4.4	Key findings	35
5	**Policy and program initiatives**	**37**
5.1	Overview	37
5.2	Commonwealth	37
5.3	New South Wales	41
5.4	Victoria	42
5.5	Queensland	45
5.6	Tasmania	46
5.7	Western Australia	47
6	**Conclusion**	**49**

TABLES

Table 1 Overnight trips, NVS 2017 First Quarter	12
Table 2 Overnight expenditure, NVS 2017 First Quarter	13

Table 3 Total day trips, NVS 2017 First Quarter 13
Table 4 Day trip expenditure, NVS 2017 First Quarter 14
Table 5 Day trip and overnight expenditure, NVS 2017 First Quarter* 14
Table 6 Visitor (both international and domestic) by age group, NVS 2016 16
Table 7 Expenditure by age group, NVS 2016 17
Table 8 Number of visitors aged 60 years and over by region, NVS 2016 17
Table 9 Expenditure of visitors aged 60 years and over by region, NVS 2016 17
Table 10 Access barriers 21
Table 11 O'Carrollyns occupancy (%) 27
Table 12 Source of O'Carrollyns markets (%) 27
Table 13 Example of national and local access standards and awards 36
Table 14 Description of Make Local Communities Accessible initiative 37
Table 15 Description of difference role of organisations in supporting inclusive tourism43

FIGURES

Figure 1 Inclusive tourism market segments 9
Figure 2 Proportion of people with disability by age group 11
Figure 3 Social participation activities, NSDAC 2015 12
Figure 4 Australian Tourism Opportunity Matrix 38
Figure 5 Visitor information sources pre and during visit, by visitor profile 40
Figure 6 Australian Tourism Data Warehouse, Disabled Access Listings 41
Figure 7 Increase opportunities to take part in and enjoy sports, tourism, arts, cultural and recreational activities 46

Executive summary

Overview

There are approximately 4.2 million Australians with disability, which accounts for almost 20 per cent of Australia's population, and around 1 billion people with disability worldwide, or 15 per cent of the world's population.[1] [2]

People with disability face a range of barriers in accessing infrastructure, services and products, hindering their participation in social and economic activities.[3] These barriers can be physical, e.g. door width and steps limit accessibility for wheelchair users, or intellectual and sensory, e.g. signs or information are not easily read or interpreted.[4]

Similar barriers are faced by other population groups, including older people and young families. These population groups often have specific access needs, such as ramps or large font pamphlets and menus. Addressing barriers faced by people with disability will have a flow-on effect and reduce barriers for these other population groups.

Inclusive tourism is a concept that refers to tourism services and products where people of all abilities feel welcome and wanted as customers and guests.[5] In particular, it focuses on the process of enabling people with disability and groups with similar access needs to utilise tourism services.[6] This report will showcase the growing demand for inclusive tourism and recreational services and the economic benefits of catering to the needs of people with disability.

Purpose of this report

This report is part of a project being implemented by the University of Technology Sydney, Institute for Public Policy and Governance (UTS:IPPG) and Local Government NSW (LGNSW) to enable local governments and tourism operators in regional New South Wales to improve access to their infrastructure, services and products. The project is funded by the NSW Department of Industry and NSW Department of Family and Community Services.

The report outlines the economic opportunities associated with inclusive tourism.

Demonstrating the economic opportunities

Australian inclusive tourism market is growing

Demographic changes in Australia are creating the conditions for increased demand for inclusive tourism services and products. Projections over the next 40 years indicate that the proportion of the population aged 65 years and over will almost double to

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[1] Australian Bureau of Statistics, Disability, Ageing and Carers, Australia: Summary of Findings, 2015, 2016 Accessed at http://www.abs.gov.au/ausstats/abs@.nsf/mf/4430.0.
[2] United Nations World Tourism Organisation (UNWTO), *Accessible Tourism*, accessed at: http://ethics.unwto.org/content/accessible-tourism
[3] UNWTO, Accessible Tourism for All: An Opportunity within Our Reach, 2016, accessed at: http://cf.cdn.unwto.org/sites/all/files/docpdf/turismoaccesiblewebenok.pdf
[4] Ibid.
[5] Ibid.
[6] It's Heaven, Inclusive Tourism, 2016, accessed at: http://www.itsheaven.org/inclusive/

around 25 per cent.[7] This is a permanent change; the age structure of Australia's population is set to include a far higher proportion of older people.

The prevalence of disability increases with age; a person aged 65 years is 14 times more likely to have a disability than a four-year-old.[8] In 2015, about half of all people aged 65 years and over had some form of disability. In addition, in 2013 there were 1.3 million families with young children, and with slightly higher fertility rates this group is also expected to increase.

Value of the inclusive tourism market in Australia

Outlined below are key tourism demand statistics that demonstrate the economic opportunities associated with catering tourism and recreational services for people with disability.

Tourism Research Australia's (TRA) National Visitor Survey (NVS) 2017 First Quarter data on day and overnight trips shows that:

- People with disability spent $3.3 billion on tourism services, accounting for 17 per cent of all tourism expenditure
- On average, people with disability spent more on day trips than people without disability, $111 compared with $106
- People with disability took around 9 million day trips, which accounted for 21 per cent of all day trips
- People with disability spent on average $615 on overnight trips compared with $677 for people without disability
- Expenditure was $2.9 billion for older people and $2.7 billion for young families.[9]

This expenditure data does not include the multiplier effect. Previous research has shown that on average, the travel group size for people with disability is 2.8 for domestic overnight trips and 3.4 people for day trips.[10] Often, people with disability travel with their families or carers. As a result, a multiplier of 0.5 is often applied to expenditure of people with disability.[11]

An important consideration for regional tourism operators is that older people generally favour regional destinations over capital cities. In 2016, 64 per cent of visitors aged 60 years and over chose to visit regional destinations as opposed to capital cities; indicating that there will be growth in demand for regional tourism from this market.[12]

International inclusive tourism market

One billion people worldwide have disabilities, almost half of whom are in Asia—a key target market for tourism operators in Australia. When combined with families and carers, this rises to 2.2 billion.[13]

[7] Australian Government Treasury, Australia's demographic challenges, accessed at: https://demographics.treasury.gov.au/content/_download/australias_demographic_challenges/html/adc-04.asp
[8] Dimitrios Buhalis and Simon Darcy (Eds.) Accessible Tourism: Concepts and Issues, 2011.
[9] Tourism Research Australia, National Visitor Survey First Quarter 2017, available on special request.
[10] Dimitrios Buhalis and Simon Darcy (Eds.) Accessible Tourism: Concepts and Issues, 2011.
[11]University of Surrey, Economic Impact and Travel Patterns of Accessible Tourism in Europe –Final report, 2015
[12] Tourism Research Australia, National Visitor Survey 2016, available on special request.
[13] United Nations, Promoting Accessible Tourism for all, access at: https://www.un.org/development/desa/disabilities/issues/promoting-accessible-tourism-for-all.html

Evidence from Europe, the United Kingdom and the United States is conclusive that products, services and destinations, which are tailored to people with access needs, generate considerable returns to businesses and wider benefits across the economy.

Outlined below is a summary of the demand in each market.

- The United Kingdom has a similar rate of disability to Australia, with 20 per cent of the population reporting a disability. In 2013, 12.4 billion pounds was spent by groups of visitors where a member of the party had a disability, 20 per cent of the total spent on day trips and overnight trips that year. Day trips and overnight trips by people with disability have increased 20 per cent in the United Kingdom over recent years, compared to 11 per cent growth in the broader tourism market.[14]
- There are almost 140 million people with access needs across Europe. Around 40 per cent are people with disability and the remainder are older people 65 years and over. Seven hundred and eighty-three million trips were taken annually by this market cohort, and it is forecast to grow to 862 million by 2020. This growth was estimated to generate over $500 billion in direct economic benefits and $1 trillion in indirect benefits across Europe.[15]
- Around 54 million Americans have some form of disability. They have a combined spending power of more than $1 trillion, of which about 20 per cent ($220 billion) is discretionary income.[16] Nearly 16.5 per cent of US tourism spending is by people with disability.[17]

Business case studies on the financial benefits of delivering inclusive services

Outlined below are examples of small and large accommodation providers that have targeted the inclusive tourism market and benefited financially.

- A small accommodation provider in Port Stephens invested in inclusive features that go beyond basic access requirements. These features include accessible paths of travel to level entries, kitchens with sink and bench access, and accessible open plans. Following these adjustments, they had substantial growth in guests with access needs, from 4 per cent to 18 per cent, from 2001-02 to 2006-07. Overall, they attributed 20 per cent of their revenue over that period of time to people with access needs.
- A large hotel chain operating in Europe adapted approximately 500 hotel rooms to meet the requirements of people with disability. The hotel chain has estimated that they have sold 15,000 more room nights in Sweden than in previous years since making these adjustments and improving accessibility.

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[14] VisitsUnlimited, Accessible Tourism Statistics UK, accessed at: http://www.visitsunlimited.org.uk/accessible-tourism-statistics-uk/

[15] University of Surrey, Economic Impact and Travel Patterns of Accessible Tourism in Europe –Final report, 2015

[16] Murphy, M., Winters, M. (n-d). Why Marketing Accessibility is Vital to the Health of the Florida Tourism Industry. VSA Florida. Available at: http://www.dos.myflorida.com/media/696103/inclusive-tourism.pdf

[17] Eurasia Partnership Foundation, Universal Design Guide for Inclusive Tourism, n.d. Accessed at: http://www.keroul.qc.ca/DATA/PRATIQUEDOCUMENT/136_fr.pdf

Australian Government policy enablers

A combination of reforms to the disability sector by the Commonwealth Government and the introduction of a disability inclusion plan by the NSW Government have the potential to:

- Increase the spending capacity of people with disability
- Improve access to mainstream infrastructure and services.

The Commonwealth Government has introduced the National Disability Insurance Scheme (NDIS) which has given people with disability choice and control over how and on which services they spend the funding they receive. Australians with disability are expected to explore new opportunities not available to them under previous funding models, including travel. Data from NDIS trial sites indicate people with disability are spending a significant portion of their funding packages on recreational activities.[18]

The NSW Government's Disability Inclusion Plan aims to create liveable communities with increased physical accessibility; opportunities for social engagement; and improved quality of personal, social and business interactions. Better access to infrastructure and services will address access barriers that are not the responsibility of businesses and the private sector.[19] This has the potential to enable people with disability to access businesses that they previously could not due to public infrastructure barriers.

Summary

Everyone, regardless of ability or age, should be able to enjoy tourism and recreational experiences with ease. Addressing barriers faced by people with disability, whether by investing in new infrastructure or uploading information about accessibility of services and products, makes economic sense. This investment will also provide businesses and destinations with a competitive advantage by attracting other growing market segments (older people and young families), ultimately increasing the utilisation of services and bringing about financial benefits to tourism operators, businesses and local economies.

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[18] National Disability Insurance Agency, *Report on the sustainability of the scheme*, 2015. accessed at: https://www.ndis.gov.au/html/sites/default/files/Report-on-the-sustainability-of-the-scheme.pdf

[19] Department of Family and Community Services, Disability Inclusion Plan, 2015

1 Project background

1.1 Overview

UTS:IPPG's previous research on inclusive tourism found that peak industry bodies and state and local government agencies have sought evidence regarding the business and economic opportunities associated with inclusive tourism to persuade businesses to improve their inclusiveness.

As such, UTS:IPPG has drafted this report to summarise findings from available literature and data that demonstrate the business and economic opportunities associated with inclusive tourism.

This report:

- Analyses current and future trends, and demonstrates the economic case for inclusive tourism
- Examines case studies on inclusive tourism services and products and the economic benefits they can yield as well as capacity building initiatives that have enabled businesses to better meet demands of people with disability
- Outlines the current policy terrain for inclusive tourism and draws on a range of data sources to demonstrate current and future demand for inclusive tourism services and products.

1.2 Outline of document

This report demonstrates the business and economic opportunities associated with inclusive tourism and aims to encourage tourism operators, including local governments, to participate in a Local Government NSW project that will increase their capacity to deliver inclusive tourism experiences.

The report consists of the following elements:

- The market for inclusive tourism – Demonstrates the growing demand for inclusive tourism services and products both in Australia and internationally
- Case studies – Profiles the business benefits of delivering inclusive services and products
- Policy frameworks – Outlines Commonwealth, state and local government policy and legislative frameworks that enhance inclusion of public infrastructure and assets
- Conclusion – Outlines next steps.

1.3 Project background

This report is part of a project that aims to enable regional tourism businesses and local governments to improve information provision on and marketing of inclusive services and products. This project is led by Local Government NSW (LGNSW) with the University of Technology Sydney, Institute for Public Policy and Governance (UTS:IPPG) providing research support.

The project is funded by the NSW Department of Industry through the Tourism Demand Driver Infrastructure (TDDI) grant program and the NSW Department of Family and Community Services (FACS).

The project has five components, which include:

- Identifying economic opportunities associated with inclusive tourism
- Strategic engagement with tourism information supply chain
- Site visits of regional tourism precincts
- Development of an inclusive tourism online learning package
- A regional roadshow to promote and test an online learning package.

1.4 Research gaps and limitations

The most recent data examined in this report show travel patterns for the First Quarter of 2017. It is not feasible to model this data over a full year as travel patterns and behaviours are seasonal.

Also note, Tourism Research Australia, which administers the National Visit Survey, will not ask respondents to identify as people with disability in future quarterly surveys. As a result, data on the inclusive market for 2017 will not be possible to calculate in the future.

The last time the size of the inclusive tourism market was reported for a full year was over 10 years ago. A full year of data would provide us with a better understanding of the total size of the inclusive tourism market and how it compares with other key tourism markets.

In addition, there is a lack of case studies on Australian businesses showcasing the business case for inclusive tourism. Currently, there is only one example of an Australian business sharing its customer data to assess the financial impact of inclusive services. This limits our ability to demonstrate the financial payback from catering to people with disability, their families and carers.

2 Defining key concepts and terms

Inclusive tourism

Inclusive tourism encompasses a range of concepts and terms relating to ideas that tourism should be accessible to all. There are multiple terms used internationally and in Australia to describe 'inclusive tourism'. Some examples are: accessible tourism, adapted tourism, Tourism for All, Barrier Free Tourism (BFT), Easy Access Tourism and Universal Tourism. There is no agreement or consensus on which term is most appropriate, and this is partly because the concept has evolved significantly over the last 10 years. However, most definitions focus on the functional elements of tourism being accessible to all people.

Initially, many of the terms (mentioned earlier) were used to describe an approach to support integration of people with disability in the tourism market. More recently, there has been greater focus on removing barriers in different environments, services and products in the tourism industry (and broader community), and as a result, the inclusiveness of environments irrespective of the capabilities of individuals is now an important focus.

This report adapts a definition from the United Nations World Tourism Organisation (UNWTO) and Buhalis and Darcy and replaces the term 'accessible tourism' with 'inclusive tourism':

> *Inclusive tourism is a form of tourism that entails strategical planned collaboration proceeds between stakeholders that 'enable people with access requirements, including mobility, vision, hearing and cognitive dimensions of access to function independently and with equity and dignity through the delivery of universally design tourism precincts services and environments'.*[20][21]

This definition adopts a whole of life approach to tourism and considers the needs of people with permanent and temporary disability, people with specific medical conditions, seniors and families with small children.

This report has chosen to use the term 'inclusive tourism' instead of the UNWTO and Tourism Australia term 'accessible tourism' to reflect the broader policy and legislative frameworks of the Australian Commonwealth, New South Wales and local governments. [22][23] The Commonwealth Government's National Disability Strategy 2010-2020 and the NSW Government *Disability Inclusion Act 2014* and subsequent state government and local government disability inclusion plans explicitly reference achieving 'inclusion in social, economic, sporting and cultural life' and ensuring people with disability, their families and carers can fully participate in their communities.[24][25]

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20 World Tourism Organisation, 2016.
21 Buhalis and Darcy, 2011.
22 Tourism Australia, *Accessible Tourism.* Accessed at http://www.tourism.australia.com/industry-advice/Accessible-Tourism.aspx#About.
23 World Tourism Organisation, 2016.
24 Council of Australian Governments, *National Disability Strategy 2010-2020,* 2010. Accessed at https://www.dss.gov.au/sites/default/files/documents/05_2012/national_disability_strategy_2010_2020.pdf.
25 NSW Department of Family and Community Services, *Disability Inclusion Act*. Accessed at https://www.adhc.nsw.gov.au/about_us/legislation_agreements_partnerships/nsw_disability_inclusion_act.

Inclusion and accessibility

Inclusion and accessibility relate to the participation of people with disability in the community. Both inclusion and accessibility refer to the removal of barriers that may impede participation to increase quality of life.[26] Participation includes full citizenship, formation of social capital, and complete and rewarding social engagement.[27] Inclusion happens on an everyday or episodic basis, in informal or formal ways and on interpersonal, organisational, interagency, intergovernmental, and inter-sectoral levels.[28] The barriers to inclusion and accessibility may be physical, for example, stairs which prevent wheelchair access or lack of transport access; or cultural/social, for example, emotional and attitudes.[29]

Disability

The United Nations *Convention on the Rights of Persons with Disabilities* (CRPD) is a legally-binding international agreement which expands on the rights presented in the *Universal Declaration of Human Rights*. The purpose of the CRPD is to promote, protect and ensure the full and equal enjoyment of all human rights and fundamental freedoms by all people with disability and to promote respect for their inherent dignity. Under the CRPD, people with disability include “those who have long-term physical, mental, intellectual or sensory impairments which in interaction with various barriers may hinder their full and effective participation in society on an equal basis with others”.[30]

Universal Design

Universal Design refers to a broad spectrum of ideas to produce accessible buildings, products and environments. It is defined by the CRPD as “the design of products and environments to be usable by all people, to the greatest extent possible, without the need for adaptation or specialized design”.[31] The aim of Universal Design is to recognise human diversity and find ways for all people to access and use environments and objects in inclusive ways.[32]

Universal Design is the tool that must be used in order to achieve accessibility and inclusiveness. It recognises the nexus between ageing, disability and the continuum of ability of people over their life spans.[33] The aim of Universal Design is to simplify the lives of all people, making products, communications and the environment usable by the greatest number of people at the lowest possible economic cost. Universal Design benefits tourism in its entire extension and in all its phases.[34]

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26 Julie Rodier, “A Narrative Policy Analysis of the Accessibility for Ontarians with Disabilities Act, 2005: Exploring Implementation in Municipal Recreation”. (Master’s thesis, University of Waterloo, 2010).
27 Elizabeth Kastenholz, Celeste Eusébio, and Elisabete Figueiredo, “Contributions of tourism to social inclusion of persons with disability”, *Disability & Society*, 30(8) (2015), 1259-1281.
28 Rodier, 2010. p.79
29 Kastenholz, Eusébio and Figueiredo, 2015.
30 United Nations, *Convention on the Rights of Persons with Disabilities,* 2015. Accessed at www.**un**.org/disabilities/documents/convention/convoptprot-e.pdf.
31 Ibid.
32 Jenene Burke, “Just for the fun of it: making playgrounds accessible to all children”, *World Leisure Journal*, 55(1) (2013), 83-95.
33 Simon Darcy, Bruce Cameron, and Shane Pegg, “Accessible tourism and sustainability: a discussion and case study”, *Journal of Sustainable Tourism*, 18(4) (2010), 515 -537. Accessed at http://www.tandfonline.com/doi/abs/10.1080/09669581003690668.

34 World Tourism Organisation, 2016.

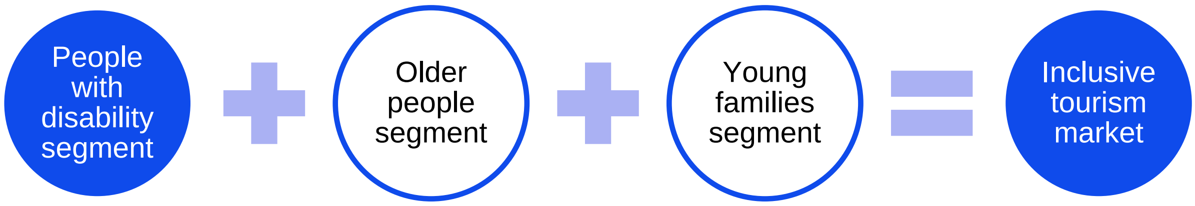
3 The market for inclusive tourism

3.1 Overview

This section reviews data on the size and value of the inclusive tourism market and demand for inclusive tourism services in Australia and other key international tourism destinations.

The inclusive tourism market is made up of three market segments: people with disability, older people and young families.

Figure 1 Inclusive tourism market segments



Research has shown that making adjustments and providing inclusive services for people with disability will have flow-on benefits for older people and young families. People with disability, older people and young families share similar needs when accessing tourism services. The concept of inclusive tourism includes these seemingly disparate consumer segments.[35]

People with disability are the key market segment within the inclusive tourism market. Tourism operators and businesses which cater services and products to needs of people with disability also help address barriers for older people and young families.

Importantly, the reverse does not work; disability is wide-ranging and can be sensory, intellectual or physical, which would not necessarily be addressed through efforts to cater to older people and young families.

Therefore, this section will mainly focus on the extent to which people with disability participate in the tourism market. By showcasing people with disability's utilisation and participation in tourism activities, we will debunk common myths about this market segment. Common myths include that there is little demand from people with disability and that it is a niche market and not a priority. However, there is a growing body of evidence showing that people with disability make up a significant proportion of the overall tourism market.

This section will review:

- Demographic data: Outlines the size of the inclusive market and include data on people with disability, older people and young families
- Travel pattern data: Shows how often and what proportion of all trips taken are taken by people with disability, older people and young families

[35] VisitEngland, East does it: Simple, low-cost changes to benefit you and your visitors, found at: https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/easy_does_it.pdf

- Expenditure data: Shows how much people with disability, older people and young families have spent on tourism services.

This data will be reported at Australian and international levels and focus on the following developed international regions: England, Scotland, European Union and the United States.

Note, there are limitations to the travel pattern and tourism expenditure data, in particular in Australia, where there is no ongoing collection on travel patterns of people with disability.[36]

3.2 The Australian market

3.2.1 Market size

There are 4.2 million Australians with disability. This is approximately 20 per cent of the total population. The proportion of people with disability in Australia has remained relatively consistent over the last 20 years.[37]

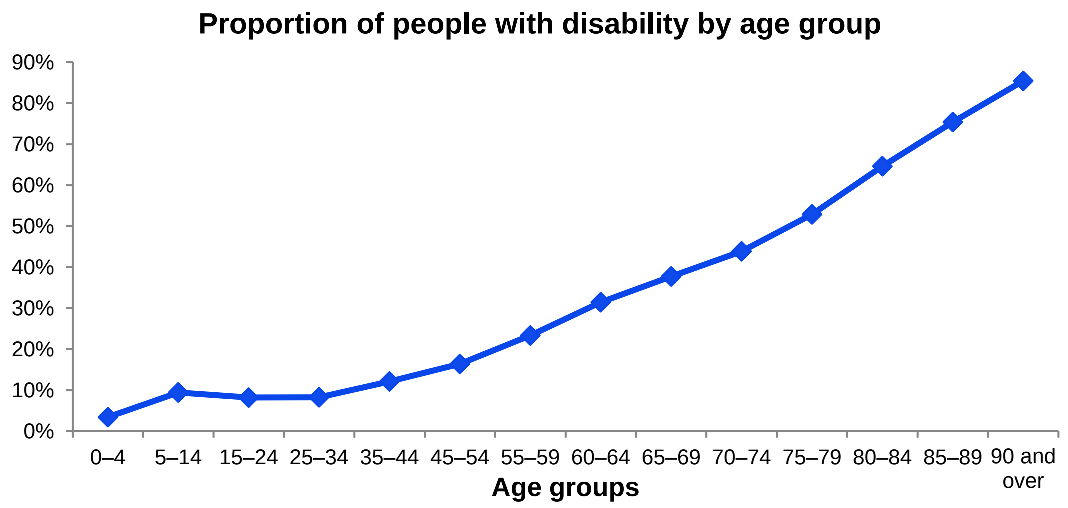
However, the proportion of people with disability in Australia is expected to increase due to its ageing population. Prevalence of disability increases with age; a person is 14 times more likely to have a disability at age 65 than they are at 4 years old.[38]

Australia's population aged 65 years and over has grown from 8 per cent in 1970-71 to 15 per cent in 2016.[39] Projections indicate that over the next 40 years, the proportion of the population aged 65 years and over will almost double to around 25 per cent. This is a permanent change; the age structure of the population will include a far higher proportion of older Australians.[40]

Figure 2 shows the proportion of people with disability in each age group. As shown, there is a significant increase of people reporting a disability after the age of 50 years. As Australia's population ages, it is anticipated that the number of people with disability will increase.

[36] For analysis of travel pattern and tourism expenditure data this paper will rely on Tourism Research Australia's National Visitor Survey from 2003-04 and 2017 First Quarter. 2017 First Quarter NVS data only includes domestic overnight and data and therefore our analysis is limited in scope. NVS 2003-04 data includes outbound data.
[37] National Survey of Disability, Ageing and Carers, 2015
[38] Dimitrios Buhalis and Simon Darcy (Eds.) Accessible Tourism: Concepts and Issues, 2011.
[39] Australian Bureau of Statistics Cat. 3101, Australian Demographic Statistics, July 2016
[40] Australian Government Treasury, Australia's demographic challenges, found at: https://demographics.treasury.gov.au/content/_download/australias_demographic_challenges/html/adc-04.asp

Figure 2 Proportion of people with disability by age group



Source: National Survey of Disability, Ageing and Carers (2015)

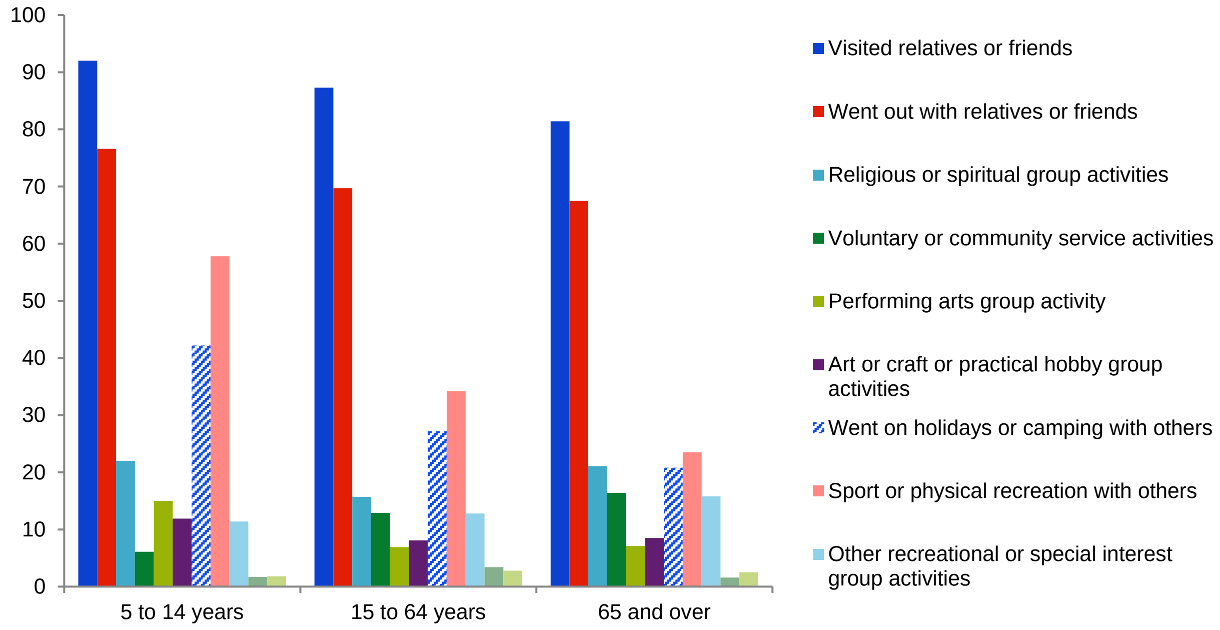
In terms of social and recreational participation rates, the 2015 National Survey of Disability, Ageing and Carers (NSDAC) found that, over the 12 months prior to the survey, most people with disability (77.4%) participated in social activities, such as visiting a public place or going on a holiday or camping.

Going on a holiday or camping is one of the more commonly reported social activities for people with disability across all age groups (Figure 3). For example, the 2015 NSDAC found that almost half (42%) of all people with disability aged 5 to 14 years, over a quarter (27%) of those aged 15 to 64 years, and just over a fifth (21%) of those aged 65 years and over went on a holiday or camping with friends. [41]

This appears comparable to the broader population. For example, the 2015 NSDAC also reports that, of Australians aged 65 years and over without disability, around 26 per cent had gone on a holiday over the 12 months prior to the survey.

[41] Australian Bureau of Statistics, Disability, Ageing and Carers, Table builder data

Figure 3 Social participation activities, NSDAC 2015



Source: National Survey of Disability, Ageing and Carers (2015)

3.2.2 Latest tourism trends – people with disability

There are myths that people with disability travel and spend less than the general population because of economic circumstances. Data from the First Quarter 2017 National Visitor Survey indicates that this is not the case. On average, people with disability spent $111 on day trips and $615 on night trips. People without disability spent $105 on day trips and $677 on overnight trips.[42]

Importantly, these figures do not include expenditure of the total travel group/party. Previous research in Australia indicates that people with disability travel with 2.8 people for an overnight trip and 3.4 for a daytrip, on average.[43] Research on travel expenditure of people with disability often applied a multiplier of 0.5 to reflect the increase in travel group size.[44]

Table 1 shows that people with disability went on almost 3.8 million overnight trips or 17 per cent of all overnight trips.

Table 1 Overnight trips, NVS 2017 First Quarter

	Number (#)'000	Proportion (%)
People with disability	3,768	17
People without disability*	18,975	83
Total	22,743**	100

[42] Tourism Research Australia, National Visitor Survey First Quarter 2017, available on special request.
[43] Tourism Research Australia, National Visitor Survey First Quarter 2017, available on special request.
[44] University of Surrey, Economic Impact and Travel Patterns of Accessible Tourism in Europe –Final report, 2015

*This includes people who reported no disability and were not willing to disclose their status.

** This does not include missing values that could be attributed to either group.

Source: Tourism Research Australia, National Visitor Survey First Quarter 2017, available on special request.

People with disability spent approximately $2.3 billion while travelling overnight over the 2017 First Quarter. This is 15 per cent of total expenditure on travel in Australia. The lower proportion of overnight spending suggests that people with disability spent less on overnight travel than people without disability. Nonetheless, Table 1 and Table 2 show that people with disability are a significant proportion of the overnight tourism market.

Table 2 Overnight expenditure, NVS 2017 First Quarter

	Million ($)	Proportion (%)
People with disability	2,316	15
People without disability*	18,975	85
Total	15,415	100

*This includes people who reported no disability and were not willing to disclose their status.

Source: Tourism Research Australia, National Visitor Survey First Quarter 2017, available on special request.

Table 3 shows that over one-fifth of all day trips over the 2017 First Quarter were by people with disability. Considering people with disability make up approximately 20 per cent of the population, this indicates that people with disability go on day trips more often than people without disability.

Table 3 Total day trips, NVS 2017 First Quarter

	Number (#) '000	Proportion (%)
People with disability	8,991	21
People without disability*	33,508	79
Total	42,501**	100

*This includes people who reported no disability and were not willing to disclose their status.

** This does not include missing values that could be attributed to either group.

Source: Tourism Research Australia, National Visitor Survey First Quarter 2017, available on special request.

People with disability spent $1 billion travelling on day trips and accounted for 22 per cent of all day trip expenditure. This reflects the high average expenditure rates of people with disability compared with people without disability. Refer to Table 4.

Table 4 Day trip expenditure, NVS 2017 First Quarter

	Million ($)	Proportion (%)
People with disability	1,003	22
People without disability*	3,520	78
Total	4,523	100

*This includes people who reported no disability and were not willing to disclose their status.

Source: Tourism Research Australia, National Visitor Survey First Quarter 2017, available on special request.

Table 5 shows that overall tourism expenditure of people with disability is $3.3 billion and accounts for 17 per cent of overall expenditure.

Table 5 Day trip and overnight expenditure, NVS 2017 First Quarter*

	Million ($)	Proportion (%)
People with disability	3,317	17
People with no disability*	16,619	83
Total	19,938	100

*This includes people who reported no disability and were not willing to disclose their status.

Source: Tourism Research Australia, National Visitor Survey First Quarter 2017, available on special request.

The latest data on travel patterns and tourism expenditure by people with disability shows that they already make up a significant portion of the tourism market. The data shows they spend more on day trips and are likely to go on day trip more often than people without disability. However, a smaller proportion of people with disability go on overnight trips.

Data suggests that people with disability want to travel but may face barriers going on overnight trips. This is consistent with previous research and expenditure data that shows people with disability find it more difficult to locate appropriate accommodation that meets their needs.[45]

3.2.3 Previous research on travel patterns of people with disability

Darcy and Dwyer (2011) carried out an analysis of the travel patterns of people with disability using 2003-04 NVS data and combined it with NSDAC to model the economic contribution of people with disability to Australia's tourism sector. This involved computation of low and high expenditure scenarios.

Darcy and Dwyer (2011) found that:

- People with disability travelled on a level comparable with the general population for domestic overnight and day trips

[45] Darcy, S. Tourism patterns and experiences of New South Wales people with a physical disability. *Tourism research: Building a better industry; Proceedings from the Australian Tourism and Hospitality Research Conference*, 1997.

- Around 88 per cent of people with disability took a holiday each year, which accounts for 8.2 million overnight trips, or more than 10 per cent of 70 million overnight trips taken across Australia
- People with disability spent between $8 billion and $11.9 billion on tourism
- People with disability contributed between $3 billion and $4.5 billion to Tourism Gross Value Added (12.3%-15.6% of total tourism GVA)
- People with disability contributed between $3.8 billion and $5.7 billion to Tourism Gross Domestic Product (11%-16.4% of total)
- People with disability sustained between 51,820 and 77,495 direct jobs in the tourism industry (11.6%-17.3% of direct tourism employment).[46]

This research also demonstrated that there is latent demand; there is potential for the market to grow more if barriers to participation can be removed. Research in Australia and internationally has shown that travel experiences of people with disability constrains their demand for tourism services and products.[47]

Without a permanent question in the NVS asking people whether they have a disability, it will not be possible to carry out a full year analysis on people with disability's contribution to the tourism market and track its growth as Australia's population ages.

3.2.4 Market preferences, behaviours and experiences

Darcy (1997) has also examined the travel preferences, behaviours and experiences of Australians with disability.[48] Just one in three are satisfied with their current level of travel and more than half cited lack of suitable accommodation as a reason for not travelling more. Almost two-thirds indicated that information about accessible accommodation is a major barrier in travel planning and nearly half found the information they receive is inaccurate. In particular, study respondents reported:

- Room access standards often fall below the accepted Australian Standards
- Information is poorly documented and the information presented is not detailed enough nor specific to each room
- Accessible rooms do not have equal amenities to other rooms across aesthetic attributes such as vista and room location
- Tourism operators do not identify they have accessible rooms and do not promote the rooms they have available.

A report by Price Waterhouse Cooper (PWC) indicates these challenges often lead to lower hotel utilisation by people with disability, who subsequently prefer to stay with friends and family when travelling.[49][50] Despite people with disability representing 20 per cent of the Australian population, just 4 per cent of hotel rooms are accessible and specific demand for these rooms comprises 3 per cent of all demand, as estimated by PWC.

[46] Dimitrios Buhalis and Simon Darcy (Eds.) Accessible Tourism: Concepts and Issues, 2011.
[47] Ibid
[48] Darcy, S. Tourism patterns and experiences of New South Wales people with a physical disability. *Tourism research: Building a better industry; Proceedings from the Australian Tourism and Hospitality Research Conference*. Bureau of Tourism Research, 1997
[49] PWC. An Assessment of Accessible Accommodation in Australia: Supply and Demand. PWC 2013.
[50] Dwyer, L., & Darcy, S. Chapter 4 - Economic contribution of disability to tourism in Australia. In S. Darcy, B. Cameron, L. Dwyer, T. Taylor, E. Wong & A. Thomson (Eds.), Technical Report 90040: Visitor accessibility in urban centres (pp. 15-21). Gold Coast: Sustainable Tourism Cooperative Research Centre, 2008.

PWC suggests this is often because hotel operators hold these rooms on a last to let basis to ensure they are available for those who need them. PWC further estimates demand for accessible rooms is expected to double over the next 20 years, equal to growth in demand for all other room types. Even four to five star hotels, which were mostly constructed after introduction of Australian Standards for access and mobility, have lower rates of utilisation by people with disability.[51]

On this issue, a 2011 report by the Victorian Competition and Efficiency Commission's (VCEC) found barriers to inclusive tourism, including concern from operators about the cost and lack of utilisation of accessible rooms. From a supply perspective, operators generally report low occupancy of accessible rooms, yet most have done nothing to market the accessibility features of their accommodations. The VCEC report argued businesses could address low use by more carefully designing the rooms, educating staff, and better marketing to people with disability and older people, who have similar access needs.

3.2.5 Travel patterns – older people[52]

According to NVS 2016 data older people aged 60 years and over account for a significant proportion of the total tourism market in Australia, spend less than people aged 15-59 and prefer regional tourism locations.

Table 6 shows that people aged 60 years and over account for 22 per cent of all visitors in Australia.

Table 6 Visitor (both international and domestic) by age group, NVS 2016

	Age group	Number (#) '000	Proportion (%)
Total Australia	15 to 59 years	76,299	78
Total Australia	60 or more years	22,067	22
Total Australia	Total	98,366	100

Source: Tourism Research Australia, National Visitor Survey 2016

Table 7 shows people aged 60 years and over accounted for 18 per cent of all expenditure on tourism. People aged 60 years and over spent less per night on average than 15-59 year-olds. On average, a person aged 60 years and over spent $212 a night, while a person aged 15-59 spent $310.

This explains why the proportion of total expenditure by people aged 60 years and over was lower than their proportion total visitors.

[51] *Ibid*
[52] All data related to older people in this section is from the National Visitor Survey 2016. UTS:IPPG made a special request to Tourism Research Australia to enable an analysis of full year travel patterns of older people. This data is not comparable to data from NVS 2017 First Quarter as this is full year data while data from 2017 is only for the first quarter of the year.

Table 7 Expenditure by age group, NVS 2016

	Age group	Expenditure ($ Million)	Proportion (%)
Total Australia	15 to 59 years	71,435	82
Total Australia	60 or more years	15,763	18
Total Australia	Total	87,198	100

Source: Tourism Research Australia, National Visitor Survey 2016

As can be seen in Table 8, older people preferred regional tourism destinations to capital city destinations. Sixty-four per cent of all people aged 60 years and over travelled to a regional destination.

Table 8 Number of visitors aged 60 years and over by region, NVS 2016

	Number (#) '000	Proportion (%)
Regional	14,027	64
Capital city	9,807	44
Total Australia	22,067	100

Source: Tourism Research Australia, National Visitor Survey 2016

Table 9 shows that expenditure by people aged 60 years and over in regional tourism destinations accounted for 53 per cent of all expenditure. In comparison, expenditure of people aged 15-59 in regional tourism destinations only accounted for 39 per cent of their total expenditure.

Table 9 Expenditure of visitors aged 60 years and over by region, NVS 2016

	Expenditure ($ Million)	Proportion (%)
Regional	8,292	53
Capital city	7,471	47
Total Australia	15,763	100

Source: Tourism Research Australia, National Visitor Survey 2016

3.2.6 Travel patterns – young families

The young families demographic make up a smaller proportion of the inclusive tourism market than people with disability and older people. In 2013, there were approximately 1.3 million young families in Australia. With a slight increase in fertility rates, this figure is expected to increase in the coming years.[53]

Data from NVS 2017 First Quarter shows that for young families:

- Total expenditure was around $2.7 billion

[53] ABS, Cat -4442.0 Family Characteristics and Transitions, Australia, 2012-13, 2013

- Average day trip expenditure was around $106
- Average overnight expenditure was around $850.

3.3 International markets

Given the focus of Australia's tourism bodies on international tourism and higher levels of spend by international tourists, it is important to understand the potential international inclusive tourism market. Data on this market has been produced for some of Australia's key international tourism target markets, including the United Kingdom, United States and European Union. Furthermore, the data on the people with disability segment of the international market tends to be more current than data on the domestic market.

Over 1 billion people worldwide have disabilities, almost half of whom are in Asia. When combined to include families and carers, this rises to 2.2 billion.[54] Collectively, they control over $8 trillion in annual disposable income. Across Australia's target international tourist markets, this includes 11 million people with disability in the United Kingdom, 78 million in the United States, and 82 million in China.

This represents a significant market opportunity. For example, international tourists with disability travelling to the United Kingdom spend over $500 million annually. Assuming a similar expenditure, the US, European and Chinese markets could be worth over $10 billion in direct economic benefits annually. However, the economic contribution of this market is much larger. For example, it has been estimated that people with disability visiting the European Union contribute over $118 billion in both direct and indirect economic benefits.[55]

In 2012, Destination NSW produced data on the Asian baby boomer holiday market.[56] They found that almost 700,000 baby boomers travelled to Australia, an increase of 3 per cent from the preceding year. About 40 per cent of all baby boomers who travelled to Australia came from 'eastern' markets in Asia, an increase of 20 per cent, and about half of these visited New South Wales whilst here.[57]

3.3.1 The United Kingdom

The United Kingdom has a similar prevalence of disability as Australia at just less than 20 per cent of the population. VisitEngland has estimated that people with disability, their families and carers have a combined spending power of $350 billion, whilst those 65 years and over have a spending power of $171 billion or about 15 per cent of total household spending in the United Kingdom. VisitEngland has estimated the inclusive tourism market has grown by about a third in recent years, outstripping the 11 per cent growth in the broader tourism market.[58]

The value of the UK inclusive tourism market has also increased by 20 per cent in recent years and is now worth over $21 billion. About two-thirds of this $21 billion is spent on daytrips and the remainder on overnight trips. The overnight trip market for tourists with disability has grown faster than the daytrip market. VisitEngland has also

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54 United Nations, Promoting Accessible Tourism for all, access at: https://www.un.org/development/desa/disabilities/issues/promoting-accessible-tourism-for-all.html
55 University of Surrey, Economic Impact and Travel Patterns of Accessible Tourism in Europe –Final report, 2015
56 Destination NSW, *International market segments*, 2013. Accessed at http://www.destinationnsw.com.au/wp-content/uploads/2013/10/ATE13-Baby-Boomers-eastern-market-FS.pdf.
57 Ibid
58 Travability, "Inclusive Tourism–The Most Under Serviced Sector in Travel", 2015. Accessed at http://travability.travel/Brochures/industry_guide.html.

estimated the regional spend by people with disability and found that some regions benefited from tourism spending of over $100 million annually.

In the United Kingdom, people with disability make daytrips in proportion to their representation in the overall population. That is, 20 per cent of the daytrip market is people with disability, and when they travel they spend roughly the same as people without disability. Whilst people with disability take overnight trips at a slightly lower rate (14%), they are more likely to stay longer, prefer to travel off-peak, and spend more because they are accompanied by partners, children or companions.[59]

A 2014 survey commissioned by the UK Department for Work and Pensions found nearly two-thirds of the United Kingdom's top attractions were not fully accessible. To drive action, the United Kingdom's tourism boards have joined forces to develop a list that recognizes the 20 most accessible attractions, of which most are arts and culture venues, museums and galleries, or outdoor recreation and adventure activities.[60]

VisitScotland estimates that between January and November 2009, inclusive tourism contributed $5.5 billion in direct and indirect economic benefits to the Scottish economy. In 2015, spending by people with disability travelling with at least one other person (50% of people with disability) accounted for around 21 per cent of all daytrip spending in Scotland and 15 per cent of all overnight trip spending. The combined total of this was $2.2 billion in direct economic benefits.

The number of trips undertaken in the Scottish inclusive tourism market has increased by the same amount as the UK market (about a third) since 2009, even though the broader Scottish tourism market declined by 4 per cent over the same period. Similarly, the value of these trips has increased significantly, by about 55 per cent, compared to a 20 per cent increase in the value of all trips.

The European Commission has found two-thirds of Europeans would 'buy, or pay more for products if they were more accessible and better designed for all'.[61] Drawing on this research, VisitScotland suggests that inclusive tourism is not a price sensitive market and that the top two barriers are not physical or economic but staff attitude and training and information provision.

3.3.2 The European Union

As of 2011, there were almost 140 million people with access needs in Europe, of which 40 per cent were people with disability under the age of 65 years.[62] These figures are expected to grow 1 per cent annually until 2020. In what is perhaps the most extensive of its kind, a multi-year study by the European Commission (2015) examined the economic impact and travel patterns of the inclusive tourism market (hereafter referred to as the European Commission study).

The European Commission study surveyed over 2,500 Europeans with access needs. It found that 783 million trips were taken in the year prior to the survey and forecast this to grow to 862 million by 2020. The majority of trips were domestic whilst a quarter were intra-European and about 10 per cent were international. Trips were split roughly equally between overnight and daytrips.

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59 VisitEngland, *The Purple Pound*, 2010. Accessed at https://www.visitbritain.org/sites/default/files/vb-corporate/ve_purplepound2016_d3.pdf
60 Oliver Smith, "Tourist attractions 'still failing' disabled travellers," *The Telegraph*, November 7, 2014. Accessed at http://www.telegraph.co.uk/travel/destinations/europe/united-kingdom/articles/Tourist-attractions-still-failing-disabled-travellers/.
61 University of Surrey, *Economic Impact and Travel patterns of Accessible Tourism in Europe,* 2015. Accessed at http://ec.europa.eu/DocsRoom/documents/5566/attachments/1/translations/en/renditions/native.
62 Ibid.

Within the inclusive tourism market segments, people with disability were equally likely to take daytrips and overnight trips whilst older people were more likely to take overnight trips. The study also looked at daily spending and found people with disability and older people spent the same on daytrips ($120/day), and older people ($160) spent slightly more on overnight trips than people with disability ($150).

Inclusive tourism demand was estimated to generate over $500 billion in direct economic benefits and $1 trillion in indirect benefits across Europe. The value-add of inclusive tourism to the European economy was further estimated at $220 billion and the indirect value add at over $500 billion. Inclusive tourism demand is responsible for the direct employment of 4.2 million people and indirect employment of 8.7 million people, suggesting an employment multiplier of two. That is, for every one job created to directly service the inclusive tourism market, one job is created in another part of the economy.

The study produced a series of accessibility improvement scenarios from minimum, medium to extensive improvement and estimated economic activity could increase by 24, 33 and 43 per cent, respectively. It also that found direct employment would initially jump by 20 per cent, then a further 6 per cent and 10 per cent under the respective scenarios. The study estimated this would increase economic growth by 18, 25 and 36 per cent under the scenarios. Up to 85 per cent of this was attributed to existing travellers travelling more rather than to new travellers. New travellers only accounted for a significant proportion of new economic activity (i.e. more than 20%) under the extensive improvement scenario. The study reasoned the increase in economic activity is due to people with disability being 50 per cent more likely to travel if improvements are made and older people 40 per cent more likely. Importantly, whilst these markets are more likely to travel, the study found people with disability would only spend an additional 10 per cent during their trips whilst the older people would spend a little more.

Across the European Union's 11 key international tourist markets, there are almost half a billion people with access needs. One-third of these are people with disability and the rest are older people. These markets include many of the same target markets for Australia, such as China, India and the United States. The study found access improvements could increase demand and economic activity of international inclusive tourists by 28, 49 and 75 per cent under minimum, medium and extensive improvements.

Other studies from nations within the European Union have found similar results. For example, a German study found tourists with disability contribute almost $3 billion in direct economic benefits, which rises to just over $7 billion if indirect benefits are included.[63] The study also found that 37 per cent of Germans with disability have decided not to undertake trips because of lack of accessibility features and almost half of these would be more likely to travel if this issue were addressed. A further 60 per cent indicated they would be willing to pay a higher price for accessibility features.

3.3.2.1 Travel information and behaviours

The European Commission study considered inclusive tourism information and behaviour patterns. It found three-quarters of a total of 66 travel websites reviewed provided information on inclusive tourism offers, but not accessibility features. These websites included accommodation venues, airlines, railways and tourism boards, and

63 Neumann and Reuber, *Economic Impulses of Accessible Tourism for All,* Study commissioned by the Federal Ministry of Economics and Technology and Federal Ministry of Economics and Labour, 2004.

destination marketing websites such as for beaches. Some websites had accessibility features integrated into the main websites, whereas others had stand-alone sites similar to Western Australia's *You're Welcome Access WA* portal. The study also analysed 11 travel brochures and found font size was too small on almost all, none provided brochures targeted at those with access needs and just four provided information on accessibility features.

Travellers with access needs were found to share many similarities with those without access needs. For example, they are just as likely to use standard travel information infrastructure; such as websites and word of mouth. However, travellers with access needs are more likely to use specialist sources or book through travel groups and a majority check for accessibility features and availability of on-site assistance before travelling. Although most travellers with disability find this information sufficient, reliable and accessible, a substantial minority does not and engages in substantial advanced planning to prevent facing specific access barriers when travelling.

European Commission's study also investigated specific access barriers. There was generally low satisfaction with the availability of information on medical help and health treatments, accessible facilities, services and locations other than accommodation, and provision of alarm systems. Price was also a barrier because many have to pay more than the standard price or switch to a more expensive product to make it accessible. Initiatives such as the Companion Card[64], which operates in a number of Australian jurisdictions, can overcome these price barriers.

The study found different access needs lead to different travel behaviours. For example, people with disability and older people mentioned medical help and catering to dietary needs as preferred access improvements, whilst young families mentioned equipment and activities for children. Toilets, parking and lifts were identified by all as the most important features of building accessibility. The study found that if these issues were addressed at a destination, over 80 per cent would make a return visit.

The European Commission's study then examined access barriers at different stages of the travel journey. Attitudinal barriers are experienced more often than physical ones across all tourism sectors and market segments.

Table 10 Access barriers

Travel stage	Access barrier
Pre-travel information gathering	• Accessibility information not included in mainstream channels • Lack of geographic coverage of information • Lack of comprehensive tourism content and user involvement • No personalisation services or opportunity to exchange experiences • No objective measurements of accessibility • Lack of information on access pathways • Over-emphasis on mobility needs

[64] Companion Card NSW is not-for-profit program that supports permanent Australian residents living in NSW with a life-long severe disability who require assistance through a companion. The government-funded program gives eligible participants physical cards which they may present at certain venues or activities and receive a second ticket free of charge for their companion

	• Lack of general tourism information • Reliability of information in terms of accuracy, professional collection and currency	
Transit journey	• Largely relates to airlines • Lack of user-friendly toilets on journey • Distance between cabin seat and toilets on board • Insecure airline wheelchair services • Attitudinal issues of travel staff • Most problematic stage for people with communication difficulties	
Transport at destination	• Access paths and accessible parking	
Accommodation	**PHYSICAL / STRUCTURAL**	**ATTITUDINAL**
	• Position of toilet • No grab rails • Long steep ramps • Narrow paths and lifts • Existence of steps and no ramps or kerb ramps • Height of shower holds • No shower recess • Limited number of accessible rooms or too much furniture • Accessible rooms not close to hotel amenities • Table and bed width and height too narrow or low • Under-bed clearance • Inadequate shower chair • Bathrooms not accessible and doors too narrow • Lighting and other controls too high • Poor circulation • Door steps and width too narrow • Sloping bathroom floor • Signage too small	• Not understanding different access needs • Not directly addressing person with access needs • Refusal to design rooms that meet access needs

Food and restaurant sector	• No one reads out the menu • Lack of information about how the table is setup, food service and location of buffet • Stairs at entrance • Doors too heavy to open • Lack of room between tables • Difficulties handling cutlery at the same time as mobility aids
Attractions / activities	• Nature-based activities • Shopping opportunities

Source: University of Surrey, Economic Impact and Travel Patterns of Accessible Tourism in Europe – Final report, 2015

3.3.3 The United States

Around 54 million Americans have some form of disability. They have a combined spending power of more than $1 trillion, of which about 20 per cent ($220 billion) is discretionary income.[65] Of this income, about 6 per cent ($13 billion) is spent annually on travel, which translates into a further $114 billion in indirect economic benefits (total direct and indirect benefit of $127 billion).[66] Depending on the type of trip, Americans with disability travel in groups of between 2.8 and 3.5 people.[67]

Like most Western countries, America is ageing. In 2010, over 40 million people were aged 65 years and over and this is projected to double to more than 80 million by 2050.

Over 40 per cent of American baby boomers will retire with some form of disability and this is projected to fuel a 25 per cent growth in the inclusive tourism market. More than 21 million Americans with disability take at least one trip for business or leisure every two years and studies show that 24 million Americans with disability would travel or travel more frequently if their access needs were met.

On behalf of Open Doors, a Chicago-based not for profit organisation, Mandala Research surveyed over 1,200 American adults with physical disability to understand their travel habits and experiences, such as how often they travel, how much they spend, what information they use to make decisions, and their experience with different travel operators. The survey repeated those undertaken in 2002 and 2005.[68]

The research found almost three quarters travelled at least once in the last two years, and just 6 per cent of these were day trips. This travel frequency is unchanged from the previous 2005 survey and equates to almost 25 million travellers with disabilities. Almost all had travelled for leisure, and almost a fifth travelled for business or business and leisure combined. The average travel group size was 2.7 people.

Significantly, there was no discernible difference between people with disability who had travelled and those who had not over the last two years. For example, a roughly

65 Maureen Murphy and Marian Winters, "Why Marketing Accessibility is Vital to the Health of the Florida Tourism Industry," *VSA Florida and Culture Builds Florida*. Accessed at http://www.dos.myflorida.com/media/696103/inclusive-tourism.pdf.
66 Open Doors Organization, *Research among adults with disabilities - travel and hospitality* (Chicago: Harris Interactive, 2005).
67 Murphy and Winters.
68 Open Doors Organization

similar proportion of people with severe disability reported they had travelled (32%) as had not travelled (37%) over the last two years.[69]

The research estimated a total spend of $34.6 billion by travellers with disability, including $9 billion on airline services and $11 billion on cruise ships. The average trip length was about 5 days with travellers spending $500 ($100/night), although almost 10 per cent spent more than $1,000 per trip.[70]

Overall, the highest items of expenditure were cruise ships ($1,376), airfares ($400) and accommodation ($230). Almost a third had taken an international holiday, spending $2,500 on average, with the Caribbean, Europe and South and Central America the most popular destinations. When on cruise ships, travellers with disability spent on average $200 on on-shore excursions.

Almost 20 per cent reported they had taken 6 or more trips over the last two years, and a similar proportion reported they had taken between 3 to 5 trips over that period. These 'frequent travellers' were more likely to use previous experience as the preferred source of information, generally travel alone and prefer cruise holidays. Interestingly, these travellers did not differ from others in their use of assistive devices or demographic characteristics.

When they travelled, almost all had eaten at a restaurant, three quarters stayed at a hotel, almost half had flown and about a quarter had rented a car. Just over a quarter had travelled outside the United States, whilst cruise ship holidays and organised group tours were each popular for about 10 per cent of the sample population.[71]

Almost two thirds used the internet to book their travel, either on handheld or desktop devices, and a similar number used the internet to find out about accessible travel facilities. This is significant given the US Travel Association has previously found that less than half of all American travellers use a mobile device whilst travelling, compared to 6 out of 10 travellers with disability. Friends and family were also a popular source of travel information for over a third of travellers with disability.

The research found the proportion of travellers with disability experiencing access issues has declined since 2005, but a significant proportion (about two thirds) still report issues. Issues tend to be experienced more during the transport stages of a journey, rather than at the destination.

Significantly, the number of travellers with disability who report travelling by air or cruise ship and using hotels or restaurants has remained unchanged since the first survey in 2002, although travellers were generally spending more in 2015 than they were in 2002. This indicates the market may be saturated and that further accessibility improvements are required to open up latent demand.[72]

[69] Ibid
[70] Ibid
[71] Ibid
[72] Ibid

4 Case studies

4.1 Overview

This section presents a number of case studies that showcase national and international, small and large businesses that deliver inclusive products and services. Also highlighted are projects initiated by local and national governments and non-government organisations that have improved access to information on inclusive tourism businesses.

These case studies offer insights into the:

- Business benefits of providing inclusive products and services
- Types of inclusive products and services offered
- Processes undertaken to improve the inclusiveness of businesses.

Businesses must invest time or funding to improve the inclusiveness of their services and products. As shown in the following case studies, some businesses have consciously decided to improve the inclusiveness of their services and products in order to target the inclusive tourism market through measures such as upgrading their facilities to meet the access needs of people with disability, their families and carers. The positive outcomes achieved by these businesses attest to the business case for inclusive tourism.

In most cases in Australia and other developed nations, businesses automatically provide inclusive services (to some degree) due to building standards and anti-discrimination laws. However, in many cases these standards and laws are not effectively marketed or promoted. The presented case studies include projects that have been initiated by government and non-government organisations to help improve this information provision.

The following case studies affirm the demand for inclusive tourism experiences and the financial benefits to development and promotion of inclusive services.

4.2 Australian case studies

Outlined below are three case studies from the Australian regional context which demonstrate that:

- People with disability can become a significant customer base for small businesses
- The provision of information is important for stimulating the inclusion tourism market
- Collaboration and partnerships are one way of building the capacity of businesses to develop and promote inclusive tourism experiences.

Note there are not a large number of detailed, in-depth case studies available in the Australian context on inclusive businesses. This is partly due to reluctance by small businesses to share commercially valuable information as well as their limited capacity to participate in and support a research project on their businesses.[73]

4.2.1 O'Carrollyns cabins

In 'Accessible tourism and sustainability: a discussion and case study', Darcy, Cameron and Pegg (2010) provide a comprehensive case study of a regional accommodation provider, O'Carrollyns, showcasing the inclusive features and characteristics of the business and detailing the financial benefits of inclusivity. Their case study utilised a mixed methods approach including field visits, semi-structured interviews with business owners and an analysis of financial records (from 2001-02 to 2006-07).

O'Carrollyns is situated at One Mile Beach, Port Stephens, 160 km north-east of Sydney. Its premises are universally designed to provide inclusive accommodation for all travellers.

Outlined below is a summary of the detailed case study Darcy et al. have provided.

4.2.1.1 Inclusive features

O'Carrollyns' owner invested in and developed inclusive practices that go beyond the basic access requirements.

The business has nine cabins[74], all of which include accessible car parking, accessible paths of travel to level entries, open-plan living areas including kitchens with sink and bench access, reachable facilities, lever taps, internal sliding doors, open-plan accessible bathrooms with lever taps, roll-in showers, hand-held shower hoses and grab rails for the showers and toilets. Shower chairs, commode chairs, hoists, hospital beds, monkey bars and bed sticks are also available. An accessible path of travel is provided around the facility with graded concrete pathways leading to the lake, bridge, lookout and fishing spot.[75]

4.2.1.2 Strategic partnerships and collaboration

The business also supports other businesses within the region that offer good access. O'Carrollyns has a working relationship with a diverse range of local entities, including Tamboi Queen Cruises, Nelson Bay Taxis, Port Stephens Coaches and the management of the marina. Local community relationships have been also developed with the Koala Foundation (KF), Access Committee, Probus Clubs, the fishermen's co-operative, car clubs and other special interest groups.[76]

In particular, relationships with disability organisations and access committees provide a strategic approach to reaching large numbers of people with disability and the inclusive tourism market more generally.

4.2.1.3 Demand for inclusive services and products

From 2001-02 to 2003-04, overall occupancy increased to 61 per cent. Occupancy requiring access peaked at 19 per cent in 2004-05. A subsequent 50 per cent increase in cabins from 6 to 9 was reflected in decreased occupancy. However, access occupancy reached 18 per cent in the 10 months of 2006-07.

73 Darcy, Cameron and Pegg, 2010.

74 Ibid.
75 Ibid.
76 Ibid.

As Table 11 reveals, a substantial and significant growth in guests seeking access, from 4 per cent to 18 per cent, was recorded from 2001-02 to 2006-07.

This growth indicates that businesses that provide inclusive services are rewarded with higher rates of visitors that utilise those services.

Table 11 O'Carrollyns occupancy (%)

Year	Occupancy with no access needs	Occupancy requiring access features	Total occupancy
2001/02	40	4	44
2002/03	43	13	56
2003/04	48	13	61
2004/05	34	19	56
2005/06	35	17	52
2006/07*	32	18	50

**10 months*

Source: Darcy et al. (2010)

Table 12 shows the different market segments accessing O'Carrollyns. There are three market segments which require some access support or are likely to have chosen to stay at O'Carrollyns due to their inclusive services. They include:

- Respite groups
- Retirement villages and nursing home residents
- People who require barrier-free holidays.

While over the three years shown below there are fluctuations in the proportion of respite groups and people requiring barrier-free holidays, combining these three groups shows that likely 35 per cent of all customers in 2006-07 stayed at O'Carrollyns due to the inclusive nature of their service.

Table 12 Source of O'Carrollyns markets (%)

Market segment	2004-05	2005-06	2006-07
Families	13	16	20
Couples	19	15	14
Groups of friends and extended family groups	23	21	9
Conference, business and recreational groups	7	2	11

Overseas visitors and backpackers	7	6	11
Respite groups	6	10	22
Retirement villages and nursing homes	7	7	3
People requiring barrier-free holidays	18	23	10
Total	100	100	100

Source: Darcy et al. (2010)

According to Darcy et al., overall, the inclusive tourism market provided about 20 per cent of the business's revenue.

In addition, the resort's owner demonstrated the demand for inclusive features and the size of the market generated by the provision of inclusive features, i.e. the multiplier effect.

The owner-operator noted the following:

> *I didn't realise the market was that big . . . It's the number of people in wheelchairs or who need access but it's the hangers on, the people that come with them. To have the place booked because one person is in a chair I think is remarkable. But that person has brought another 40 guests with them.*[77]

This supports the previous research that suggested the market dynamics of inclusive tourism are not fully understood by the industry. Research based on US, UK, Canadian and Australian studies suggests that people with disability travel with an average of 3–5 people in their groups, as family or friends, for day trips or overnight trips.[78]

4.2.2 Alpine Accessible Tourism Project (AATP)

Alpine areas in Australia are found in New South Wales, Victoria and Tasmania, each area having its own state and local government jurisdictions as well as separate protected-area management agencies.

The Alpine Accessible Tourism Project was funded under Ausindustry's Australian Tourism Development Program and was co-ordinated by Disabled WinterSport Australia (DWA). The project was unique in that it sought to provide a systematic approach to inclusive tourism across all alpine areas in Australia. This project used available information from previous inclusive tourism research and practice and its goal was the development of community capacity, training and resources to offer accessible summer alpine tourism.

4.2.2.1 Development of inclusive experiences

Rather than setting up separate "disabled" activities (e.g. DWA), AATP provided training and information to mainstream activity operators to enable them to find ways to adapt their existing products to provide for different access needs.

One example was the use of instructors from Riding for the Disabled who trained other operators so they could investigate how they could adapt their existing horse-based

77 Ibid.
78 Ibid.

activities for a broader market. Other training was provided in challenge ropes course operations, abseiling (rappelling), rock climbing and canoeing. Information was also provided for operators who provide fishing and bushwalking activities. At no time was the aim to make everything ‘accessible’, rather the challenge was for operators to be skilled enough that they could find ways to make their products as accessible as possible within the confines of their resources, location and the market interest.[79]

4.2.2.2 Improving inclusive tourism information provision

The outputs from the project include an accessible tourism resource kit, disability awareness training, accessible accommodation audit template and wayfinding map. For the stakeholders involved, the project provided a destination management focus through specifically targeting accessible tourism and collaboratively working together through a tightly defined precinct approach to accessible tourism.[80]

From this project, a number of tourism businesses and facilities developed access and inclusion statements that provided detailed information on their inclusive tourism offerings. A visitor centre and a couple of businesses that developed inclusion statements detailing accessibility of the premises are highlighted below.

- Kosciuszko National Park Visitor Centre (NSW) – Through the AAPT, the visitor centre and attached café and cinema developed a detailed inclusion statement which describes its wheelchair access provision, including interactive computers which are at wheelchair height and an audio loop. In order to help people with disability plan, it also describes where there are no access provisions.
- Buttercup Cottage (Vic) – This is a small business with one self-contained unit. Through the AAPT, the business developed an access statement with pictures and measurements of what is accessible and what is not.
- Howman’s Gap (Vic) – This is a YMCA facility with 160-person capacity. Through the AAPT, the business was able to describe what elements of the premises were accessible and its capacity to provide inclusive services to people with access needs.[81]

Overall, through the AAPT project, over ten businesses and a number of tourism precincts developed inclusion statements that detailed levels of accessibility and inclusion of services and products.

As a result of the AAPT project, consumers with disability who are interested in going to alpine areas have access to consolidated inclusive tourism information meeting all their information needs.

4.2.3 Gippsland inclusive tourism

Gippsland region is a pioneer in Australian inclusive tourism and has created the first accessible tourism plan in regional Victoria. The Gippsland Accessible Tourism Plan’s partners are Destination Gippsland, Tourism Victoria, the six local governments in Gippsland (Baw Baw Shire Council, Bass Coast Shire Council, East Gippsland Shire Council, Latrobe City Council, South Gippsland Shire Council, and Wellington Shire Council), and ‘relevant partners.’

79 Dimitrios Buhalis, Simon Darcy and Ivor Ambrose (Eds.), *Best Practice in Accessible Tourism Inclusion, Disability, Ageing Population and Tourism (*Channel View Publications, 2012).
80 Ibid.
81 Tourism Tasmania, *Accessible Tourism Case Studies*. Accessed at
http://www.tourismtasmania.com.au/industry/accessible_tourism/case_studies

The Plan outlines challenges and opportunities the Gippsland tourism industry faces in becoming more inclusive and recommends actions in the areas of tourism product, marketing, training, advocacy, policy and management.

4.2.3.1 Development of marketing and information on inclusive services

Through this initiative, information on inclusive experiences is now easily available for people with disability, their families and carers; older people; and parents with young families.

Examples include:

- Accessible Gippsland Brochure – This brochure details inclusive services; accommodation; attractions and experiences; dining; walks, tracks and trails; and beaches. It is available as an accessible e-brochure. The brochure is organised by location and category and each facility, service, activity and destination includes descriptions, accessibility features and contact information (if available). The brochure also includes general safety and contact information.[82]
- Mobility Maps – East Gippsland, Bass Coast, Baw Baw, Wellington, and South Gippsland all have mobility maps available online for certain central shopping areas within their local government areas.
- Accessible Accommodation Resources – Bass Coast Shire offers accessible accommodation resources on its tourism website.
- Hospitality Kit – Bass Coast and East Gippsland have hospitality kits available for hire for the Deaf and hard of hearing. These hospitality kits are easily found on the local governments' respective websites.
- Bass Coast Access Resources – Bass Coast Shire Council has a dedicated webpage for accessibility which lists information and resources such as easy access beaches, easy access eateries, designated accessible toilets, supermarket home delivery services and pictorial bus timetables for local bus services.[83]

4.3 International case studies

Outlined below are four case studies on businesses operating in Europe with high-quality inclusive services and products. The case studies highlight:

- Motivations for improving inclusiveness of business
- High demand for inclusive tourism services
- Key inclusive features of their business.

These case studies are summaries of more detailed and in-depth studies done by the University of Surrey (2015) and VisitEngland. Overall, these case studies will show that both large and small businesses can benefit from improving inclusiveness of their services and products.

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82 Accessible Gippsland, "Inspiring Visitor Experience". Accessed at http://e-brochures.com.au/inspiredbygippsland/accessible-e-brochure/PDF/Destination-Gippsland-Accessible-e-Brochure.pdf
83 Bass Coast Shire Council, "Access resources". Accessed at http://www.basscoast.vic.gov.au/Community/Accessibility/Disability_Access_Information

4.3.1 Scandic Hotels[84]

Scandic Hotels is a hotel chain operating in Sweden, Denmark, Finland, Norway, Germany, the Netherlands, Belgium and Poland. The first hotel was established in 1963 and the chain has grown to 155 hotels in operation, with 29,696 rooms.

Their products and services are targeted towards companies, families, couples and events.

4.3.1.1 Inclusive features

Scandic has made a concerted effort to invest and upgrade the inclusiveness of their services and product offerings.

In 2015, approximately 500 hotel rooms had been adapted to meet the requirements of people with disability.

All 155 hotels practise Scandic's own accessibility concept, which is their *Accessibility Standard*. The standard has grown over the years and today it contains 110 checkpoints to follow. Eighty-one of these points are mandatory for all hotels and for new hotels all points must be considered. This standard works as a checklist and template for the hotels.

Scandic inclusive products and services include:

- Rooms for people with disability (equally well-designed as any other room)
- Online accessibility information – every Scandic Hotel has its own page with unique information about the hotel and its facilities. Each provides a general information page about accessibility, such as recommended hotels in different cities, tips and advice, useful links and more
- Public areas at the hotel that are adapted for people with special needs, such as lowered reception desks for wheelchair users, hearing loops in conference facilities, vibrating alarm clocks and more
- Food and beverage – no allergenic garnish on the buffet breakfast, gluten- and lactose-free bread at breakfast
- Guide dogs are always welcome at the hotels.

4.3.1.2 Demand for inclusive experience

The Scandic Hotel chain identified the inclusive tourism market as an untapped market, and enhanced the accessibility of their rooms as a way to gain competitive advantage over other accommodation providers.

To effectively market and promote their inclusive services, the Scandic Hotel group uses tailored marketing materials and lectures at accessibility conferences to advertise their business.

Satisfaction feedback has shown that a significant proportion of their guests were unable to stay at Scandic hotels until they started to make adjustments and adaptions to their products and services.

In 2005, Scandic assessed that they sold 15,000 more room nights in Sweden than in previous years as a result of improved accessibility. Scandic has indicative data

84 University of Surrey, 2015.

suggesting that their business has increased every year in all countries since these improvements.

Importantly, they also found that the rate of return compared to investment is relatively fast, as many of their investments to enhance inclusiveness of their services were repaid in less than one year.

4.3.2 Chateau des ducs de Bretagne[85]

The Chateau des ducs de Bretagne is a medieval fortress located in the City of Nantes, France. The fortress includes a museum and accommodation and was re-opened in 2007 after extensive renovations.

A key component of the restoration process was to ensure that the attraction and accommodation were fully inclusive.

4.3.2.1 Inclusive features

The Chateau aims to cater for every type of disability:

- Twenty-eight out of 32 rooms are accessible for visitors with mobility disability. They also provide free wheelchair loans
- Touch and sound devices are provided around the museum, with special audio guides and exhibition visit booklets for visually impaired visitors. Guide dogs are also allowed on the premises
- The multimedia terminals are subtitled and interactive for hearing impaired people
- Tailored assistance is provided at the visit, with large print colour cards and break out fun areas in the museum exhibitions for people with intellectual disability
- All staff are provided with disability awareness training.

4.3.2.2 Demand for inclusive experience

There was significant commitment from the City of Nantes, as proprietors of the Chateau, to inclusivity. Nantes has a long-standing commitment, both political and practical, to improving facilities and services for people with disability across various aspects of city life. Together with Grenoble, Nantes is one of the more accessible cities in France.

The City of Nantes staff provided expertise and knowledge on access issues and were heavily involved in planning the renovations. In addition, many ongoing improvements are based on trial and error through the engagement of users. People with disability tested the infrastructures until suitable solutions were found.

As of early 2013, six years after the museum reopened to the public, more than 7,500,000 people have visited the castle. The museum team estimated that 6 per cent of those visiting the Castle had some kind of disability that impacts their daily lives.

85 Ibid.

4.3.3 High Wray bed and breakfast[86]

High Wray is a bed and breakfast accommodation provider with two rooms, located in a regional setting in the United Kingdom, between London and the south coast cities of Southampton and Portsmouth.

4.3.3.1 Inclusive features

High Wray's owners have made strategic decisions to target the inclusive tourism market and provide inclusive services and products that could be used by older people and people with disability, their families and carers.

The majority of their features are designed to accommodate people with mobility needs. For instance, High Wray provides:

- Parking places that are close to accommodation
- Covered entrances
- Grab rails
- Wheel-in showers
- Low-level kitchen facilities, including sink, hob, kitchen and work surfaces
- Pull out cupboards
- Sliding doors (to give more space)
- Large clear areas in the rooms for easy wheelchair movement
- Low-hanging rails in bedroom cupboards.

In addition, all guests are asked if they have any specific requirements and the owners take a flexible approach to accommodating guests. They alter rooms based on the feedback or needs of their guests and have portable equipment, such as a deep seat for showers and toilet seat raisers.

4.3.3.2 Demand for inclusive experience

The owners of High Wray upgraded their property in the 1990s to cater to a wider market, including guests with physical access needs. One of the owners also has a background in the disability sector and was able to apply this knowledge to improve inclusiveness of the business.

To promote their business, they market specific inclusive features through disability-specific websites and magazines, e.g. 'Disability world and Mobilise' (a disabled driver's magazine).

Analysis of their local competition and feedback from their guests show they are one of the few inclusive accommodation providers in the area. Their inclusive, self-contained flat has such a strong reputation and is in such high demand that at times it needs to be booked more than 18 months in advance.

86 VisitEngland, "High Wray: Stand out from the crowd". Accessed at https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/highwray_casestudy.pdf.

4.3.4 Hytte lodge[87]

The Hytte is a self-catering holiday cottage in a regional setting located in the northeast of the United Kingdom (near Newcastle). In total, they have four bedrooms with multiple beds in each room.

4.3.4.1 Inclusive features

The Hytte was designed to provide fully accessible, five-star accommodation. The Hytte target markets include older people and groups and families with members who have disability or are wheelchair users. The features include:

- Large-print brochures and an accessible website, text phone, fax and e-mail available
- Local electric wheelchair/mobility scooter hire
- Parking next to the front door for up to four cars and well-lit, level paving with wide ramped or stepped access with handrails on both sides
- Level ground floor throughout with open-plan living, dining, and kitchen area which provides space for wheel chairs to manoeuvre
- Wood flooring throughout, with removable rugs
- Lowered windows where possible
- Hot-tub is accessible via 2 steps or mobile hoist (supplied)
- Accessibility of most of the gardens and grounds and wheelchair-accessible garden furniture.

The Hytte provides comprehensive information on their levels of accessibility. Their Access Statement provides complete information with descriptions of all the rooms, including door widths, height of beds, turning space, outdoor access, etc.

4.3.4.2 Demand for inclusive experience

The owners were aware of their obligations under the Disability Discrimination Act (now Equality Act) to be more accessible, but they also looked at various local tourism brochures and were surprised that no inclusive accommodation was listed. They also found there was no information at the local Tourist Information Centre.

The owners made the strategic decision to target this market. They attended a *Welcome All* course run by VisitEngland and then joined the National Accessible Scheme. They advertise and market their business on specialist websites such as Good Access Guide. Additionally, their own website is now fully accessible, which is important as they found that people with disability mainly make bookings using the internet.

They reported that annual occupancy levels reached 92.5 per cent and that approximately 65-75 per cent of the groups who have stayed with them have had some access need. The owners believe that being accessible is a key reason for them achieving such a high occupancy level in such a short timeframe since opening.

87 VisitEngland, "The Hytte: Achieving exception quality and accessibility". Accessed at https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/England-documents/hytte_casestudy.pdf

4.4 Key findings

4.4.1 Importance of capacity building

Local and national tourism authorities have made significant efforts to increase the capacity of businesses to develop and market their inclusive tourism products and services. In Australia, both Queensland and Victorian Governments have developed business toolkits that aim to support businesses to improve the inclusiveness of their products and services.

In addition, some local governments or stakeholders have collaborated to develop local business guides.

- Queensland – *Inclusive Tourism: Making your business more accessible and inclusive*
- Victoria – *Accessible Tourism: it's your business*
- (Former) Marrickville Council and Human Rights and Equal Opportunity Commission – *Missed Business: How to attract more customers by providing better access to your business*.

In the United Kingdom, VisitEngland provides various resources to businesses to help them improve inclusiveness of their products and services. They provide:

- Free inclusive tourism training slides appropriate for induction of staff
- An online program to increase disability awareness of general business
- An online training program for accommodation providers
- Classroom-style training.

There is recognition from tourism authorities, the disability sector and people with disability that businesses may not have the technical knowledge or understanding needed to create an inclusive environment and that training and support is needed to help them improve their products and services.

In the Chateau and Hytte case studies, the managers and owners of the business used information provided by local authorities, i.e. Chateau and national authorities, to understand how to make their services and products inclusive. In the Chateau and Scandic case studies, staff were provided with disability awareness training and customer service training to increase their understanding and knowledge of needs of people with disability.

Additionally, the Alpine Tourism Project shows how dedicated investment and support for businesses can improve the information they provide about the accessibility of their services. Many of these businesses would have lacked the skills and expertise to design access statements, but with the help of experts they were able to put together detailed summaries of what aspects of their services and products were inclusive and what were not.

4.4.2 Importance of marketing and information provision

All case studies stressed the importance of providing information on levels of accessibility and inclusion of services and products.

In the Australian example, O'Carrollyns accommodation developed strategic partnerships with the local disability sector, local government and other local tourism service providers to cross-market their inclusive tourism products and services and generate bookings from word of mouth.

Through the Alpine Tourism Project, businesses were able to increase the level of information on their inclusive services. This was seen as an important step to promote businesses to people with disability, their families and carers.

The international case studies also demonstrate the importance of marketing and information provision. Scandic Hotel group provides detailed information on access features and both Hytte and High Wray have access statements and market their services and products through disability-specific magazines and information sources.

Table 13 Example of national and local access standards and awards

VisitEngland have recognised the importance of information standards and certification. They have put together the National Accessible Scheme, which is the only scheme that rates the accessibility of visitor accommodation throughout England. Holding an independently awarded NAS certification shows that a business is committed to access for all and gives potential guests a label they can trust while providing clear expectations for customers when booking. Both Hytte and High Wray use this certification to promote their businesses to people with disability.

In Australia, the NSW Business Chamber has developed access awards for businesses that demonstrate high levels of inclusiveness. There is an inclusive business award in the NSW South Coast region; winners and finalists can then promote themselves as inclusive businesses.

4.4.3 Inclusiveness financial benefits

Four of the six case studies presented show positive financial outcomes from offering inclusive products and services. Although social responsibility is a motivation, businesses examined in this report do not deviate from their ‘business’ focus, i.e. they are still motivated to increase profit and service utilisation.

According to Darcy et al., 20 per cent of O’Carrollyns’s business revenue was from people with access needs and from Table 11 and Table 12 we can see that a number of market segments use the business due to its inclusive features.

Scandic Hotels, High Wray and Hytte lodge all made business decisions to harness the inclusive tourism market. Despite the common misconception that investment in inclusive tourism is costly, these businesses (ranging from small to a large chain) have achieved fast rates of return; Scandic Hotels reported that in some cases their investments were returned within a year. The types of accommodations made vary from having wheel-in showers to simply providing easily accessed information about their facilities on the internet. These businesses market themselves through various specialist websites, brochures and magazines and have built strong reputations. By doing so, they have gained a competitive advantage and have seen occupancy rates increase. Hytte saw its annual occupancy levels reach 92.5 per cent shortly after opening, Scandic Hotels sold 15,000 more room nights in Sweden than previous years upon making the improvements, and High Wray is sometimes booked out 18 months in advance. Furthermore, Scandic Hotels reports that their business has increased every year in all countries since these improvements.

The inclusivity focus of these businesses not only creates an enjoyable experience for all guests, but importantly taps into a market with high demand.

5 Policy and program initiatives

5.1 Overview

Governments across Australia have committed to improving social and economic participation for people with disability. This section profiles selected government initiatives aimed at improving access to tourism for people with disability and making Australia's tourism sector more inclusive. Whilst these commitments stem from disability policy, the outcomes they produce can help capture other tourism markets with similar needs, such as older people and young families.

5.2 Commonwealth

The National Disability Strategy 2010-2020 (the Strategy) sets a ten-year national policy framework for improving the lives of Australians with disability, their families and carers. It is a commitment by all levels of government, industry and the community to a unified, national approach to disability policy and program development.

The Strategy has six priority areas, one of which is inclusive communities that improve access to built, natural and virtual environments. These environments include public transport; parks, buildings and housing; digital information and communications technologies; and civic life, including social, sporting, recreational and cultural life. The Strategy notes that changing attitudes towards disability - accompanied by access improvements - has the potential to increase the contribution of people with disability to the economy as consumers.[88]

Table 14 Description of Make Local Communities Accessible initiative

Make Local Communities Accessible for all Australians
The 2010-11 *Make Local Communities Accessible for all Australians* program provided grant funding for local councils to make buildings and public spaces more accessible. It also provided grants to Australia's four major cinema chains to build technical capacity, fast tracking audio description and captioning. Together, these have made every day and tourism experiences more accessible for people with disability.[89]

5.2.1 National Disability Insurance Scheme

The NDIS will increase participation of people with disability in Australia's social and economic life and will change the lives of Australians with disability. The NDIS provides people with disability greater choice and control over how the government funding they receive is spent on services. This increased financial independence will have a significant and positive impact on all parts of the Australian economy.

For example, economic modelling by National Disability Services shows that, once fully implemented, the NDIS will enable 25,000 to 40,000 more people with disability to work, support 34,000 new jobs for carers, and create a further 85,000 new jobs in the

88 The Council of Australian Government, 2010.
89 Department of Social Services, *Make Local Communities Accessible for all Australians* 2011. Accessed at https://www.dss.gov.au/our-responsibilities/disability-and-carers/program-services/for-service-providers/accessible-communities/make-local-communities-accessible-for-all-australians-accessible-communities

sector.[90] In total, the NDIS will increase Australia's GDP by approximately 1.2 per cent, or between $18 billion and $23 billion per annum.

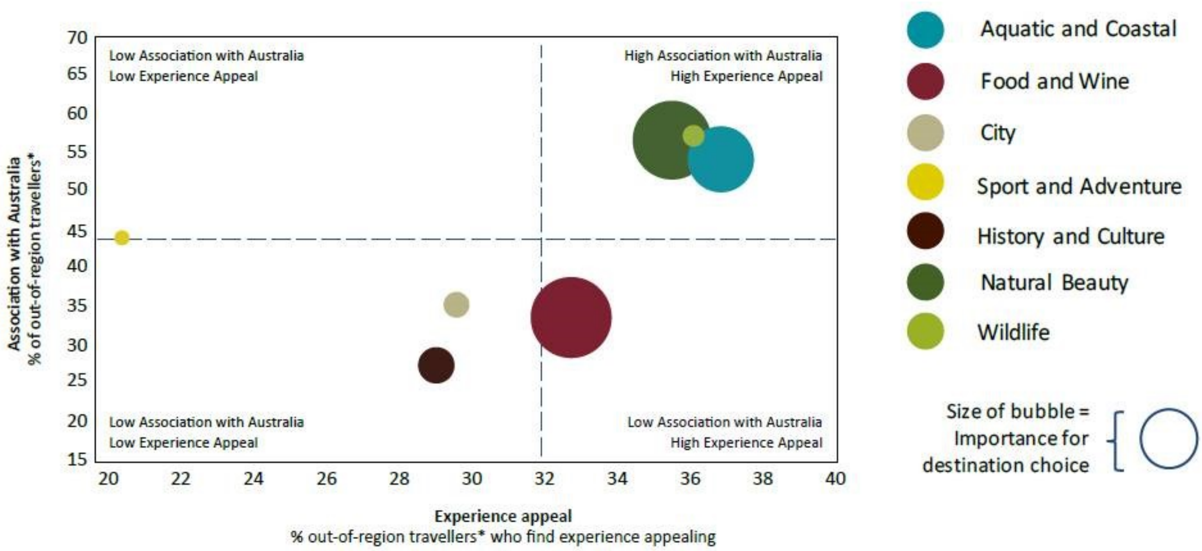
Under the NDIS, people with disability are expected to explore new opportunities not available under previous funding arrangements, including travel. During the NDIS trial period, people with disability have consistently identified social participation as one of the top three support needs.

A significant proportion of NDIS personal expenditure is being spent on community participation services. These services assist people with disability to engage in everyday activities, such as going to the shops, as well as recreation and leisure, such as travel and events. Data from the NDIS *COAG Disability Reform Council Quarterly Report June 2015* identified that people with disability spent almost 20 per cent of their funding on community participation, highlighting that involvement in the community is very important for people with disability.[91] Further data from the NDIS trial sites also show consistently high spending on recreation. Because of this, there is a degree of optimism in the tourism sector about the economic potential of providing more inclusive tourism opportunities for people with disability.

5.2.2 Tourism Australia

Tourism Australia (TA) is Australia's tourism agency responsible for delivering *Tourism 2020*, Australia's tourism plan. *Tourism 2020*'s goal is to grow Australia's overnight tourism spend from about $115 billion to $140 billion by 2020. TA identifies substantial opportunities for this in aquatic and coastal, nature, and food and wine experiences.[92] These tend to be strongly associated with images of Australia and are highly appealing experiences (Figure 4). However, destination is an important factor when choosing these experiences, which tend to be concentrated in regional areas such as the Hunter and South Coast regions of New South Wales.

Figure 4 Australian Tourism Opportunity Matrix



Source: Tourism Australia, 2012

90 National Disability Services, *Economic benefits of the NDIS*. Accessed at https://www.nds.org.au/policy/national-disability-services-report-projects-economic-benefits-of-the-ndis
91 National Disability Insurance Agency, *Report on the sustainability of the scheme*, 2015. Accessed at https://www.ndis.gov.au/html/sites/default/files/Report-on-the-sustainability-of-the-scheme.pdf
92Tourism Australia, *Tourism 2020*, 2011. Accessed at http://www.tourism.australia.com/documents/Tourism_2020_overview.pdf

TA defines inclusive tourism as 'the ongoing endeavour to ensure tourist destinations, products and services are accessible to all people, regardless of their physical limitations, disabilities or ages'.[93] TA acknowledges that creating inclusive tourist destinations, products and services is important for tourism operators because it enables more people to enjoy travel and operators can open up new sources of income by securing more visitors and extending their seasons. TA's focus on accessible tourism covers both public and privately owned tourist locations, such as national parks, resorts and cruise ships. TA identifies three core inclusive tourism markets:

- Those with young children in prams
- Seniors with mobility requirements
- People with permanent or temporary disability.[94]

They add that including these markets requires consideration of:

- Physical and mobility access needs
- Hearing access needs
- Vision access needs
- Cognitive access needs.[95]

5.2.3 Tourism Research Australia

Tourism Research Australia (TRA) is Australia's tourism industry intelligence agency and provides research, analysis and forecasts across the tourism market. TRA's work is based on the National Visitor Survey and International Visitor Survey as well as other research activities.

In conjunction with the Tourism Industry Councils, TA and state and territory tourism bodies, TRA held ten Research Roundtables across Australia in 2016. The Research Roundtables were the first stage in developing the National Tourism Research Framework (NTRF) and identified the NDIS as a significant opportunity for the tourism sector.[96]

The roundtables noted a particular need for inclusive tourism research that investigates the impact of compliance with accessibility regulations on operators, access needs of people with disability, tourism demand and usage rates, the size of the inclusive tourism market, and strategies used by tourism operators to market to the segments.

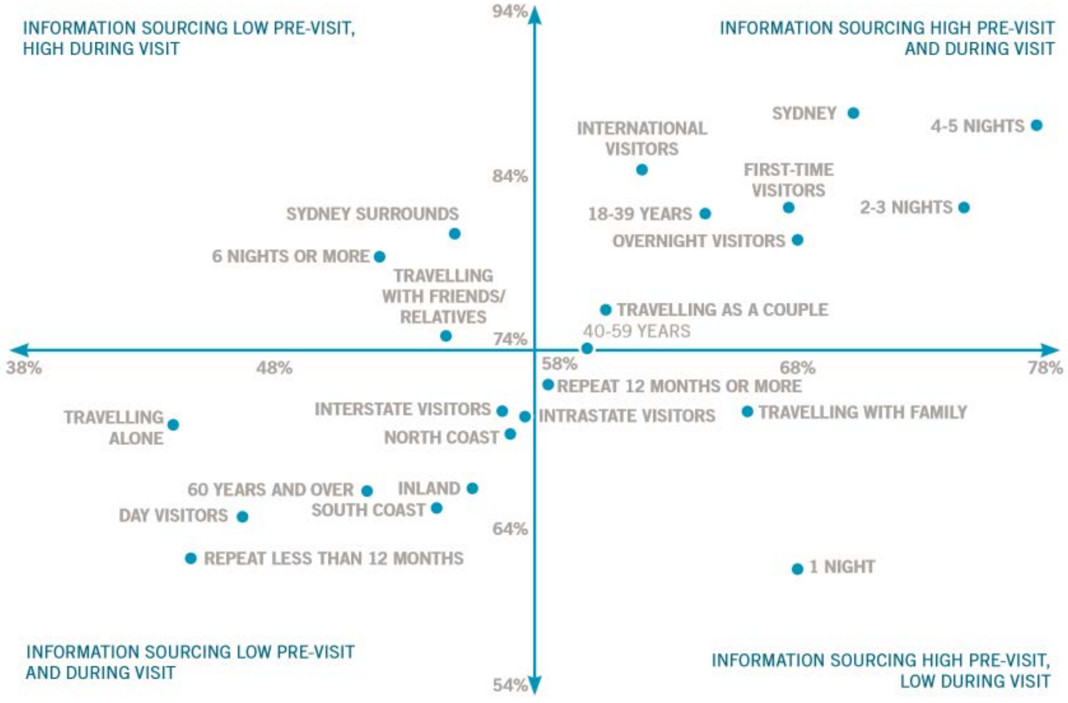
Accurate and reliable information is an important barrier to inclusive tourism and TRA has produced other research that reveals some important trends on the type of information tourists access before and during a visit. For example, in New South Wales:

- Different types of tourists seek out different information from different sources (Figure 5). The internet, specifically travel websites, is the most common source of information, followed by direct contact with operators and word of mouth

[93] Tourism Australia, Accessible Tourism, accessed at: http://www.tourism.australia.com/en/news-and-industry-tools/building-your-tourism-business/accessible-tourism.html
[94] Ibid
95 Tourism Australia, *Industry Advice,* 2017. Accessed at http://www.tourism.australia.com/industry-advice/Accessible-Tourism.aspx.
96 Tourism Research Australia, *Tourism Research Roundtables 2016*, 2016. Accessed at https://www.tra.gov.au/about-us/about-us/national-approach-to-tourism-research/tourism-research-roundtables-2016

- Nearly two-thirds obtain information before they travel, mostly looking for information on accommodation and experiences. During their trips, they look for information on experiences as well as local maps, restaurants, and events
- Over three quarters of tourists use smart phones and similar devices to obtain travel information during their stays. However, Visitor Information Centres (VICs) are a common resource for tourists over the age of 60 years and tourists travelling with friends and family, and tourists who receive information from VICs are more likely to visit the destinations to which they are referred. These types of tourists fall within the inclusive tourism market; for example, people with disability often travel with friends and family. [97]

Figure 5 Visitor information sources pre and during visit, by visitor profile



Source: Tourism Research Australia, 2016

5.2.4 Australian Tourism Data Warehouse

The Australian Tourism Data Warehouse (ATDW) is Australia's national platform for digital tourism information and jointly managed by state and territory tourism organisations. ATDW collects, stores and distributes data on tourism destinations, products and services across Australia and has over 40,000 listings. The data is compiled into a nationally agreed format and is accessible by tourism operators, wholesalers, retailers and distributors for use on websites and booking systems.

A search of the ATDW for 'disabled' access attributes indicates there are over 6,500 listings (about 16 per cent of all) with these features. These listings include accommodation, food and drink, journeys, attractions, general services, tours, destination information, hire goods, transport, events and information services. They

97 Tourism Research Australia, *Visitor Information Servicing in New South Wales*, 2016. Accessed at https://www.tra.gov.au/Research/View-all-publications/All-Publications/Destination-Visitor-Survey-results/Strategic-regional-research-reports/visitor-information-servicing-in-new-south-wales

tend to be concentrated along Australia's eastern seaboard capital cities (Sydney, Melbourne, Brisbane, Adelaide, Hobart and Darwin), and there are some in regional areas (Figure 6).[98]

Figure 6 Australian Tourism Data Warehouse, Disabled Access Listings

Source: ATDW, 2017

5.3 New South Wales

The NSW Disability Inclusion Plan sets out the NSW Government's disability policy objectives:

1. Development of positive community attitudes and behaviours towards people with disability
2. Creation of more liveable communities for people with disability
3. Achievement of a higher rate of meaningful employment participation by people with disability through inclusive employment practices
4. More equitable access to mainstream services for people with disability through better systems and processes.[99]

The Plan aims to create liveable communities with increased physical accessibility; opportunities for social engagement; and improved quality of personal, social and business interactions. The Plan defines liveable communities as places where people have the opportunity to live, learn, work and play; to exercise their rights; to feel safe and belong; and to raise a family and grow old.

Inclusive tourism focuses not only on issues of physical access but also on customer service and feeling included in tourism experiences. Importantly, the Plan's objectives

98 Australian Tourism Data Warehouse, "Product Listings". Accessed at http://atdw.com.au/our-listings/.
99 Department of Family and Community Services, *Disability Inclusion Plan, 2015. Accessed at: https://www.facs.nsw.gov.au/__data/assets/file/0007/313495/FACS_NSW_DIP_080316.pdf*

to develop positive community attitudes and behaviours towards people with disability and more equitable access set a broad framework to encourage inclusive tourism.

5.3.1 Companion Card

Companion Card NSW is not-for-profit program that supports permanent Australian residents living in New South Wales with life-long disability who require assistance through a companion. The government-funded program gives eligible participants physical cards which they may present at certain venues or activities and receive a second ticket free of charge for their companion.[100] Applications for the Companion Card consider need of care and do not take into account finances or age.

Tourism businesses can become Companion Card affiliates by registering (via NSW Companion card website) to accept Companion Cards. Once a business registers, they agree to issue a companion ticket at no charge to the card holder. It can be considered a 'good look' for organisations to affiliate with the Companion Card and may make them a more attractive service/experience for people with disability, their families and carers. [101]

The Companion Card does not address physical accessibility needs, its purpose is to offset the doubled financial cost of attending venues, events and activities for people with disability who require lifelong carers. For example, a person who is able to navigate most activities alone but finds some venues inaccessible would not qualify for the program.[102]

5.3.2 Seniors Card

Permanent residents aged 60 years and over who work on average 20 hours per week or fewer are eligible for the Seniors Card. The Seniors Card entitles holders to discounts at thousands of businesses, including accommodations, book shops, insurance companies, etc.[103] For example, holders of a Senior Card may receive a Gold Senior/Pensioner Opal card which, in 2017, caps at $2.50 per day.

5.4 Victoria

The Victorian Government suggests there is a compelling business case for making tourism more inclusive and has developed the *Accessible tourism: it's your business* resource kit to raise awareness and support the Victorian tourism industry to become more inclusive. The kit draws on international good practice such as the *At Your Service* resource developed by VisitEngland in the lead up to the 2012 London Paralympic Games.

The kit includes six topics:

1. The common barriers preventing a tourism business from being accessible
2. Marketing an accessible business
3. Tips for assessing buildings and facilities
4. Developing an access statement

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[100] Service NSW, *Apply for a Companion Card*. Accessed at: https://www.service.nsw.gov.au/transaction/apply-companion-card
[101] NSW Companion card, Affiliates, Accessed at: http://www.nswcompanioncard.org.au/affiliates
[102] NSW Companion Card, *Frequently Asked Questions*. Accessed at: http://www.nswcompanioncard.org.au/about-companion-card/faqs
[103] Service NSW, *Apply for a NSW Seniors Card*. Accessed at: https://www.service.nsw.gov.au/transaction/apply-nsw-seniors-card

5. Integrating accessibility into a business plan
6. Integrating accessible features into digital listings.

The kit provides links to other resources that build tourism operator capacity and provide information to people looking for more inclusive tourism opportunities.

These resources include:

- Accessible Victoria, which includes listings of accessible attractions across the state
- A free Accessible Melbourne e-book by Lonely Planet
- Mobility maps for Melbourne including accessible venues and amenities
- Access, engagement and professional development resources for people with disability participating in the arts and cultural life of Victoria
- Information on all terrain wheelchairs available in National Parks and beaches
- Blogs by people with disability that include articles on travelling and associated activities such as going to the theatre and dining.[104]

The kit also identifies different roles for tourism organisations in developing and promoting more inclusive tourism.

Table 15 Description of difference role of organisations in supporting inclusive tourism

Organisation	Role
Tourism businesses, including accommodation providers, attractions, tour operators, cafés and restaurants	• Increase knowledge about the accessible tourism market • Identify barriers, gaps and areas of improvement • Develop strategies to incorporate access into core businesses • Improve and better target the marketing and promotion of businesses
Regional tourism boards and associations	• Provide leadership to the tourism industry in their region • Plan and deliver a coordinated regional approach to accessible tourism • Support local tourism businesses to promote and market their accessibility
Visitor information centres	• Provide positive first impressions to visitors • Promote accessible local businesses and attractions • Encourage local businesses and attractions to become more accessible

[104] Victorian Economic Development, Jobs, Transport and Resource, Accessible Tourism. Accessed at: http://www.tourism.vic.gov.au/business-tools-support/accessible-tourism.html#accessiblitytoolkit

Local government	• Bring together, support and promote accessible businesses, festivals, events and open spaces to create a holistic approach to accessible tourism • Incorporate accessible tourism into Council's broader tourism, business and economic development strategies and plans • Link tourism businesses to relevant local grant, award and accreditation schemes
State government	• Support accessible tourism related activities within their areas of responsibility • Promote the importance of accessible tourism to staff and funded organisations

Source: Victorian Government, Accessible Tourism – it's your business

5.4.1 Accessible Tourism Plan 2010-2013

In 2010, the Victorian Government developed the *Accessible Tourism Plan*, which recognises the corporate social responsibility of tourism operators, encourages the industry to see the economic benefit of offering inclusive products and services, helps operators meet legal accessibility obligations when developing new facilities, and enables people with access needs to function independently with equity and dignity through universally designed products, services and destinations.

The plan articulates three roles for the Victorian Government:

1. Increasing industry awareness and understanding of tourist accessibility needs
2. Encouraging new and existing products to capitalise on the business benefits of providing accessibility tourism produces
3. Increasing dissemination of information on accessible products and attractions.[105]

The plan notes the inclusive tourism market, although not easily measured, is growing and the tourism industry will benefit from a greater focus on the issue. It also indicates that tourists with physical disability have been the typical focus of inclusive tourism initiatives but the market is increasingly broad and includes a growing population of families with prams and older visitors with vision and hearing impairments.

The plan notes that some destinations have accessibility information, but this is not consistent. As a result, it focuses on improving information about inclusive tourism products, services and destinations and identified development of databases as a key action to disseminate information, which could help Victoria compete in the inclusive tourism market. The Access for All Abilities Program supported the Accessible Tourism Plan by providing dedicated officers in local councils to promote accessibility to arts and culture, sporting and recreation organisations which are key tourism operators at the local level.[106]

105 Tourism Victoria, *Accessible Tourism Plan 2010-2013*, 2010. Accessed at http://www.tourism.vic.gov.au/images/stories/Documents/StrategiesandPlans/final_accessible_tourism_plan_2010-2013.doc.
106 Ibid.

5.4.2 Victorian Companion Card

In 1999, the Victorian Network on Recreation and Disability developed the Companion Card through grant funding from the City of Melbourne. The card is for people with disability who always require a companion to provide care in order to participate in society. A website accompanies the card and provides users with a list of over 1,000 official affiliates across Australia (about 0.4 per cent of Australia's 273,500 tourism businesses). [107]

The card was designed to respond to concern from people with disability who experienced unfair pricing policies by entertainment, leisure and recreation venues and events. Importantly, it was not developed to offset the need to have accessibility features such as ramps, lifts, toilets, appropriate signage or captioning, etc., and responsibility for providing these remains with venue and event operators. Instead, the card is promoted to operators as a way to enhance their public image and access an additional, untapped market.

Operators are advised that if someone presents a card it is because they are a person who, due to their disability, requires care from a companion to participate at the venue or event and that legislation requires they not discriminate against people with disability because of their need for care by charging two admissions. If they do, operators are advised they may be involved in discriminatory practice. They are encouraged to recognise the card and provide a second ticket to the cardholder's companion at no charge in order to comply with anti-discrimination legislation.[108]

5.5 Queensland

The *Queensland Disability Plan 2014-2016* sets out the Queensland Government's disability policy framework. It aims to improve access and participation across the entire service system, including in education; employment; health care; arts; cultural, recreational and sporting pursuits; the built environment; public and private spaces; and in the delivery of disability services.

The plan includes four strategies, the first of which is to increase opportunities for people with disability to take part in and enjoy sports, tourism, arts, and cultural and recreational activities. The plan includes actions that commit the Queensland Government to partnering with tourism organisations to develop an industry resource to provide guidance on developing inclusive tourism products and experiences, and to making Gold Cost Commonwealth Games venues fully accessible to meet national requirements. The guide, profiled at Section 3.5.1, has now been released.

107 Companion Card. Accessed at http://www.companioncard.org.au/ccindseecc.htm.
[108] Ibid.

Figure 7 Increase opportunities to take part in and enjoy sports, tourism, arts, cultural and recreational activities

Strategy 1: Increase opportunities to take part in and enjoy sports, tourism, arts, cultural and recreational activities

Actions	Timeline			Responsible area within the department
	Year 1 (Dec 2013-14) Products/ activities	Year 2 (2014-15) Products/ activities	Year 3 (2015-16) Products/ activities	
Partner with tourism organisations to develop an Access All Areas resource to inform the tourism industry of legislative obligations and provide guidance on developing tourism products which offer more inclusive tourism experiences	Ongoing consultation	Access All Areas resource developed.	Ongoing consultation	Tourism
Office of the Commonwealth Games Coordination (OCGC) to work in partnership with the Gold Coast 2018 Commonwealth Games Cooperation (GOLDOC) to deliver accessible games venues and associated events	Ongoing consultation	Ongoing consultation	Ongoing consultation	GOLDOC through OCGC, Tourism

Source: Queensland Government, 2014

Other strategies include providing government and public information in diverse languages and accessible formats, including formats that best meet the needs of Aboriginal and Torres Strait Islander people, and promoting and providing access to communication and assistive technologies that are appropriate and affordable.

5.5.1 Inclusive Tourism – Making your business more accessible and inclusive

Flowing from the *Queensland Disability Plan 2014-2016*, the Queensland Government has developed the *Inclusive Tourism: Making your business more accessible and inclusive* resource in partnership with the Queensland Tourism Industry Council, the Anti-Discrimination Commission, Queensland Disability Service Council and the Local Government Association of Queensland.

The resource assists operators to understand their legal obligations in relation to accessibility, to increase their knowledge about the inclusive tourism market, and to develop strategies to improve the accessibility of their businesses to appeal to a wider range of visitors of all abilities and ages. Local governments can use the guide to support and promote inclusive tourism across businesses, festivals, events and public spaces and to incorporate inclusive and accessible design into their design codes and planning guidelines. It also includes information to assist people with disability planning a holiday.[109]

5.6 Tasmania

The Tasmanian Government's *Visitor Economy Strategy 2015-2020* notes that because Tasmania is an island, many sectors of the economy rely on tourism visitor

[109] Department of Tourism, Major Events, Small Business and the Commonwealth Games, "Inclusive tourism: Making your business more accessible and inclusive," 2017.

growth. A growing visitor economy with improved access and better infrastructure can enhance the desirability and opportunity to visit Tasmania. The strategy sets a target to grow visitation by 350,000 to 1.5 million tourists, and this will grow tourism industry employment by 20,000 jobs by 2020.

Tourism Tasmania acknowledges inclusive tourism is about more than physical access and includes everything a tourism business does, such as availability and clarity of information about the business, ease of getting to the business, and using its products and services once there. Promoting ease of access can help tourism operators increase their market shares and maintain an edge over competitors by demonstrating that the tourism business is customer focused.[110]

5.7 Western Australia

Western Australia's *State Government Strategy for Tourism* sets a target to double the contribution of tourism to the State's economy from $6 billion to $12 billion by 2020.

The *You're Welcome AccessWA* website[111] is an initiative of the Western Australia Disability Services Commission (the Commission), developed through partnership between the state and local governments and disability, community and tourism sector peak bodies. It focuses on improving information availability and accuracy through a searchable clearing house of accessibility specifications, features, photos and diagrams for tourism products, services and destinations.

The website allows users to search by region, local government area, town, city or suburb, as well as facility, venue or activity type such as accommodation, arts and culture, community and leisure, entertainment, national parks and reserves, health services, and tourist attractions. Advanced searching allows users to focus their results on particular accessibility attributes, such as toilets, door-opening mechanisms, and door width and height.

There are over 10,000 listings from 3,000 businesses (about 1 per cent of Australia's 273,500 tourism businesses), community groups, facilities, venues and attractions across 17 categories. This includes 216 accommodation and 143 entertainment venues, as well as 464 tourist attractions. For example, the website gives information on 31 beaches that provide beach wheelchairs.

The initiative also includes written guidance and awareness training to build the capacity of businesses, community groups and government agencies to make their products, services and destinations more accessible. These include fact sheets on providing access to facilities such as beaches, cinemas and theatres, hotels, car parking, toilets, motels and accommodation, and recreation centres, as well as the access needs of people with hearing and vision impairments.

5.7.1 Western Australian Companion Card

In 2006, the Western Australia Government adopted the Companion Card program from Victoria. As in Victoria and New South Wales, the Western Australian program aims to promote the rights of people with disability to fair ticketing and provides a simple and consistent method of identifying people who legitimately require care to participate.

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110 Tasmanian Government and Tourism Industry Council Tasmania, *The Tasmanian Visitor Economy Strategy 2015-2020,* 2015. Accessed at http://www.t21.net.au/__data/assets/pdf_file/0004/37723/T21-Strategy-web.pdf.
111You're Welcome AccessWA. Accessed at http://www.accesswa.com.au/

As in Victoria, the card is promoted not as a new responsibility, discount scheme, concession or benefit, but as a way to assist businesses and organisations to comply with disability discrimination legislation requirements. It provides a list and searchable database of over 470 venues and activities across Western Australia that are officially affiliated with the program. These listings are organised by local government area, venue or activity type. Although businesses are encouraged to sign up, other businesses often accept the card even if they are not officially affiliates of the program.

6 Conclusion

This report demonstrates the market opportunity associated with offering inclusive tourism products, services and destinations to people with access needs.

It shows that the estimated size of the inclusive tourism market is a very good reason in itself to consider improving the inclusiveness of services and products. In addition, major reforms to the disability sector and greater focus of Commonwealth, state and local governments on improving access and inclusion to public services and infrastructure could create opportunities for tourism operators to broaden their consumer markets. Improving physical access through disability inclusion action plans and giving people with disability, their families and carers greater choice and control will enable them to participate in the visitor economy.

Removing barriers within businesses, creating inclusive services and products, and marketing them effectively will be key to the tourism sector taking advantage of this growing consumer market.

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