Understanding the opportunity for Australia in Accessible Tourism

FINAL REPORT

Client: Tourism Research Australia (Austrade), Tourism Events and Visitor Economy branch, Victorian Government and Tourism and Events Queensland

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This report has been divided into six sections:

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- Methodology and Approach. Provides further context for the findings by outlining the way the study was conducted and the rationale behind the design.
- Market size and Value for Accessible Tourism. This section enables us to understand the 'size of the prize'
- Understanding the Market. In this section, the profile, behaviour and needs of travellers with a disability is considered.
- How to operationalise the opportunity. This primarily provides feedback from the stakeholder research (with some specific topics from consumers). Similarly where there is overlap or support from stakeholders this is also cross-referenced in the 'Understanding the Market' section.

Executive summary

Introduction

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

With an estimated 20% of Australian adults having a disability or long-term health condition[1], and an ageing population, the disability sector is set to grow[2]. By 2050, it is estimated that nearly one-quarter of the population will be aged 65 or over. In 2015, five million people had long-term health conditions in Australia and this is also predicted to grow. Although the Australian Bureau of Statistics Survey of Disability, Ageing and Carers suggests that people over 54 are healthier than previous generational cohorts, the overall growth in the ageing population in both volume and longer life expectancy is expected to lead to greater numbers of travellers who may need extra assistance.

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

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[1] National Visitor Survey, Tourism Research Australia, year ending March 2017
[2] Australian Bureau of Statistics survey on Disability, Ageing and Carers (2015)

- current size and future potential of the market for accessible tourism, especially for Victoria and Queensland
- drivers of, and barriers to, accessible tourism
- needs of travellers with a disability and those who travel with them
- experience delivered – including during the planning phase – both as a measure of satisfaction, and to identify new areas for experience and product development or supporting infrastructure
- most effective communication channels to reach this audience including the role of advocacy in travel for this segment
- best ways to support businesses to become (more) accessible
- opportunities to grow the market.

The study used the following definition for 'disability':

> *An on-going condition, requiring special care, that substantially inhibits a person's ability to participate effectively in activities, or perform tasks or actions unless they have aids or support.*
>
> *This would include a condition which is permanent but may vary in intensity (e.g. multiple sclerosis) or a long-term temporary disability (lasting more than 6 months).*
>
> *A person with a disability might face special needs when travelling, in accommodation, and in using other tourism services.*

Value and size of the sector

There is a sizeable, growing and diverse range of travellers with accessible needs. For simplicity in this report they are referred to as a sector. For simplicity, in this report they are referred to as a sector. Eighty-four per cent of travellers with a disability or their carers[3] have taken an overnight trip as defined in Tourism Research Australia's National Visitor Survey (NVS), that is, an overnight trip least 40 kilometres from home. Around one-quarter have also taken overnight trips closer to home. Approximately three-quarters of those with a disability travel, with more people stating they would like to if the products or technologies existed to enable/support their travel. The following estimates are based on the domestic market only, therefore do not include estimates of international travellers and spend.

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

Australia*[4][5][6][7]

- An estimate of the size of the current accessible tourism sector for overnight and/or day trip travel is around 1.3 million individuals, or 7% of the total Australian adult population. However, as many people with a disability travel with others, especially when they need to travel with a carer, a multiplier of 2.45 (overnight) or 2.62 (day trips) needs to be applied. By this measure, 14% of the Australian population (an estimated 3.4 million people) has need of accessible tourism experiences and services for an overnight and/or day trip.
- An estimate of annual expenditure by tourists with a disability (both overnight and day) based on NVS data would be around $3.2 billion annually (of which $2.7 billion is overnight spend and $546 million is day trip spend). Again, the multiplier of those travelling with a person with a disability means the true value of the sector could be as high as $8.0 billion.

Victoria*

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

Queensland*

- Travellers with a disability who had taken at least one domestic trip (overnight and/or day trip) represented 8% (289,000) of the Queensland adult population.
- When considering an average travel party size was 2.28 for a Queensland resident with a disability (including adults caring for a child with a disability), this represented 13% (657,000) of Queensland's total population.

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* Please refer to footnotes 4 to 7 for Australia, Victoria & Queensland

[4] Tourism Research Australia, National Visitor Survey (NVS), March 2017 quarter % of population who were willing to answer a question on disability status and identified as having a disability

[5] Australian Bureau of Statistics, Australian Census 2016 and Population Statistics, December 2016 (% applied to total census population)

[6] Quantitative Research component of this project, conducted by MyTravelResearch.com, July 2017

[7] Note this multipler takes into account of solo travelers with a disability as well as those who travel with carers

- Estimated spend for travellers with a disability was $781.0 million (approximately 4% of total domestic spend in Queensland), of which 84% was overnight spend.
- Estimated spend for the travel party (including the person with a disability) was $1.9 billion (approximately 10% of total domestic spend in Queensland), 84% of which was overnight spend.

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

Although people with a disability generally have lower incomes than the average for the population as a whole, not all need to be considered as low income. More than one-quarter of those who identified as having a disability were in the top two income categories (disposable income above $900 per week[8]).

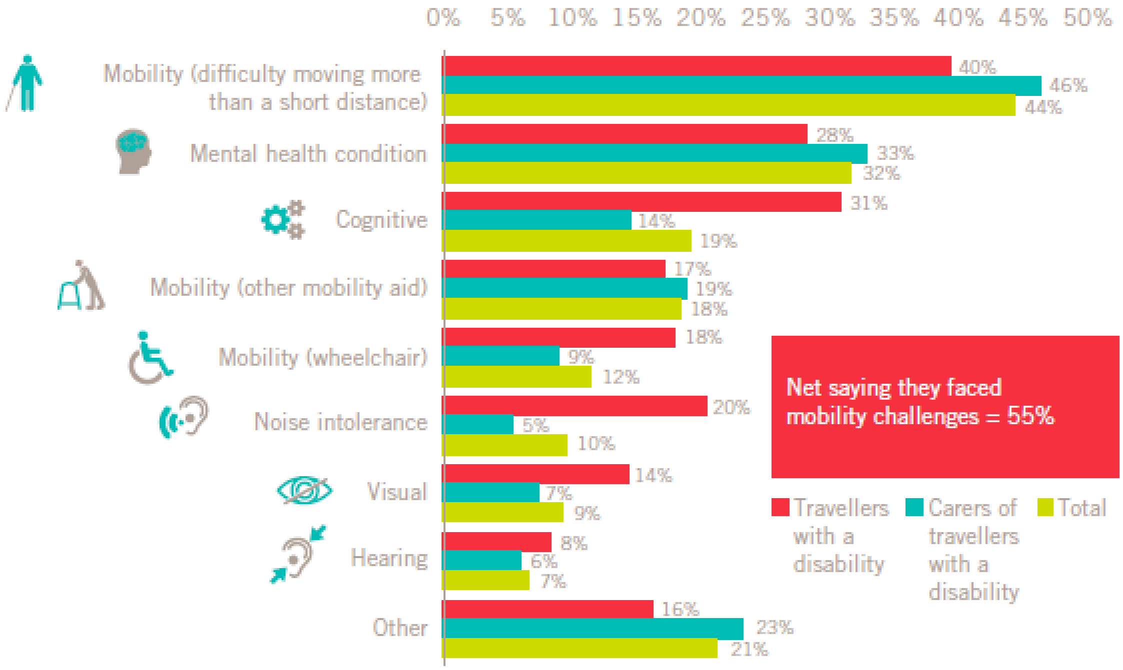
Understanding the accessible tourism market

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

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

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

Figure 1: Nature of disability faced

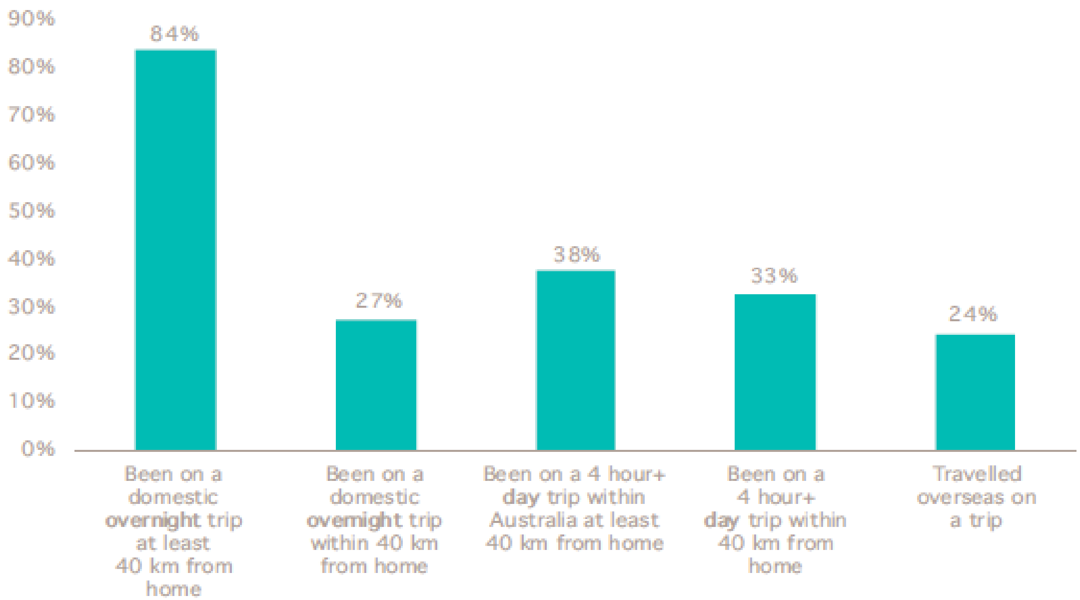


Source: Quantitative survey question: D3 What is (or are) the nature of the disability (or disabilities)
Base Total n = 1,406: n = 1,001 Travellers with a disability n = 405 Carers of travellers with a disability
Note Unweighted data.
* Multiple responses possible

- There is substantial opportunity to better utilise existing assets to meet the needs of those with mobility issues (e.g. hotel rooms could have more categories beyond the standard 'fully accessible'). Within this diverse sector, there are also many opportunities to meet the needs of specific groups. For example, Wi-Fi is vital to those travelling with children with Autism Spectrum Disorder to an even greater extent than for most travellers, as interacting with phones and tablets is an important tool to help manage a changing in environment, using entertainment.
- Short (single night trips or day trips) and/or local trips (within 40 kilometres of home) are major growth opportunities, potentially because it's easier to get there, less planning is required, and/or more is known about the area (and therefore less information searching is needed). This could also be an opportunity for those who find travel 'so stressful it's not worth it' or 'just too hard' (23% and 22% respectively).
    - Intrastate travel forms a significant part of the accessible tourism market and provides a cost effective local option that might be easier to navigate, given the level of organisation that some disabilities require prior to a trip.
    - Day trips to iconic locations close to home would be particularly engaging for those with very high support needs.

- In common with Australians in the general population, most travel by people with disabilities and their carers is for leisure (travel for holiday, and to visit friends and relatives (VFR) combined), with holiday being the largest motivator. However, VFR is also important and VFR hosts are a key conduit for information about what to do in the destination.
- Importantly, respondents noted that knowing the layout of the VFR accommodation helped with planning the travel, and resulted in a less stressful trip. This highlights that accommodation providers could be offering more information on their website that shows layout and helps the traveller determine if this is suitable for them and/or the best accommodation options for their needs.

Figure 2: Types of trips taken in the past two years



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

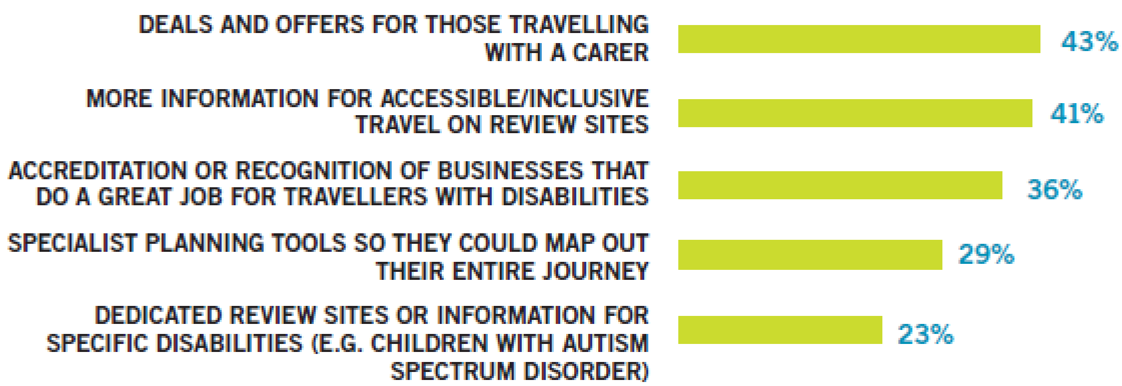
"The biggest gaps in the information provided by a lot of accommodation properties is what "ACCESS" really means. As explained earlier, they say they are disabled friendly but do they really know what this really means? ACCESS means different things to different people with disabilities." Male, Traveller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

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

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

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

Figure 3: Respondents' top 5 priorities for improving travel



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

Specific needs of the market

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

Information

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

They **need information** that is:

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

Specifically:

- 18% of respondents said that they thought information provision was the number one priority to drive accessible tourism – the highest number of overall mentions
- 41% wanted information contained on review sites like TripAdvisor that were relevant to travellers with specific needs
- 36% said that it would be great to have accreditation that shows businesses that have made the commitment to accessible travel
- 23% wanted specialised review sites for their needs
- 19% would like case studies that 'encourage' them by showing what is possible.

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

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

Planning

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

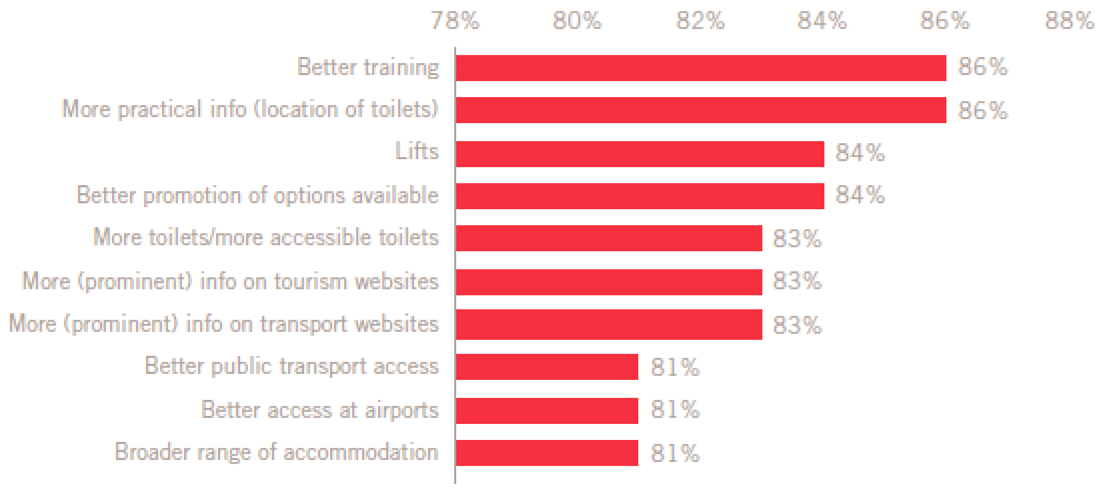
Service

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

Facilities and transport

Respondents rated some of the following priorities for improvement as important[9]:

Figure 4: Top 10 priorities by improvements



hoists (65%), More changing facilities (59%), Access to free Wi-Fi (57%) and Access to fast Wi-Fi (53%).

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

Growing and enhancing the market

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

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

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

[9] Top ten ranked by net importance (extremely important and important)

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

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

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

- **Collate** – bringing the experiences together to provide a holistic offering in some key destinations will help the traveller plan and navigate their trip. Government, peak bodies in both the tourism and disability sectors, and service providers can all potentially play a role to help identify new areas of experience and product development or supporting infrastructure. Governments can work with the sector in a number of ways, including improving accessibility standards in the industry and developing infrastructure that considers the complete user experience.
- **Promote** – many travellers are not aware of what is on offer, therefore promoting what is available to generate demand is important. The information needs to be easy to find, well-structured and provide the opportunity to delve further for planning and to build confidence in the experience/trip. This is the responsibility of individual businesses and destinations.
- **Build** – while not the highest priority for now, new infrastructure needs to be the subject of ongoing focus. Ensuring that any new infrastructure employs universal design principles will make widening this opportunity more cost effective in the future. This is a cross-industry responsibility.

Methodology

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

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

Introduction and project background

The potential of Accessible (or Inclusive) Tourism for Australia is currently under discussion. A number of factors are driving this:

- The rollout of the National Disability Insurance Scheme (NDIS) has felt to change the context of how people with a disability are viewed and how their needs are serviced.
- The 2018 Commonwealth Games on the Gold Coast (CG2018) has heightened the focus on the capabilities and travel potential of people with a disability. CG2018 will have the most extensive Commonwealth Para-sports stream in the history of the event: hosting up to 300 para-sport athletes and 38 medal events across seven sports, which is an increase of 45 per cent more athletes and 73 per cent more medals compared to the para-sport competition staged at the Glasgow 2014 Commonwealth Games[10].
- A global recognition that the sector has strong growth opportunities, despite the absence of current data on the travel behaviour of, experience and potential for travel in Australia by people with a disability and those who travel with them.

More specifically, the objectives of the study were to understand:

- the current size and future potential of the market for accessible tourism, especially for the states of Queensland and Victoria
- the drivers and barriers of Accessible Tourism including those such as events (e.g. the Commonwealth Para-Sports event on the Gold Coast in 2018)
- the experience delivered including during the planning phase both as a measure of satisfaction and to identify new areas for experience and product development or supporting infrastructure
- the most effective communication channels to reach this audience including the role of advocacy in travel for this segment (especially through specific community groups).

[10] https://www.gc2018.com/para-sport-announcement

To ensure a broad range of travellers with a disability were covered, carers and a variety of stakeholders were included, in addition to travellers themselves.

Following submission of their proposal to Tourism Research Australia (Austrade) in January 2017, MyTravelResearch.com (MTR) was commissioned to undertake the research to address this information gap. The report that follows details the findings of the research program MTR specifically designed to deliver Tourism Research Australia (TRA), Tourism Events and Visitor Economy branch, the Victorian government (TEVE) and Tourism and Events Queensland (TEQ) answers to the project objectives.

MyTravelResearch.com is a specialist travel and tourism research agency with collectively more than 60 years experience. It had previously produced a whitepaper on Accessible Travel and produced reports on it for its Macro Trends database. The team also included Bill Forrester of Travability a specialist consultant and travel provider in the Accessible Tourism sector.

Methodology and approach

MTR's approach included 5 steps as outlined in Figure 2 below.

Figure 2. Overview of approach

<u>More detail on consumer qualitative research</u>

The qualitative research was designed to align the approach as closely as possible with best practice for researching people with disabilities, whilst acknowledging that budgets were limited. In particular, we tried to bring the principles of Participative Action Research (PAR) to the design. This is considered best practice for conducting research with people with a disability. The underlying principle is that as far as possible people with a disability should have input into the design and that it should be designed from their point of view. The approach adopted tried to take a 'best practice meets the real world approach'.

Accordingly, we used a mixture of online and face-to-face qualitative research:

- Online bulletin board with n=32 people with disabilities and their carers (n = 35 were recruited, of whom n = 32 completed all the tasks)
- In-depth interviews with carers and people with visual and cognitive impairment (as the online bulletin board was not suitable in all cases for these audiences). A mixture of one on one interviews and paired in-depth interviews were included. This allowed us to ensure that travellers with severe disabilities including severe cognitive disabilities were full participants in the project.

Both those who had travelled and those who had not travelled were included: the latter in order to understand the scale of any 'latent' demand. However, it proved challenging to find people who had not travelled.

Online Bulletin Board details

Participants for the online bulletin board were recruited from metro and regional areas of Victoria, Queensland and New South Wales, ensuring a good mix of those who had travelled and those who had not. For a detailed breakdown by regions, please see Appendix 1.

Other specifications

- No more than half to be Visiting Friends and Relatives Travellers (VFR)
- Can include cruising as long as the trip includes a domestic port in Australia
- Other half not to have travelled at all in the past 10 years or since acquiring their disability
- No rejecters of travel to Queensland or Victoria
- Must be able to access the internet either via computer or smartphone on a daily basis either at home, with employer's permission at work or at a venue convenient to them (e.g. a library they can access easily)

The online bulletin board arrangements were as follows:

- Run over a week (may hold it open for longer to allow access)
- 4 active days, 3 catch up and question days. Total effort around 2.5 hour
- Opportunity for all clients to view the board and pose questions in real time

A copy of the discussion guide is included in Appendix 2.

In-depth interview details

In order to include more views of people with high-level disability needs (especially in terms of communication) or those whose needs were less suited to an online bulletin board, we conducted face-to-face interviews. Six paired and 18 one-on-one depth interviews were conducted in people's homes to overcome any challenges with accessing a specific location. Participants were equally sought from Melbourne, Brisbane and Sydney in order to reflect the largest potential source markets for both Victoria and Queensland. For more details on the sample structure please refer to Appendix 1.
A copy of each of the discussion guides is provided in Appendix 2.

More detail on the stakeholder research

Thirteen one-hour telephone interviews with stakeholders were conducted with stakeholders following a discussion guide agreed with TRA, Tourism Events and Visitor Economy branch, the Victorian government and Tourism and Events Queensland.

The list of stakeholders was agreed with all sponsoring agencies and the aim was to include a broad range of views including those within the travel and tourism sector (tour operators, airports, accommodation providers and other services, destinations), disability representatives/service providers (e.g. Yooralla) and other providers (e.g. transport).

It was originally envisaged that these would be approached by the sponsoring agencies. Instead MyTravelResearch.com in conjunction with Travability took on responsibility for identifying the contacts and contacting the organisations identified as of interest. A long list of around 20 organisations was identified including service providers in priority order. The full list is provided in Appendix 1.

Interviews were conducted with:

Type of organisation	Organisation	Background	Contribution to Project
Destinations	Destination Melbourne	Regional Tourism Organisation, regarded as a leader in this space	Understand importance of accessible, practical tips and experience including how to get industry to embrace, contacts
	Gold Coast Tourism	Regional Tourism Organisation, gearing up for Commonwealth Games 2018 (CG18) with the largest ever para-games stream in CG history	Understand importance of accessible, practical tips and experience including how to get industry to embrace, impact of events

Type of organisation	Organisation	Background	Contribution to Project
Specialist consultants	Chris Veitch	UK accessible travel expert, helped develop Visit England strategy (and then subsequently Visit Britain and Visit Scotland, has also worked with Gold Coast). International speaker on topic	International perspective from a destination which is regarded as a leader and has successfully targeted the sector. Assistance in understanding the opportunity and practical input on how to operationalise
	Inclusive Tourism	Australian-based accessible travel consultant (Melissa James) works with businesses and destinations to help them become more accessible	Assistance in understanding the opportunity and practical input on how to operationalise
Service providers that offer or support travel experiences	Yooralla	Not for Profit providing broad range of disability services including travel, employment and accommodation	Draw on their practical experience, including travellers with many different types of disabilities (including high needs), understand impact of funding
	YMCA Escapes	Division of YMCA, provides camping experiences for travellers with a disability, seen as a leader in more immersive experiences	Draw on their practical experience, including travellers with many different types of disabilities (including high needs), understand impact of funding
	Traveller's Aid Melbourne	Not for Profit which assists travellers at stations and airports. Has developed a training course to help businesses to improve access	Provide perspective on public transport

Type of organisation	Organisation	Background	Contribution to Project
Recreation/Govt	Parks Victoria	Developing accessible experiences to support its charter and to build a 'whole of government' approach to benefits of interacting with nature. Recognised as a leader in field	Practical experience in operationalising the experience, particularly within the public sphere
Travel tourism and transport providers 1 - Travel companies	Club Mates Travel	Travel booking company and tour operator specialising in accessible and supported holidays in Australia and overseas. NDIS registered supplier	Practical example of servicing the sector, expert input on requirements from policy, destinations, attractions, experiences and accommodation providers.
	Leisure Options	Leisure Options provides disabled holiday tours and programs for people with disabilities	Practical example of servicing the sector, expert input on requirements from policy, destinations, attractions, experiences and accommodation providers
Travel tourism and transport providers 2 - Airports	Melbourne Airport	International Airport	Insight on opportunities and practical challenges. Input into policy
	Australian Airports Association	Represents 300+ Australian Airports	Sits on the Commonwealth committee looking at Accessible Travel. Policy input ability to cover a broad range of different airports
	Shannon Airport (Ireland)	International Airport	Has introduced a room for travellers with Autism Spectrum Disorder provided insight on decision-making behind this

Support resources (such as videos) were also supplied by Vision Australia, Inclusive Tourism and YMCA Escapes.

Where participants are willing to go on the record, we have identified them either in person or by organisation type (where revealing the identity of one participant might reveal commentary by those who were not willing to be identified).

A copy of the discussion guide is included in Appendix 2.

More detail on the consumer quantitative research

We conducted n = 1,406 interviews split between n = 1,001 people with a disability and n = 405 with carers for people with a disability. All had to have travelled in the past two years. In the case of carers only trips with the person they cared for were included.

Based on findings from the qualitative research we widened the criteria to include both day and overnight trips. To understand the power of local experiences, day and overnight trips within 40km of home were allowed. Quotas were set to ensure the key focus was on overnight trips as defined in the National Visitor Survey (NVS) with no more than n = 150 to have done a daytrip (including carers). An upper limit of n=50 was set for trips for medical reasons.

More detail on the key quotas is included in Appendix 1 and the questionnaire is included in Appendix 2.

Fourteen percent (14%) of the population qualified as a traveller with a disability, whilst 15% qualified as carers. Four percent (4%) were both travellers with a disability and cared for someone else with a disability. This provided a useful 'sense check' for the estimation of the market carried out below, although ultimately the decision was taken to use the NVS % as the core incidence measure.

<u>Usage of the National Visitor Survey (NVS) Data</u>

In the March quarter of 2017, questions were added to the National Visitor Survey (NVS) to profile travellers with a disability. These questions were filtered to 18 years and over (see questions in Appendix 2). This report has been prepared using this data filtered by 18 years and over to complement the findings of the quantitative and qualitative research. In particular, it provides an opportunity to identify where travellers who identify as having a disability share characteristics with the general population.

However, there are differences between the samples:

- Only 40% of the NVS sample had travelled within the qualifying period.

- Furthermore, the NVS is conducted by telephone whereas the quantitative survey was conducted online. Time periods were likewise different.
- As noted above, wherever possible the aim was to keep question formats common to enable comparability. However, the needs of this particular survey did dictate that there were small differences.

Despite the many differences, there is a high degree of congruity in the findings between the two samples suggesting that the overall findings do represent the behaviour, views and needs of travellers with a disability.

However, they should be treated as complementary findings and not directly compared.

In order to differentiate the two, charts and tables in orange shades are sourced from the quantitative research whilst those in grey shades are sourced from the NVS.

In the NVS only overnight trips at least 40km from home and daytrips at least 50km and at least 4 hours are included. However in the qualitative research, we identified that many trips are taken within this, both for day and overnight. So we asked about both trips that match the NVS 'aligned trips' and these closer trips in the quantitative research. The distance for day trips was made to be at least 40km for the quantitative research, as the difference between a 40km day trip and a 50km daytrip was unlikely to affect the sizing of the market significantly, but the inconsistency (ie, if used at least 40km for overnight trips and at least 50km for daytrips, as defined in the NVS) did have the potential to increase the cognitive burden of completion for this audience.

S3. In the past two years have you done any of the following IF **tempCarer**: with the person you care for> please select all that apply? MR

Been on a trip within Australia where you stayed away from home for **at least one night**, at a place **at least 40 kilometres from your home**	1	**NVS equivalent**
Been on a trip within Australia where you stayed away from home for **at least one night within 40 kilometres of your home**	2	
Been on a trip within Australia a distance of **at least 40 kilometres in total** and were away from home for **at least 4 hours but did not stay overnight**	3	**NVS aligned**
Been on a trip within Australia **within a distance of 40 kilometres** but where you were away from home for **at least four hours** (day trip) excluding routine travel such as commuting between work / school and home	4	
Travelled **overseas** on a trip	5	IF NONE OF CODES 1-4 SELECTED, SKIP TO S5a-c, then terminate
None of the above	6	SKIP TO S5a-c, then terminate

Market size and Value for Accessible Tourism

Determining the size of the Accessible Tourism market is difficult, because the definition can include many factors (more detail below). In the January to March quarter, Tourism Research Australia had added questions to the NVS. As far as possible for both the qualitative and quantitative research, we sought to match the definitions used in that document. Wording was varied a little for the qualitative research in order to make sense when used in this context. But the definition for the quantitative research was an exact match.

As a final check, the definition was benchmarked against the United Nations World Tourism Organisation (UNWTO) 'Tourism for All' definition to ensure some international comparability. Overall the definitions are comparable. The UNWTO definition contains this group but is broader including "*the elderly [who do not identify as having a disability], people carrying luggage, small children or people who are big or small in size or stature.*" This broader group was not included as it was felt that other research already covered the needs of these groups and the level of complexity within the current audience risked being overshadowed. However as a general principle any product or service that is relevant to people with a permanent or temporary long term disability is likely to enhance the appeal of the product or service to these other groups and increases the value of investing beyond the market considered in this report.

The definition used to conduct this research was:

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

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

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

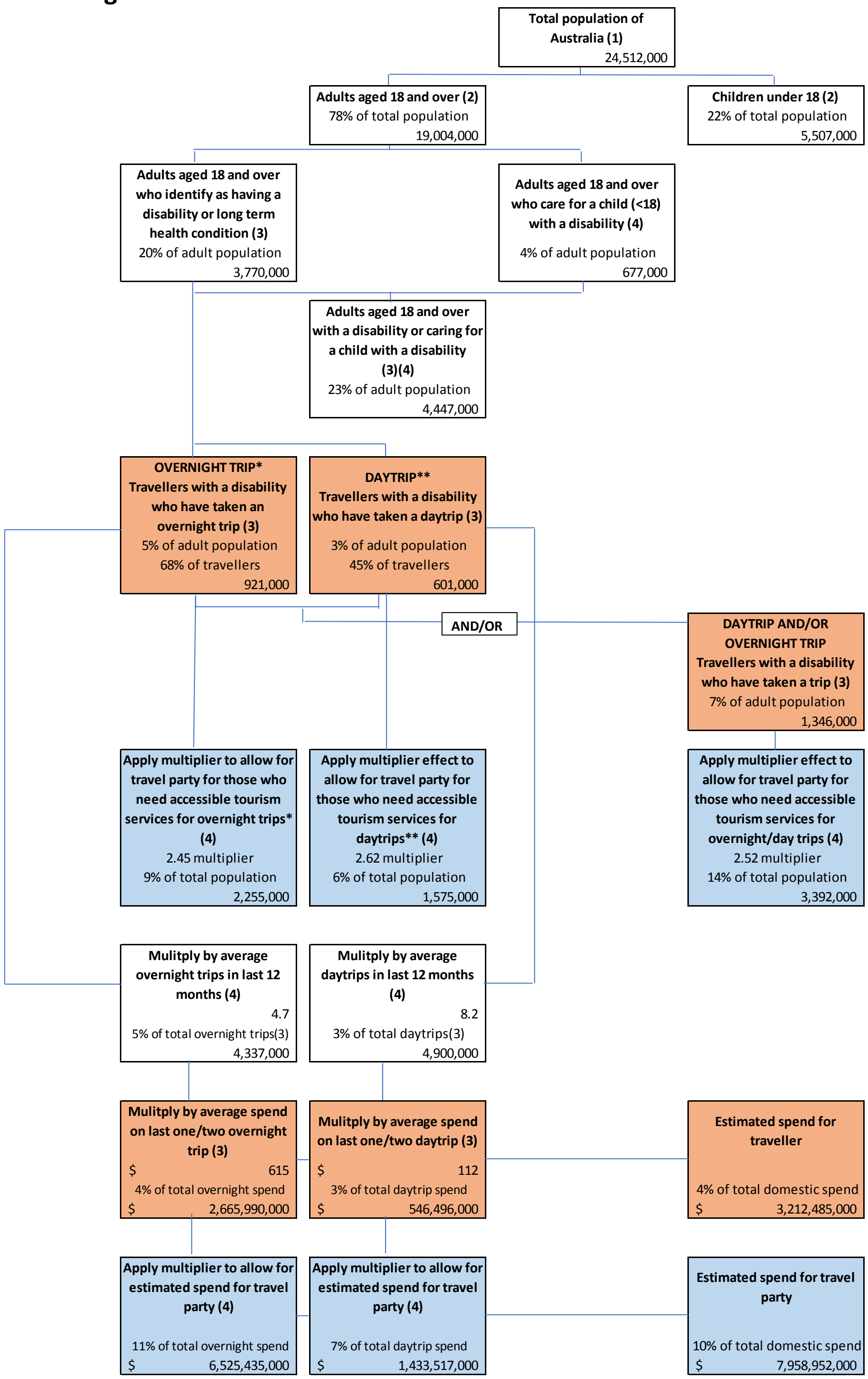
Figure 3 outlines the process used to estimate the size of the market for Accessible Travel. The aim was to develop a process that was

a) **Replicable.** This meant that should the possibility of adding the questions to the NVS arise again and to provide a benchmark then it would be possible to develop this). As a result only two numbers were drawn from the quantitative survey: the % of the population aged 18+ who cared for a child with a disability and the number of trips taken annually. Both of these could also be added in future or obtained via an omnibus survey. The estimates thus derived can be used as a benchmark to track the future growth of the sector and the impact of any initiatives undertaken.

b) **Transparent.** This ensured that the process was clearly understood and could be reviewed and applied by anyone. Transparency also supported the goal of replicability noted above.

c) **Defensible.** The process and resulting estimates should have credibility and be one with which all the key parties were comfortable. The estimates were developed jointly by MyTravelResearch.com and Tourism Events and Visitor Economy branch, Victorian Government. Both the process and the estimates were then peer reviewed by Tourism and Events Queensland, Tourism Research Australia (Austrade) and Travability.

Figure 3. The market for Accessible Tourism in Australia[11]



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11 Sources used: (1) Australian Bureau of Statistics (ABS), Australian Census 2016 (2) ABS, Population Statistics, Dec 2016 (% applied to total census population) (3) Tourism Research Australia, National Visitor Survey (NVS), March 2017 quarter % of population who were willing to answer a question on disability status and identified as having a disability (4) Quantitative Research component of this project, conducted by MyTravelResearch.com, July 2017 * Overnight trips are as defined in the National Visitor Survey i.e. atrip involving at least one night away staying more than 40 kilometres from home itor Survey ** Day trips are as aligned with the National Visitor Survey i.e. a trip lasting at least 4 hours and at a certain disatance from home but which did not involve an overnight stay. The NVS uses 50 kilometres from home but 40 kilometres from home was used in the survey as the desire was to reduce the cognitive load on participants.

We estimate that travellers with a disability who have taken a domestic trip (daytrip and/or overnight) represent **7% (1.3 million)** of the Australian adult population. When taking into consideration an **average travel party size of 2.45 for an overnight trip** and **2.62 for a day trip** by persons with a disability (including adults caring for a child with a disability) living in Australia, this represents **14% (3.4 million)** of the total population.

This is consistent with the incidence seen for other markets such as the UK where the estimated incidence of adult travellers with a disability is 14%[12].

The figures were also calculated for Victoria and Queensland as set out below.

Victoria

- Travellers with a disability who had taken a domestic trip (overnight and/or day trip) represented 7% (349,000) of the Victorian adult population.
- When considering the average travel party size was 2.24 for a Victorian resident with a disability (including adults caring for a child with a disability), this represented 12% (784,000) of the total Victorian population.

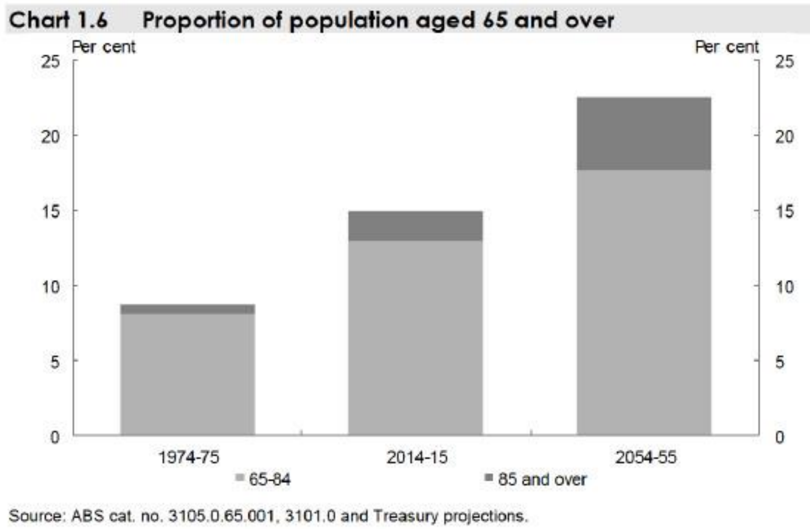
Queensland

- Travellers with a disability who had taken a domestic trip (overnight and/or day trip) represented 8% (289,000) of the Queensland adult population.
- When considering an average travel party size was 2.28 for a Queensland resident with a disability (including adults caring for a child with a disability), this represented 13% (657,000) of the total Queensland population.

It is also expected that the proportion of travellers who need accessible tourism services will grow as Australia's and the world's population ages. Chart 1 shows the forecast proportion of the population that has or will form part of the population aged 65 and over, between 1974 and 2055. Elsewhere the report estimates that within 15 years, more than one in five of the population will be in this age group. If we continue to apply a multiplier of around 2.5 to estimate the size of the total market for accessible travel then more than 40% of the market could have some need for accessible tourism services.

[12] The Purple Pound, the Volume and Value of Accessible Tourism, Visit England

Chart 1. Forecast of population share aged 65 and over



Source: Australian Government, 2015 Intergenerational report

Although this study primarily focuses on domestic travel, it is worth noting that this will also impact international inbound markets (making the size of the opportunity even larger). UNWTO estimates that by the year 2050 the number of persons over age 60 will increase to account for 20% of the world population, with one-fifth of this group being over 80 years old. Although the evidence from the ABS survey on Disability, Ageing and Carers (2015) suggests that people over 54 are healthier than previous generational cohorts; overall growth is expected to lead to greater numbers of travellers who need extra help.

To understand the economic value of the sector, we used data from Tourism Research Australia's NVS. In the March quarter of 2017, questions were added to the NVS to understand the potential size of the market. The questions asked are included in Appendix 2.

The March quarter covers peak summer holidays and as such may not be typical of other quarters. So to estimate expenditure, the calculation used the average expenditure per day from the NVS and applied this to the average trip length (NVS) and number of trips (Quantitative data).

Average expenditure per overnight trip for travellers with a disability is $615 dollars or $147 per day. This is below those for travellers who did not identify with having a disability ($690 or $183 per day), but as noted travellers with a disability often travel with others so this needs to be considered.

Based on this approach, the estimated spend for travellers with a disability is **$3.2 billion** (approximately **4% of total domestic spend** in Australia). Applying a multiplier, the estimated spend for travel party along with this person is **$8.0 billion** (approximately **10% of total domestic spend** in Australia).

The estimates were also applied to Victoria and Queensland to provide estimates for each state as set out in Table 1a.

Table 1a. Share of total Australian expenditure and estimated spend by travellers with a disability for Queensland and Victoria

Share of spend and estimated spend data per state for each type of trip		Daytrips*		Overnight trips**		Total trips
Queensland: Share of total spend		25%		22%		24%
Estimated spend in Queensland						
- by traveller	$	659,762,000	$	121,242,000	$	781,005,000
- by travel party	$	1,614,873,000	$	318,032,000	$	1,932,905,000
Victoria: Share of total spend		21%		24%		21%
Estimated spend in Victoria						
- by traveller	$	547,375,000	$	132,767,000	$	680,142,000
- by travel party	$	1,339,787,000	$	348,262,000	$	1,688,049,000

Estimates derived from Tourism Research Australia, National Visitor Survey (NVS) data, March 2017 quarter % of population who were willing to answer a question on disability status and identified as having a disability and market sizing above* With the NVS, daytrips are defined as at least 4 hours and at least 50 kilometres from home, ** With the NVS, overnight trips are at least one night and at least 40 kilometres from home

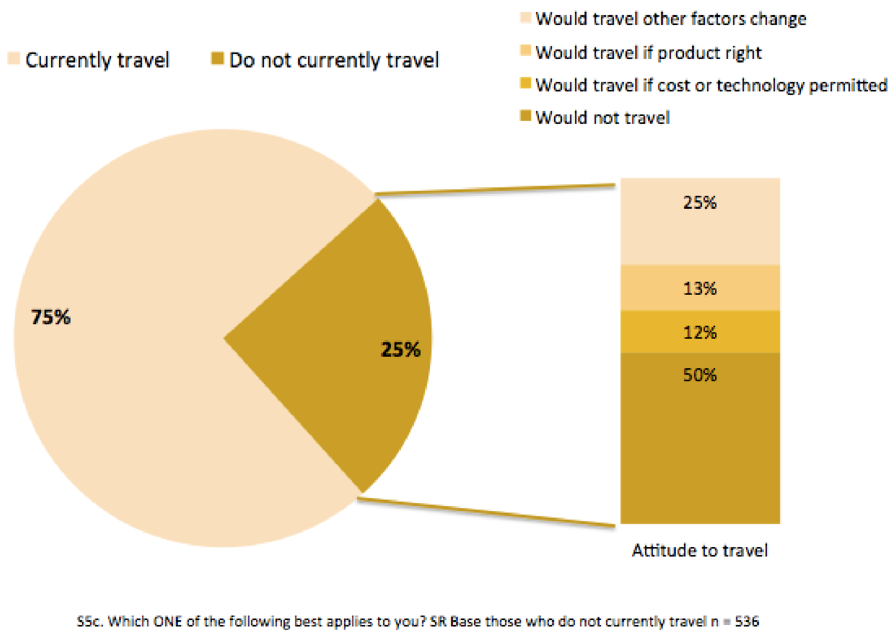
Latent demand for travel

There may be those who currently do not travel, but would like to should the product or the opportunity increase the potential for this. The screening questions from the online survey allowed us to identify this latent demand.

Of those who identified as having a disability, around a quarter said that they did not currently travel. Of these around half (or 13% of all adults with a disability) said they would like to travel but circumstances did not permit. 12% (or 3% of all people with a disability) said **the current product was the reason**, with a further 13% (3% of all people with a disability) said **either the cost or current technologies to support them were a barriers**.

Chart 2 Latent demand for Travel

(Proportion of those with a disability who have travelled in past 2 years and Attitude to Travel)



Source: Quantitative Research

Overall, this means that the latent opportunity for travel constitutes around 4% of the total disability market or 193,000 individuals[13].

- Potential of those with a disability (including adults caring for a child with a disability) who are not currently travelling, however would likely travel with certain industry improvements (in accommodation, transport, current technologies) is an additional **1% in spend (approximately $735 million)** [14]
- When factoring in travel party this comes to **$1.8 billion: an additional 2% in spend for the total travel party (including the person with a disability)**.

[13] Calculated using % of population identifying with a disability in chart 2 above.

[14] Based on the $3.2 billion spent by the current travellers

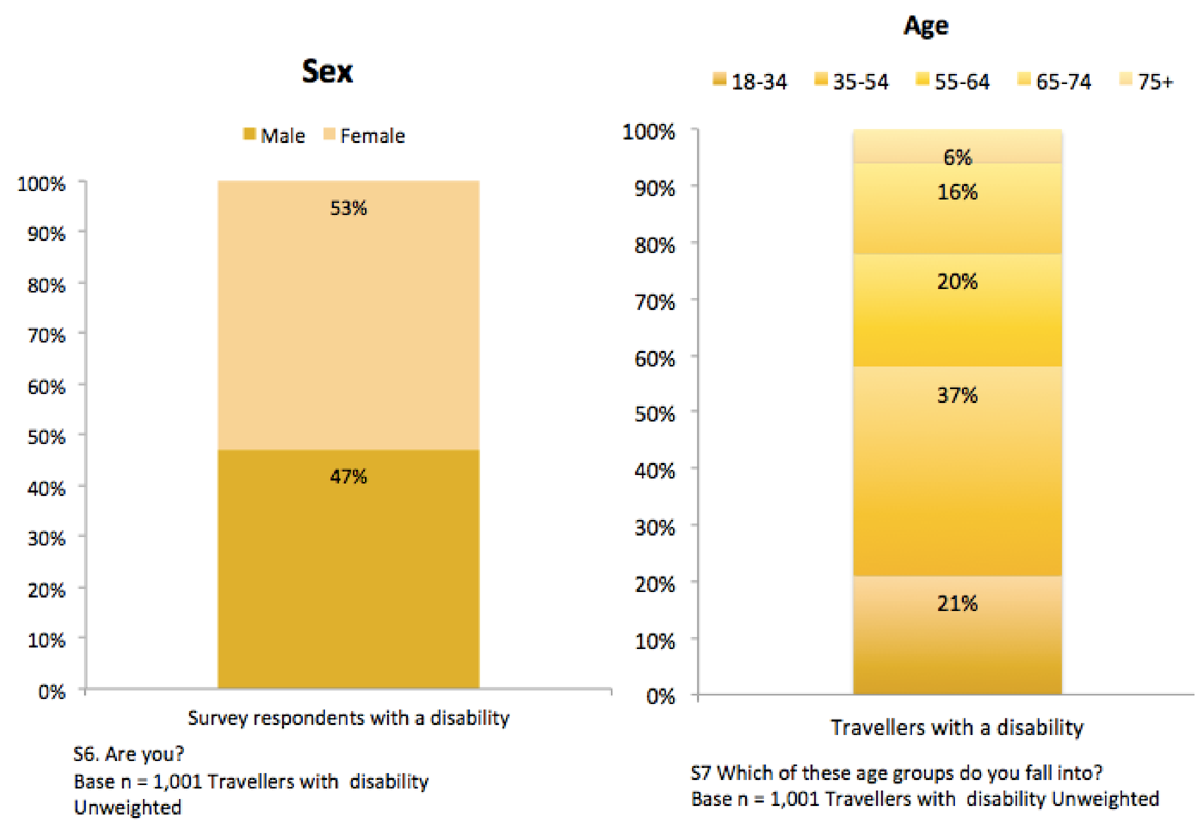
Market Understanding

Profile of travellers with a disability

Demographics

In the quantitative research we found that slightly more travellers with a disability are female and that they skew older (see chart 3 below). This is consistent with the data from the NVS (see chart 4) and the research sighted during the literature search from international markets such as Europe[15] and North America[16].

Chart 3. Travellers with a disability – Demographic Profile

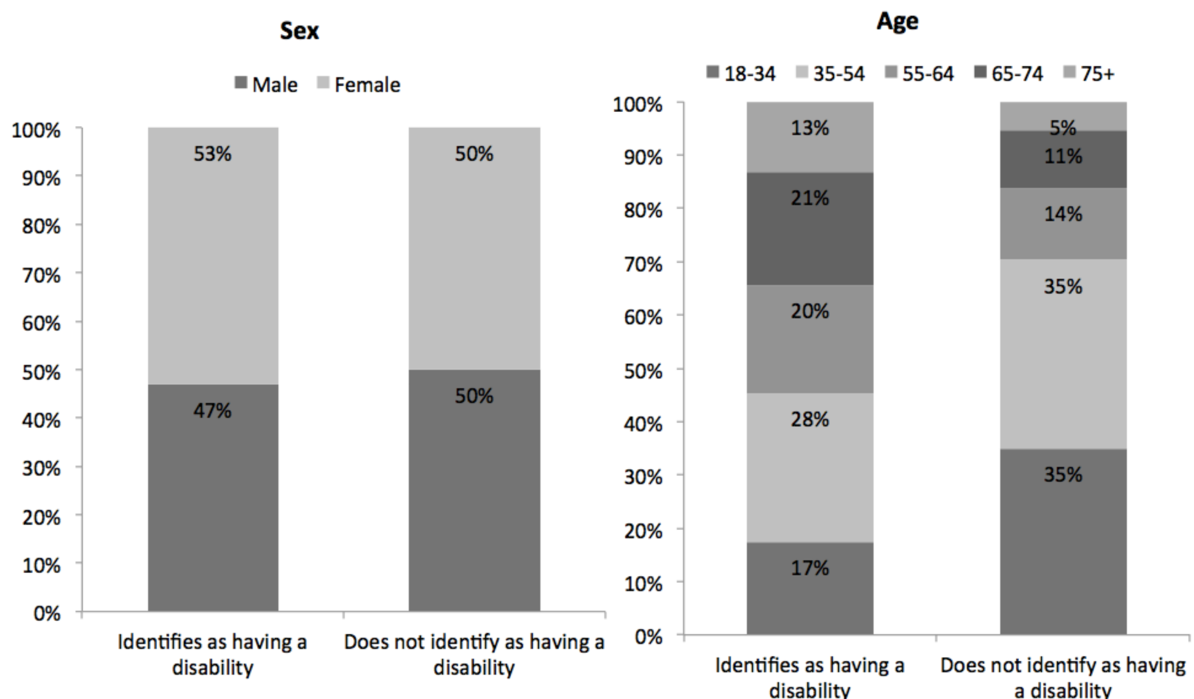


Source: Quantitative Research

[15] ECONOMIC IMPACT AND TRAVEL PATTERNS OF ACCESSIBLE TOURISM IN EUROPE – FINAL REPORT, European Commission, DG Enterprise and Industry (DG ENTR) in 2012-2013

[16] Open Doors Foundation Research, 2015

Chart 4. Comparison of demographic profile for travellers with a disability compared to the rest of population



Source: Tourism Research Australia, NVS, March quarter 2017
Sample size n = 29,164 of whom n = 7,288 identified as a disability, Weighted data

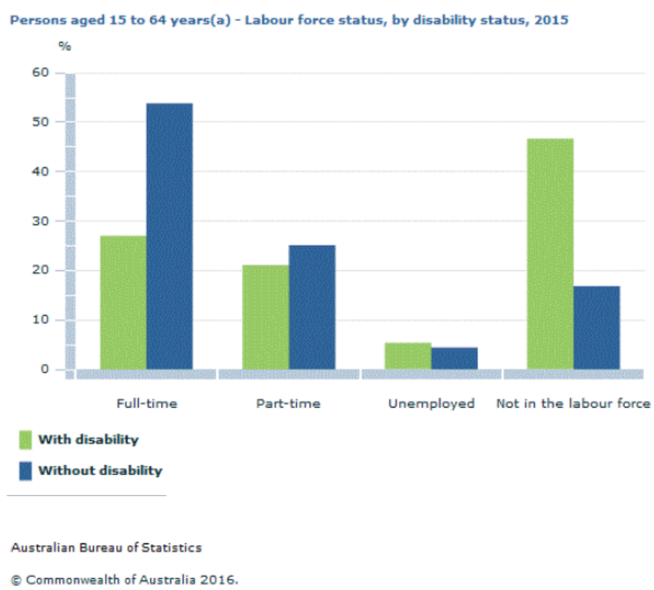
We found that incidence of overnight travel (using the NVS definition) was higher among older travellers especially those whose children had left home.

However, those under 25 with a disability were more likely to take trips closer to home. Incidence of lifelong disability is stronger among this group and this focus on closer overnight destinations may reflect their higher need status. At the same time, it provides some clear opportunities for local marketing to this audience.

During the study a common comment in both the qualitative and quantitative research was around the cost of travel for people with a disability. This reflects a common travel industry perception that people with a disability are not a high yield market. As the following chart shows, people with a disability are more heavily concentrated in the lower income quintiles. But this may reflect the fact that many of these respondents may have age related disabilities or face more severe disabilities. As noted, above travellers with a disability are slightly younger than the total population with a disability. Nevertheless, 28% of those living with a disability are in the top two income quintiles[17].

This would equate to approximately 364,000 travellers if reflected among a traveller group but the actual number is likely to be higher (as international studies have shown that those who generally have higher disposable incomes[18]).

Chart 5. Income by disability status[19]



***Footnote(s):** (a) Living in households*

***Source(s):** ABS Survey of Disability, Ageing and Carers: Summary of Findings—2015*

Many travellers with a disability hoped that their NDIS funding would either enable them to fund trips or would ease their financial situation sufficiently to enable travel.

"THE MOST IMPORTANT TASK [to facilitate accessible tourism] To understand that the NDIS should cater for the funding of travel packages for families with people with disabilities. If the funding is not available I can assure you for most families leisure travelling is beyond their reach." Female, 35 to 54, Carer, Sydney

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[17] The study cited (ABS Survey of Disability, Ageing and Carers 2015: Summary of findings) does not list the income quintiles. But 6523.0 Household Income and Wealth, Australia, 2013–14 shows the top two income quintiles as having $1,657 and $2,668 per week disposable income respectively. Further information on the distribution of this is not available. The chart is blurry in the original report but included here as it is of value to the estimate.

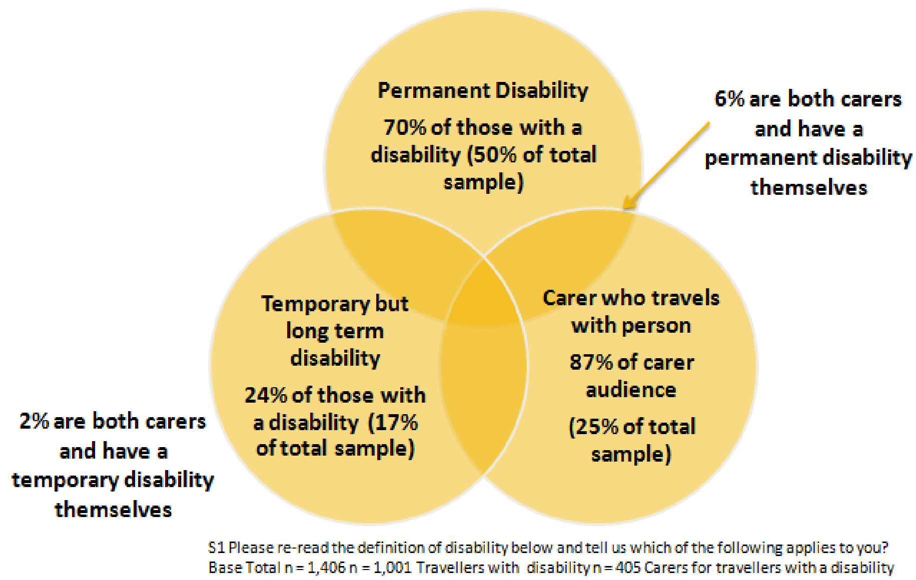
[18] For example, Geoff Carmody Associates papers for the Transport and Tourism Forum and http://www.amadeus.com/documents/future-traveller-tribes-2030/travel-report-future-traveller-tribes-2030.pdf

[19] http://www.abs.gov.au/ausstats/abs@.nsf/Lookup/4430.0main+features202015

Nature of disability faced

The majority of those who travel have a permanent disability (70%). Six percent (6%) of carers also have a permanent disability (see Figure 4).

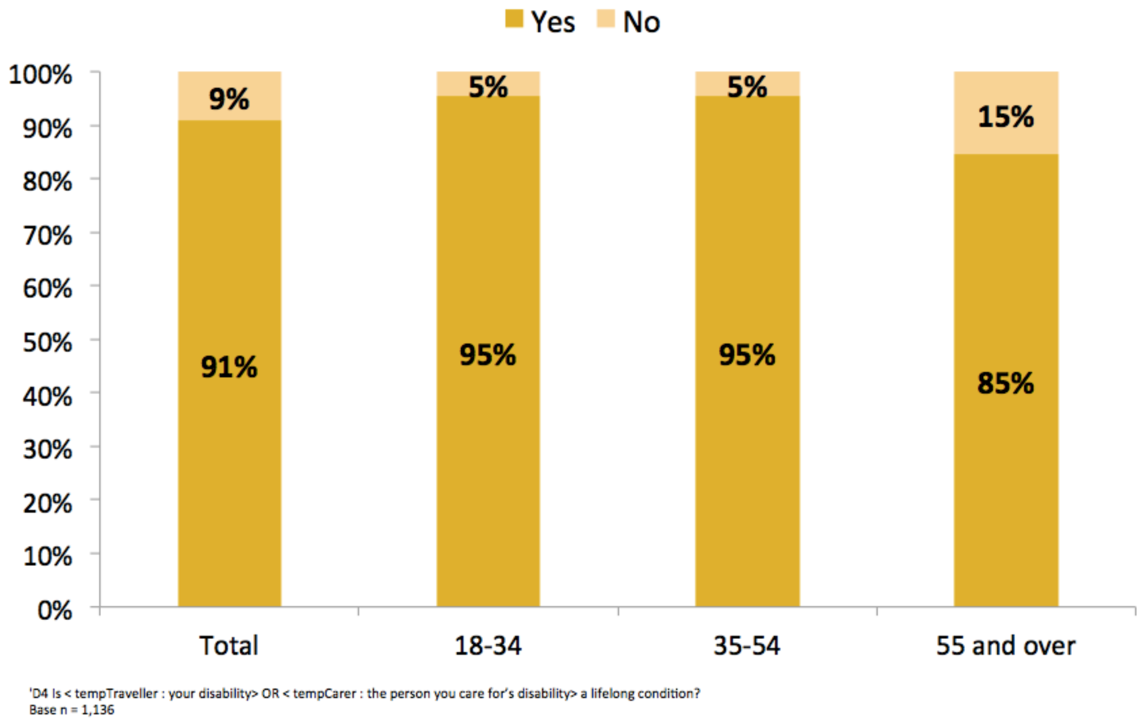
Figure 4: Nature of disability



Source: Quantitative Research

For most (91%), the disability is a lifelong condition. This incidence however falls with age. While just 5% of those aged 18-34 say their disability is a not lifelong one, three times as many travellers over the age 55 say that this is the case. This often has an impact on their attitudes to the limitations of travel and on their issues and concerns.

Chart 6. Whether disability is a lifelong condition



Source: Quantitative Research

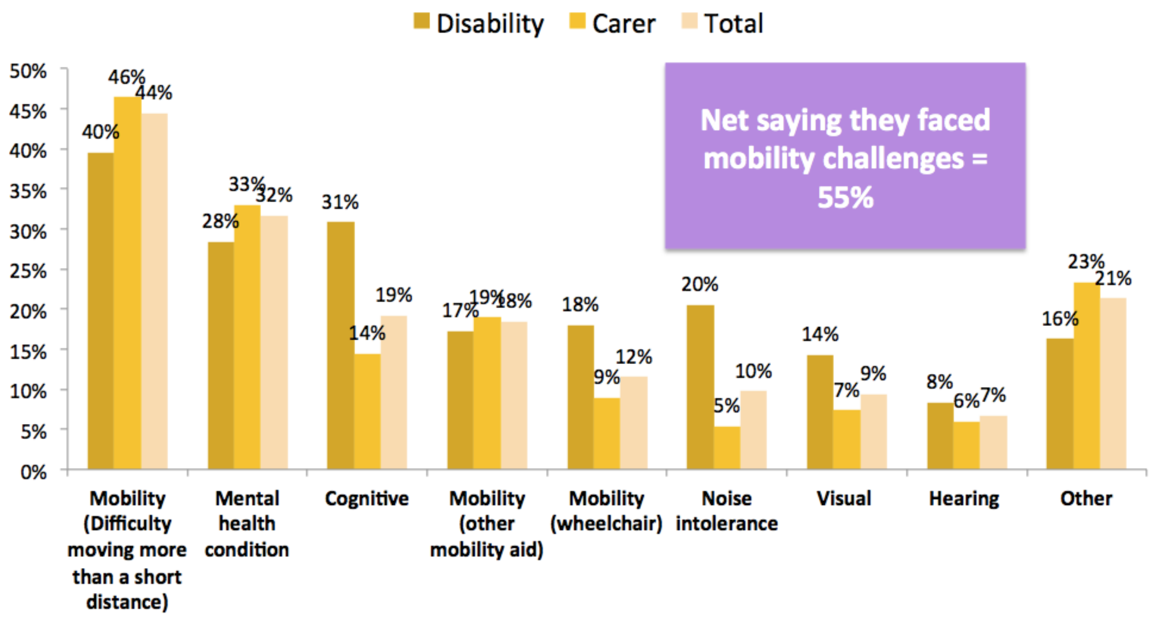
Mobility issues are the most common type of disability in this study who participated with 55% saying they had difficulty with mobility in some way[20]. Twelve (12%) said that a wheelchair was required. (See the following chart.)

Mental health is also a major issue with one in three saying that they experienced mental health issues.

Other disabilities covered a wide range including complications from Type 2 Diabetes, chronic pain, paralysis in one or more limbs and heart-lung conditions (e.g. severe emphysema).

[20] For full definitions see questionnaire in Appendix 1. No more detail was supplied on issues like distance. In the qualitative research, difficulty walking varied from between 50 metres and 500 metres.

Chart 7. Nature of disability faced



D3 What is (or are) the nature of the disability (or disabilities) < tempTraveller : you face> OR < tempCarer : the person you care for face>
Base Total n = 1,406 n = 1,001 Travellers with disability n = 405 Carers for travellers with a disability Note Unweighted data,
* Multiple responses possible

Source: Quantitative Research

It is clear that disability is a complex topic. Many people with a disability faced multiple challenges with a high overlap between mental, cognitive and physical conditions. The complexity of this can be glimpsed in Table 5, where the extent of overlap between conditions is clear.

Table 5. Mix of disabilities faced

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

D3 What is (or are) the nature of the disability (or disabilities) < tempTraveller: you face> OR < tempCarer: the person you care for face>? Base n = 1406 Source: Quantitative Research, Unweighted data. Elements highlighted in blue and with an arrow are significantly more likely to be related to this condition, those highlighted in red and with an arrow are statistically less likely to be related to this condition.

How to read this chart: Numbers are column %s e.g. 36% of those with a visual disability (First column) also have difficulty with memory, learning or understanding (2nd row) Items coloured blue and with an upwards arrow are higher than average for the total market, those in red and with a down arrow are lower than average

This complexity was reflected in the ways that people in the qualitative research described their conditions.

"My mother had a very serious operation three years ago which left her on oxygen 24/7. She cannot walk long distances so she is wheeled in a wheelchair mostly unless it doesn't involve a lot of walking and then she uses a walker. She cannot wipe herself in the toilet nor perform any household duties. Cooking with a flame is obviously dangerous due to the oxygen but she can microwave meals. My mother also has macular degeneration and that involves her to be taken for a daycare procedure every second week.

My father is elderly and his disabilities are age related but has just been discharged from hospital and he requires a huge amount of care now. Prior to his hospitalisation he was Mums primary carer. I have now taken over that role although I shared the responsibility with him to a large degree. I now care for them both since November 2016." Female, Carer, 35 to 54, Melbourne

"I have had severe Depression, Anxiety, and PTSD for 8 years now and my Mother has been taking care of me through all of it. My learning and physical disabilities started when I was born, but only became a major issue when combine with my other problems. I have chronic pain from my legs being different

lengths that has gotten worse over the last five years." Female Aged 18-34, Traveller, Regional Queensland

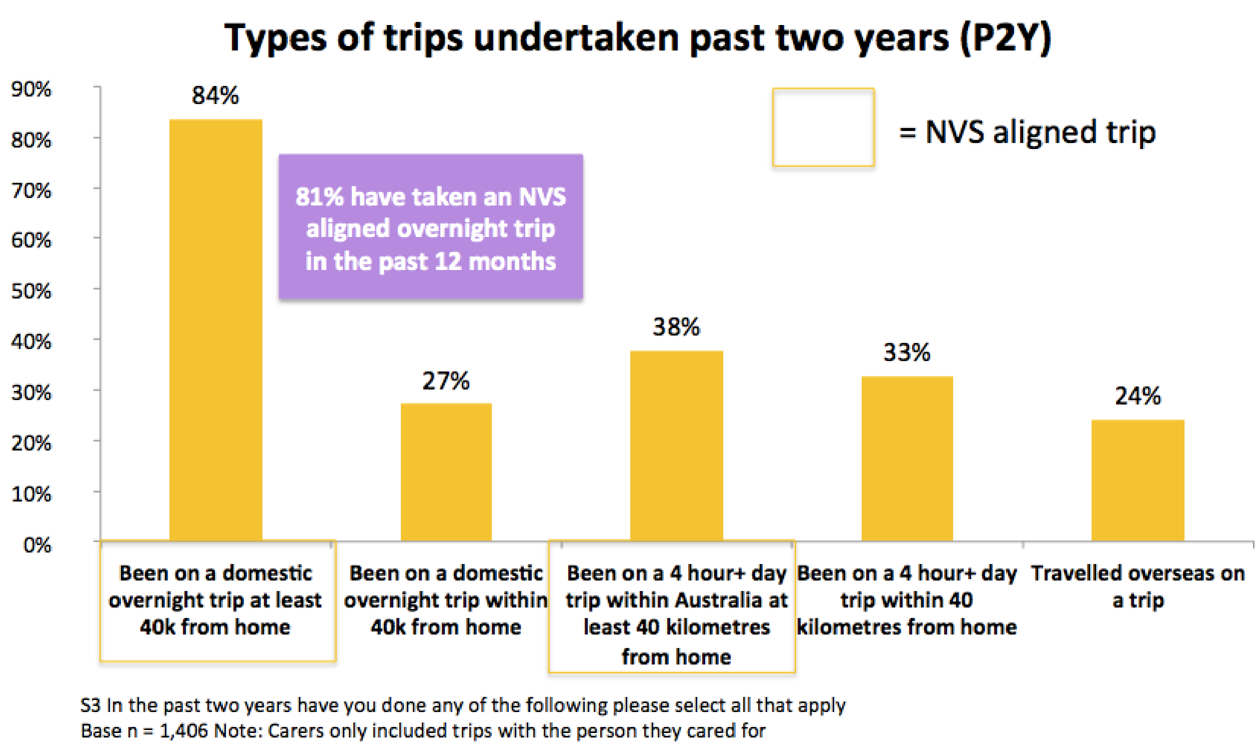
"Ahhh well do you want everything? I will start with Asperger's: I was born with it, Depression I was first diagnosed in 1984, chronic back pain since about 1977 with a discectomy in 1998 followed by a fusion in 2001, left hip was replaced 4 years ago. Triple bypass was done 10 months ago, if you want to know more about other health problems please ask" Male, 35 to 54, Regional Victoria

Travel Behaviour

Types of trips undertaken

Eighty-four percent (84%) of travellers with a disability or their carers[21] have taken an overnight trip that matched the definition used in the NVS. Around a quarter have also taken overnight trips closer to home with incidence of these close overnight trips higher among those aged 18-34 or with a temporary but long term disability.

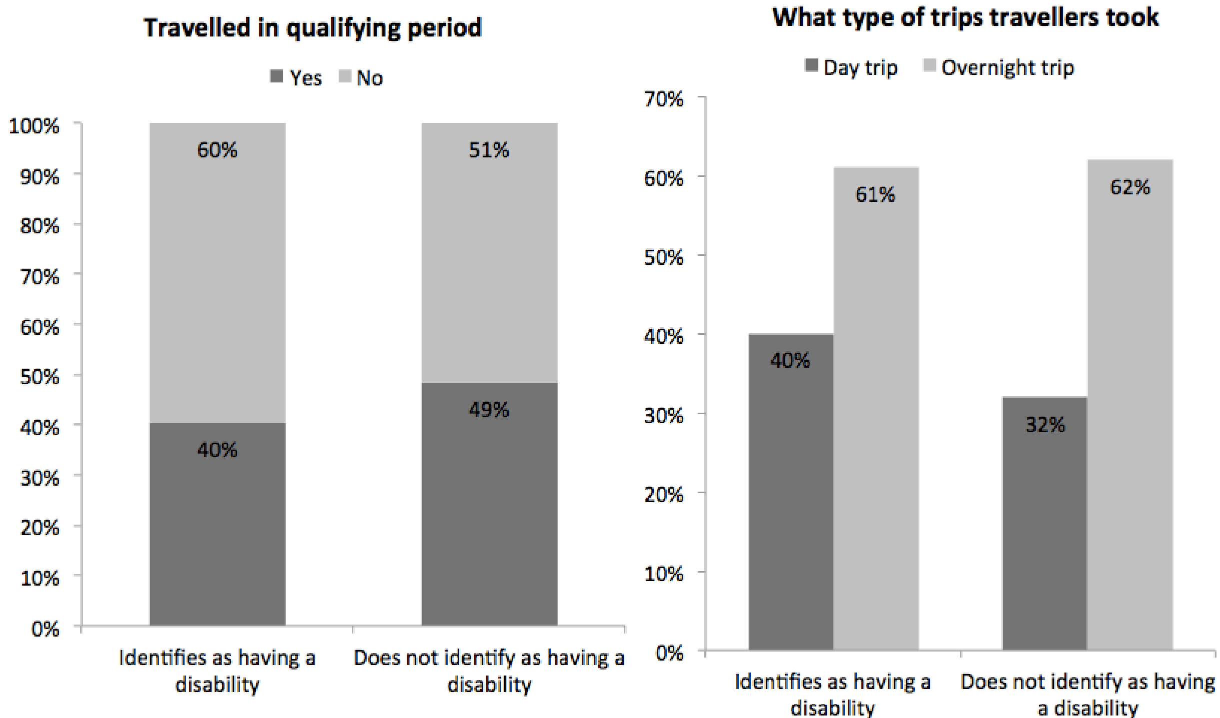
Chart 8. Type of trips undertaken in past 2 years



Source: Quantitative Research

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

Chart 8a. Comparison of travel incidence between travellers who do or do not identify with a disability



Source: Tourism Research Australia, NVS, March quarter 2017
Sample size n = 29,164 of whom n = 7,288 identified as a disability, Weighted data

Incidence of travel for people with a disability is slightly lower than those without. But 40% of those who identified with a disability had travelled in the last 28 days (see Chart 8a) above. Among those who have travelled incidence of overnight travel is very similar between those who do and do not identify with a disability at 61% and 62% respectively.

In the qualitative research, it also emerged that day trips are an important travel experience for people with a disability, especially those who are more severely disabled or who suffer from cognitive disabilities. The NVS confirms this. 40% of those with a disability had taken a daytrip in the qualifying period compared to 32% of those without a disability. As a result, a small part of the sample focused on those who had only taken day trips.

"Attending a football match is a something [son with Down's syndrome] enjoys. We go together. As I go as his carer it is cost effective for us both to attend."

Around one quarter had travelled overseas. In the qualitative research, Europe emerged as a popular destination – especially the UK and Ireland. Favourable comments were made on the quality of the opportunities for accessible travel in these markets by travellers in both the qualitative and quantitative research.

"The UK had really improved since the Olympics. London used to be terrible but now it is very good – there were ramps everywhere and you could use public transport. They seem well set up." Male, 35 to 54, traveller, Sydney

However, a few travellers had ventured beyond this.

"I went to Syria just before the civil war. I'm going to Iran later this year." It's challenging, but I want to get on with my life. It helps that my partner is a man, he can lift me places and we 'points hack' to get upgrades to business class." Traveller with a disability (in a wheelchair), Male, 35-54, NSW

Trip Frequency

Two thirds of those who had taken an overnight trip (NVS definition: at least 40 kilometres from home) in the past 2 years had taken at least one trip in the past 12 months.

Most are fairly frequent travellers with an average of 4 trips per year in the past 12 months and 6 trips over a 2–year period. Regular day trips are a key feature as well, with most taking one at least every 6 weeks or so.

There is relatively little difference in frequency within or without the 40km distance for overnight trips and only a slight difference for day trips (local trips are more frequent). This suggests that local markets could be a valuable (and cost-effective) market source for the tourism industry.

Table 6. Trip frequency by trip type

	Past 2 years				Past 12 months			
	Overnight trips in Aus at least 40k away	Overnight trips in Aus within 40k	Day trips in Australia> 4 hours and at least 40k away	Day trips in Australia > 4 hours and within 40k excluding routine	Overnight trips in Aus at least 40k away	Overnight trips in Aus within 40k	Day trips in Australia> 4 hours and at least 40k away	Day trips in Australia > 4 hours and within 40k excluding routine
None	16%	73%	62%	67%	3%	2%	2%	2%
1 trip	21%	10%	7%	6%	24%	11%	10%	10%
2-3 trips	31%	10%	9%	8%	28%	8%	12%	8%
4-5 trips	14%	3%	6%	4%	7%	1%	6%	5%
6-9 trips	8%	1%	5%	4%	4%	1%	2%	2%
10-19 trips	6%	1%	5%	4%	3%	1%	3%	3%
20 or more trips	4%	2%	6%	6%	2%	1%	2%	4%
Not applicable					29%	75%	63%	68%
Mean	6.0	6.3	14.2	18.0	4.1	4.1	7.0	7.8

Source: Quantitative Research Trips of each type taken (T1a and T1b) Base n = 1,406

If we compare travel frequency with the broader population in the NVS data, we can see that travellers who identify as having a disability tend to travel nearly as often as those who do not so identify (see Table 7).

Table 7. Comparison of trip frequency between travellers who do or do not identify as having a disability

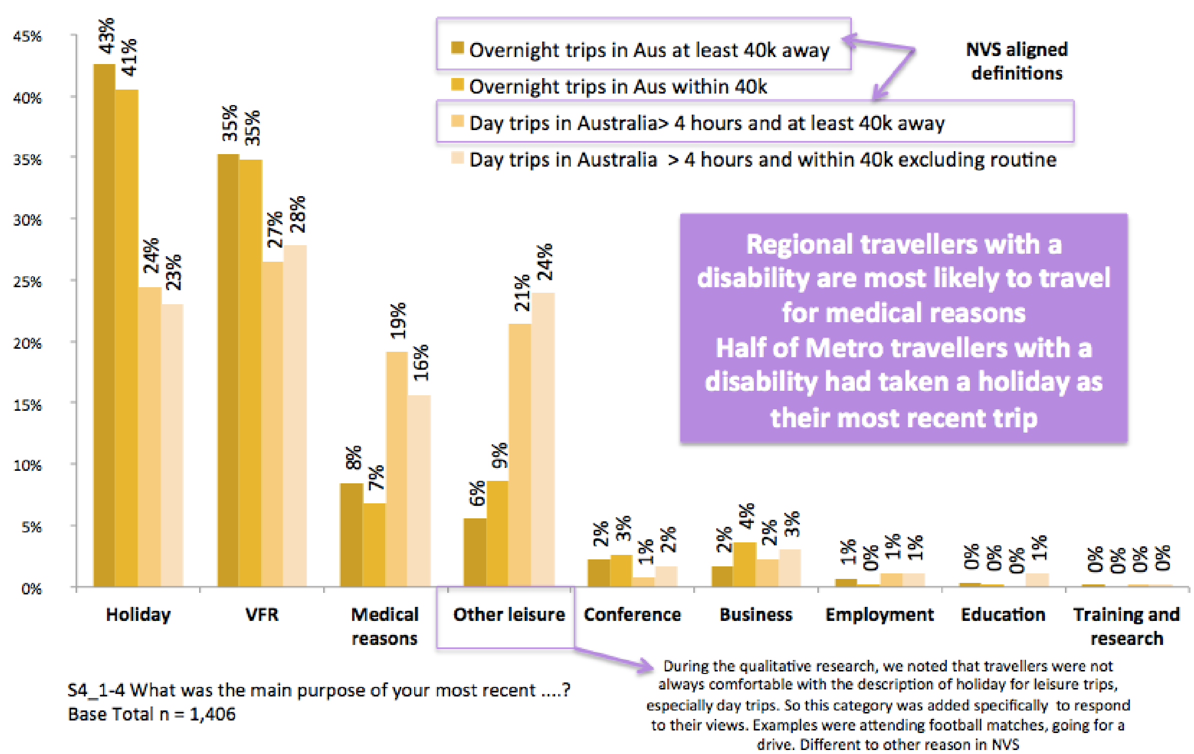
Number of trips	Daytrips		Overnight trips	
	Identify as having a disability	Do not identify as having a disability	Identify as having a disability	Do not identify as having a disability
None	84%	85%	75%	70%
1 trip	14%	13%	19%	23%
2-3 trips	2%	2%	5%	5%
4-5 trips	<1%	<1%	1%	1%
6+ trips	<1%	<1%	<1%	<1%

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

Most recent trip – Purpose of trip

The majority of overnight trips are for leisure purposes (see chart 9). Around 2 in 5 are for holidays, with a further third being to visit friends and relatives.

Chart 9. Purpose of most recent trip



Source: Quantitative Research

Even among day trips, most are for leisure purposes (although around one in six are for medical reasons).

When trip purpose is compared with the overall population (see Table 8) we can see holiday remains an important reason (most important reason for daytrips, narrowly behind VFR for overnight trips). However, overall VFR or Other reason (likely to be medical) is higher compared to the general population.

Table 8. Comparison of trip purpose with general population

	Daytrips			Overnight trips		
	Identifies with a disability	Does not identify with a disability	Total	Identifies with a disability	Does not identify with a disability	Total
Holiday	43%	52%	50%	38%	46%	44%
Visiting friends and relatives	30%	26%	27%	39%	32%	33%
Business	6%	10%	9%	13%	20%	19%
Other reason	21%	12%	14%	11%	5%	6%
No other reason	0%	0%	0%	0%	0%	0%
In transit	0%	0%	0%	2%	1%	1%
Not stated/not asked	0%	0%	0%	0%	0%	0%

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

Chart 10. Purpose of Trip by place of residence

Source: Quantitative Research

Travellers living in metro areas are more likely to have taken a holiday. In contrast those in regional areas were more likely to have travelled for medical reasons.

Most recent trip – Travel Party

On average those with a disability were part of a group of between 2 or 3 people (see table 9). This is consistent with international research that shows that a multiplier of between 2 and 3 needs to be applied to expenditure figures if the true scale of the accessible tourism market is to be understood.

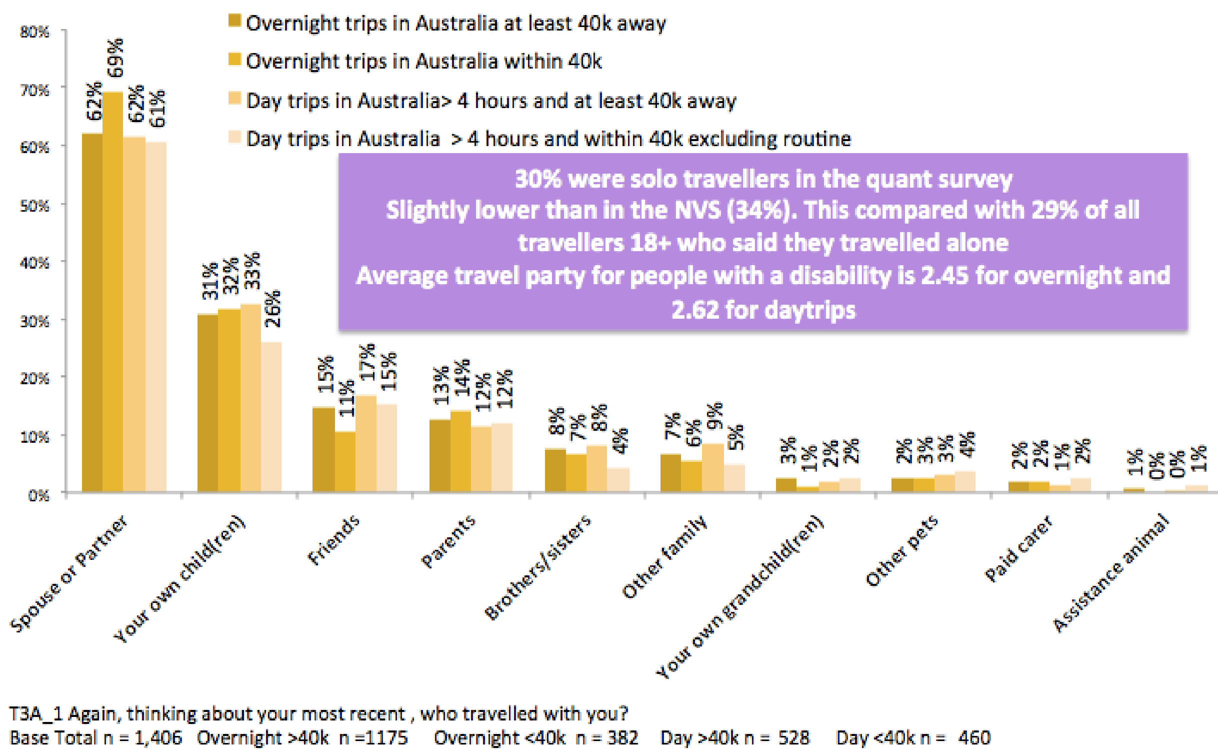
Table 9. Size of Travel Party

	Overnight trips in Australia at least 40km away	Overnight trips in Australia within 40km	Day trips in Australia> 4 hours and at least 40km away	Day trips in Australia > 4 hours and within 40km excluding routine
Travelled alone	30%	29%	25%	24%
With 1 other person	44%	47%	46%	47%
With 2 - 4 others	23%	20%	26%	26%
With 5 - 9 others	2%	1%	2%	2%
With 10 or more others	2%	2%	1%	2%
Average size of travel group	2.45	2.54	2.62	2.77

Source: Quantitative Research, T2. Thinking about your most recent trip <QCARERS ADD, with the person you care for>, how many people travelled with you? <SELECTED MORE THAN ONE OF CODES 1 to 4 AT S3 ADD: for each type of trip>? Please include yourself and <QCARERS ADD, the person you care for as well as> members of your direct party only. Base n = 1,406

However, between a quarter and a third of travellers with a disability are solo travellers. Overall, incidence of solo travel among travellers with a disability is slightly higher than for the general population. Although those with significant disabilities require carers, many travellers with a disability do have the capacity to travel alone. Incidence of solo travellers for overnight trips rises with age and is also higher among those with mental health issues. Thus some of this solo travel may reflect the absence of travelling companions. Those with cognitive difficulties or intolerance to noise and other cues are less likely to be solo travellers. The most typical travelling companions are spouses and partners (see chart 11). Sixty-two percent (62%) travelled with partners on overnight trips at least 40 kilometres away, rising to more than two thirds for closer overnight trips. Overall travelling companions don't tend to vary for different types of trips.

Chart 11. Travelling companions for most recent trip



Source: Quantitative Research

Those aged 18-34 or those with a mental health condition were least likely to travel with a partner. Travelling with a spouse also declines for those aged over 75 (more likely to be doing multi-generational travel with grandchildren). Apart from being more likely to be solo travellers, those with a mental health condition were more likely to be travelling with their parents, siblings or other family members.

Those travelling with children (around a third for all trips) were often carers for children, especially those with cognitive disabilities.

Incidence of travel with paid carers is relatively modest and is generally limited to those with the greatest mobility challenges.

Around 1% travel with assistance animals, with a further 2% travelling with other pets. Incidence of pet ownership was observed to be high among the participants of the qualitative research as well.

Table 10. Travel Party Comparison with general population (overnight trips)

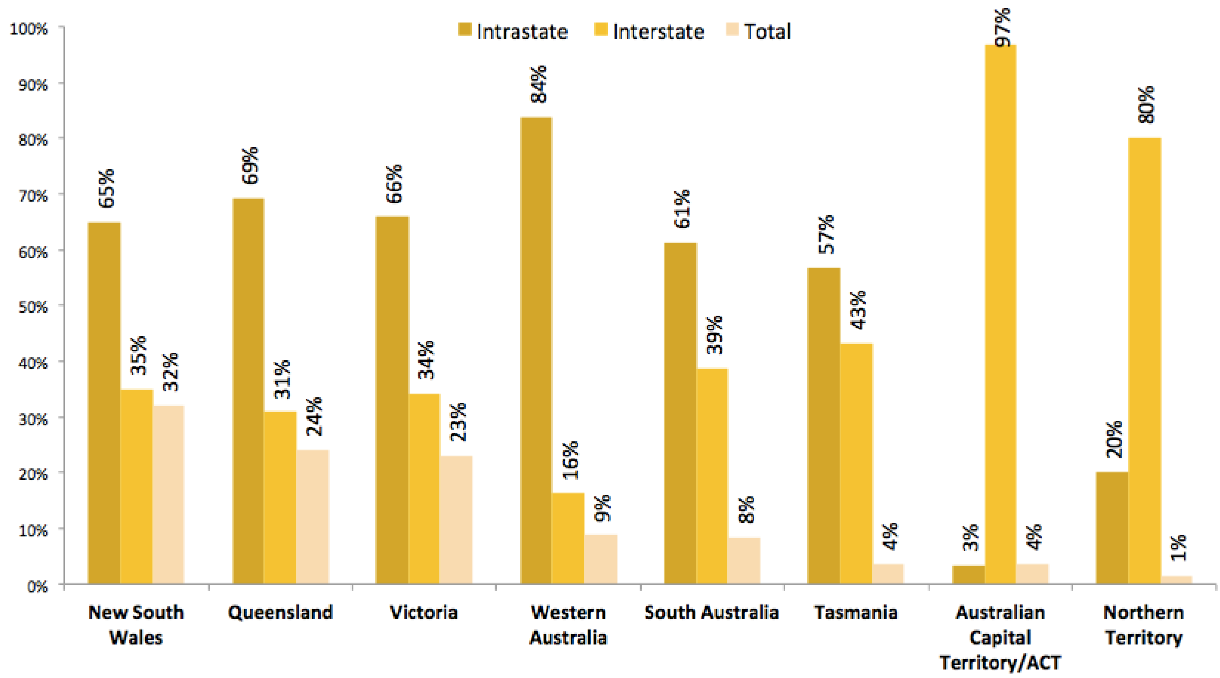
Travel Party	Identifies with a disability	Does not identify with a disability	Total
Travelling alone	34%	28%	29%
Adult couple	30%	26%	27%
Family group - parents and children	14%	19%	18%
Friends or relatives travelling together - with children	4%	4%	4%
Friends or relatives travelling together - without children	16%	17%	17%
Business associates travelling together - with spouse	0%	0%	0%
Business associates travelling together - without spouse	2%	5%	4%
School/uni/college group (incl if sporting)	0%	0%	0%
Non-school sporting group/community group or club	0%	0%	0%
Other	0%	0%	0%

Source: Tourism Research Australia, NVS, March Quarter 2017 Sample size n = 29,164 of whom n = 7,288 identified as a disability

Most recent trip – Destination

New South Wales is the most visited destination with 32% having visited on their most recent trip, as most travel is intrastate this figure reflects its larger population (see chart 12). Around a quarter of travellers each has visited Queensland and Victoria and again this dominated by intrastate travel.

Chart 12: Destination State for most recent trip (All Australia)



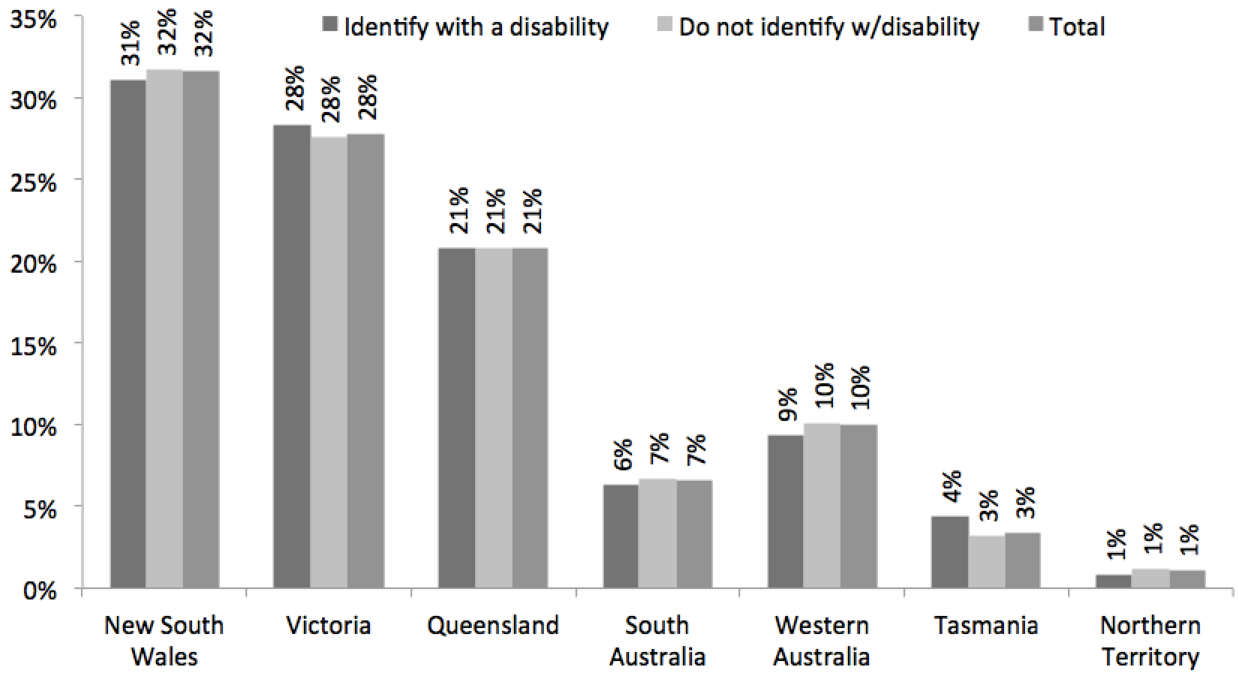
T4 Where did you go for your most recent trip / in Australia
Base Total n = 1,406 Note small sample sizes for Western Australia, South Australia, Tasmania, ACT and Northern Territory
Unweighted data

Source: Quantitative Research

Those from Regional areas are more likely to visit Queensland, whilst those from Metro areas are more likely to visit Victoria.

States visited to do differ materially from the general population (see Chart 12a).

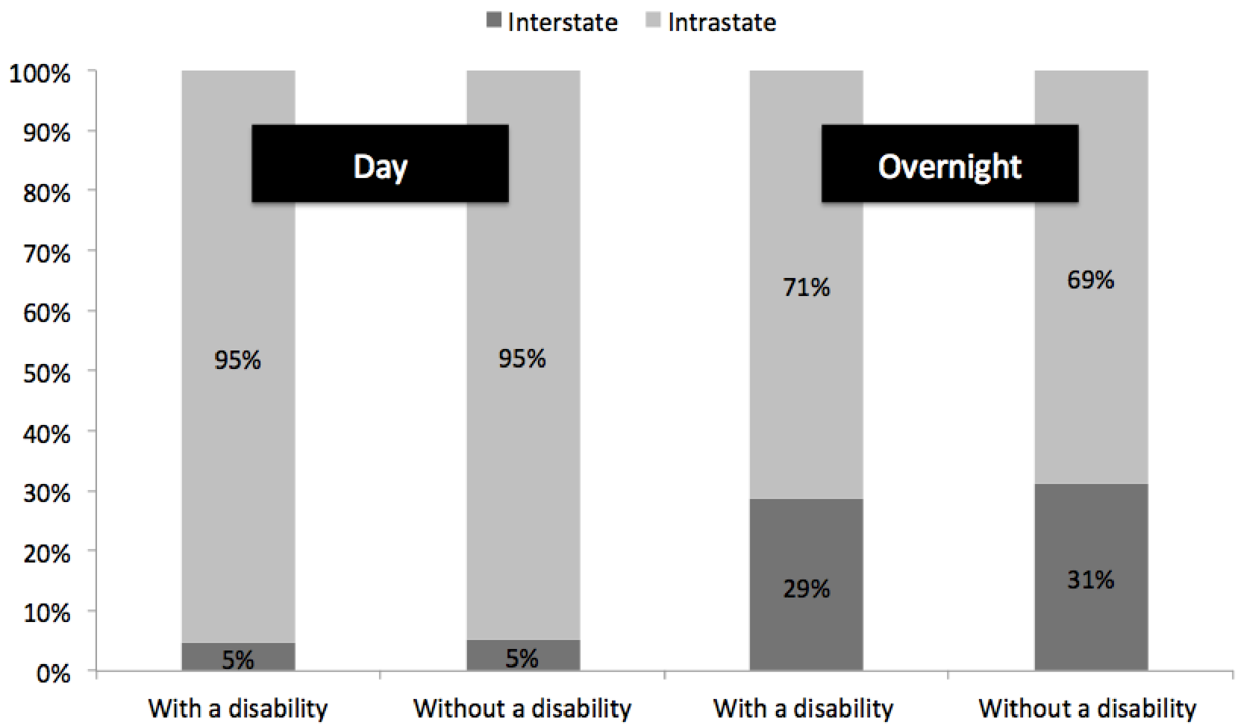
Chart 12a: Destination state for most recent trip – Travellers with a disability compared to the general population



Source: Tourism Research Australia, NVS, March Quarter 2017, Sample size n = 29,164 of whom n = 7,288 identified as a disability

Similarly there is remarkably little difference in the incidence of intrastate and interstate travel between travellers with a disability and the general population. (See Chart 13.)

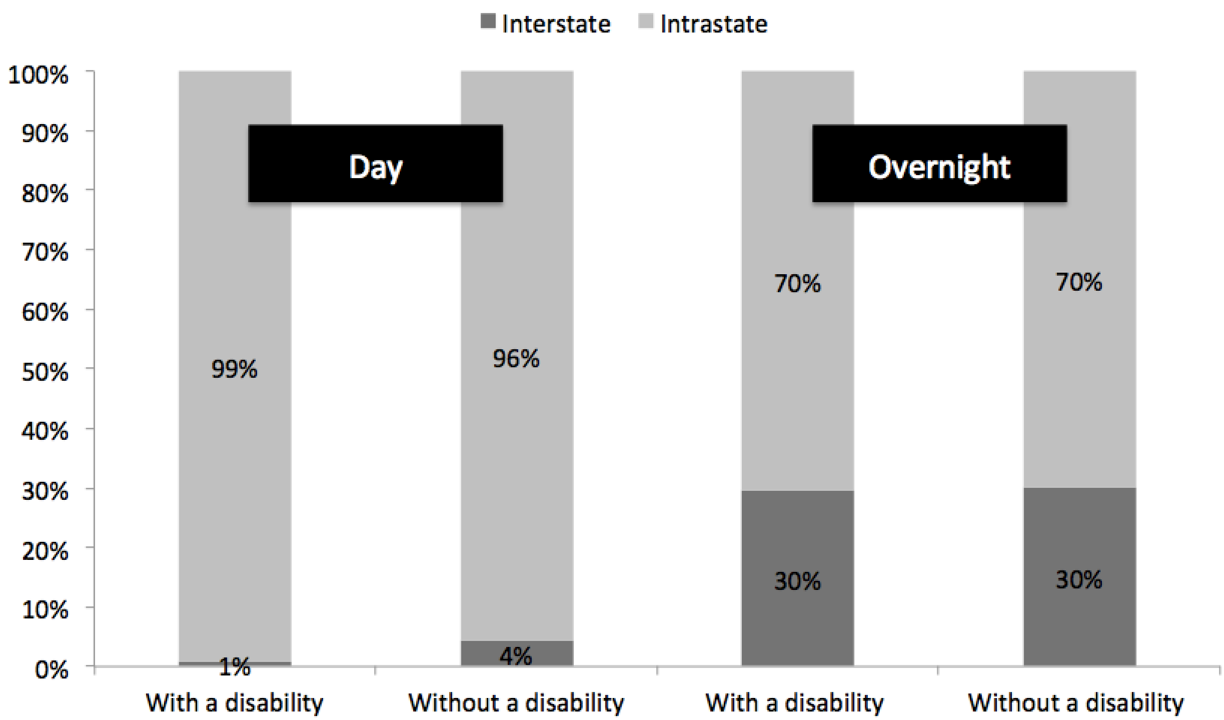
Chart 13: Interstate vs. Intrastate Travel compared to the general population



Source: Tourism Research Australia, NVS, March Quarter 2017 Sample size n = 29,164 of whom n = 7,288 identified as a disability

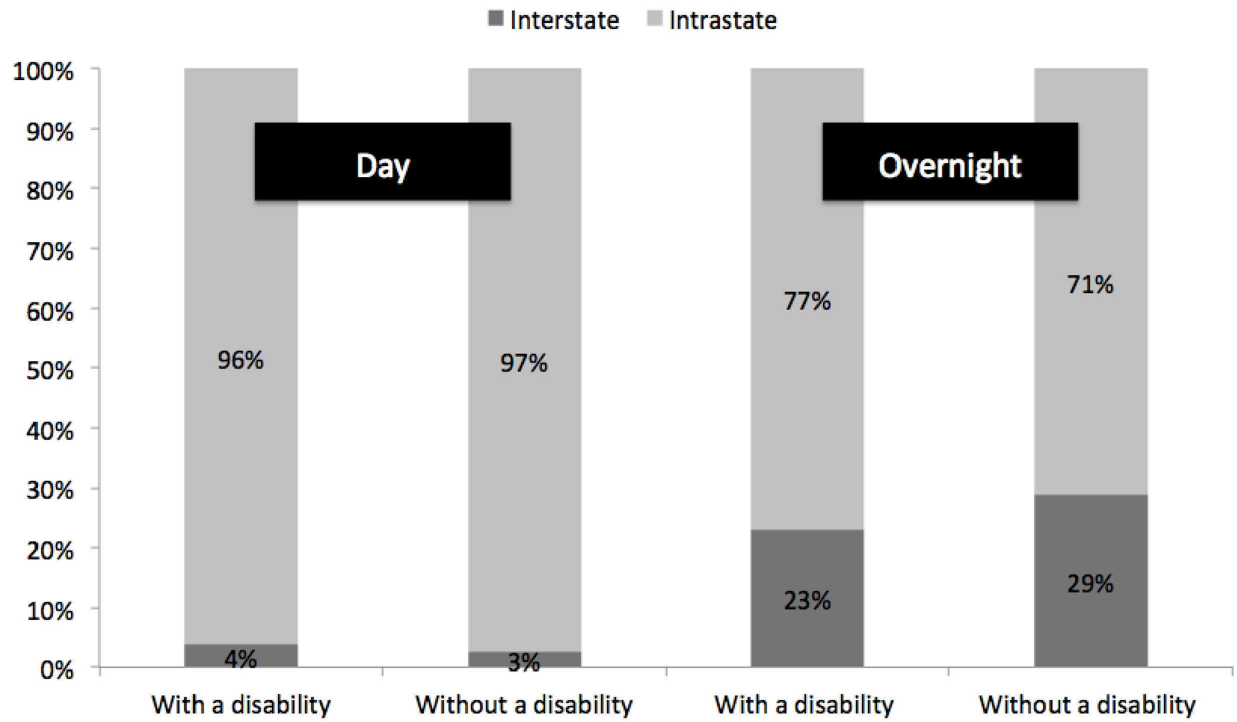
This pattern is broadly reflected for Queensland (see Chart 13a), but Victoria has a higher proportion of intrastate overnight visitors (see Chart 13b).

Chart 13a: Interstate vs. Intrastate Travel compared to the general population – Queensland visitors



Source: Tourism Research Australia, NVS, March Quarter 2017 Sample size n = 29,164 of whom n = 7,288 identified as a disability

Chart 13b: Interstate vs. Intrastate Travel compared to the general population – Victorian visitors



Source: Tourism Research Australia, NVS, March Quarter 2017 Sample size n = 29,164 of whom n = 7,288 identified as a disability

Nine percent (9%) of travellers to Queensland are from Victoria and 8% of visitors to Victoria are from Queensland (see Table 11).

Table 11. Source markets for visitors

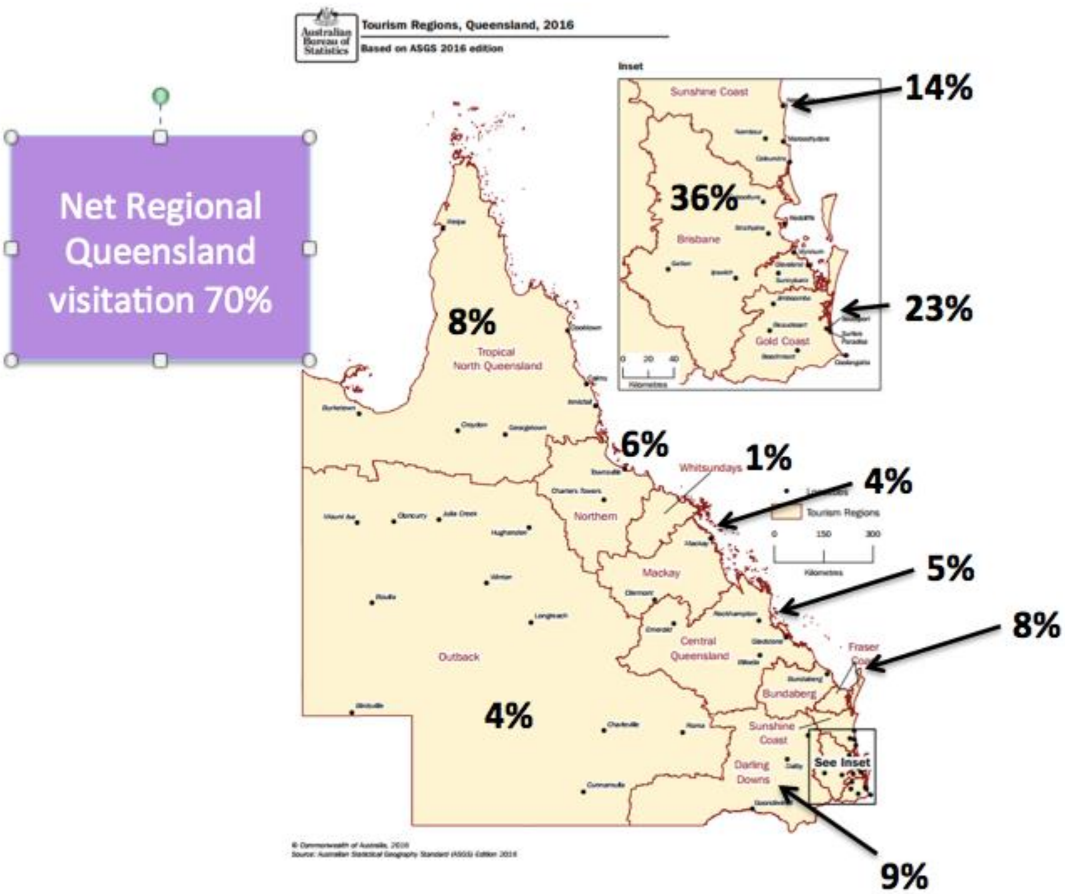
State visited	State of residence							
	NSW	VIC	QLD	SA	WA	ACT	NT	Tasmania
Australian Capital Territory/ACT	8%	2%	2%	1%	1%	3%	0%	0%
Northern Territory	1%	1%	1%	2%	2%	0%	20%	0%
New South Wales	65%	17%	20%	9%	9%	73%	0%	8%
Queensland	16%	9%	69%	9%	4%	10%	20%	8%
South Australia	2%	5%	1%	61%	3%	7%	20%	5%
Tasmania	3%	2%	2%	1%	1%	0%	0%	57%
Victoria	8%	66%	8%	22%	3%	10%	20%	22%
Western Australia	2%	2%	1%	1%	84%	0%	20%	0%
Other Australian territory or dependency	0%	0%	0%	0%	0%	0%	0%	0%

Source: Quantitative Research, Question T4 Where did you go for your most recent visit Base n = 1,406

The capital cities are the most visited destinations for each state with 36% of visitors to Queensland going to Brisbane or surrounds and 42% visiting Melbourne as Figures 4 and 5 show. However, overall visitation of regional areas is higher for both states: more than two thirds have visited a regional area in each state, rising to nearly three quarters of intrastate travellers.

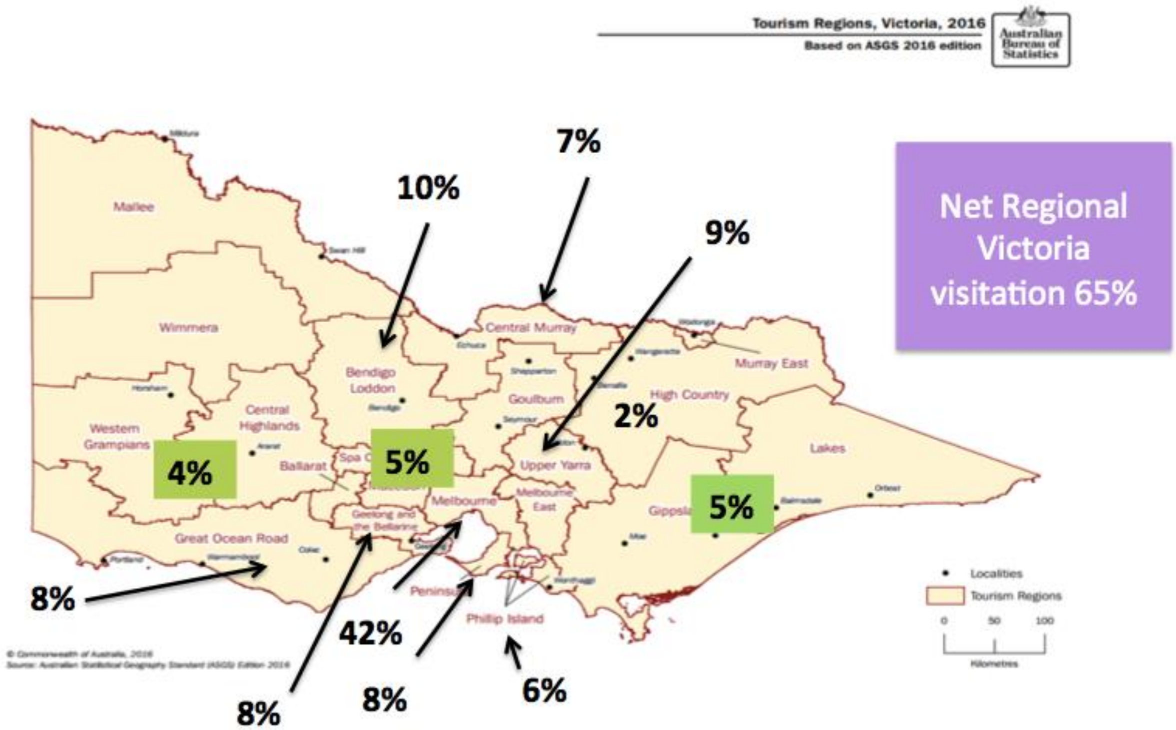
But there are also differences between the states: Brisbane visitors are more likely to be intrastate visitors, whereas those who visit Melbourne are more likely to be interstate visitors. Seventy percent (70%) of interstate visitors to Victoria go to Melbourne with a lower regional dispersal by travellers with a disability for Victoria than for Queensland.

Figure 4. Regions visited (Queensland)



Source: Quantitative Research, T5. You mention that you had visited <state> on your last trip, where did you go? Queensland Base n = 340

Figure 5. Regions visited (Victoria)



Source: Quantitative Research, T5. You mention that you had visited <state> on your last trip, where did you go? Victoria Base n = 323

The Gold Coast, the second most visited destination in Queensland overall, is stronger as an interstate destination and is as likely as Brisbane to be the destination for interstate visitors to Queensland.

Table 12. Split of Visitors to key regions – interstate and intrastate

State visited on last trip (day and overnight combined - 84% are overnight)	Total	Intrastate	Interstate
Queensland Base n = 340			
Brisbane and surrounds	36%	38%	33%
NET Regional Queensland	70%	74%	68%
Gold Coast	23%	17%	34%
Sunshine Coast	14%	13%	15%
Tropical North Queensland	8%	8%	8%
Fraser Coast	8%	10%	5%
Southern Queensland Country	7%	7%	6%
Townsville & North Queensland	6%	8%	3%
Southern Great Barrier Reef	5%	7%	3%
Mackay	4%	4%	2%
Outback	4%	4%	3%
The Whitsundays	1%	0%	2%
Victoria Base n=323			
Melbourne	42%	30%	70%
NET Regional Victoria	65%	75%	34%
Goldfields	10%	9%	11%
Yarra Valley & Dandenong Ranges	9%	10%	5%
Mornington Peninsula	8%	10%	6%
Geelong & the Bellarine Peninsula	8%	9%	6%
Great Ocean Road	8%	10%	4%
Murray	7%	7%	7%
Phillip Island	6%	9%	0%
Daylesford & the Macedon Ranges	5%	6%	3%
Gippsland	5%	7%	1%
Grampians	4%	5%	2%
High Country	2%	1%	3%

Source: Quantitative Research, T5. You mention that you had visited <state> on your last trip, where did you go?

Queensland visitation tends to be more concentrated in the three key areas of Brisbane, the Gold Coast and the Sunshine Coast. In contrast, regional travel in Victoria is fairly dispersed.

When compared to the general population (see tables 13 and 14) it can be seen that day trip patterns are broadly similar. However, there are some differences in overnight trips. Brisbane has stronger overnight visitation for people with a disability, whereas more overnight travel is regionally dispersed in Victoria.

Table 13. Visitation to Queensland regions compared to the general population

Regions visited (ranked by total overnight)	Day trips: Identifies with a disability	Day trips: Does not identify with a disability	Day trips: Total	Overnight trips: Identifies with a disability	Overnight trips: Does not identify with a disability	Overnight trips: Total
Brisbane	31%	34%	33%	37%	29%	30%
Gold Coast	20%	22%	21%	24%	21%	21%
Sunshine Coast	21%	16%	17%	13%	17%	17%
Darling Downs	5%	9%	8%	9%	8%	8%
Central Queensland	5%	5%	5%	7%	5%	5%
Tropical North Queensland	4%	6%	5%	6%	5%	5%
Northern	3%	4%	3%	1%	5%	4%
Outback	2%	1%	1%	5%	4%	4%
Mackay	1%	1%	1%	1%	4%	4%
Fraser Coast	4%	1%	2%	4%	3%	3%
Whitsundays	1%	0%	1%	2%	2%	2%
Bundaberg	3%	2%	2%	1%	3%	2%

Source: Tourism Research Australia, NVS, March Quarter 2017 Sample size n = 29,164 of whom n = 7,288 identified as a disability

Those aged over 75 were more likely to travel to Outback Queensland and to the Fraser Coast.

Table 14. Visitation to Victorian regions compared to the general population

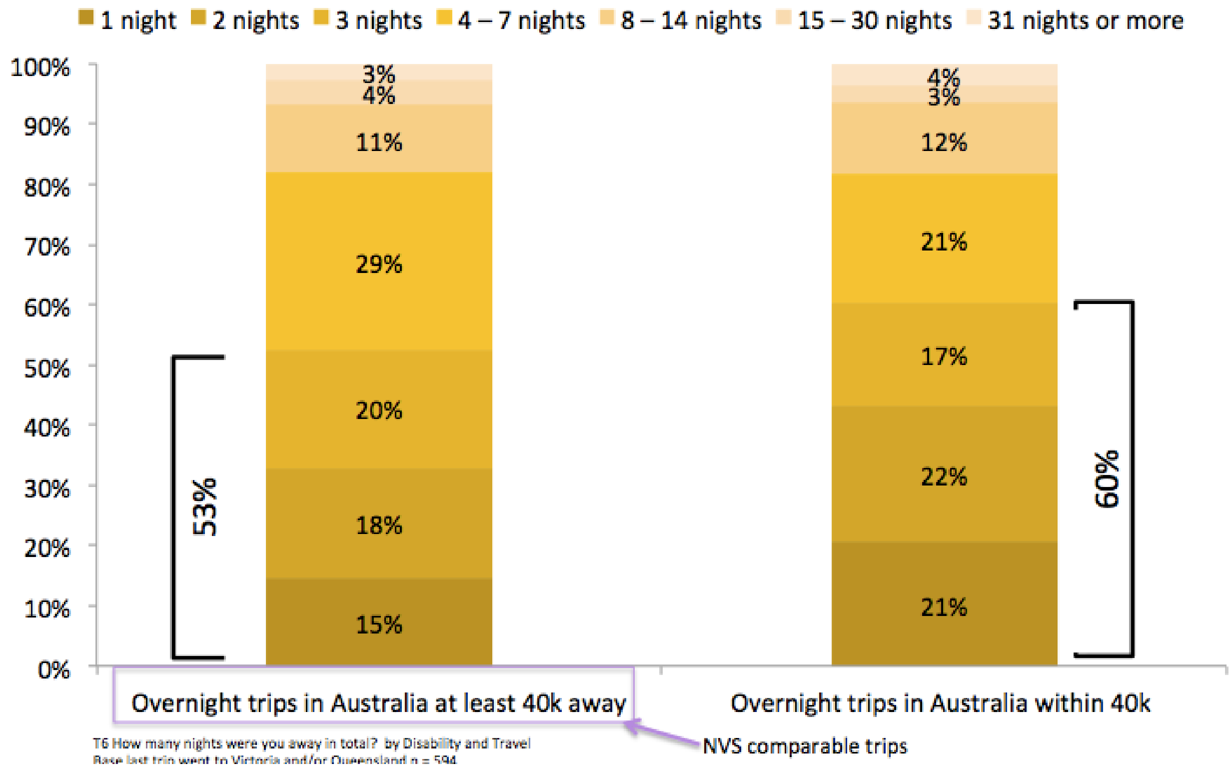
Regions visited ranked by total overnight	Day trips			Overnight trips		
	Identifies with a disability	Does not identify with a disability	Total	Identifies with a disability	Does not identify with a disability	Total
Melbourne	35%	35%	35%	35%	35%	35%
Murray	18%	15%	16%	25%	18%	19%
Gippsland	6%	11%	10%	13%	17%	16%
Goldfields	14%	11%	11%	12%	9%	10%
Mornington Peninsula	9%	9%	9%	9%	9%	9%
Geelong and the Bellarine	8%	8%	8%	8%	8%	8%
Grampians	5%	4%	4%	7%	6%	6%
Yarra Valley & the Dandenongs	10%	11%	11%	7%	6%	6%
Great Ocean Road	3%	3%	3%	3%	3%	3%
Daylesford and the Macedon Ranges	3%	2%	2%	3%	3%	3%
Phillip Island	3%	3%	3%	3%	3%	3%
High Country	2%	2%	2%	2%	2%	2%

Source: Tourism Research Australia, NVS, March Quarter 2017 Overall sample size n = 29,164 of whom n = 7,288 identified as a disability

Length of most recent trip

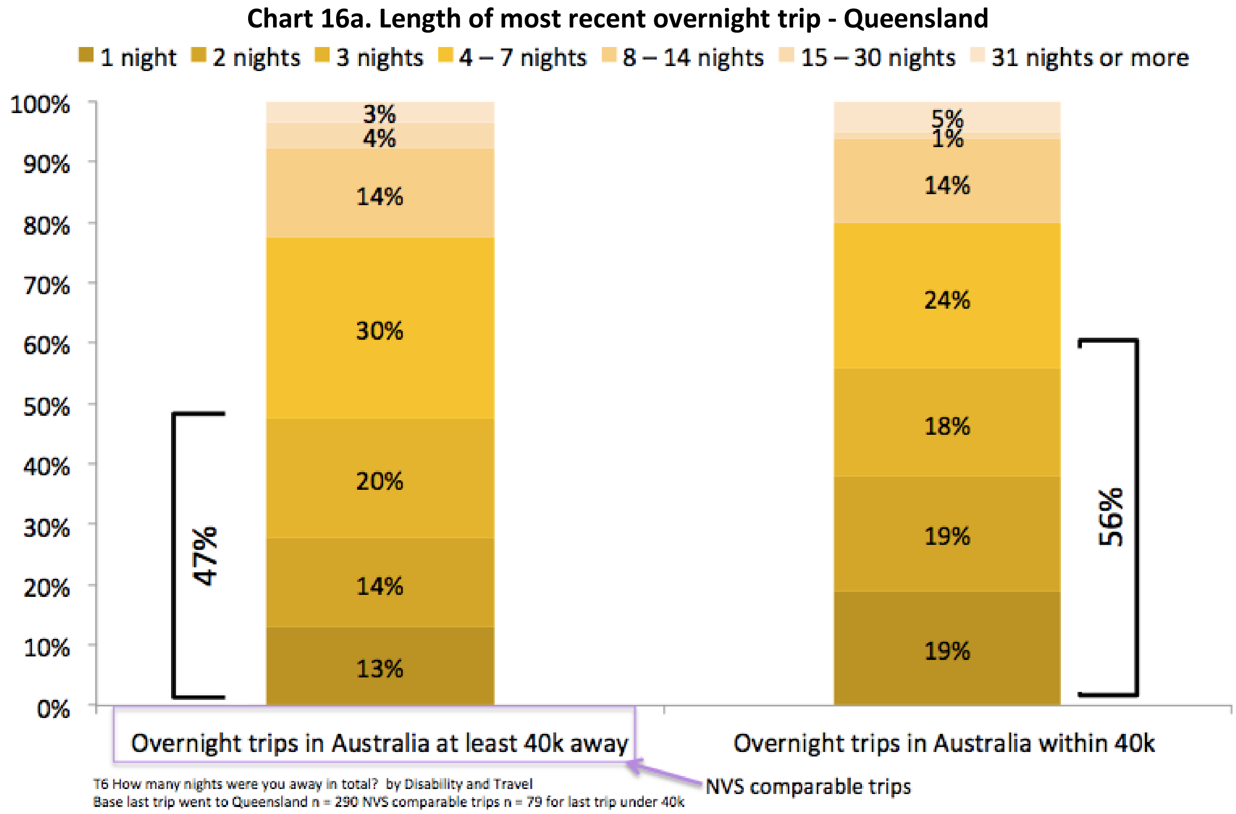
More than half of all trips are for 3 nights or less (see Chart 16). Closer trips tend to be shorter on average, 29% of trips at least 40 kilometres from home are for 4-7 nights as opposed to 21% for those within 40 kilometres of home.

Chart 16. Length of most recent overnight trip



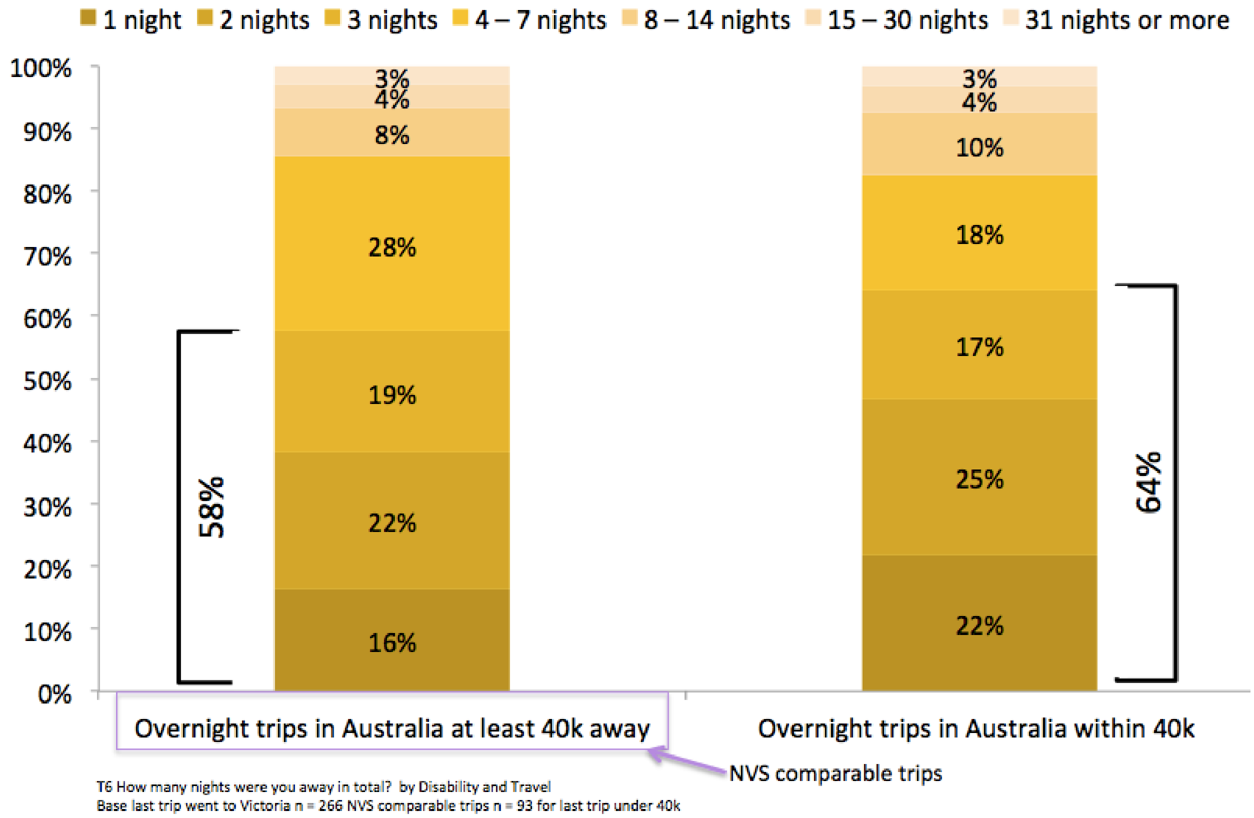
Source: Quantitative Research

Breaks in Victoria tend to be slightly shorter than those in Queensland. As charts 16a and 16b show, 58% of overnight trips at least 40 kilometres from home are for 1 to 3 nights, compared to 47% for Queensland.



Source: Quantitative Research

Chart 16b. Length of most recent overnight trip – Victoria



Source: Quantitative Research

Table 15.
Comparison of most recent trip length: Travellers identifying with a disability compared to the general population

	Identifies as having a disability		
Length of Trip	Identifies as having a disability	Does not identify with a disability	Total
1 night	26%	29%	28%
2 nights	23%	25%	25%
3 nights	16%	16%	16%
4 - 7 nights	24%	21%	22%
8 - 14 nights	9%	7%	7%
15 - 30 nights	3%	2%	2%
31 or more nights	0%	0%	0%

Source: Tourism Research Australia, NVS, March Quarter 2017 Sample size n = 29,164 of whom n = 7,288 identified as a disability

According to the NVS data for the March quarter 2017, average trip length for travellers identifying with a disability was slightly longer than for those who did not: 4.2 nights as opposed to 3.8. In particular, travellers with a disability are more likely to take trips longer than 4 nights.

Most recent trip – Main type of accommodation used

Staying with friends and relatives even for holiday trips is the most common form of accommodation used, with one third of travellers stating that this was where they stayed on their most recent trip. This reflects the strong VFR component of leisure trips for travellers with a disability. It was less common for holidays although 1 in 8 holiday traveller stays were with family or friends.

The second most common form of accommodation used is a standard motel room (25%) and this was the most used form of accommodation for holiday overnight trips and business trips including for conferences and training.

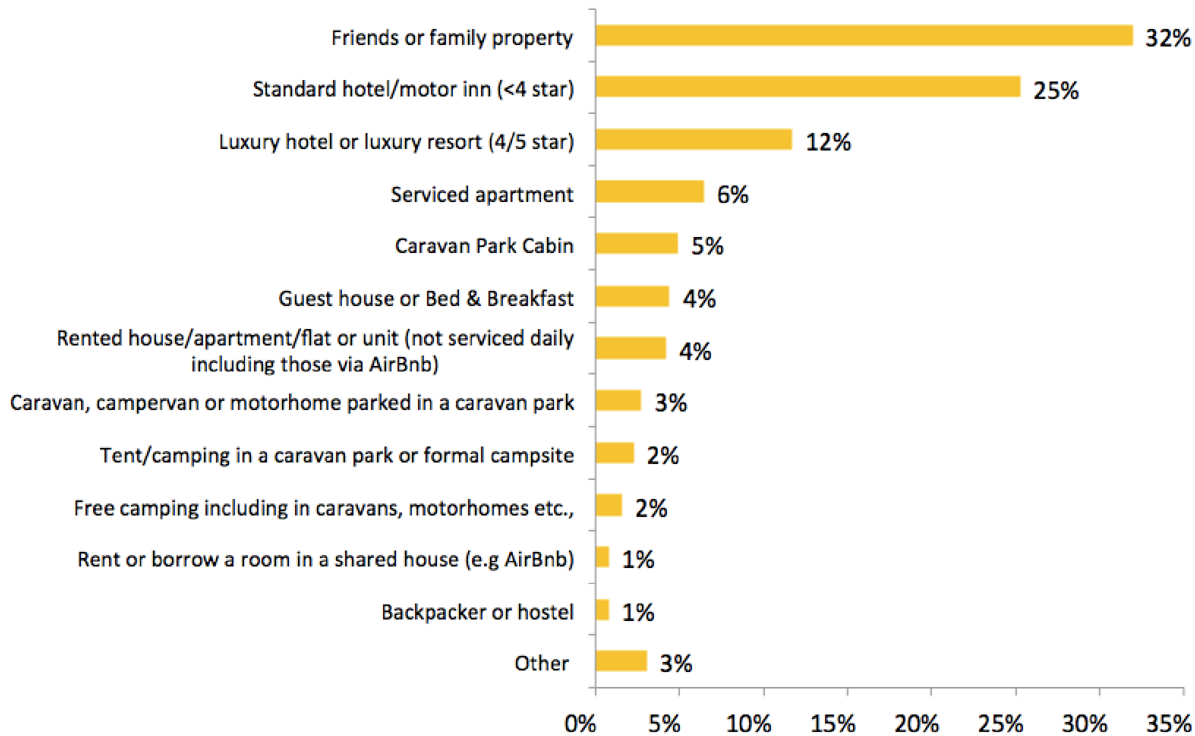
4-star plus accommodation is the third most used at 12% overall. Again incidence is higher for holiday trips, particularly those within 40 kilometres of home where 21% had used this type of accommodation on their most recent trip.

Serviced apartments were used by 6%. In the qualitative research, families of children with cognitive disabilities commented that this was an attractive form of accommodation – including use of Airbnb. Indeed a number of participants in the qualitative research indicated that they were investigating Airbnb, as this was felt to be cost effective and an option that could be thoroughly investigated.

"Perhaps AIRBNB should start up getting people who have their homes already decked out for disabilities a separate section created into their website to accommodate the disabled!!!" Female, 35 to 54, Carer, Sydney

Those aged 18-34 were slightly more likely than average to use guesthouses and backpacker accommodation.

Chart 17. Main form of accommodation used on most recent trip



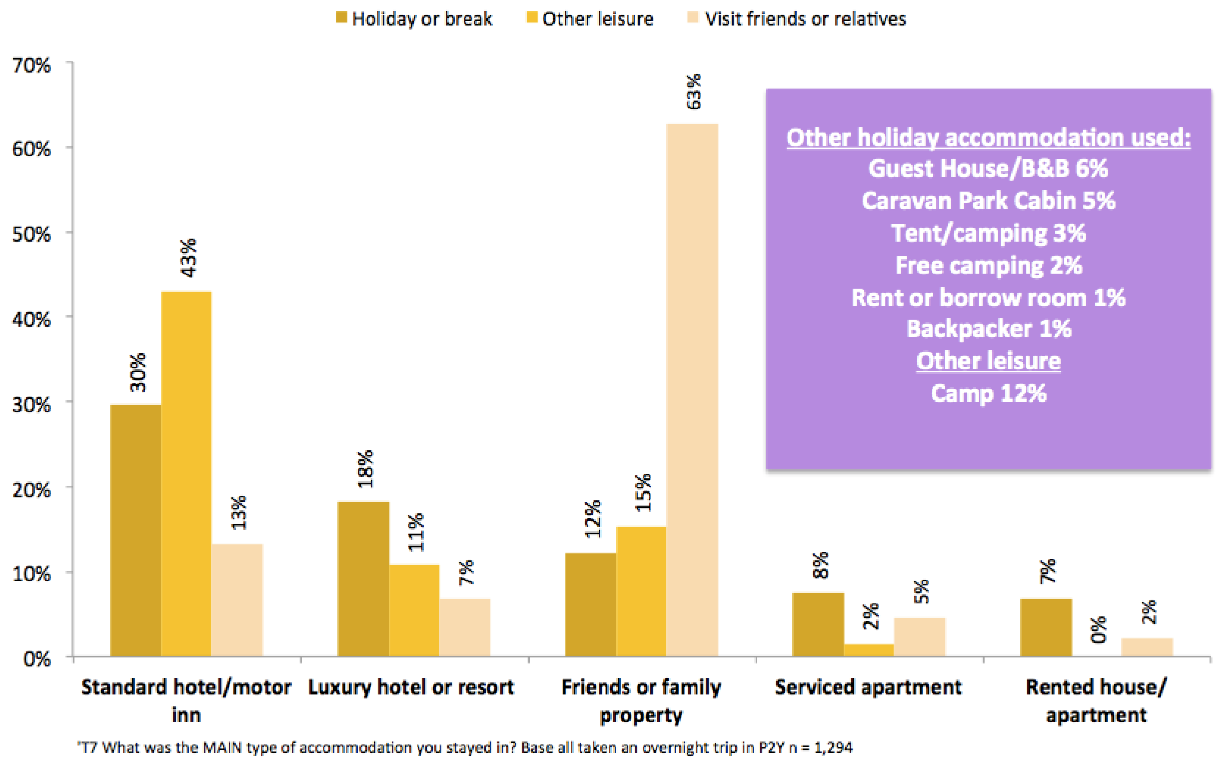
'T7 What was the MAIN type of accommodation you stayed in? Base all taken an overnight trip in P2Y n = 1,294

Source: Quantitative Research

There is however variation in the type of accommodation used depending on the nature of the trip undertaken. (See Chart 17a[22]). Paid accommodation is most typically used for all purposes except VFR.

[22] Note Chart 17a replaces Table 16. There is now no Table 16

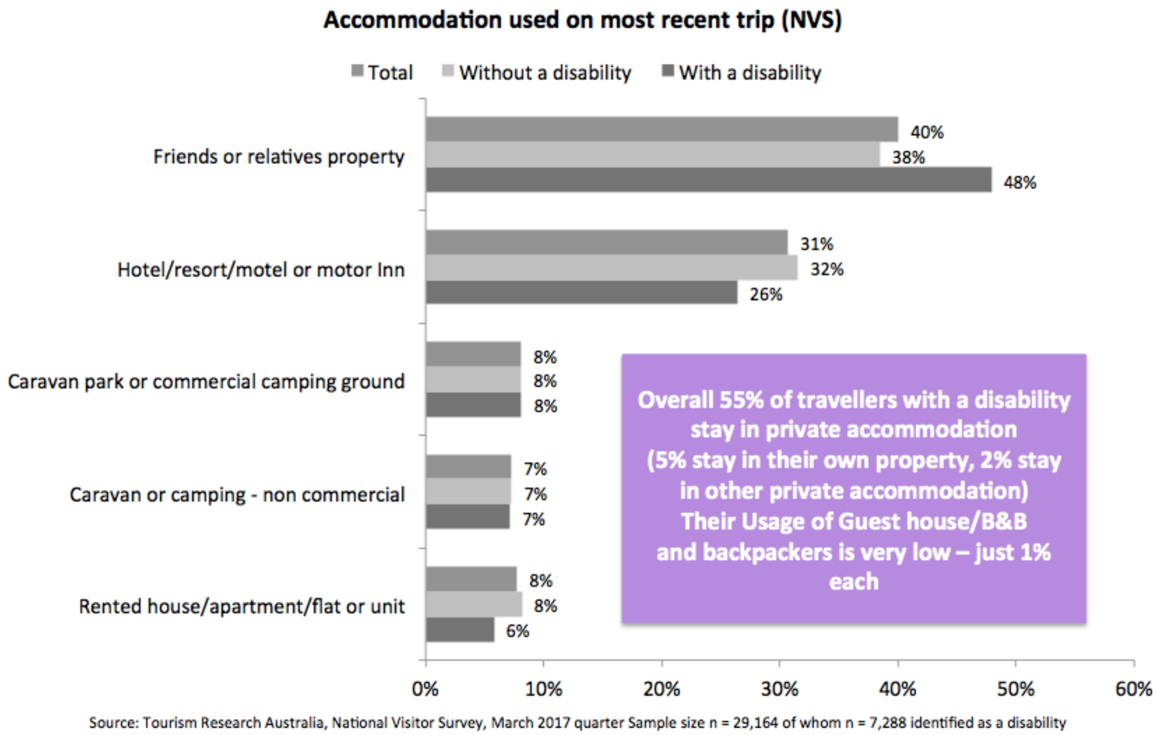
Chart 17a. Main Type of accommodation used on most recent trip by purpose (Top 5)



Source: Quantitative Research, T7 What was the main form of accommodation you stayed in? Base, all who had taken an overnight trip in P2Yn = 1,294

When compared to the general population, usage of friends and relatives property is higher for travellers with a disability (see Chart 18) again reflecting the importance of VFR within the accessible tourism sector overall. But apart from this and standard accommodation, all other forms of accommodation (rentals, caravans) are equally popular for travellers with a disability.

Chart 18. Accommodation used for persons with a disability compared to the general population



Most recent trip – transport preferences

As the chart 19 shows, travellers said they found using a private vehicle most convenient for both day and overnight trips. 78% said it was their preferred transport mode for day trips and 69% for overnight trips.

However, the evidence from the qualitative research and feedback questions in the quantitative research clearly show that this is for many a reflection of the current offering:

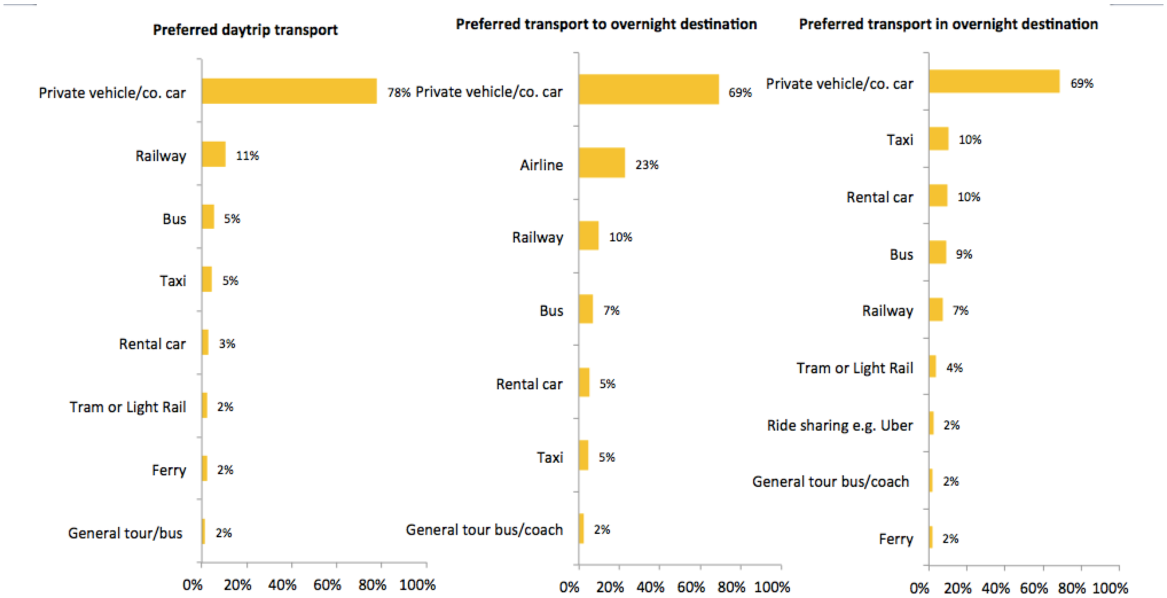
- Those from regional areas noted that they often had little choice on this, as other options were limited.
- Uncertainty over ease of use for public transport options across the whole journey made it stressful to consider using alternative transport. For example, it wasn't always certain that accessible buses would be available or whether there would be seats.
- Previous experience of using alternatives (both airports and ground transport). For those with less obvious disabilities (e.g. able to walk short distances, but not stand for a long time) found it difficult if transport was crowded.

Cost was also a factor for services like taxis. In the qualitative research, some travellers noted that they had access to disability discounts and those who were in a wheelchair were more likely to use taxis, but even so this was felt to be an expensive option which was only used occasionally, and the perception is that the vouchers are only available within the state. Vision Australia advises travellers that it is possible to apply to other states for a package whilst visiting, but that this needs to be done from the state of residence in advance and is time consuming. Improving this procedure and communicating that discounted cab fares are an option are a possible quick win to facilitate more interstate travel.

"I have a taxi voucher that gets me a discount, but even so it is expensive if you do it every time. I simply don't have the money." Female, 35 to 54, Carer, Melbourne

"I do use the vouchers but I have to save them, I'm on a pension and it doesn't stretch far." Male, over 55, Traveller with mobility and mental health issues, Melbourne

Chart 19. Preferred means of transport (Top 5[23])



DT1 Which of these were the easiest for you to use on your most recent daytrip? Base n = 132
DT2 Which of these were the easiest way to get you to your destination...
And DT3 Once at your destination, which of these were the easiest to use to get around whilst you were there? If you stayed overnight...
Base n = 1,294

Source: Quantitative Research

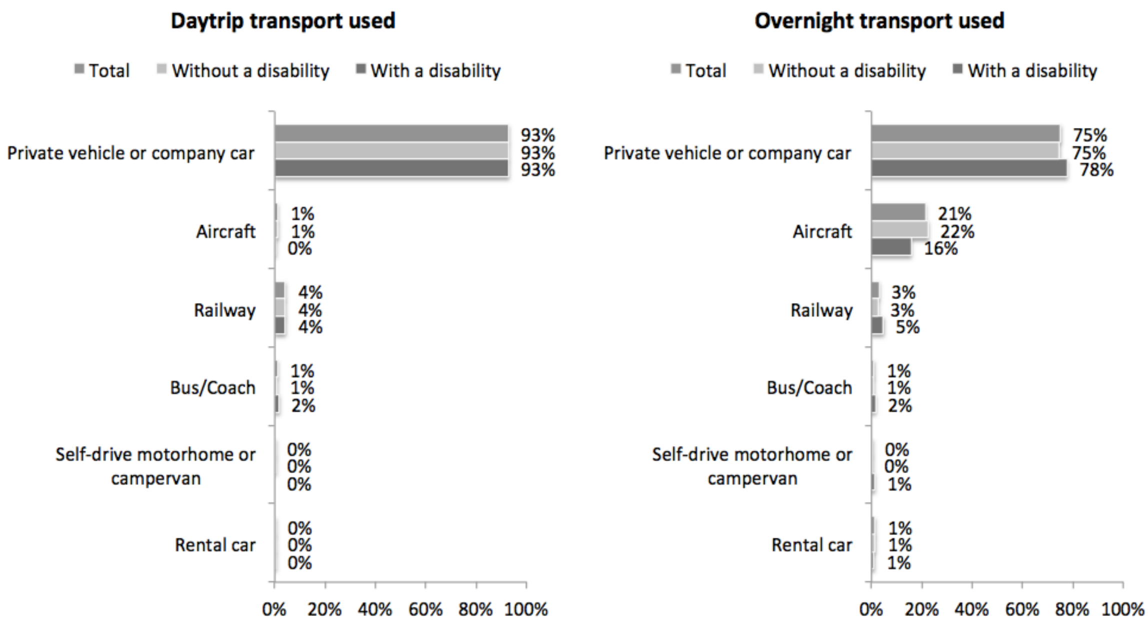
Those aged 18-34 and those who were not native Australians were less likely to rely on cars than other groups, although this was still their most used option.

Uber was more popular with younger travellers with a disability. Australian residents who have lived here less than 10 years were more likely to use a variety of public transport (depending on where they lived) and to use rental cars.

[23] More than 5 items appear if several responses shared the 5th position

Transport preferences for travellers with a disability are not markedly different from other Australians however as chart 20 shows. Australians largely prefer to take their own car whether they are travelling for a day or overnight. Aircraft is the second highest preference for overnight travel across the population, although incidence is slightly lower for travellers with a disability who are slightly more likely to use ground transport.

Chart 20. Transport used on last trip for person with a disability compared to the general population



Source: Tourism Research Australia, NVS, March Quarter 2017 Sample size n = 29,164 of whom n = 7,288 identified as a disability
Note: means with <1% not shown

Experiences undertaken on most recent trip

Information from the NVS (March 2017 quarter) was used to understand the activities undertaken by travellers identifying with a disability. Besides understanding which activities they are most likely to do overall, we have also considered those with the highest proportion of travellers with a disability (as organisations offering these services may be higher priorities).

Although travellers with a disability undertake slightly fewer activities, the most undertaken activities for both overnight and day trips do not greatly differ from those undertaken by travellers who do not identify as having a disability. Eating out at restaurants, spending time with friends and family, going to the beach and nature-based activities are all popular.

Playing sport is also a popular activity for both day and overnight travellers.

Overnight trips

Two thirds of overnight travellers who identify as having a disability ate out a restaurant, a quarter went to the beach (see Table 17). Shopping, sightseeing and social activities are all popular activities. Around one in nine visits a national or state park. Overall, travellers with disabilities undertake the same activities at the general population. They are slightly less likely to go to the beach or go bushwalking but these are still amongst their most popular activities.

Table 17. Top 20 activities for travellers with a disability compared to the general population

Activity	Identify with disability	Do not identify with disability	Total
Eat out / dine at a restaurant/cafe	62%	63%	63%
Visit friends & relatives	53%	45%	46%
Go to the beach	25%	31%	30%
Sightseeing/looking around	25%	24%	24%
Go shopping for pleasure	25%	20%	21%
Pubs, clubs, discos etc	23%	22%	22%
Visit national parks / state parks	11%	11%	11%
Go to markets	10%	8%	9%
Bushwalking / rainforest walks	9%	12%	11%
Picnics or BBQs	8%	7%	7%
Visit museums or art galleries	7%	6%	6%
Fishing	7%	7%	7%
Go on a daytrip to another place	6%	6%	6%
Exercise, gym or swimming	6%	8%	8%
Visit history / heritage buildings, sites or monument	6%	5%	5%
Play other sports	4%	3%	3%
Water activities / sports	4%	6%	6%
Visit wineries	4%	4%	4%
Attend festivals / fairs or cultural events	4%	4%	4%
Visit botanical or other public gardens	3%	4%	4%
Visit food markets (2016 onwards)	3%	2%	2%
Attend movies/cinema	3%	3%	3%

Source: Tourism Research Australia, NVS, March Quarter 2017 Sample size n = 29,164 of whom n = 7,288 identified as a disability

Table 18 shows the activities that have the highest proportion of visitors with a disability (and are above the threshold for consideration due to sample size). Food and wine, culture and heritage figure strongly as themes. Both theme parks and national parks do well. Apart from food and wine experiences, many are among the activities that were identified by stakeholders as generally leading the way in offering accessible experiences.

Table 18. Activities with the highest share of people with a disability

Top Activities where people with a disability have the highest share of activities*	
Visit food markets	19%
Play other sports	19%
Visit history / heritage buildings, sites or monuments	18%
Go shopping for pleasure	18%
Visit friends & relatives	18%
Go to markets	17%
Visit museums or art galleries	17%
Go on a daytrip to another place	17%
Picnics or BBQs	16%
Visit amusements / theme parks	16%
Sightseeing/looking around	15%
Fishing	15%
Eat out / dine at a restaurant and/or cafe	15%
Charter boat / cruise / ferry	15%
Visit national parks / state parks	15%

Source: Tourism Research Australia, NVS, March Quarter 2017 Sample size n = 29,164 of whom n = 7,288 identified as a disability

In addition, there were a few activities that commanded a high share of activity among people with a disability but were not statistically significant. However, the qualitative research among stakeholders and the desk research did indicate that some of these were also product categories that were among the strongest for offering fully accessible experiences. These were largely in the water-based activities space such as whale watching, cruises and ferries and scuba diving.

Daytrips

Activities undertaken by travellers with a disability on daytrips do not generally differ from those on overnight trips or from those undertaken by travellers who do not identify as having a disability (see table 19). Most activities tend to be fairly low energy or social: eating out, shopping, going to the beach. There are also fewer activities undertaken overall on a day trip.

Table 19. Top 20 activities for People with a disability compared to the general population

Activity	Identifies with a disability	Does not identify with a disability	Total
Eat out / dine at a restaurant and/or cafe	48%	45%	46%
Visit friends & relatives	36%	32%	33%
Go shopping for pleasure	20%	16%	17%
Sightseeing/looking around	15%	17%	16%
Go to the beach	12%	17%	16%
Pubs, clubs, discos etc	8%	7%	7%
Picnics or BBQs	5%	6%	5%
Visit national parks / state parks	4%	6%	6%
Bushwalking / rainforest walks	3%	4%	4%
Visit botanical or other public gardens	3%	2%	3%
Visit museums or art galleries	3%	2%	2%
Visit history / heritage buildings, sites or monuments	2%	2%	2%
Fishing	2%	2%	2%
Exercise, gym or swimming	2%	4%	3%
Play other sports	2%	2%	2%
Attend festivals / fairs or cultural events	2%	2%	2%
Attend an organised sporting event	2%	3%	2%
Go to markets	2%	2%	2%
Attend theatre, concerts or other performing arts	2%	2%	2%
Surfing	2%	1%	1%
Visit food markets (2016 onwards)	3%	2%	2%
Attend movies/cinema	3%	3%	3%

Source: Tourism Research Australia, NVS, March Quarter 2017 Sample size n = 29,164 of whom n = 7,288 identified as a disability

Daytrip activities where travellers with a disability are most strongly represented (see Table 20) are very diverse. But heritage and cultural attractions and events are all strong. Playing sport is an important one for travellers with disabilities as well.

Table 20. Activities where people with a disability have highest share of activity (above threshold)

20 Daytrip Activities where people with a disability have the highest share of activities	
Visit museums or art galleries	28%
Visit food markets	27%
Visit botanical or other public gardens	26%
Attend festivals / fairs or cultural events	25%
Go shopping for pleasure	25%
Pubs, clubs, discos etc	24%
Visit friends & relatives	23%
Play other sports	22%
Eat out / dine at a restaurant and/or cafe	22%
Visit history / heritage buildings, sites or monuments	22%
Attend theatre, concerts or other performing arts	21%
Fishing	19%
Sightseeing/looking around	19%
Picnics or BBQs	19%
Go to markets	19%

Source: Tourism Research Australia, NVS, March Quarter 2017 Sample size n = 29,164 of whom n = 7,288 identified as a disability

Travel planning

Overall, the sources of information used to plan and book travel by travellers with a disability and their carers do not greatly differ from those observed for the general population in other studies. Internet search and word of mouth dominate. Fourteen percent mentioned that family and friends in the destination did most of the research and advice for them especially when the prime motivation is visiting friends and relatives. This is consistent with other research into the Visiting Friends and Relatives market[24] which shows that hosts are a key information channel and a very cost effective one to reach.

[24] MyTravelResearch.com Visiting Friends and Relatives Research 2014, DNSW VFR Hosts Research 2016

Previous experience potentially plays a greater role overall for travellers with a disability. The need for certainty over the experience and the stress of travel mean that travellers with a disability will often return to the same destinations or accommodation if they find that it works for them.

Similarly, they tend to rely slightly more on expert opinions and personal contact:

- Peak bodies for specific disabilities, NDIS co-ordinators and specialist travel agencies were all mentioned in both the qualitative and quantitative research. For the last of this personal contact was frequently mentioned.

"I would check the MS Australia website. They have lots of resources to help with this…" Female, traveller, 18-34, Queensland

- Besides asking them to tell us which were their key sources at each stage of the path to purchase, participants in the quantitative study were asked to provide any other sources. Overall the most consistent mentions were for the ability to call direct to destinations or tourism businesses (29%).

Inspiration

Internet search is the number one source of inspiration for travel by travellers with a disability (46%) as shown in chart 21. Word of mouth from general friends and family is second most important. As noted, above previous experience with the destination is important for travellers with a disability. Knowing what to expect makes the experience more enjoyable.

The ideas I have for travel in Australia mainly involve revisiting a few places I have enjoyed.

1. The area from Albury/Wodonga through Bright, East Gippsland, Healesville and the Yarra Valley. Last time we did that by train to Albury from Sydney, then a rental car from Albury to drive to all those places and return the car to Albury and train home.

2. A similar concept by flying to Launceston and touring Tasmania by car though Freycinet, Hobart, then to the west coast back to Launceston and fly home.

3. Fly to Perth, car to Margaret River and surrounds, maybe a return visit to Monkey Mia.

4. Fly to Adelaide and visit the Adelaide Hills, Barossa Valley and Clare/Eden Valley(s)

(You may detect some wine area influences here)

I do read the travel sections of Sydney Morning Herald and Sun Herald and sometimes get ideas there." Male, Over 65, Mobility issues, Sydney

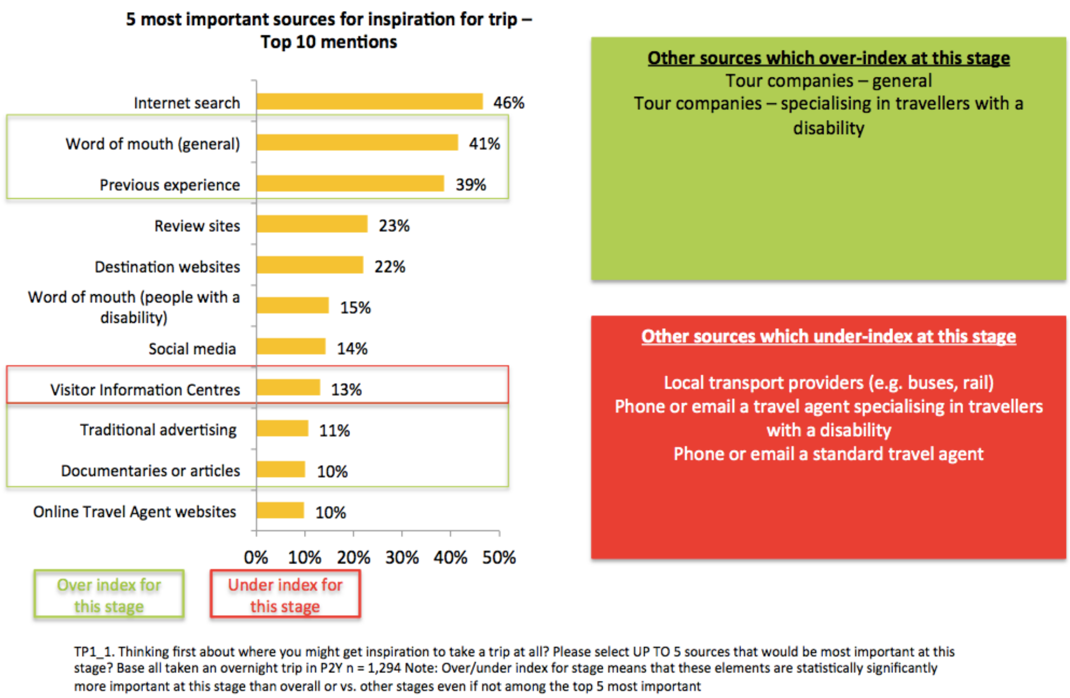
This also means that review sites figure among the top sources of inspiration and that local transport providers are also part of this stage. For travellers with a disability it is hard to be inspired when you don't know what is possible.

There is a strong preference to connect with a business or destination personally by phone or email at this stage.

Traditional advertising and content such as documentaries or press articles are other sources of inspiration for travellers with a disability: just as they are for travellers in general[25].

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

Chart 21. Important sources of inspiration for travel



Source: Quantitative Research[26]

[25] Passport to Discovery, OMD and MyTravelResearch 2015

[26] In this section, we have included reference to over/under indexing of sources of information. This analysis is included as we believe that this sheds useful light on what is important. Travellers typically consult up to 10 sources when they plan travel (Passport to Discovery research), but travellers with a disability may consult many more (Darcy estimates as many as 40). So by understanding those that are more significant at this stage of planning, organisations can more effectively plan their channel marketing strategy.

Those aged 18-34 are more likely to use social media as a source of inspiration whilst older travellers value the advice of travel agents, both general and specialist ones. Travel agents are also highly valued by those who face significant challenge with mobility (wheelchair users).

Online disability forums also play a strong role in inspiration for travellers who depend on wheelchairs for mobility.

Both this group and those with disabilities such as Autism Spectrum Disorder are more likely to rely on their NDIS coordinators. The latter group is also very likely to contact the peak bodies for the relevant disability.

Planning

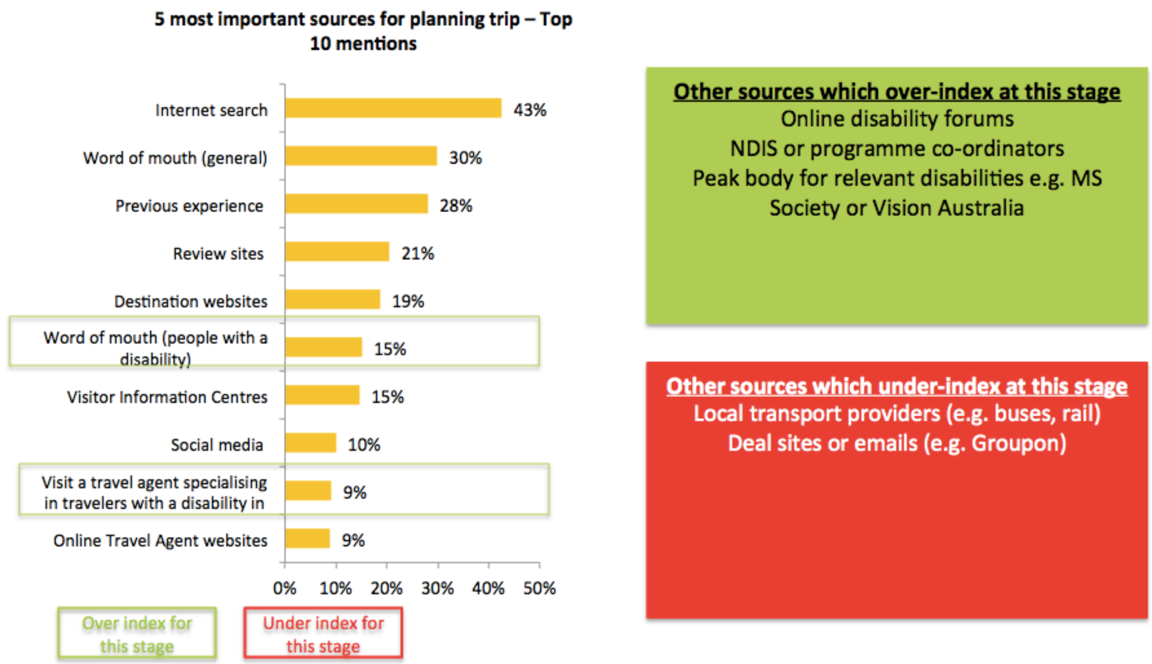
Overall the main sources used to plan a trip do not differ greatly from those at the inspiration stage (see chart 22): Internet search, word of mouth and previous experience continue to be the main sources.

Typical search terms include a mixture of standard search terms (e.g. *Flights to Florida*) and more specific ones (e.g. *"autism friendly, distance between rest stops"* or *"accessible [destination name]"*)

In addition, specialist advice becomes more important at this stage. Word of mouth from others with a disability and expert advice from specialist travel agents, NDIS coordinators and peak bodies are all more important at this stage: to realise their trip travellers want to know exactly what to expect. Destinations and tourism businesses can significantly increase their chances of converting travellers to visit can significantly increase by connecting with these specialist sources.

"I find that some travel agents can be quite helpful, but if it is only a sort thing I usually Google accommodations I always ring the place I'm staying directly to make sure they are accessible." Male, 35 to 54, Mobility issues, Sydney Metro

Chart 22. Important sources for planning travel



TP1_2. Now which do you think would be most helpful in planning the trip once you had decided where to go or what to do? Please select UP TO 5 sources that would be most important at this stage? Base all taken an overnight trip in P2Y n = 1,294 Note: Over/under index for stage means that these elements are statistically significantly more important at this stage than overall or vs. other stages even if not among the top 5 most important

Source: Quantitative Research

Overall the pattern of who uses which source at this stage is similar to that noted for inspiration. The main difference is that tourism offices and visitor information centres are most heavily used by travellers aged over 55 to plan their travel.

Booking (prior to departure)

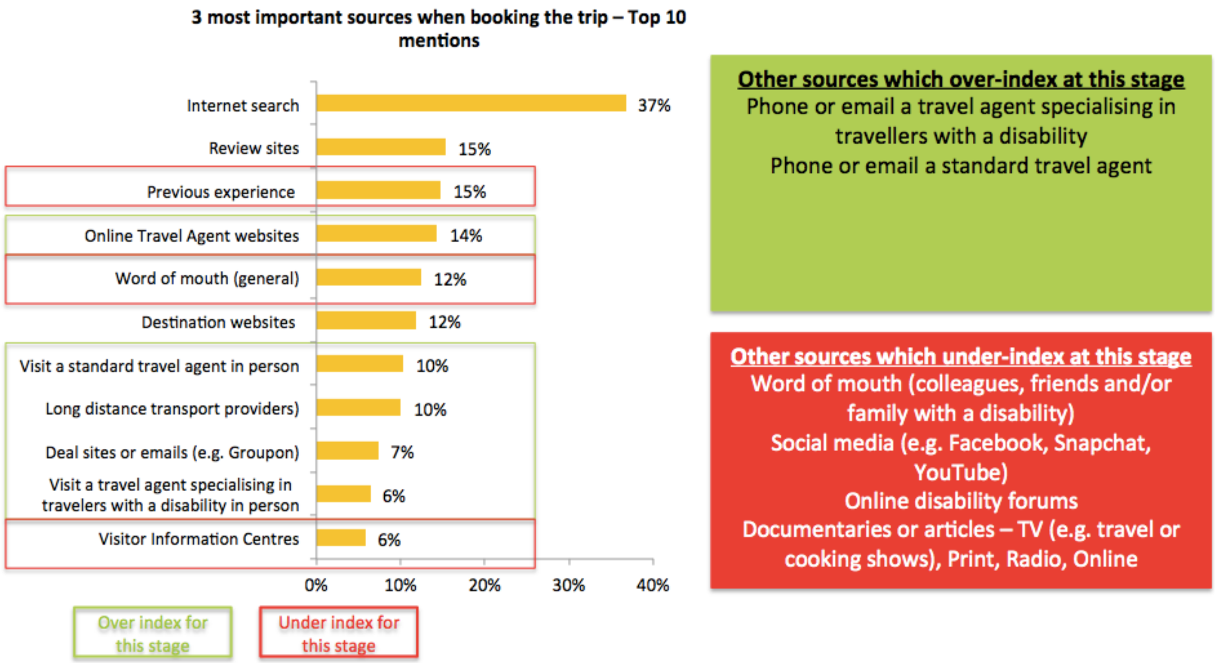
Whilst Internet search is still the leading channel for travellers with a disability at the booking stage its use is lower. Overall, slightly fewer channels are required for the booking stage.

Review sites remain important (which potentially gives TripAdvisor a significant advantage in converting this market) to connect the information to the booking. Online Travel Agents (OTAs) are used more than traditional agents, but the latter – especially those specialising in looking after travellers with a disability are heavily relied on. For these travellers (often those who face significant mobility challenges) personal contact is important: whilst phone and email contact with agents also over-indexes at the booking stage it is face-to-face contact that is strongest.

Many travellers with a disability have lower levels of disposable income than average. As a result, deal sites such as Groupon can be a popular way to book being used by 7% of travellers (over-indexing for this stage). They are particularly used by those aged 18-34 but in the qualitative research participants of all ages said they used them.

Overall the booking stage is the one where we see the least differentiation in channels used compared to other points on the customer journey.

Chart 23. Important sources for booking travel



TP1_3. Which of these would you use to book any elements of your trip before you left home? For this please select your TOP 3 choices Base all taken an overnight trip in P2Y n = 1,294 Note: Over/under index for stage means that these elements are statistically significantly more important at this stage than overall or vs. other stages even if not among the top 5 most important

Source: Quantitative Research

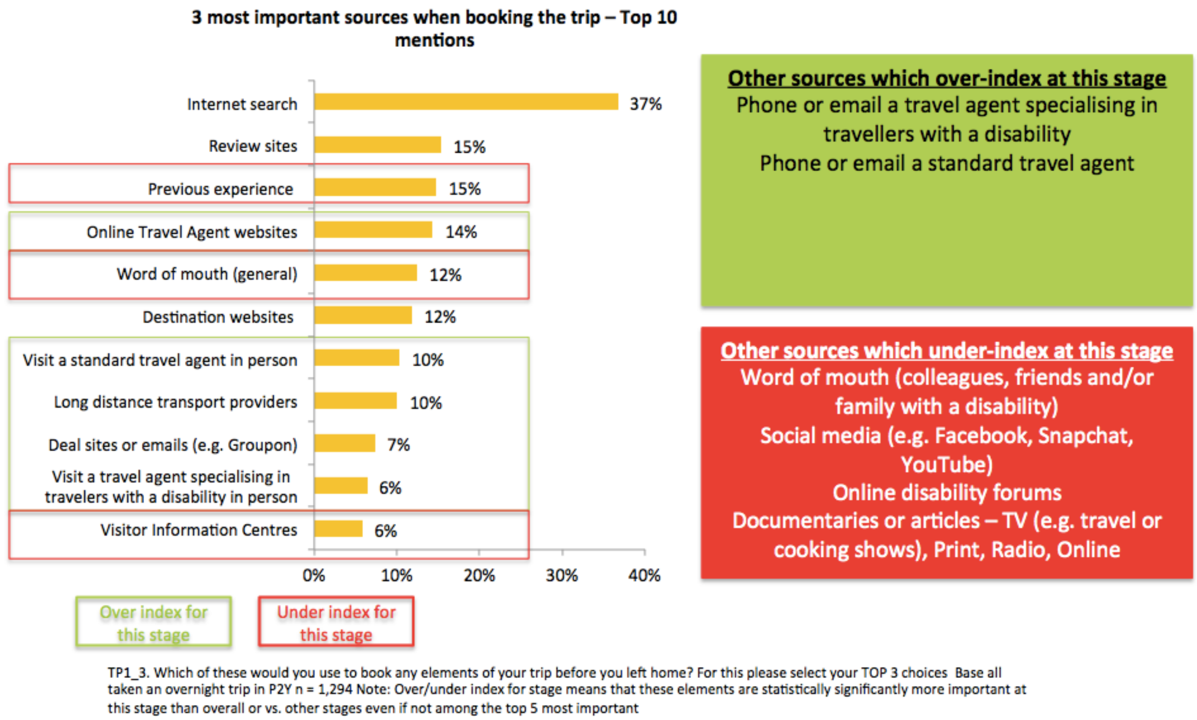
Whilst on the trip

Internet search continues to play a leading role for travellers with a disability once they are on their trip. 39% say they will use search to help them find what they need whilst travelling.

Beyond that knowledge and experience are key (see chart 24). Visitor Information Centres (VICs) are the second highest channel used, followed by word of mouth and their own previous experience. Again (VICs) and previous experience are most heavily relied on by those aged over 55.

In contrast, those aged 18-34 are most likely to use social media to find out more or get recommendations.

Chart 24. Important sources when on the trip



Source: Quantitative Research

Priorities for supporting travel planning

Even though many travellers with a disability said that they loved travel it can be a very stressful experience, particularly when planning or en route.

"I dread it. Every time I do it I ask myself why I am doing this. It's the anxiety speaking." Male, Traveller, aged over 55 with mobility, diabetes and mental health issues, Melbourne

Planning the trip in great detail can provide reassurance. As a result, travellers often feel the need for information that is simultaneously:

- Detailed
- Easy to find
- Easy to process

Overall, the need to have really detailed information is the highest priority with 75% rating this Extremely Important or Important (see the following chart). This was particularly important for those who face physical challenges in terms of limited mobility. These comments from the in the qualitative research demonstrate typical experiences:

"They said the room was accessible but it was more than 100 steps from the lift to the room. I can walk, but I struggle to walk that far." Male, Traveller with difficulty walking distances due to permanent injury, Aged 35-54, Melbourne

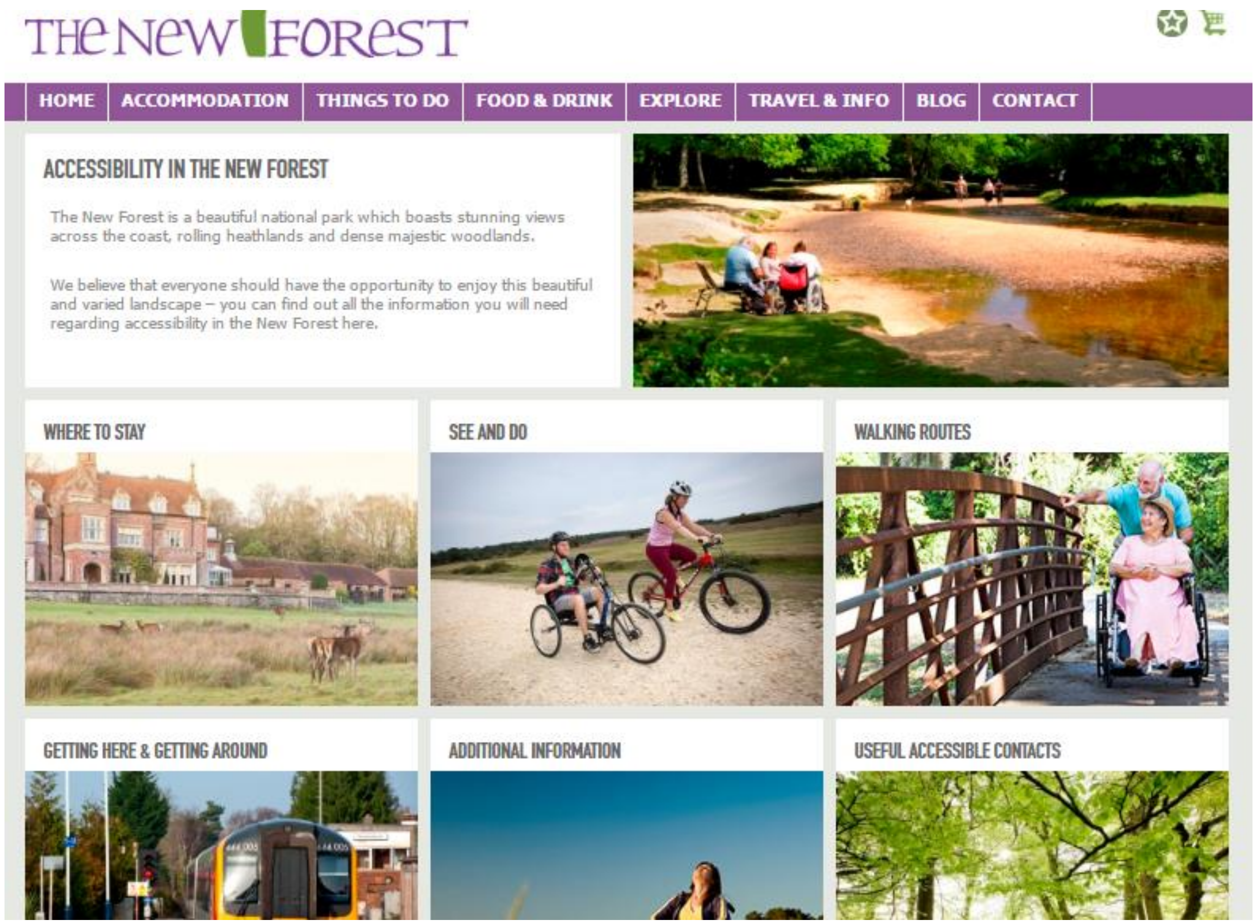
Ideally, most travellers with a disability want to plan every detail of their trip in advance. This is particularly important for those with cognitive disabilities or for those who care for them. Many will rehearse the experience beforehand to manage anxiety and create predictability:

"Dad has Alzheimer's' and he gets distressed if he doesn't know where everything is from the light switches to the restaurant is in advance. A map showing all of these details would really help. He'll also want to know what time tea is from the moment he arrives." Female, Carer for father with Alzheimer's and son with learning disability, Over 55, Sydney

*"We got to security [at Melbourne Airport] and [son with Down's Syndrome] didn't understand that we have to wait, so he got angry. Then the security man told him he needed to take his baseball cap off so he told him to f**k off. We laugh now but I felt so stressed. It would have been good to know the whole process so I knew what to expect and could have taken him through it. We rehearse all the details for trips so he doesn't get upset." Female, Carer, 35 to 54, Melbourne*

However, structuring the information is very important in order to make it easy to find the key details:

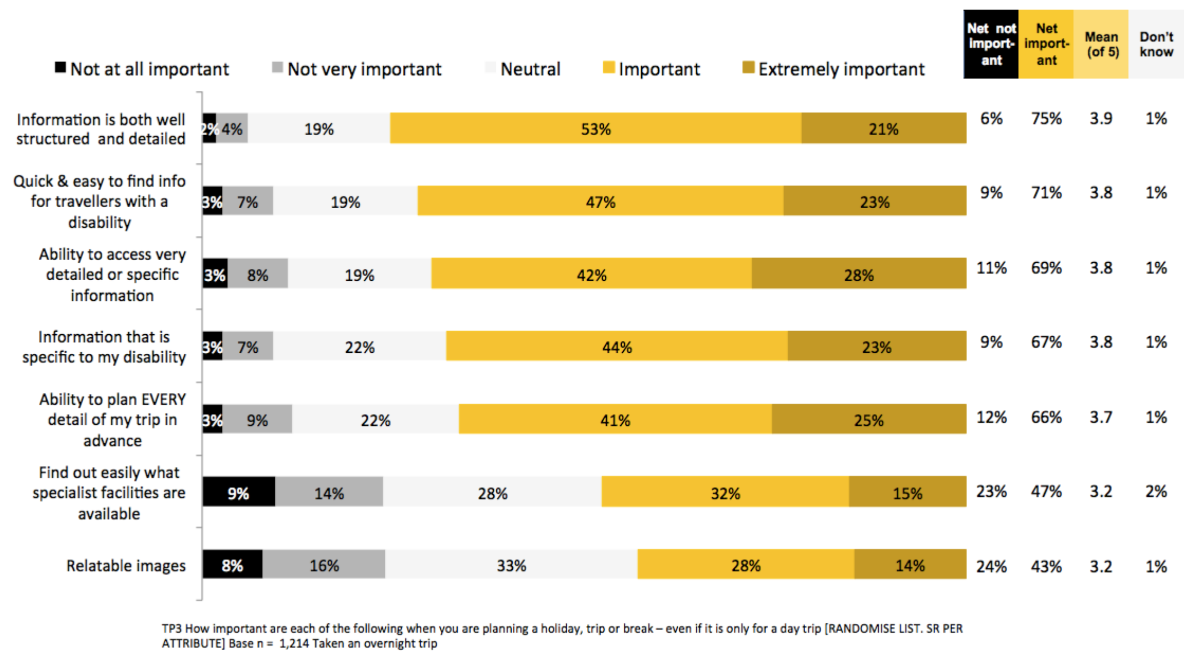
"It takes so long to read it all. I can't work through it. I just want a simple front page with lots of links or drop down menus to further information." Female, Carer for father with Alzheimer's and son with learning disability, Over 55, Sydney



Although relatable images are of lower priority than information overall, they remained an emotive touchstone for traveller that demonstrated the commitment of a destination or businesses to meeting their needs. Interestingly, travellers with mental health condition were most likely to rate this as extremely important. Many of those with mild cognitive impairment, mental health issues and even those with ambulant mobility issues noted in both the qualitative research and in some of the open-ended questions of the quantitative survey that they were the 'invisibly disabled': finding a way to demonstrate this visually, whilst challenging would meet this need.

Specialist facilities were very important to those who faced severe restrictions on their mobility even if they were not important to all travellers.

Chart 25. Travel Planning Priorities



Source: Quantitative Research

Advocacy

Willingness to recommend accommodation type

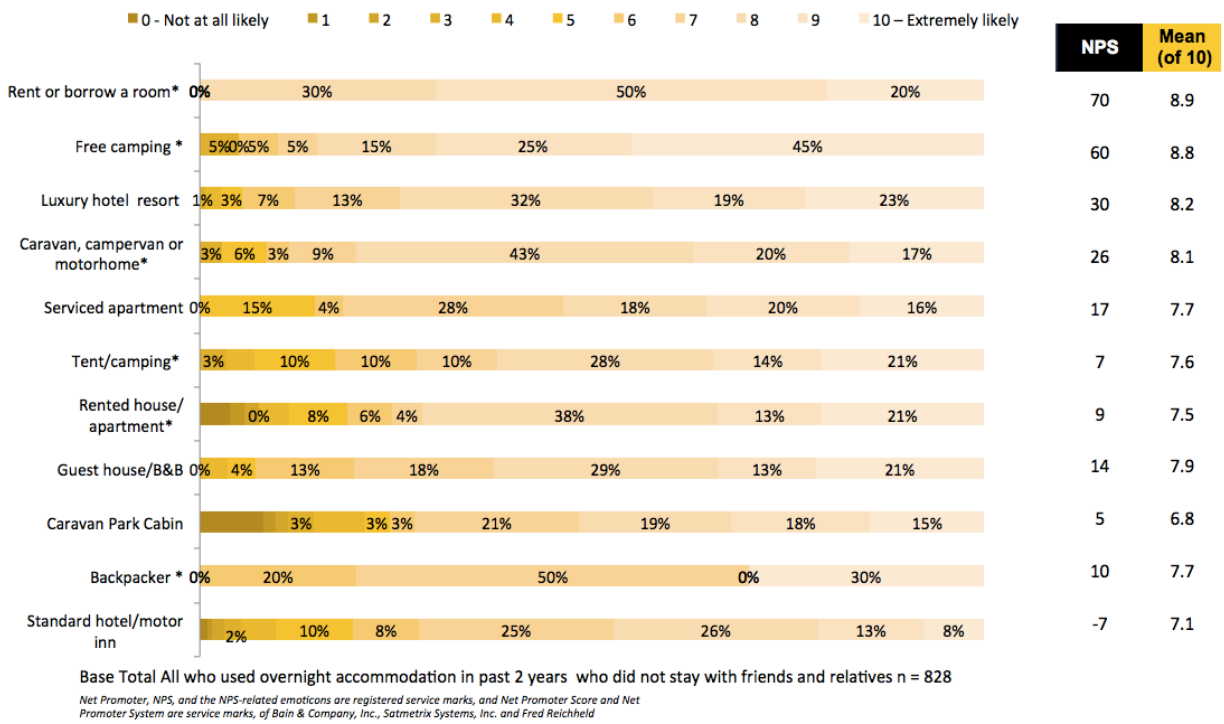
Many of the highest levels of recommendation are for those forms of accommodation where travellers have more autonomy and control (see Chart 26) even if they were not currently widely used:

- Shared houses via AirBnb and free camping were the most likely to be recommended by travellers with 70% and 60% respectively rating at 9 or above their likelihood to recommend this form of accommodation. However usage is currently low so these will remain niche options for travellers with a disability.
- Serviced apartments and mobile homes staying in caravan parks were rated quite highly (although less so the cabins) by this group. In the qualitative research, self-service apartments were very highly rated (although less so overall). This type of accommodation is particularly valuable for those with cognitive difficulties or intolerance to cues such as Autism Spectrum Disorder. It creates a more predictable environment and there is less sensitivity about the reaction of guests compared to hotels or motels.

"Homestay is something I have been interested in...... Perhaps AIRBNB should start up getting people who have their homes already decked out for disabilities a separate section created into their website to accommodate the disabled!!!" Female, 35 to 54, Carer, Regional, Melbourne

- The more upmarket the hotel or resort the more likely it is to be recommended.
- Standard hotels and motels were the least likely to be recommended, but the most commonly used form of accommodation. There is an opportunity for accommodation providers in this category to stand out.

Chart 26. Likelihood to recommend different types of accommodation



Source: Quantitative Research

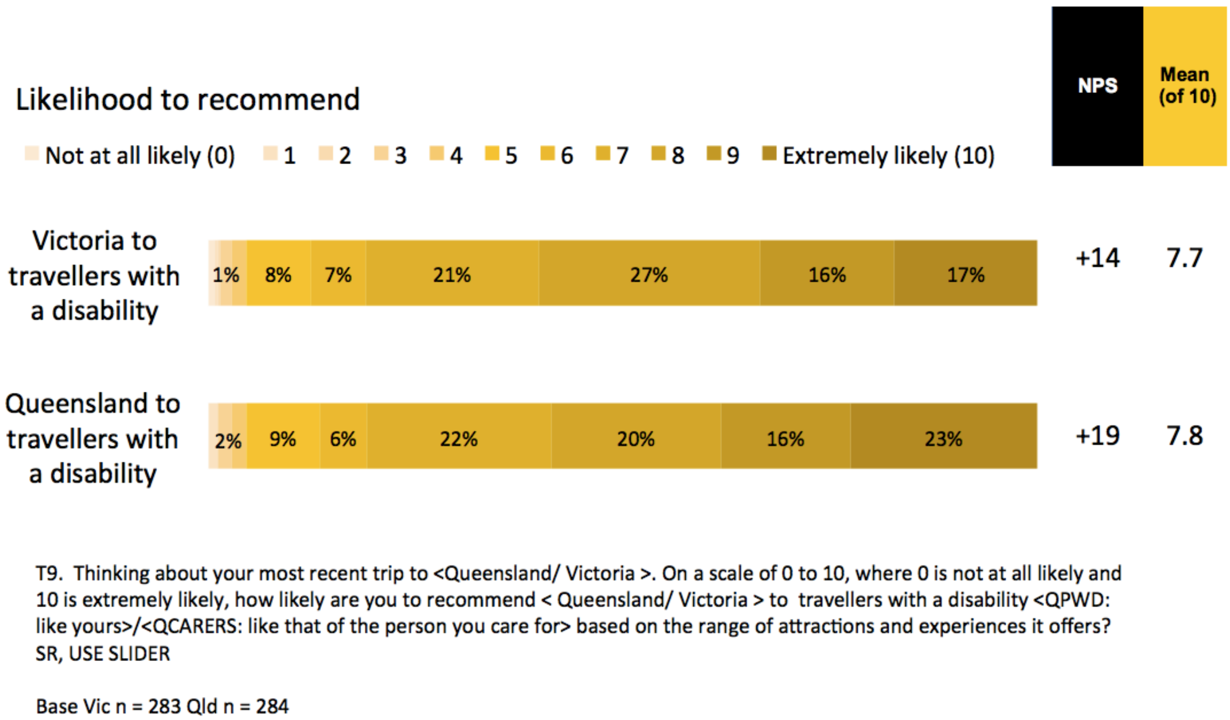
Willingness to recommend destination

Willingness to recommend both Victoria and Queensland as destinations for travellers with disabilities is positive with at least a third rating this at 9 or 10 out of 10. More than half rated this at above 8 out of 10.

Local pride plays a strong role: 67% of Victorians rate their likelihood to recommend Victoria at 9 or 10 and 59% of Queenslanders would do the same for Queensland.

Those over 55 also rate their likelihood to recommend Queensland more highly than younger age groups.

Chart 27. Willingness to recommend Victoria or Queensland



Source: Quantitative Research, Note: over-indexing/under-indexing is relative to other stages of the planning process

Recommendation of key services and experiences

Nearly two thirds of travellers with a disability or carers have not recommended any service or experience in the past 12 months (refer to chart 28). Those over 55 are least likely to have recommended anyone.

Accommodation providers (16%) had the highest overall number of mentions, followed by experiences, destinations, attractions and airlines. Overall 3% of people commented later in the survey that there are many good providers out there rather than choosing to recommend one.

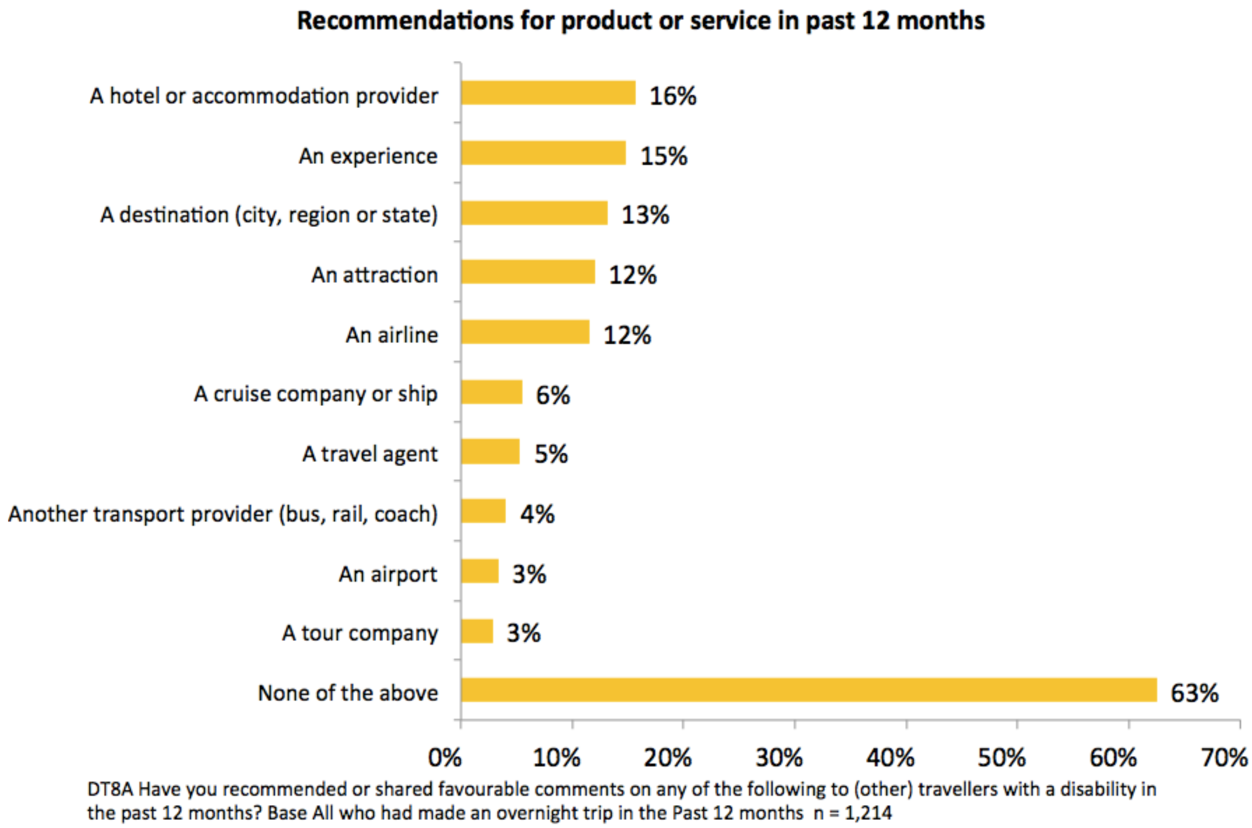
More detail on recommendations

- Accommodation: Most of the major accommodation providers received mentions but none outperformed AirBnb which had the highest overall number of recommendations;
- Destinations: Brisbane and Melbourne both received more than one mention as recommended destinations, as did Launceston and the Blue Mountains in NSW;

- Attractions: Sydney Opera House and both Melbourne and Sydney Aquariums also received a number of mentions. As categories, Museums, Zoos and Aquariums received a number of mentions;
- Experiences: Experiences mentioned were very diverse and included positive service experiences across categories. Although this term has a clear meaning for those in the travel industry, it is less well understood by travellers with a disability;
- Airlines: Qantas received the most mentions as an airline followed by Virgin;
- Cruise companies: Only 6% of people said they had recommended a cruise company, but that is consistent with overall incidence of cruising suggesting that advocacy is high for companies. P&O and Princess received the highest numbers of mentions. But it is also noteworthy that in the qualitative research cruising as a category of travel was very highly rated by travellers with a disability. For example, this comment:

"I just really love cruising. The whole experience. They really take care of you and they look at special requirements. Also I can visit a lot of places without it being too difficult. I am taking my friend to trial a short cruise out of Melbourne. It is my 4th cruise this year." Female, aged 35 to 54, Traveller with a disability (mobility and speech, following a stroke), Melbourne

Chart 28. Products and services recommended



Source: Quantitative Research

Across all categories of recommendation there were two consistent themes: Staff and quality of the offer, followed by price or value:

- **The staff** really drive recommendations. Attitude tends to be the strongest part of this, but knowledge of what is available or easily connecting people with what is available and ability to recognise what is needed are also important. Flexibility is a key part of attitude. Typical words to describe this included 'accommodating' or 'nothing too much trouble'. People were most important in service industries like travel agents and tour operators, as well as for airlines.
- **The quality of the offer** for their needs in terms of details like ramps, accessible rooms, ability to get around (attractions, experiences, destinations). The built environment and physical offer were important in driving recommendations for destinations, attractions, experiences, ground transport providers and airports. Quality of the experience was important for attractions, experiences and destinations. Concepts like being 'family friendly'; 'fun' and 'beautiful' were mentioned.

- Price or value was an important third level consideration (just as it is for travellers generally).

The walk away dollar[27]

A large part of the focus on accessible tourism is on the cost and challenges of developing the infrastructure and facilities to meet the needs of travellers with a disability. However, the literature indicates that failing to deliver a positive experience and advocacy is a significant opportunity cost (and is supported by the drivers of recommendation outlined above).

A study by the Business Disability Forum in the UK[28] identified the opportunity cost for businesses in failing to provide a good experience as £1.8bn per month. This is generated when poor experiences either directly or by word of mouth encourage not just people with a disability but their friends and family to avoid the business concerned or to provide negative feedback.

A broader consumer study by the Ehrenburg-Bass Institute at the University of South Australia shows that negative word of mouth is a significant barrier to customer acquisition[29].

When considering whether (and how much) to invest in becoming more accessible, destinations and businesses need to consider that the business opportunity is broader than simply serving this sector of the market.

Priorities for improvement

Driving improvement in the offer for Accessible Tourism was considered in a number of ways:

- A list of overall improvements based on the qualitative research was tested. Specific initiatives were also tested to understand priorities
- Travellers and carers were asked to identify their number one priority for improvement in an open-ended question
- Both tangible and soft barriers to travel were tested

Detail for all of these questions is provided in the charts 29-31, figure 6 and table 21.

However, across all the different types of analysis a few key issues stand out as the highest priorities:

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[27] This concept was developed in the UK as the walk away pound and most of the information in this section relates to that report. We believe the concept and the experience are relevant for Australia which is why it is included here despite the absence of similar numbers for Australia.
[28] http://businessdisabilityforum.org.uk/media-centre/news/walkaway-pound-report-2015/
[29] The impact of word of mouth on intention to purchase currently used and other brands. East, Romaniuk, Chawdary and Uncles, IJMR, Issue 3 2017

- **Access to deals** especially those that recognise many people with a disability need to travel with a carer, but often have low levels of disposable income. 43% said special deals for carers were a priority and 47% that the cost of travel was the critical barrier given low levels of disposable income.
- **Information** to inspire as well as enable travellers to plan their trips. Within this:
    - 41% want information contained on review sites like TripAdvisor that were relevant to travellers with specific needs.
    - 42% said they are not targeted by information provided currently. They find this discouraging. In the feedback provided on key priorities, there were consistent mentions of the need to 'encourage' people with a disability to travel. Although many already do the experience can be very stressful. Similarly, stakeholders emphasised that a long history of being poorly recognised by the sector has meant that many travellers with a disability have low expectations. Better-targeted information can inspire travellers and increase propensity to travel.
    - 23% want specialised review sites for their needs.
    - 18% said that they thought information provision was the number one priority to drive accessible tourism – the highest number of overall mentions.
    - 36% said that it would be great to have accreditation that shows businesses, which have made the commitment.
    - 19% would like case studies that 'encourage' them by showing what is possible.
    - There are opportunities to use existing assets better. Many rooms that are not fully accessible would still be relevant for a wide range of traveller with disabilities (i.e. those close to lifts or with large bathrooms).

"You say that hotels often say they can't sell accessible rooms. Well have they tried? I have never seen an advert for an accessible room." Female, Traveller facing challenges with walking and some cognitive difficulties, Aged over 55, Brisbane

"I don't need a fully accessible room. But I do need to know that I can walk to the room and that a resort has a relatively small number of steps in the main areas or to get to the pool. Why don't they advertise or price rooms so that I can make that choice? That should be simple to do and would make it easier for me to take more trips." Male, 35 to 54, Traveller with mobility challenges, Melbourne

"The biggest gaps in the information provided by a lot of accommodation properties is what "ACCESS" really means. As explained earlier, they say they are disabled friendly but do they really know what this

really means? ACCESS means different things to different people with disabilities. A blind person's access needs are different access needs to a person in a chair and so on.. " Male, Traveller with a disability, aged over 55, Regional Queensland

"On websites like Expedia they don't always clearly specify if the hotels or areas of interest cater for people with disabilities. These travel websites need to clearly state if and how they accommodate for those with special needs" Female, Aged 18-34, Traveller with disability relating to mobility, Melbourne

- **Attitude of people** both within the tourism industry and more generally. 86% said that the attitude of tourism and hospitality staff was an area for improvement. Those aged 18-34 are particularly sensitive to being stared at or not understood, as are those with cognitive and mental health issues and other groups whose disability is not immediately understood. It is attitude rather than skills that seems to be the priority. The key words here were *patience, respect* and *understanding*. In the qualitative research, solutions to this were discussed. Overall people with a disability were not comfortable with wearing labels to indicate their disability, but a few did indicate that a symbol (NOT a wheelchair) badge might be acceptable.

"It's the people judging around you that are the problem especially because my daughter is beautiful and you cannot tell she has a disability." Female, 35 to 54, carer for a child with severe learning difficulties, Sydney Metro

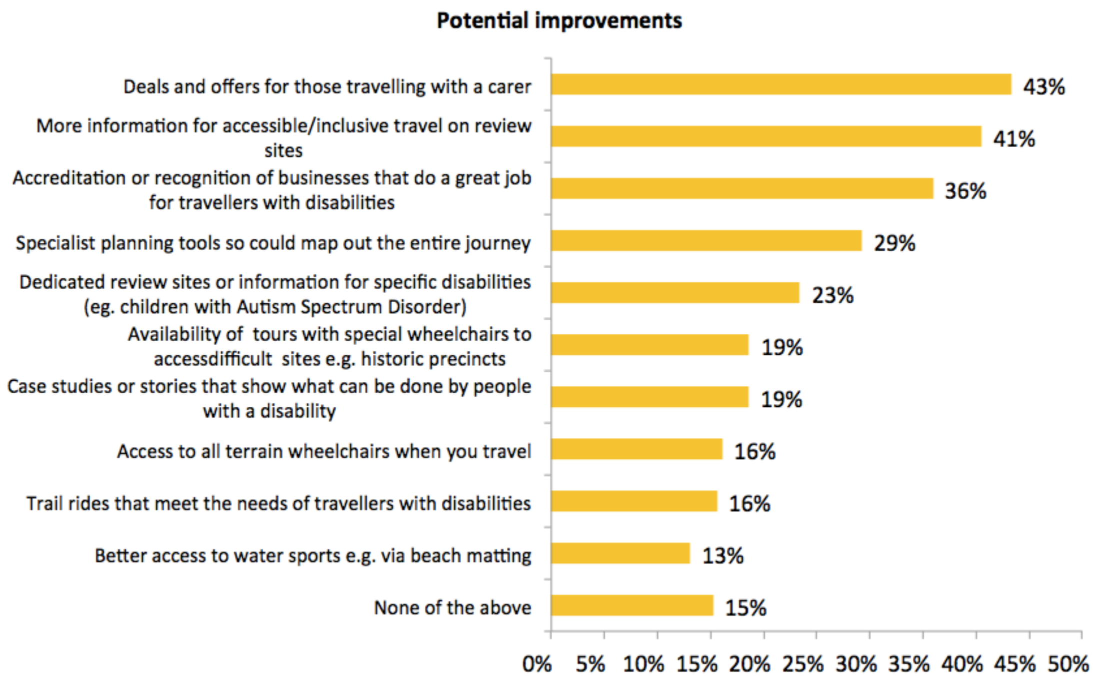
- **Facilitating infrastructure** was another priority. Although most people felt that the key issue is to have reasons to travel, the facilitating infrastructure like lifts and toilets is still not adequate especially transport arrangements. More than four out of five travellers with a disability cited lifts, toilets and better transport provision as priorities for improvement. These are barriers to travel and make the whole experience stressful.

"Toilets. I need to know where the toilets are and how far apart they are. If I am planning a trip I always need to know how far away a toilet is. Ideally I need one with washing facilities as I suffer from incontinence and need to change pads and clean up. I try to plan my food to give me the longest break till I need to go. There should be clean, accessible toilets at regular distances on all roads." Female, Traveller facing challenges with walking and some cognitive difficulties, Aged over 55, Brisbane

"I don't need a fully accessible room, but I do need a lift to get me to the floor as I can't manage stairs." Male, 35 to 54, Difficulties with walking long distances, Melbourne

"There are gaps on room size like the distance between the bed and wall to make sure you can fit the tool you need to help to help the Clint to get to bed and the size of the shower to make sure you can fit a shower chair and move around it." Female, 30 to 54, Carer for person with cognitive disabilities, Brisbane Metro

Chart 29. Interest in products and services that could improve travel



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

Source: Quantitative Research

Table 21. What is most important priority to facilitate travel for people with a disability?

	Base n = 1,406
Better planning tools/More information relevant to our needs/Advertising to us/Reviews aimed at us/Agents who specialise	18%
Other Greater Accessibility/Better access to sites	16%
Try to understand their needs/Listen/Be flexible	10%
Better information on access	10%
Treat them with respect/acceptance/dignity/care/caring staff/be inclusive	8%
Access for people with some mobility e.g. wheelchairs	6%
Cater for all types of disability/not just wheelchairs	6%
Better access at airports/on airlines	5%
Lower costs/cheaper options/discounts	5%
Better access/services at beaches/pools	5%
DT9 What is the MOST important thing we could do to facilitate travel for people with disabilities?	

Source: Quantitative Research

Figure 6 summarises some of the key word choices in the suggested improvements.

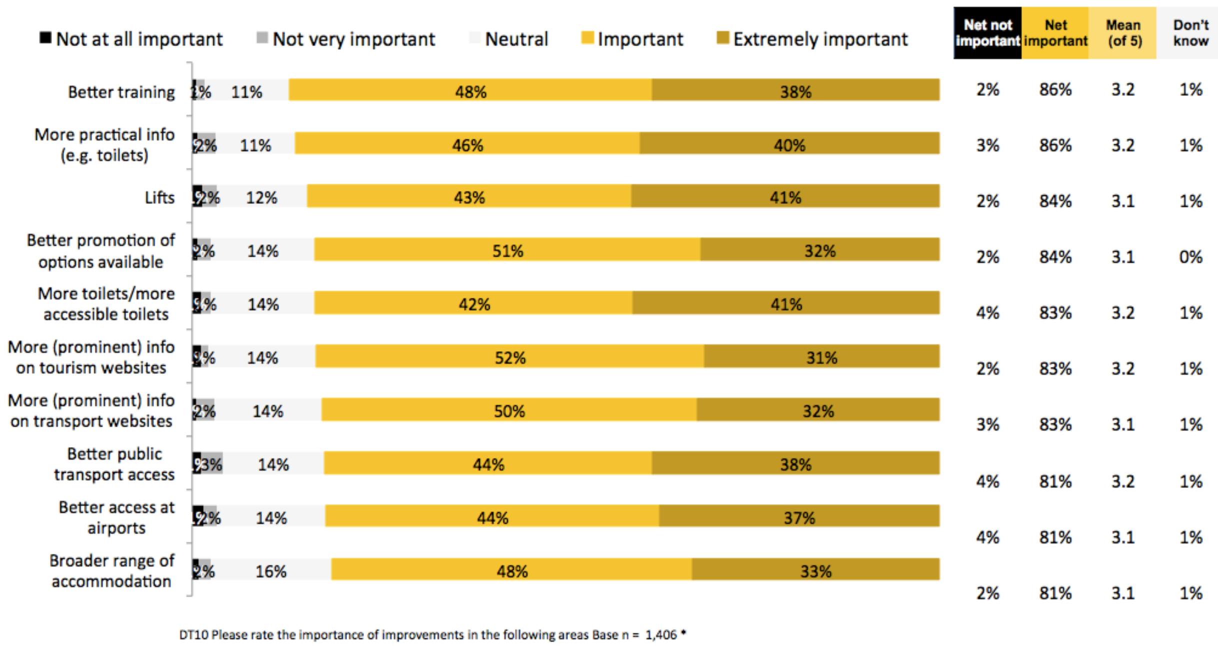
Figure 6. Key themes and words from question DT9

Source: Quantitative Research

Although overall Wi-Fi is not a key product or area for improvement, it is of vital importance to travellers with cognitive disabilities or conditions like autism. Among these families, it is a vital asset and one whose absence is likely to be a key barrier to travel.

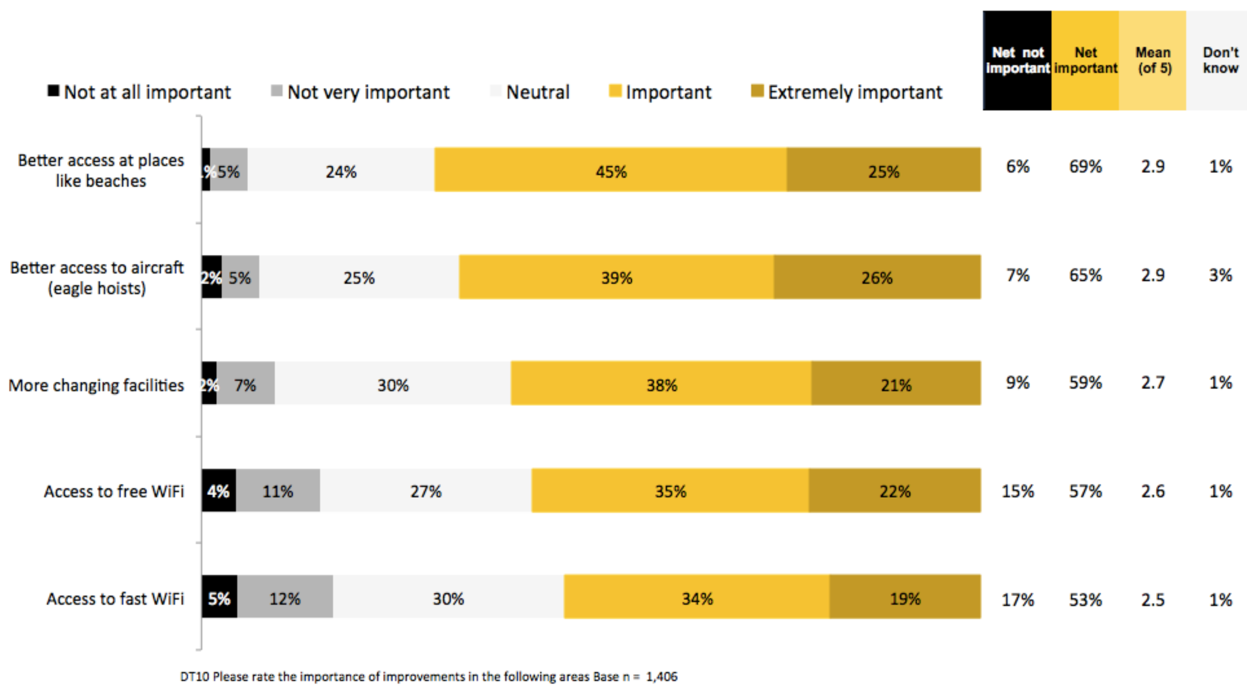
"All he needs is Wi-Fi. If he has that he will be happy for hours and if he is happy I am happy." Female, 35 to 54, Carer, Sydney

Chart 30. Priorities for improvement (Top Ten)



Source: Quantitative Research

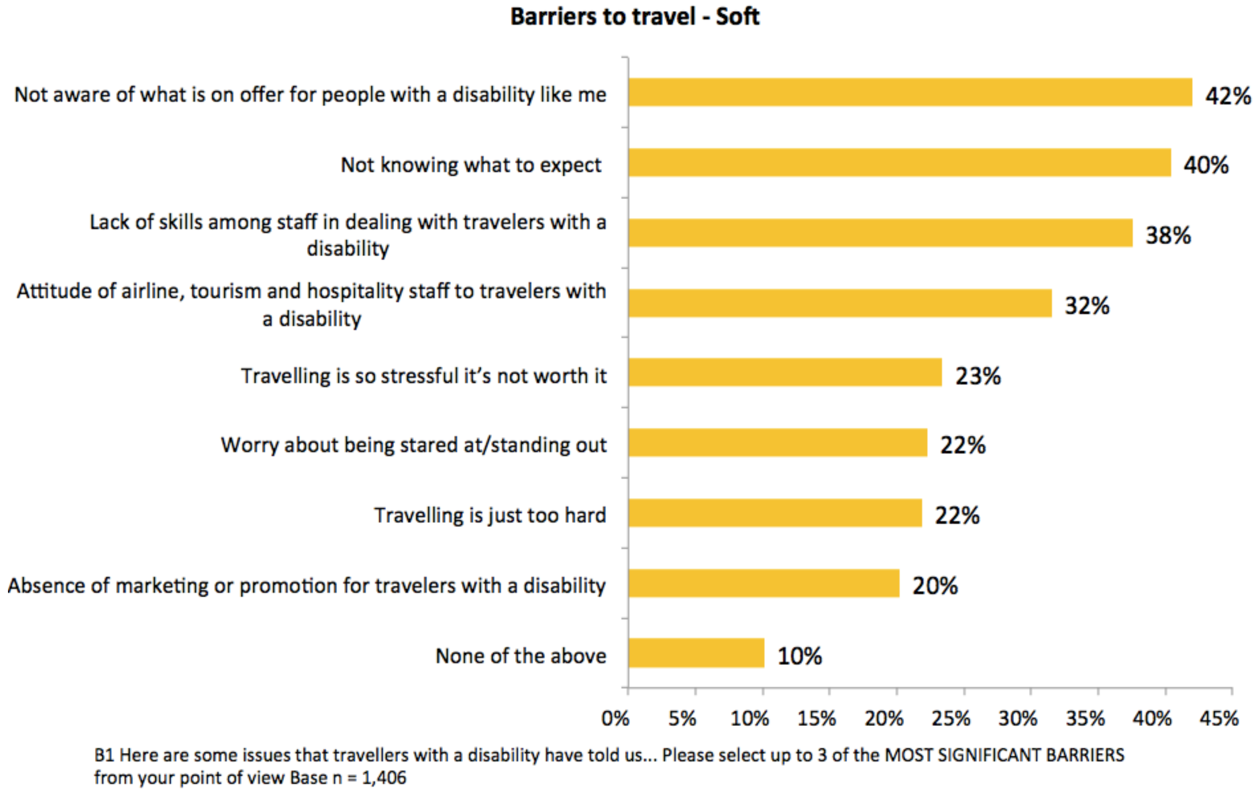
Chart 31. Priorities for improvement – Other



Source: Quantitative Research

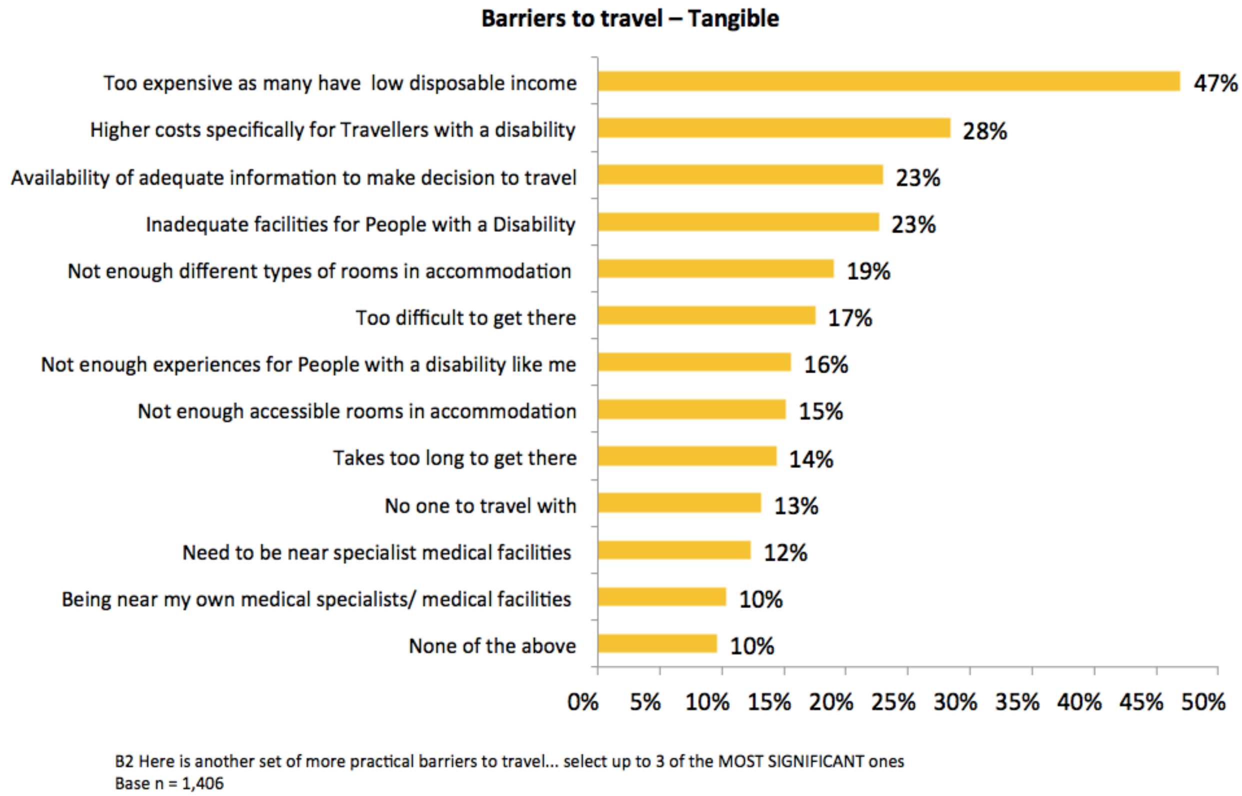
Barriers to travel that need to be overcome

Chart 32. Barriers to travel (soft)



Source: Quantitative Research

Chart 33. Barriers to travel (tangible)



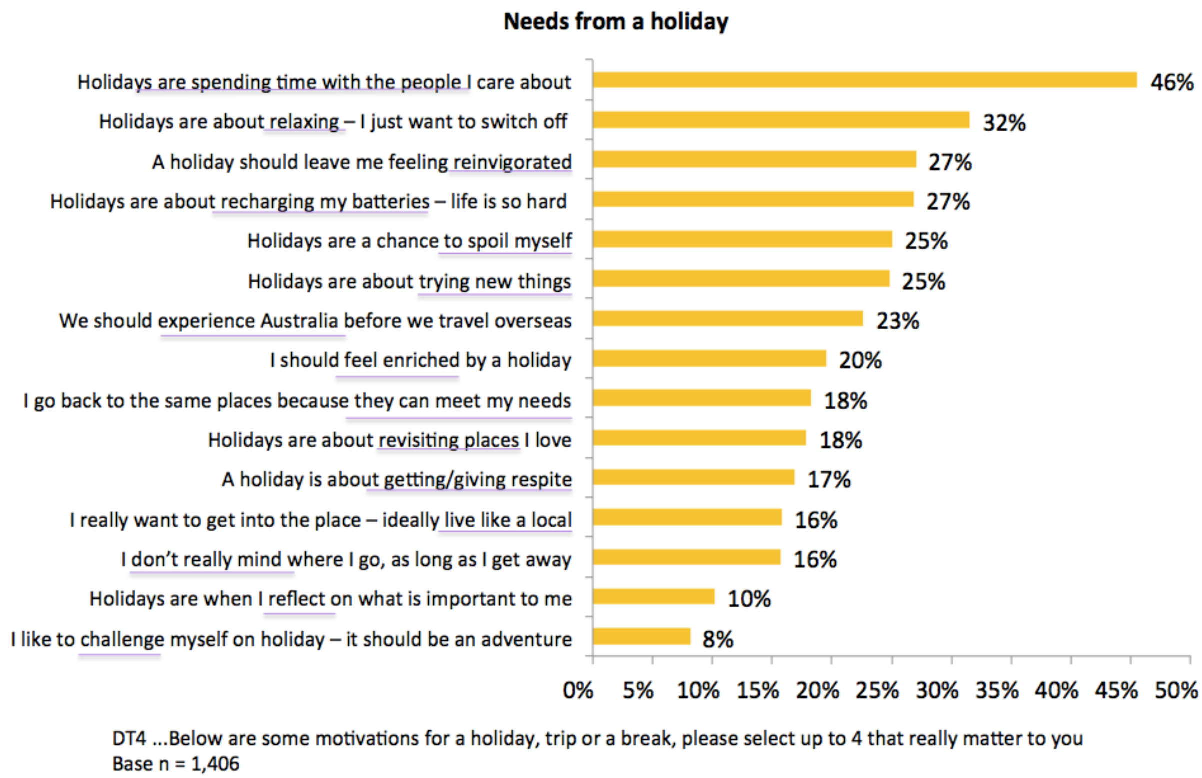
Source: Quantitative Research

Fulfilling the aspirations of travellers with a disability

Motivations for travel

The TNS Domesticate Research in 2010 and 2011 identified that the core needs from a domestic holiday for Australians were reconnection and unwinding. Travellers with a disability are no exception to this. As chart 34 shows, in the quantitative research 46% say that a trip is around reconnecting with those they care about. 32% say it is about relaxing.

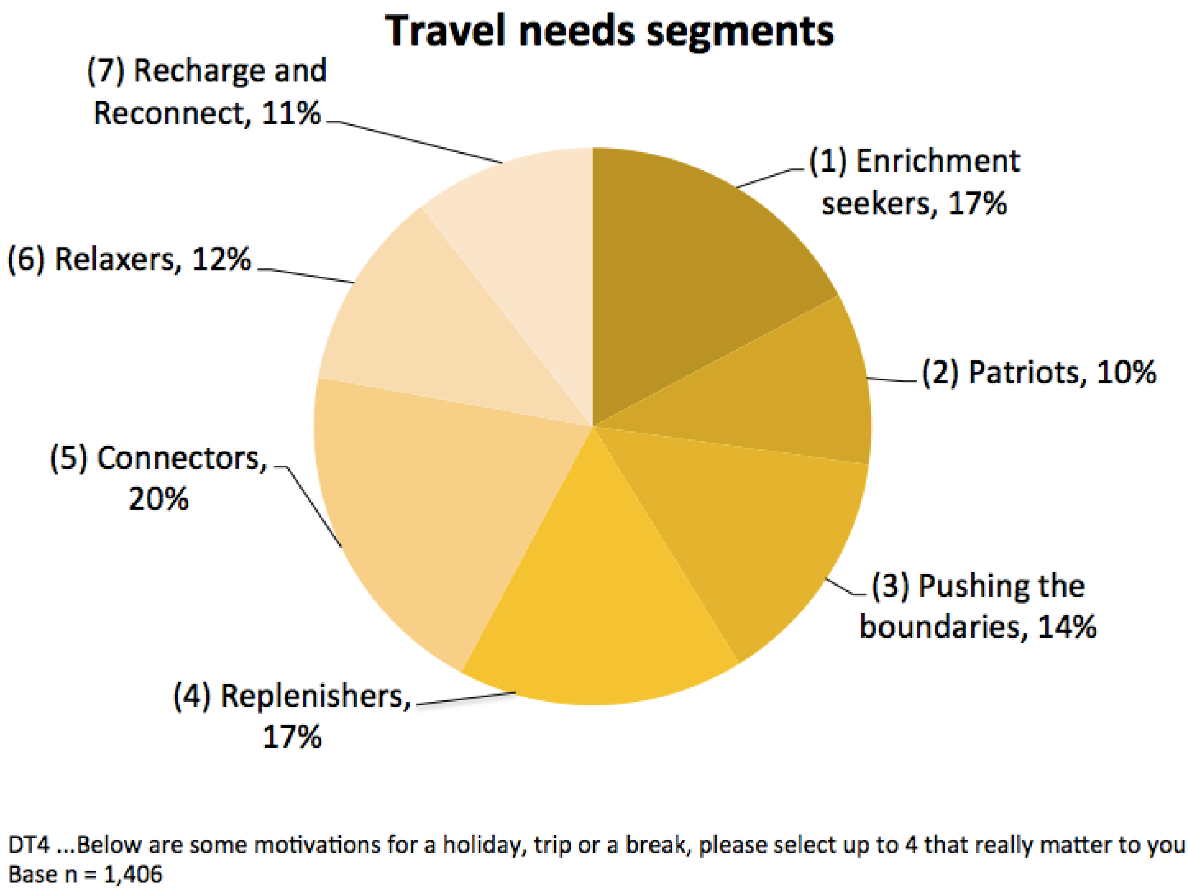
Chart 34. Needs from a holiday (overall)



Source: Quantitative Research

However, not all travellers have the same motivations from travel and there are important sub-needs within this. Based on the answers to the question above, we ran a mixed mode cluster analysis that identified 7 segments within the accessible tourism market as shown in the following chart.

Chart 35. Needs segments within the accessible tourism market

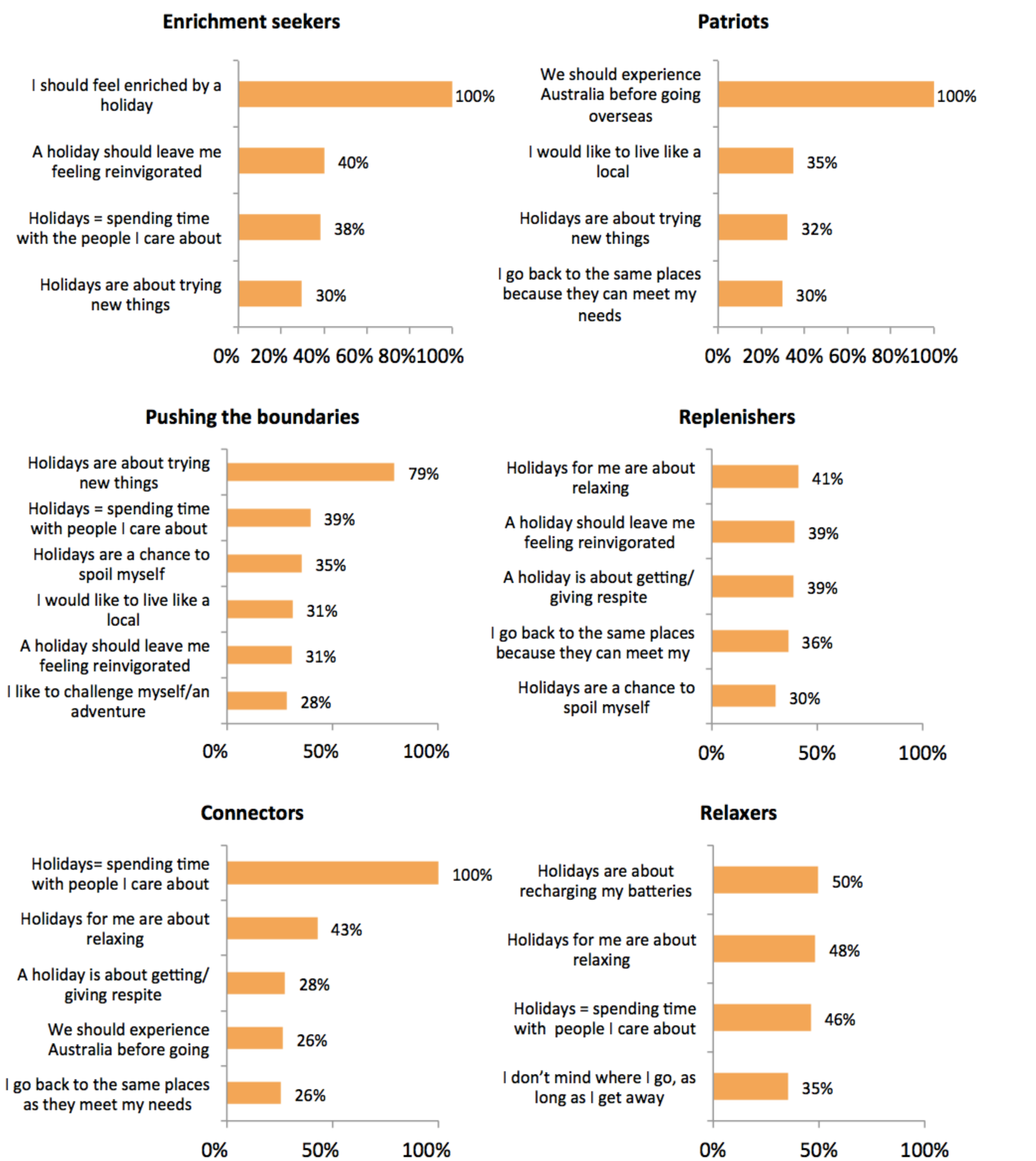


Source: Quantitative Research

The largest segment is still Connectors at 20% with a further 11% being primarily driven by a combination of recharging and reconnecting. But the segmentation reveals two groups that would otherwise be less obvious: enrichment seekers (who are seeking personal growth) and pushing the boundaries (who want to stretch themselves when the travel). These would align well with the reconnection via experience and the reconnection via understanding that were identified in Domesticate.

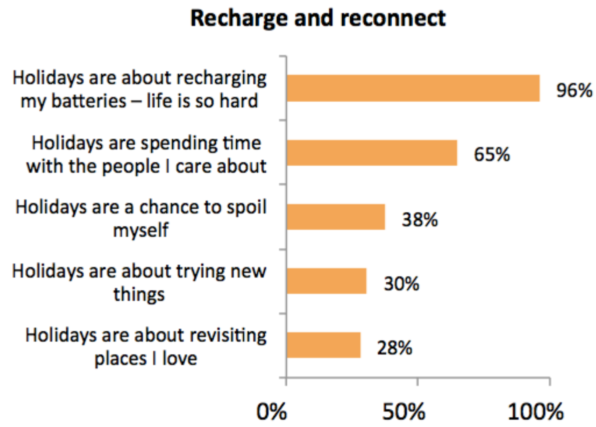
Chart 36 shows how these motivations drive the segments:

Chart 37. Key needs from a holiday by segment



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

Chart 37 (continued) Key needs from a holiday by segment



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

Many of the segments do cluster around the two key needs that TNS Domesticate™ identified in 2010/2010: Unwinding and Reconnecting. However, these two different values have different emphasis for some sub-groups. 'Relaxers' are more driven by the need to unwind, whereas 'Connectors' are more strongly driven by the need to connect with people, places and themselves. 'Recharge and reconnect' travellers are more balanced and tend to focus on the outcome: returning fresh from their trip.

'Relaxers' are the least likely to mind where the destination is as long as they get some rest. Indeed generally these segments are less driven by the place or destination. However, they are loyal. Their need to relax, unwind and reconnect means that once they know a destination can deliver on their needs they are likely to return many times.

'Replenishers' share characteristics with 'Relaxers' and 'Unwinding and Reconnecting', the key difference is that they are focused on what the trip does for them (giving them energy and resilience when they return) rather than how they feel on the trip. However, they do share the likelihood of relaxers to return to destinations that deliver on this need.

'Pushing the Boundaries' and 'Enrichment Seekers' are more driven by the experiences (and thus the destinations), but who they spend time with is also very important to them. So for these groups showcasing activities that meet their needs in the company of others (couples, families, etc.,) is likely to be very attractive.

These are true needs-based segments with very little demographic skew. The main demographic difference seems to be around lifestage: those aged 18-34 are more likely to fall into the 'Pushing the Boundaries' segment, whereas those aged over 55 are more likely than average to be 'Connectors' or 'Patriots'. They are especially likely to be 'Connectors', if they are Empty Nesters.

'Enrichment Seekers' and 'Pushing the Boundaries' travellers are most likely to place emphasis on having more information on the attractions and activities on offer.

These segments indicate that there are multiple different markets that destinations, experiences and attractions can target from the adventurous to the more relaxed. Tourism businesses and destinations should identify the motivations they are best placed to serve and then use this information to finesse message and the imagery, language that is most likely to attract the key target segments. The analysis can also be used to identify opportunities for further product development or investments in infrastructure to meet the needs of the chosen segment.

Dream Trips for Travellers with a disability

Dream trips varied from the adventurous and immersive to simple day trips. This reflects the travel motivations above, but also the extent to which people were able to enjoy the experience due to the level of their disability.

For those who face the most severe disabilities, day trips provide an important break and can be truly aspirational. Often they are about enjoying their own area:

"For me, just taking her to Taronga Zoo or to see the fireworks on Sydney Harbour would be a dream come true. I really believe we live in the best city in the world and I would love [niece with severe physical and cognitive disabilities] to see that. Having a special vantage point would make it really special. That would be my dream." Male, 35 to 54, Carer, Non traveller, Sydney

"We had planned day trips and picnics and hoped with a couple of friends along to all enjoy the trips with me driving in our Ford Falcon Wagon. I would not have to use the Internet to plan as I had a good idea where we wanted to go and how to get there." Male, 35 to 54, Carer for ageing parent, Non Traveller, Sydney

For many, who you are with is what makes it an ideal trip:

"We would go to Queensland to visit family we would stay for about a week we would visit the local beaches and spend time with family we have not seen in years… Family is very important to us and this type of trip would be beneficial to our children especially out oldest child with special needs it's also a time to relax together as a family while enjoying things our kids enjoy [nature walks, family friendly activities" Female, 35 to 54, Carer, Regional NSW

But those adventurous travellers are out there:

"My ideal trip would be a 6month trip around the world. Must see places would be Europe, Middle East, and South America. Ideally, minimal connecting flights, waiting times, and quickest routes to destinations. I feel awfully ill on long flights and quite anxious. I would be travelling someone I feel comfortable with and easy going. So far, that would mainly be my younger sister who I have found to be quite compatible and understanding when travelling with a high-needs person like myself. I feel overwhelmed by action plans, but certainly want to have a list of things to do on most days. Other days I would like to just stroll the streets." Male, Aged 18-34, Mobility, Sydney Metro

Other comments and feedback from the market

As a final check, a question was added at the end of the survey to check whether any additional insights needed to be drawn out. Only around half took this opportunity and of these almost half (46%) had nothing else to add (see table 22)[30].

Most other comments reiterated points made above. But two additional points stood out:

- Firstly, travellers with disabilities value being consulted. 8% said they were pleased to take part or that there should be more consultation. This echoes feedback from the qualitative research where everyone was excited to be asked with many interviews extending beyond the official one hour.
- Secondly, despite the challenges they want to travel. 4% commented that we should be urging people to 'just get out there and do it.'

Table 22. Additional comments on the subject of Accessible Travel

Further comments on the subject of travel with a disability	Base n = 666
No/Nothing to Add	46%
Change attitudes/Understanding	10%
Make it easier/Less stressful/More comfrotable/Make more places easier to visit	8%
Thanks/Glad to be asked/Do more surveys like this	8%
'Improve basic access issues	6%
More help in destination/en route	4%
Travel is worth it/Just get out there and do it	4%
Cheaper/more affordable/financial support	3%

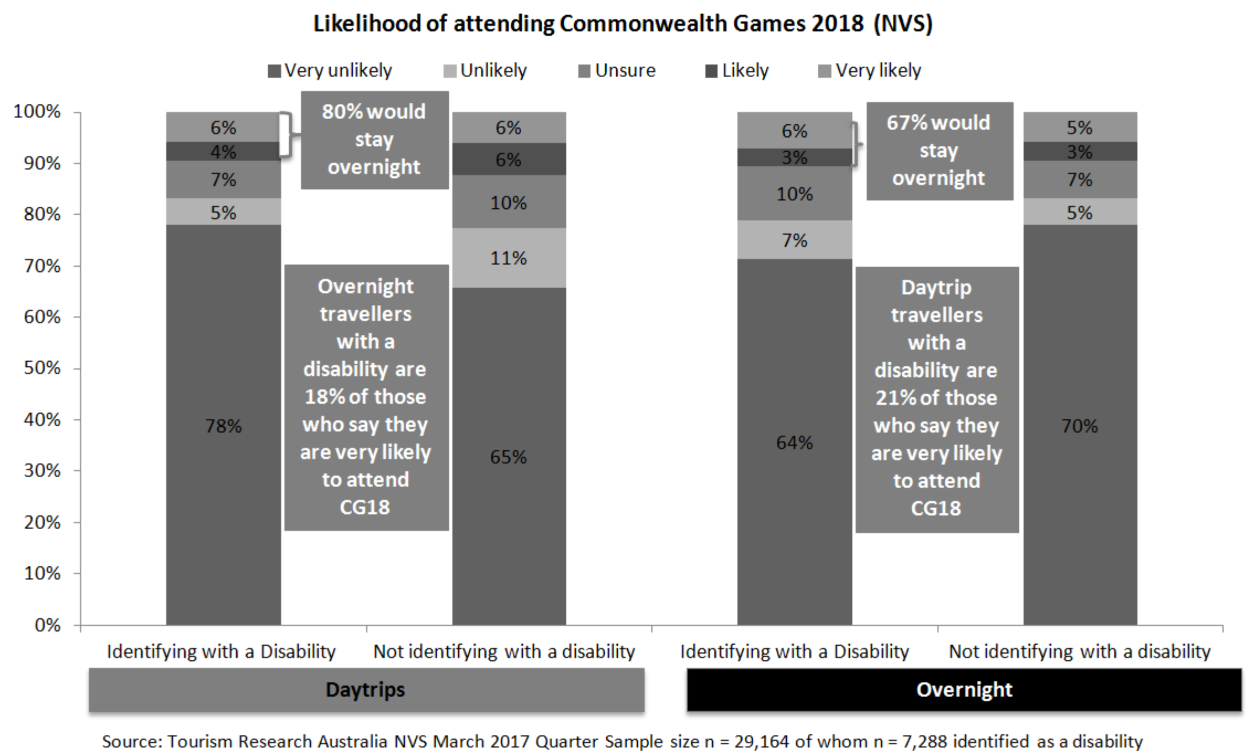
Source: Quantitative Research, Question DT10. Is there anything else you would like to add on the subject of travel with a disability?

[30]). As a result, issues that were seen as important elsewhere in this report may have lower mentions here.

Interest in the 2018 Commonwealth Games

A further driver of the growing interest in the potential for Accessible Tourism was the 2018 Commonwealth Games to be held on the Gold Coast. 'Superhumans' have featured prominently in the promotion of the event. So an objective of the study was to understand the impact of the event (and others like it). However, space in the questionnaire in particular was tight. So instead we have used the information in the supplementary questions in the NVS (see chart 37).

Chart 37. Likelihood of attending Commonwealth Games 2018



Overall, around 9% of overnight travellers identifying with a disability and 10% of day travellers who so identify say they are likely or very likely to attend the Commonwealth Games in 2018. This corresponds to around 8% and 12% of those who do not so identify respectively. So overnight travellers are more likely to attend whether or not they have a disability.

Travellers with a disability who currently stay overnight would comprise around 18% of those who are actually likely to attend (based on saying they are very likely to do so). 21% of those with who currently take daytrips and are very likely to attend would be travellers who identify as having a disability. Of these, 80% and 67% would expect to stay overnight.

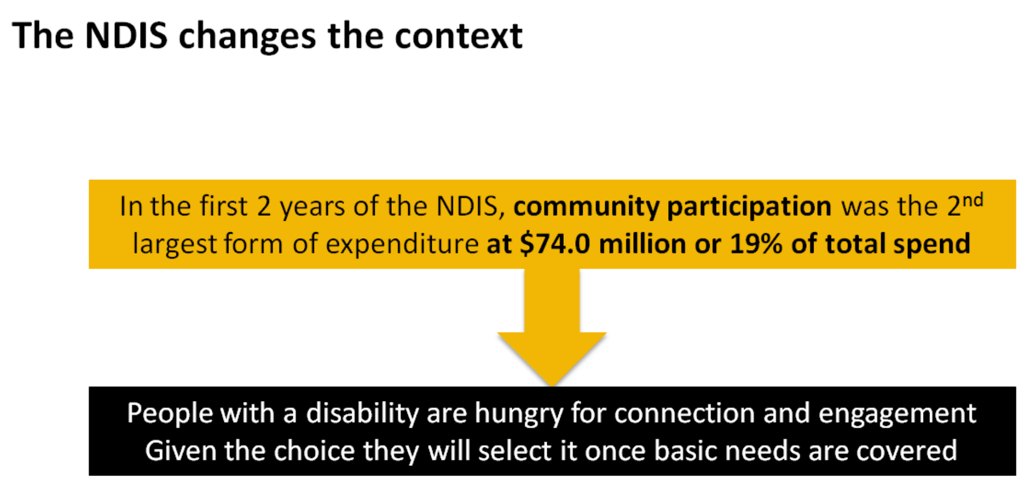
51% of those identifying with a disability who say they are very likely to attend would be intrastate travellers. New South Wales is the next highest source market accounting for 24%, followed by Victoria at 12%. Overall, 86% of those with a disability who say they are very likely to attend will be from the Eastern Seaboard states.

How do we grow and enhance the market

The National Disability Insurance Scheme and its impact on travel

One of the factors expected to impact on awareness of the opportunities for accessible travel are the opportunities created by the National Disability Insurance Scheme (NDIS). Analysis by UTS of the usage of NDIS funding [31] shows that activities which involve participation (which can include travel for example to attend sports events) accounted for around 19% of total spend (see Figure 7).

Figure 7. How the NDIS is impacting spending



Source: Ivan Howick, UTS analysis of NDIS data

So it was important to understand the extent to which travellers surveyed in the study were impacted by the NDIS and what the perceptions of industry are. Chart 38 shows what travellers with a disability and their carers know about the NDIS. Currently many know little about the NDIS and its potential impact. More than half had either never heard of it or knew very little about it. Awareness was lowest among those aged 18-34 (despite the fact that they would qualify) and among carers (for whom it would provide valuable support). Residents of NSW were slightly more likely to have heard of it, but no more likely to understand it than residents of other states.

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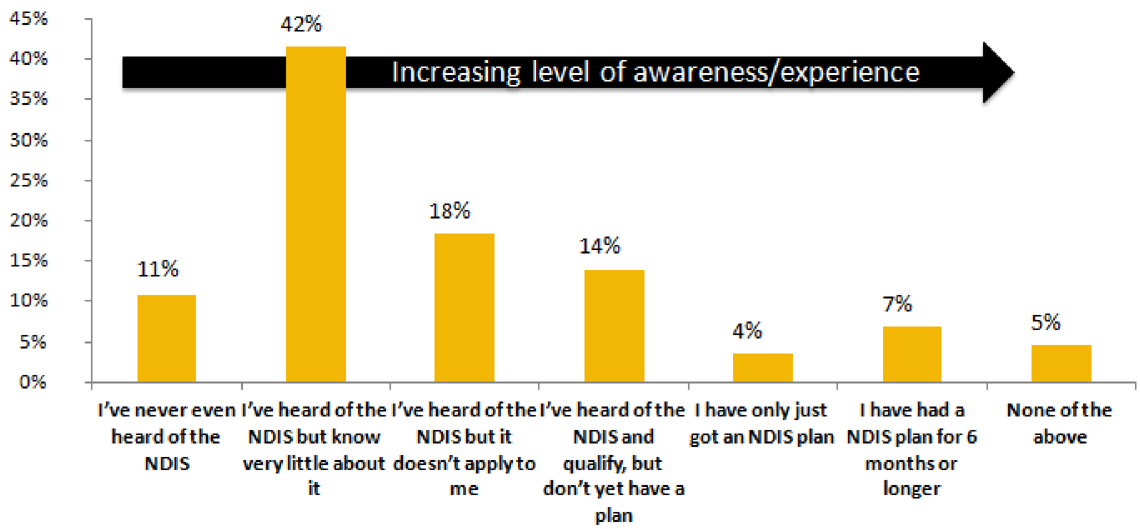
[31] Ivan Howick, Analysis of NDIS Data, quoted by Carolyn Childs, MTR in her presentation to the Live, Work, Play Conference, Sydney 2017

Chart 38: Awareness/experience of the NDIS



D9 The National Disability Insurance Scheme (NDIS) is increasingly being rolled out across Australia. Which of these best applies to you
Base n = 1,406

Source: Quantitative Research

Among those interviewed in the qualitative research, there was not only a lack of knowledge but concern or even scepticism about its impact. Currently, many are relying on hearsay from within their disability networks.

"I've heard it's had a lot of problems. A lot of people are losing their coverage." Traveller with a disability (not lifelong), female, aged 18-34, NSW

"It's not good news for me. It seems a lot more restrictive on what you can spend it on. My current provider is fantastic; I get a lot of support that won't be covered." Traveller with a disability (not lifelong), Male, aged 35 - 54, NSW

"When we talk about the NDIS, I am sceptical. It is currently on the 'national credit card' we haven't paid for it yet." Traveller with a disability, Female, aged over 65, Qld

"I have recently applied for this as we are apparently entitled to receive money/ assistance to improve [child with severe cognitive disability] quality of life. There is a lot of paperwork involved and nobody seems to know much and getting information is difficult." Female, 35 to 54, Carer, Sydney Metro

"Not a lot, I have heard it is quite difficult to get into and lots of hoops to jump through, even with obvious disability" Male, Under 35, Traveller, Brisbane

However for most of those who had a plan it was proving of real benefit. This particularly seemed to apply to carers for those with high levels of cognitive disability, for example:

"It's going to make a world of difference. [Participant starts crying] It means my husband and I can take a holiday for the first time in years. We will arrange a carer his own age for [son with severe autism] so he will have the opportunity to be with people his own age." Carer, Female, 35-54, NSW

Or this conversation between mother (carer for 4 children with a combination of Autism and Asperger's out of 6 children) and son (14 years old, Autism Spectrum Disorder, Cognitive ability of a 10-year old, has attempted suicide), Melbourne:

"Having a holiday together would mean the world to us.''

''I would just so love to be with my sisters and hang out with them and do stuff together as a family. We've sort of drifted apart so I don't get to spend much time with them. That's why I get so sad." The ambivalence and uncertainty expressed by consumers were reflected among the tour operators and service providers who participated in the stakeholder research:

"The whole disability sector will get biggest shake up. Companies like us, we understand enterprise and the disability sector. We expect an increase booking long term, but a little slow currently as we expected people to be nervous. But as people get comfortable we will see the market will grow...Size of market... 430k people are expected to sign up to the NDIS in the next few. Nationally... 80k are so far in the system so NDIA has a huge job to get people in. If figures come through, the market will grow 40%/50% in next 2-3 years. For 18 months, we interim will tread water. But we are gearing for growth, training staff, making sure we are ready to grow. Some growing pains ... this is a great time to do it. We're all learning....." Specialist tour operator

"Now with NDIS, there are a lot of unanswered questions. It [our service] is not just about travel but to learn skills. It's about a lot of inherent skills, [….]. Resilience, being able to cope in a different environment, social skills, developing friendships, follow instructions, time management, looking after things. The unanswered question's the cost of things. If someone wants to go on holiday they have to pay. They [NDIS] will pay the support worker's time. Will they pay for the support workers fare? If they[the consumer] have to be able to pay two fares to go on a holiday then for some people it will be cost prohibitive. So instead of 3k you have to save 6k..." Service Provider who also offers travel experiences

"We worry for the [tourism] industry that they have put in investment. They have invested, but worry for that investment if the NDIS won't support it [travel for people with disabilities. What the NDIS, will pay for care hours but won't pay for flights or accommodation. The message is we won't pay for holidays. It's not quite an accurate message. Prior to NDIS care providers would pay for the holidays. … They could fully fund a holiday. The whole playing field has changed and they are now saying you can't. How can we fund? It will have a flow on effect...We're advocating on this." Specialist travel provider

One area where the industry was broadly united was on the changes required to adapt which meant more paperwork, more process and potentially an overly heavy focus on risk management:

"This has changed the whole landscape. We have had to change from being a tourism business, to having to be a disability service provider and having to register with the department. A massive cost to be

implemented, ongoing cost to be audited each year. The time it takes to process a holiday enquiry has doubled, there is a lot more administrative work. Had to put on a full time person to manage the same number of customers. Those costs will have to be passed on [to customers] over next 12-18 months. Also we don't get paid till until we get back, whereas for [most people, if you go to] Flight Centre you pay before. We have solid foundations, but the entry level for a new business would be impossible. Significant compliance before you enter the market, not opposed but it needs to be thought about." Specialist travel provider

Clarification and support in understanding the process and what can be done is important to unlock the opportunity.

Understanding best practice

What being accessible really means

A common theme among the stakeholders interviewed related to the challenges of what offering accessible tourism services really means. Often it was easier to define what it is not, rather than what it is

Offering accessible tourism is not a 'binary' option. Other than at new purpose-built facilities, it is very difficult to be certain that something is or is not accessible. This reflects the diverse range of different needs of the sector, but also that those needs can be very personal or specific.

"A lot of people don't clearly understand what accessibility is. What is accessibility? You know what it's not….. Too easy to use the word without really understanding. A lot of tourism providers think they are accessible if they offer a roll in shower, but what if your door is not wide enough…. Putting a rail by the toilet is not being accessible. Getting bits of it, not thinking through from the perspective of a person that needs accessible." Specialist tour provider

"In general, a lot of places whether tourism or recreation don't understand what accessible really means. So for example, one of our team who is in a motorized wheelchair, went for a drink with friends, called ahead to see and was told the pub was accessible. When she got the entry would have been fine with a mechanical wheelchair but not with here. It depends on a degree of accessibility." Service provider

"You can't just tick a box and say it's accessible." Accessible tourism consultant

The importance of understanding the diversity of different needs closely reflects the feedback from the consumers as well.

The implication is two-fold and apparently paradoxical. Firstly, there is a need to think at a more detailed level and to identify the small individual opportunities but also to think about the experience holistically.

"Holistic approach. Let's get the need out there. From an infrastructure we need to get it out there. We can supply the complete experience." Accessible tourism consultant

"Best practice is a broad disability community not just wheelchairs, very diverse group…. How to do that the key fundamentals come together in developing that...But the pillars all must be looked at together, or it won't work." Parks Victoria

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

Reflecting the consumer view, stakeholders observed that there was a need to educate the market that accessibility is more than just wheelchairs.

"The dilemma is that people talk about accessible tourism as wheelchairs, that is not the market. There is physical not in a wheelchair and intellectual disability. So for example for our customers with an intellectual disability we have to call the hotel and get them to take wine and cheese out of fridge. Our customers don't understand that they can't just have it and that it is quite costly when they are on low incomes. Also they often shouldn't drink on medications. So when you look at the market for intellectual disability it's different... They need to talk about the whole market but currently talk about wheelchairs." Specialist tour provider

An allied concern was around how to describe and discuss the sector. There is debate whether the term inclusive tourism is a better descriptor as it enables people to move beyond the concept of wheelchairs. However, inclusive tourism is broader and may lead to a loss of focus on the specific needs of people with a disability. On balance, the preference seems to be to retain the use of the term accessible and then educate people to understand what that means.

What is best practice?

Best practice consisted of understanding this more holistic view and then working to deliver it at a detailed level.

It is also about recognising that whilst there are barriers, often the desire of consumers is to have an experience like everyone else.

"Best practice begins with understanding and viewing the challenges from the customer's perspective. At the concept stage, the needs of those visitors are considered early in the piece. Don't make assumptions about what they want or what they can't do, you are limiting of the opportunities. Often they are wanting the same experiences, how can we make that possible?" Parks Victoria

"What experiences drive satisfaction? Often they just want to go away for the weekend, just be treated like everyone else. Be part of the crew, be part of that community. Not just different. Being able to get away from your normal routine. Sometimes, they don't care what it is and just get away. " Service Provider who offers accessible tourism

There was general agreement that the models for best practice are the UK, Europe and US. The UK was mentioned most frequently. This was felt to reflect a balance of legislation to support the sector and create focus, but also the role of education and the development of specific campaigns.

"[Australia is] a long way behind Europe and Britain. Even the US is ahead, it has stringent laws. But the research and levels of engagement are much higher. One of the first places was the UK and ENAT and Visit Britain and Visit England really drove that." Accessible Tourism Consultant

"Any destinations that get it? The US... They are quite accessible, they get it. Australian destinations don't understand how big the market is." Specialist tour operator

Some organisations in Australia are beginning to make progress:

- Gold Coast Tourism was mentioned, as were individual attractions such as Philip Island and Hervey Bay Whalewatching.
- Both Queensland and Victoria were mentioned as being states that were starting on the journey. In NSW, the focus put on the issue by the local government associations was felt to indicate that there was a desire to engage with the issue.
- In the Conventions space, Perth was mentioned as having focused on this as a way to attract conventions business
- Traveller's Aid Victoria was identified as an example of an organisation that is delivering on the ground (and is being interviewed as part of this project).

But generally the comment above reflects the perception that Australia is in early stages in its journey.

Opportunities and Priorities from a stakeholder perspective

Again, there was a broad agreement that the size of the opportunity is enormous but in Australia currently not fully quantified. The drivers of that were:

- The growth in the number of people with a disability
- A growing understanding of the rights of people with a disability and on the benefits of social inclusion
- An ageing population which means that further growth is likely
- Changes in the policy settings like the NDIS
- Evidence from elsewhere like the UK on the rewards from the opportunity. The rewards have moved from being just emotional to being economic. This economic focus is felt to be vital in progressing the sector further

The two most important priorities in driving growth of the sector are felt to be Education and Promotion/Communication.

- Ensuring that people understand both the size of the opportunity and the fact that accessing the opportunity is achievable means that the sector will gain momentum. In this context, the research project was welcomed as providing input to education task. The education must be built on a sound platform of insight coming from people with a disability and their families – meaning that continuing to consult is a vital component of education.
- Promotion and communication will enable industry to capitalise on its investments was similarly important in driving momentum.

"Talk to them about the size of the market, talk about Boomers and the 55% of the population who are affected by health or disability issues (HRC). It's about their businesses and it's there to make a living. Use the statistic that they will make up 25% of all tourism by 2020. That's a quarter of my [their] business that I could not get access to because I am not accessible. You have to appeal via statistics, dollar terms. The least important is the warm, fuzzy thing. Occasionally, you have someone who has that experience. It's the bottom line..." Accessible tourism consultant

"Good information on what they require so they can plan so it will be positive experience. Engaged with Travability, providing images, moving away from things are 'accessible' to defining accessibility: what does that mean? Describe what is there in detail, so they can decide" Parks Victoria

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

Accreditation or some standardised means of demonstrating that investment (e.g. tourism awards) was felt to be helpful in allowing operators to differentiate themselves by their investment.

One challenge identified by a number of different stakeholders that currently limits the opportunities is that as a result of limited information many potential customers often have low expectations of what can be achieved. Often it was felt that carers and service providers could also have this low expectation. So creating information and a sense of what is possible would enable the sector to diversify. As the profile of customers in this project demonstrates, there are a range of different needs and aspirations out there.

"Most of my people with disability and families, have low expectations … we need to raise the bar." Service provider

This would in turn drive innovation in the sector. But it is important to note that overall, the feeling was that the key need for innovation was in small, low key and low cost innovations that would also help build dynamism. Overall, getting the basics in place and better utilisation of existing resources was felt to be more important.

"Innovation? The majority are still at baby steps. Those that have embraced the sector, are looking at what is available such as beach mats. Depends on businesses… Some businesses are not convinced. We need to show the return, and we can do baby steps…. For example if you own a café, you can offer those with electric wheelchairs the opportunity to recharge. A win, win." Accessible tourism consultant

Although infrastructure was felt to be important: *"if the basics aren't in place, they can't get there"* it was felt to be a longer term focus relative to communicating where the existing opportunities are.

"*Getting things like all the kerbs [on pavements] in place, that is a big long term job. We need to find and bring together what we already have." Accessible tourism consultant*

Another recommendation that both stakeholders and travellers agreed on was to focus on providing the detail to assess whether the product met their specific needs rather than a more binary 'accessible' or not 'accessible'. Whilst most travellers want to have full access to sites, most would look to be able to identify locations that could meet their needs.

"The first step needs to be an audit of what the business can do and to promote this to travellers. Then businesses can provide the momentum to take the next steps. It doesn't have to be all or nothing." Stakeholder

Who should play what role in operationalising the Opportunity?

From the travellers' perspective all key stakeholders have a role to play in driving accessible tourism.

"I believe all new places, venues and holiday attractions take into account disabled people more than ever before but education certainly needs to spread further. Education to all people needs to be brought further to a fore front. I was ignorant of the needs of the disable until my Mum became an invalid." Traveller, 35 to 54, Female, Carer, Regional NSW

Non-specialist private operators among the stakeholders want to make change but indicate that they find this hard to weigh against other priorities. As a result, a few frankly stated that they look to the government to create the legislative framework that shifts this as a priority.

"If the legislation changes then it becomes something we have to do. At that point we have to find a way to make it work and can pass our costs on … but we will need to do that in a way that doesn't discriminate which is important to us." Stakeholder

"The legislation helped [in the UK] because it provided a focus. People HAD to pay attention." Stakeholder

The preference of both stakeholders and travellers is that the standards should be consistent and national rather than state-based. However, it could be that states could pioneer this in the absence of national leadership. The preference for national is based on the 'individual-centred' model that sits at the heart of current planning for people with disabilities. It removes stress and uncertainty for travellers but it creates a ‘level playing field’ for businesses.

Destinations and Destination Marketing Organisations (DMOs e.g. STOs, RTOs) are felt to have a key enabling role. This is because they are the custodians of place and have an opportunity to develop this more holistically.

“I really think DMOs have a key role to play. Because they can bring it all together. It’s no use having a fabulously accessible hotel if you can’t get to the end of the road because there are no pavement ramps.” Accessible Tourism Consultant.

“Ensuring you are not only understanding the clientele, but having and option for them all and if you don't be willing to address and investigate a form of travel and activities that suits them. Have several options for known type of disabilities, have a clear statement that they will look into all clients and possibilities even if they cannot get one, the effort will hopefully be spread by word on mouth.” Traveller

This is also the view of the project’s accessibility expert Bill Forrester of Travability.

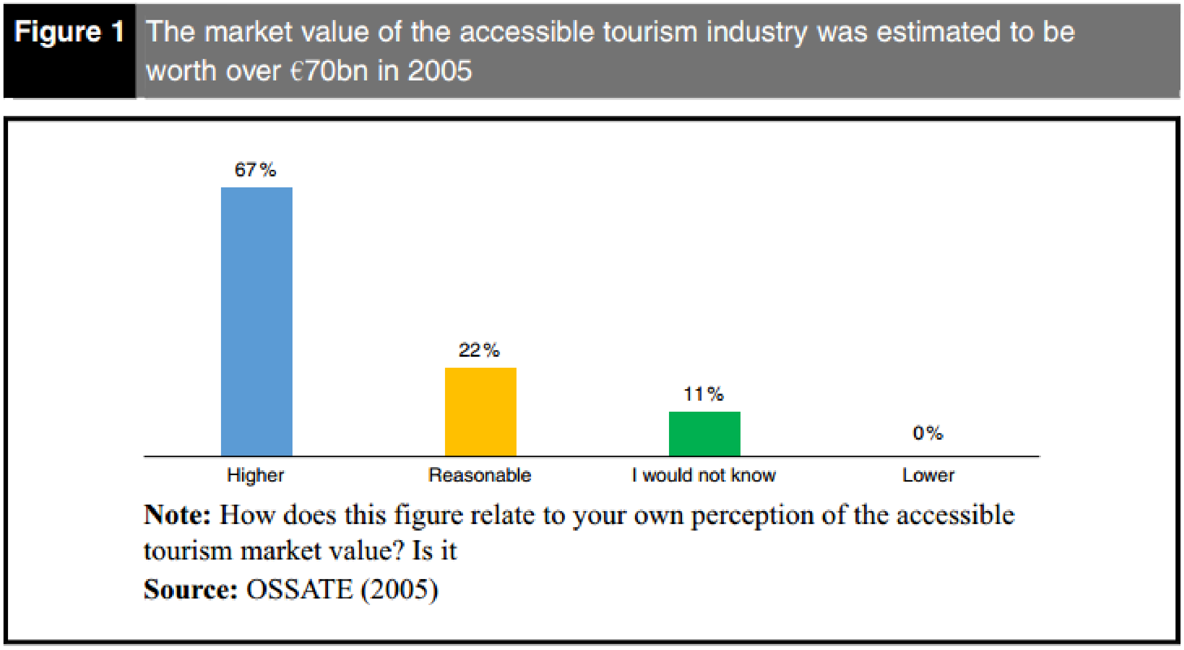
Beyond this, DMOs have the ability to curate and combine elements that can form a coherent and attractive offer to the market in a way that individual operators may find harder.

DMOs and government can play an industry education role. They can showcase businesses that are doing well and use these to inspire other businesses. They can also showcase the potential of the industry.

This is important because the evidence from international markets is that the travel industry is not fully aware of the potential of the Accessible Tourism market. Evidence within Australia is limited, but a study of operators in Europe[32] (see Chart 39) showed that fully two thirds under-estimate the value of the sector (refer to the following chart). Based on the commentary from stakeholders in this study, it is clear that the same challenge exists within the Australian tourism sector, even if the scale of the challenge is not currently quantified.

[32] James Bowtell, (2015) "Assessing the value and market attractiveness of the accessible tourism industry in Europe: a focus on major travel and leisure companies", Journal of Tourism Futures, Vol. 1 Issue: 3, pp.203-222, doi: 10.1108/ JTF-03-2015-0012 Permanent link to this document: http://dx.doi.org/10.1108/JTF-03-2015-0012

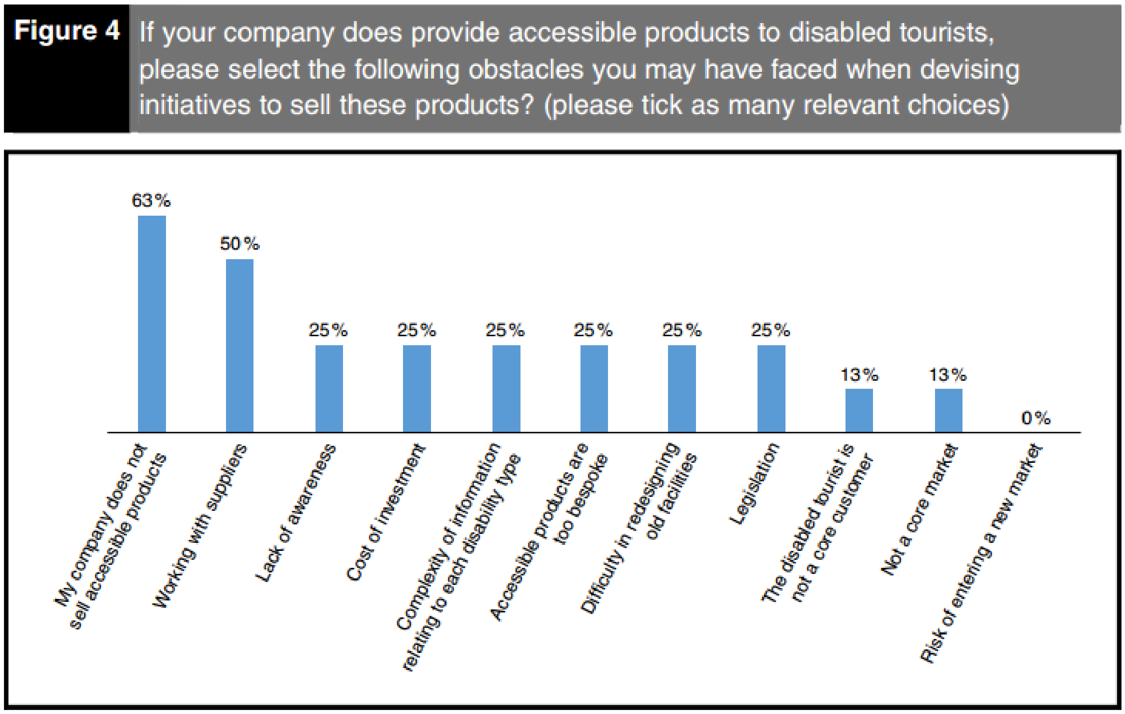
Chart 39. Estimation of value in the Accessible Tourism Industry in Europe



James Bowtell, (2015) "Assessing the value and market attractiveness of the accessible tourism industry in Europe: a focus on major travel and leisure companies", Journal of Tourism Futures, Vol. 1 Issue: 3, pp.203-222, doi: 10.1108/ JTF-03-2015-0012 Permanent link to this document: http://dx.doi.org/10.1108/JTF-03-2015-0012

As a result, the European study showed almost two thirds are not aiming products at the market. Of those that do, many do not know how to operationalise the product as chart 40 shows. Again the comments of stakeholders interviewed for this project indicates that this challenge is present in Australia even if not quantified to the same extent.

Chart 40. Barriers to offering accessible tourism products in Europe



James Bowtell, (2015) "Assessing the value and market attractiveness of the accessible tourism industry in Europe: a focus on major travel and leisure companies", Journal of Tourism Futures, Vol. 1 Issue: 3, pp.203-222, doi: 10.1108/ JTF-03-2015-0012 Permanent link to this document: http://dx.doi.org/10.1108/JTF-03-2015-0012

There is no reason to suspect that operators in Australia are any different. Indeed, feedback from consumers suggests that the challenges are the same - as this comment demonstrates.

“[If I was my role to promote accessible tourism] My first job in my new role would to educate travel agents, apartment managers and travel companies as to what are the required standards for fully disabled access to their services. Doing this would help travellers with disabilities to better plan their holidays without being disappointed on their arrival to venues or their transport. This has been the biggest hurdle for me when travelling. No one fully understands the full requirements of people with disabilities. I would hold seminars around the country and have my people explain what is "disabled access". Knowing what to expect on arrival at your chosen destination would open doors to a lot more opportunities in travel. One shouldn't have to ask accommodation houses if their doors are wide enough or their bathroom” Male, over 55, Carer, Regional Queensland

“Once you have the legislation, you need to move beyond the compliance mindset to create envy. You need people to want to do it. So you have to show them what is possible. Case studies are a great way to do that, but you also need tools to help people. I’m afraid some of those tools will still involve face-to-face training and interaction. That seems to work best.” Stakeholder

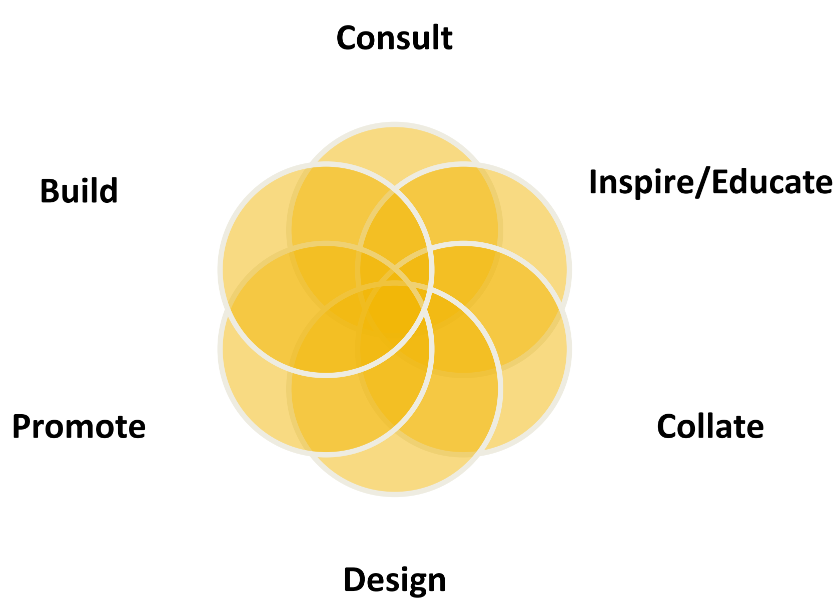
But there is also a role for *“businesses that are passionate about this sector to act as mentors to other businesses. We need grown up businesses to do that.” Stakeholder*

Government has a role to play in regulating the accessible tourism market to build confidence. However, this is a very challenging balancing act. Some providers felt it was important that the regulatory environment create a level playing field both for customers and to reward those in invested. But others had concerns that too much regulation was off-putting in encouraging businesses to engage with the sector in developing the compliance

The opportunity for businesses once inspired and educated will be to become creative in designing products and experiences that meet the need. Some businesses were also happy to educate and mentor others to build a stronger system.

Based on the feedback from stakeholders we propose the following framework

Figure 1 (repeated). How to grow and enhance Accessible Tourism in Australia



- Consulting should be the foundation of driving accessible tourism. Ensuring that what is offered is built on a rich understanding of what the core audience wants and needs. This is a responsibility for all parties, but government and DMOs can take a lead as they have the resources and skills to undertake this (and guide consultation by others)
- Inspiring and educating has two components:

    - The principal one is to ensure that industry has an understanding of the potential of this sector and support on how to start targeting it. Government, destinations and peak bodies should all have a role in driving this
    - As noted, many travellers with a disability have low expectations of what is available. But their aspiration for travel is high. Encouraging them to explore and test their boundaries. Peak bodies and service providers can play a strong role here, as can individual operators.
- Collating the experiences together to provide the holistic offering in some key destinations and in building knowledge is a quick win in terms of meeting the needs for infrastructure as well as providing momentum for destinations to grow and thus fund further development. Again, government, peak bodies in both the tourism and disability sectors and service providers can all potentially play a role in this.
- Governments can design a framework for success of the sector in a number of ways including legislation to set the expectations, 'light touch' regulation to ensure a level playing field and planning principles that enshrine universal design. This will make future delivery of the opportunity more cost effective.
- Many travellers are not aware of what is on offer. So promoting what is available to generate demand is an important step. The information needs to be easy to find, well-structured and to provide the opportunity to delve further. This is the responsibility of individual businesses and destinations.
- Although new infrastructure is not the highest priority, developing an ongoing focus on this and on ensuring that new infrastructure employs universal design principles will make widening the opportunity more cost effective in the future. This is a cross industry responsibility.

Appendix 1 – Fieldwork sample structures

Online bulletin board (OBB) Sample structure

Table 1. Sample structure for the online bulletin board

	Travelled	Not travelled	Total
Carers			
Qld - Metro	2	1	3
Qld - Regional	1	1	2
Vic - Metro	2	1	3
Vic -Regional	1	1	2
NSW - Metro	1	1	2
NSW - Regional	1	1	2
Total	8	6	14
Travellers with Disabilities			
Qld - Metro	2	2	4
Qld - Regional	2	1	3
Vic - Metro	2	2	4
Vic -Regional	2	1	3
NSW - Metro	2	2	4
NSW - Regional	2	1	3
Total	12	9	21
Geographic totals			
Qld - Metro	4	3	7
Qld - Regional	3	2	5
Vic - Metro	4	3	7
Vic -Regional	3	2	5
NSW - Metro	3	3	6
NSW - Regional	3	2	5
Total	20	15	35

Depth interview sample structure

a) Paired depths
  - N = 6 paired depths with people with cognitive disabilities and their primary carer
  - Conducted in home
  - Half to have travelled domestically (spec as per bulletin board)
  - Half to be non-travellers but would like to travel
  - Split equally between Sydney, Brisbane and Melbourne
  - 1 hour interview

b) IDIs (one on one)
  - N = 18 depths. 6 with people with visual impairment and 6 with people with a range of other disabilities (did not need to include cognitive disabilities) including long term but temporary disability (lasting more than 6 months)
  - Conducted in home
  - Half to have travelled domestically (spec as per bulletin board)
  - Half to be non-travellers but would like to travel
  - Split equally between Sydney, Brisbane and Melbourne
  - 1 hour interview

Quantitative sample details

- N = 1,000 to be individuals aged 18 or over with a permanent or long term temporary disability
  - MAX n = 350 to have ONLY done a day trip of whom no more than n = 50 to have travelled SOLELY on a day trip for medical reasons
- N = 400 to be the main or joint carer for someone with a disability who has travelled in the past 2 years either overnight or for a day trip with that person
- Max n = 150 to have ONLY done a day trip of whom no more than n = 50 carers to have travelled SOLELY on a day trip for medical reasons
- 15 minute questionnaire (actual average was 16 minutes) designed in consultation with all sponsoring bodies of the research and agreed with them. The questionnaire proved exceptionally complex as we had to bear in mind the challenges faced with online completion for many of our target audience, as well as the complex nature of the accessible tourism market (refer to summary of key findings).
- Other quotas or comments
  - Nationally representative of population in terms of age and sex
  - No upper age limit

Target Stakeholder list

The desired list of stakeholders identified at 19/06/2017 (ranked in order of preference)

Rank	Organisations
1	YMCA Escapes
2	Leisure options
=3	Chris Veitch
=3	Club Mates Travel
4	Inclusive Tourism Pty Ltd
5	Supported Holidays Victoria
6	Scope
7	City of Gold Coast – Safe and Liveable Communities Branch
8	PTV
9	Melbourne airport
10	Parks Vic
11	Our Getaway
12	AQA Victoria
13	Vision Australia
14	Stroke Foundation Australia
15	People outdoors
16	Yooralla
17	Destination Melbourne, Its Heaven on the Shoalhaven
18	TAC

Appendix 2 – Survey instruments

Accessible Tourism Questionnaire

Sample and quotas

- Assumed incidence:
  - People with a disability = 14%
  - Carers = 8%
- N = 1400 Australians (nationally representative) who have either taken a domestic overnight or day trip trip for the in the past 2 years
  - N = 1,000 to be individuals aged 18 or over with a permanent or long term temporary disability
    - MAX n = 350 to have ONLY done a day trip (ONLY Selected Code 4 or 5 at S3 Please record incidence) of whom no more than n = 50 to have travelled SOLELY on a day trip for medical reasons (ONLY selected code 4 or 5 at S3 AND selected code 9 at S4)
  - N = 400 to be the main or joint carer for someone with a disability who has travelled in the past 2 years either overnight or for a day trip with that person
    - Max n = 150 to have ONLY done a day trip (ONLY Selected Code 4 or 5 at S3. Please record incidence.) of whom no more than n = 50 carers to have travelled SOLELY on a day trip for medical reasons (ONLY selected code 4 or 5 at S3 AND selected code 9 at S4)
- 15 minute questionnaire
- Other quotas or comments
  - Nationally representative of population in terms of age and sex
  - No upper age limit
  - Retain screen out data so that we can understand incidence

Introduction

Standard welcome screen

We are conducting a study into the travel needs of people with a disability and their carers – even if you have not travelled recently you may still qualify.

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

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

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

Screening questions

S1. Please re-read the definition of disability below and tell us which of the following applies to you? SR

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

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

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

None of these apply to me	1	TERMINATE
Yes – I have a permanent disability	2	CHECK QUOTAS AT END OF SCREENER COUNTS TOWARDS N = 1,000 TRAVELLERS
Yes – I have a temporary but long term disability	3	CHECK QUOTAS AT END OF SCREENER COUNTS TOWARDS N = 1,000 TRAVELLERS
Yes – I am the main carer or a member of a care team for a person with disability	4	CHECK QUOTAS AT END OF SCREENER – COUNTS TOWARDS N = 400 CARERS
Yes – I have a permanent disability and also care for someone else with a disability (whether main or member of a care team)	5	CHECK QUOTAS CAN FALL INTO EITHER QUOTA [least filled into either carers or travelers quota]
Yes – I have a temporary disability and care for someone else with a disability (whether main or member of a care team)	6	CHECK QUOTAS CAN FALL INTO EITHER QUOTA [least filled into either carers or travelers quota]

CREATE temporary variables to hold quota –

- **tempCarer**: (S1 = 4) OR (S1 = 5/6 quota filled as carer)
- **tempTraveller** (S1 = 2/3) OR (S1 = 5/6 quota filled as travellers)

D3. What is (or are) the nature of the disability (or disabilities) < **tempTraveller** : you face> OR < **tempCarer** : the person you care for face>? Please select all that apply MR

Visual (that cannot be corrected by glasses or contact lenses)	1
Difficulty with memory, understanding or learning	2
Intolerance to noise or other cues (e.g. Autism Spectrum Disorder)	3
Mental health condition	4
Mobility requiring a wheelchair or scooter	5
Mobility requiring another form of mobility aid	6
Hearing (that cannot be corrected by hearing aids)	7
Difficulties walking or moving more than a short distance	8
Other (please specify)	9
None of the above	10 - Terminate

IF S1 = CODE 3 OR 6, SKIP TO S2

D4. Is < **tempTraveller** : your disability> OR < **tempCarer** : the person you care for's disability> a lifelong condition?
SR

	Yes	1
	No	2

S2. Do you work or does anyone in your immediate household work in any of the following professions? MR, RANDOMISE STATEMENTS EXCEPT FOR 'None of the above'

Market research	1	TERMINATE
Advertising/PR	2	
Travel and Tourism	3	
Film or TV production	4	
Sports or fitness	5	
Paid work for a charity or aid organisation	6	
None of the above	7	

S3. In the past two years have you done any of the following IF **tempCarer**: with the person you care for> please select all that apply? MR

Been on a trip within Australia where you stayed away from home for **at least one night**, at a place **at least 40 kilometres from your home**	1	
Been on a trip within Australia where you stayed away from home for **at least one night within 40 kilometres of your home**	2	
Been on a trip within Australia a distance of **at least 40 kilometres in total** and were away from home for **at least 4 hours but did not stay overnight**	3	
Been on a trip within Australia **within a distance of 40 kilometres** but where you were away from home for **at least four hours** (day trip) excluding routine travel such as commuting between work / school and home	4	
Travelled **overseas** on a trip	5	IF NONE OF CODES 1-4 SELECTED, SKIP TO S5a-c, then terminate
None of the above	6	SKIP TO S5a-c, then terminate

FOR PIPING INTO QUESTIONS:

IF CODE 1 SELECTED AT S3, SHOW <overnight trip within Australia at least 40 kilometres from your home>

IF CODE 2 SELECTED AT S3, SHOW <overnight trip within Australia within 40 kilometres of your home>
IF CODE 3 SELECTED AT S3, SHOW <day trip in Australia at least 4 hours and at least 40 kilometres from home>
IF CODE 4 SELECTED AT S3, SHOW <day trips in Australia at least 4 hours and within 40 kilometres from home but that excluded routine travel such as commuting between work / school and home>

S4. What was the main purpose of your most recent ~~trip for~~ <REPEAT FOR EACH OF CODE 1-4 SELECTED AT S3, ONLY SHOW ONE PURPOSE PER PAGE>? SR

Holiday or break	1
Other leisure	2
Visit friends or relatives	3
Business	4
Convention/conference/seminar/trade fair/exhibition	5
Training and research (funded by your employer)	6
Employment	7
Education	8
Medical reasons	9
Other reason (please specify)	10

IF EITHER CODE 1 OR 2 SELECTED AT S3 SKIP TO S6

S5a. Are you planning any trips **in Australia** [IF **tempCarer** ADD: with the person you care for] in next 12 months apart from any that are a medical necessity? This could include either day OR overnight trips SR

Yes	1	ASK S5b
No	2	SKIP TO S5c
Don’t know		SKIP TO S5c

S5b. Which types of trips [IF **tempCarer** ADD: with the person you care for] are you planning for the next 12 months? Select all that apply? MR

Trip where I will stay away from home for **at least one night** at a place **at least 40 kilometres from my home**	1	IF ONLY CODE 5 OR 6 SELECTED AT S3 TERMINATE OTHERWISE CONTINUE TO S6 RETAIN INCIDENCE
Trip where I will stay away from home for **at least one night at a place within 40 kilometres of my home**	2	IF ONLY CODE 5 OR 6 SELECTED AT S3 TERMINATE OTHERWISE CONTINUE TO S6 RETAIN INCIDENCE
Trip to somewhere **at least 40 kilometres from my home** where I will be away from home for **at least 4 hours but will not stay overnight**	3	IF ONLY CODE 5 OR 6 SELECTED AT S3 TERMINATE OTHERWISE CONTINUE TO S6 RETAIN INCIDENCE
A Trip **within 40 kilometres** where I will be away from home for **at least four hours** but will not stay overnight. (Excludes routine travel such as commuting between work / school and home)	4	IF ONLY CODE 5 OR 6 SELECTED AT S3 TERMINATE OTHERWISE CONTINUE TO S6 RETAIN INCIDENCE

S5c. Which ONE of the following best applies to you? SR

I would like to travel for reasons other than medical necessity but the experiences, accommodation or transport options currently available don't meet my needs		IF ONLY CODE 5 OR 6 SELECTED AT S3 TERMINATE OTHERWISE CONTINUE RETAIN INCIDENCE
I would like to travel for reasons other than medical necessity but factors like cost or the current technologies available to support people with a disability when away from home prevent me		IF ONLY CODE 5 OR 6 SELECTED AT S3 TERMINATE OTHERWISE CONTINUE RETAIN INCIDENCE
I would like to travel for reasons other than medical necessity but other factors than those above prevent me		IF THIS RESPONSE SELECTED, DO NOT ALLOW OTHER RESPONSES, IF ONLY CODE 5 OR 6 SELECTED AT S3 TERMINATE OTHERWISE CONTINUE RETAIN INCIDENCE
I'm quite happy staying at home/no desire to travel		IF THIS RESPONSE SELECTED, DO NOT ALLOW OTHER RESPONSES, IF ONLY CODE 5 OR 6 SELECTED AT S3 TERMINATE OTHERWISE CONTINUE RETAIN INCIDENCE
None of the above		IF ONLY CODE 5 OR 6 SELECTED AT S3 TERMINATE OTHERWISE CONTINUE RETAIN INCIDENCE

S6. Are you? SR

Male	1	SOFT QUOTA
Female	2	SOFT QUOTA

S7. Which of these age groups do you fall into? SR

Under 18	1	TERMINATE
18-24	2	CHECK QUOTAS AT END OF SCREENER
25-34	3	
35-44	4	
45-54	6	
55-64	7	
65-74	8	
75 or over	9	
Prefer not to say	10	TERMINATE

S8. In which of the following locations do you currently live (please choose your main place of residence if you have more than one)? SR

Sydney	1	CHECK QUOTAS AT END OF SCREENER
Other NSW	2	
Melbourne	3	
Other Victoria	4	
Brisbane/South East Queensland	5	
Other Queensland	6	
Adelaide	7	
Other SA	8	
Perth	9	
Other WA	10	
Canberra/ACT	11	
Darwin	12	
Other NT	13	
Hobart/Launceston	14	
Other Tasmania	15	
Other/prefer not to say	16	TERMINATE

SCREENER CRITERIA

Check QUOTAS FOR

- Total sample

- Sex – nationally representative
- Age – nationally representative
- Residence – nationally representative in terms of state and metro/regional

Quota	n	Logic
QCARERS	400	(tempCarer = yes) AND (S3 = 1/2/3/4)
Day trip only_ QCARERS	150 Max	(tempCarer = yes) AND (S3 is NOT 1/2)
Medical_ QCARERS	50 max	(tempCarer = yes) AND (S3 is NOT 1/2) AND (S4 = 9 for all Daytrip)
QPWD	1000	(tempTraveller = yes) AND (S3 = 1/2/3/4)
Day trip only_ QPWD	350 Max	(tempTraveller = yes) AND (S3 is NOT 1/2)
Medical_ QPWD	50 max	(tempTraveller = yes) AND (S3 is NOT 1/2) AND (S4 = 9 for all Daytrip)

CREATE DUMMY VARIABLE: QCARERS (SELECTED Codes 4, 5 or 6 at S1 AND Selected ANY of Codes 1 to 4 at S3) (n = 400 carers quota), QPWD (Codes 2,3, 5 and 6 at S1 AND Selected ANY of Codes 1 to 4 at S3) (n = 1,000 people with a disability quota) – **terminate respondents who are neither of these groups**

CREATE DUMMY VARIABLES
<OVERNIGHT> ASK ALL WHO HAVE TAKEN AN OVERNIGHT TRIP IN THE PAST 2 YEARS (SELECTED CODES 1 OR 2 AT S3)
<DAYTRIP> ALL WHO HAVE NOT TAKEN AN OVERNIGHT TRIP IN THE PAST 2 YEARS, BUT HAVE TAKEN A DAYTRIP (DID NOT SELECT EITHER CODES 1 OR 2 AT S3, BUT DID SELECT EITHER CODES 3 OR 4 AT S3])
[If both overnight trips (code 1 or 2) AND daytrip (code 3 or 4) selected in S3, code as OVERNIGHT]

STANDARD QUALIFYING SCREEN

This will include the sentence.

This study is about travel for people with a disability or their carers.

STANDARD SCREEN OUT STATEMENT

This will include the sentence
Thank you for your interest in participating in this research. Unfortunately, in this instance you do not meet the requirements of the survey. Thank you again for your time and we assure you that any answers you may have provided will be kept strictly confidential.
This study is being conducted for MyTravelResearch.com on behalf of Tourism Research Australia and two State Tourism Organisations.

Recent Travel Behaviour

ASK T1. If CODES 1 to 4 AT S3 were selected.

We'd like to understand a little about your recent trips.

T1a. How many of each of these types of trips do you estimate you have taken in the past 2 years <QCARERS ADD, with the person you care for>? NUMBER, ALLOW THREE DIGITS [Numeric grid] [range 1 to 999]

IF CODE 1 SELECTED AT S3, SHOW <Overnight trips within Australia which were at least 40 kilometres from your home
IF CODE 2 SELECTED AT S3, SHOW <Overnight trips within Australia which were within 40 kilometres of your home>
IF CODE 3 SELECTED AT S3, SHOW <Day trips in Australia at least 4 hours and at least 40 kilometres from home>
IF CODE 4 SELECTED AT S3, SHOW <Day trips in Australia at least 4 hours and within 40 kilometres from home excluding routine travel such as commuting between work / school and home>

SHOW TOTAL, IF **TOTAL** = 1, SKIP TO T2

T1b. And how many of these trips took place in the last 12 months? <SHOW TRIP NUMBERS FROM T1a, EACH OF CODES 1-4 SELECTED AT S3> NUMBER, ALLOW THREE DIGITS, SET MAX AT RESPONSE FROM T1a [Numeric grid] [range 0 to T1a]

IF CODE 1 SELECTED AT S3, SHOW <Overnight trips within Australia which were at least 40 kilometres from your home
IF CODE 2 SELECTED AT S3, SHOW <Overnight trips within Australia which were within 40 kilometres of your home>
IF CODE 3 SELECTED AT S3, SHOW <Day trips in Australia at least 4 hours and at least 40 kilometres from home>
IF CODE 4 SELECTED AT S3, SHOW <Day trips in Australia at least 4 hours and within 40 kilometres from home excluding routine travel such as commuting between work / school and home>

T2. Thinking about your most recent trip <QCARERS ADD, with the person you care for>, how many people travelled with you? <SELECTED MORE THAN ONE OF CODES 1 to 4 AT S3 ADD: for each type of trip>? Please include yourself and <QCARERS ADD, the person you care for as well as> members of your direct party only.
<SHOW EACH OF CODES 1-4 SELECTED AT S3> NUMBER, ALLOW TWO DIGITS. FOR QCARERS FORCE RESPONSE TO BE AT LEAST N = 2

QCARERS WHERE N = 2 FOR ALL TYPES OF TRIP (S3_1, TP s3_4) SKIP TO T4
QPWD WHERE N = 1 FOR ALL TYPES OF TRIP (S3_1, TP s3_4) SKIP TO T4

IF CODE 1 SELECTED AT S3, SHOW <Overnight trips within Australia which were at least 40 kilometres from your home
IF CODE 2 SELECTED AT S3, SHOW <Overnight trips within Australia which were within 40 kilometres of your home>
IF CODE 3 SELECTED AT S3, SHOW <Day trips in Australia at least 4 hours and at least 40 kilometres from home>
IF CODE 4 SELECTED AT S3, SHOW <Day trips in Australia at least 4 hours and within 40 kilometres from home excluding routine travel such as commuting between work / school and home>

T3a. Again, thinking about your most recent <S3> <QCARERS ADD, with the person you care for>, who travelled with you? MR. ONLY SHOW TRIP TYPES WHERE N > 2 FOR QCARERS OR N > 1 FOR QPWD. SHOW ONE TRIP TYPE PER SCREEN

IF CODE 1 SELECTED AT S3, SHOW <overnight trips within Australia at least 40 kilometres from your home
IF CODE 2 SELECTED AT S3, SHOW <overnight trips within Australia within 40 kilometres of your home>
IF CODE 3 SELECTED AT S3, SHOW <day trips in Australia at least 4 hours and at least 40 kilometres from home>
IF CODE 4 SELECTED AT S3, SHOW <day trips in Australia at least 4 hours and within 40 kilometres from home but that excluded routine travel such as commuting between work / school and home>

Spouse or Partner	1
Your own child(ren)	2
Your own grandchild(ren)	3
Brothers and/or sisters	4
Parents	5
Other family members	6
Friends	7
Paid carer (not friend or family)	8
Guide dogs, assistance or other support animals	9
Other pets	10
Other (please specify)	99

COLUMNS OR HEADERS (DEPENDING ON WHETHER SHOWN AS A GRID OR AS 1 TRIP TYPE PER SCREEN
IF CODE 1 SELECTED AT S3, SHOW <Overnight trips within Australia which were at least 40 kilometres from your home
IF CODE 2 SELECTED AT S3, SHOW <Overnight trips within Australia which were within 40 kilometres of your home>
IF CODE 3 SELECTED AT S3, SHOW <Day trips in Australia at least 4 hours and at least 40 kilometres from home>
IF CODE 4 SELECTED AT S3, SHOW <Day trips in Australia at least 4 hours and within 40 kilometres from home excluding routine travel such as commuting between work / school and home>

T4. Where did you go for your most recent <OVERNIGHT: overnight trip>/<DAYTRIP: daytrip> in Australia? MR

Australian Capital Territory/ACT	1
Northern Territory	2
New South Wales	3
Queensland	4
South Australia	5
Tasmania	6
Victoria	7
Western Australia	8
Other Australian territory or dependency	9

ASK ALL WHO TRAVELLED TO EITHER QUEENSLAND (T4 Code 4) OR VICTORIA (T4 Code 7) ASK T5 AND T6

T5. You mention that you had visited <Queensland/ Victoria on your last <OVERNIGHT: overnight >/<DAYTRIP: day> trip, where did you go? MR

IF VISITED BOTH VICTORIA AND QUEENSLAND ASK FOR BOTH, ROTATE ORDER STATES ARE ASKED
[Please show one state per page and show only relevant codeframe]

If select code 4 at T4, show 'Queensland'	Brisbane and surrounds (e.g. Scenic Rim and Mt Tamborine)	1
	Southern Great Barrier Reef (e.g. Capricorn and Gladstone)	2
	Fraser Coast (e.g. Hervey Bay and Maryborough)	3
	Gold Coast (e.g. Surfers Paradise and Broadbeach)	4
	Mackay (e.g. Sarina and Clermont)	5
	Outback Queensland (e.g. Longreach and Mt Isa)	6
	Southern Queensland Country (e.g. Toowoomba and Stanthorpe)	7
	Sunshine Coast (e.g. Noosa and Caloundra)	8
	The Whitsundays (e.g. Airlie Beach and Whitsunday Islands)	9
	Townsville & North Queensland (e.g. Magnetic Island and Charters Towers)	10
	Tropical North Queensland (e.g. Port Douglas and Cairns)	11
If select code 7 at T4, show 'Victoria'	Melbourne	12
	Yarra Valley & Dandenong Ranges (e.g. Marysville, Healesville)	13
	Daylesford & the Macedon Ranges (e.g.Hepburn Springs, Kyneton)	14
	Mornington Peninsula (e.g. Red Hill, Sorrento)	15
	Phillip Island	16
	Geelong & the Bellarine Peninsula (e.g. Ocean Grove, Queenscliff)	17
	Great Ocean Road (e.g. Twelve Apostles, Lorne, Torquay)	18
	Goldfields (e.g. Ballarat, Bendigo)	19
	Grampians (e.g. Stawell, Halls Gap)	20
	High Country (e.g. Beechworth, Snowfields, Bright)	21
	Gippsland (e.g Wilsons Promontory, Lakes Entrance)	22
	Murray (e.g. Echuca, Albury/Wodonga)	23

<DAYTRIP ASK DT1> <OVERNIGHT SKIP TO DT2>

DT1. Which of these were the easiest for you to use on your most recent daytrip? You may select up to 3 ALLOW UP TO 3 RESPONSES, MUST SELECT ONE

Private vehicle or company car	1
Rental car	2
Railway	3
Bus	4
Ferry	5
Tram or Light Rail	6
Taxi	7
Tour bus or coach - general	8
Tour bus or coach - accessible	9
Ride sharing e.g. Uber	10
Other (please specify)	11
None – they are all equally difficult	12
None – they are all equally good	13

<DAYTRIP SKIP TO T9>

DT2. Which of these were the easiest way to get you to your destination? You may select up to 3 ALLOW UP TO 3 RESPONSES, MUST SELECT ONE

Private vehicle or company car	1
Rental car	2
Railway	3
Bus	4
Ferry	5
Tram or Light Rail	6
Taxi	7
Tour bus or coach - general	8
Tour bus or coach - accessible	9
Ride sharing e.g. Uber	10
Other (please specify)	11
None – they are all equally difficult	12
None – they are all equally good	13
Airline	14

DT3. Once at your destination, which of these were the easiest to use to get around whilst you were there? If you stayed overnight in more than one place, which did you find easiest to use on average across the places you stayed? You may select up to 3 ALLOW UP TO 3 RESPONSES, MUST SELECT ONE

Private vehicle or company car	1
Rental car	2
Railway	3
Bus	4
Ferry	5
Tram or Light Rail	6
Taxi	7
Tour bus or coach - general	8
Tour bus or coach - accessible	9
Ride sharing e.g. Uber	10
Other (please specify)	11
None – they are all equally difficult	12
None – they are all equally good	13
Airline	14
None – preferred to remain in one place when I got there	15

ASK ALL WHO TRAVELLED TO EITHER QUEENSLAND (T4 Code 4) OR VICTORIA (T4 Code 7) ASK T6

T6. How many nights were you away in total? SR

1 night	1
2 nights	2
3 nights	3
4-7 nights	4
8 – 14 nights	5
15 – 30 nights	6
31 nights or more	7
Don’t know	98

T7. What was the MAIN type of accommodation you stayed in? SR

Luxury hotel or luxury resort (4 or 5 star)	1
Standard hotel/motor inn (below 4 star)	2
Guest house or Bed & Breakfast	3
Serviced apartment	4
Rented house/apartment/flat or unit (not serviced daily including those via AirBnb)	5
Backpacker or hostel	6
Caravan Park Cabin	7
Free camping including in caravans, motorhomes etc.,	8
Tent/camping in a caravan park or formal campsite	9
Caravan, campervan or motorhome parked in a caravan park	10
Rent or borrow a room in a shared house (e.g via AirBnb or couch surfing)	11
Friends or family property	12
Other	99

IF SELECT CODE 1 to 11, ASK T8. OTHERS SKIP TO T9

T8. Based on this experience and on a scale of 0 to 10, where 0 is not at all likely and 10 is extremely likely, how likely are you to recommend <accommodation at T7> as a form of accommodation to travellers with a disability <QPWD: like yours>/<QCARERS> like that of the person you care for? SR USE SLIDER

0 - Not at all likely	1	2	3	4	5	6	7	8	9	10 – Extremely likely

IF CODES 4 TO 10 SELECTED FOR ALL TRAVEL TYPE AT S4, SKIP TO DT6

ASK ALL WHO TRAVELLED TO EITHER QUEENSLAND (T4 Code 4) OR VICTORIA (T4 Code 7) ASK T9

T9. Thinking about your most recent trip to <Queensland/ Victoria >. On a scale of 0 to 10, where 0 is not at all likely and 10 is extremely likely, how likely are you to recommend < Queensland/ Victoria > to travellers with a disability <QPWD: like yours>/<QCARERS: like that of the person you care for> based on the range of attractions and experiences it offers? SR, USE SLIDER

IF VISITED BOTH VICTORIA AND QUEENSLAND ASK FOR BOTH, ROTATE ORDER STATES ARE ASKED

0 - Not at all likely	1	2	3	4	5	6	7	8	9	10 – Extremely likely

Travel Planning

TP1. We'd like to understand where you might go to help you plan <OVERNIGHT: an overnight trip>/<DAYTRIP: a daytrip> in Australia <QCARERS ADD: with the person you care for> for a holiday, trip or break.

Even if you have not taken such a trip, we would still like your views. You may draw on any previous experience you have either for overnight travel or day trips you have made. [ONE SCREEN PER STAGE]

a) Thinking first about where you might **get inspiration** to take a trip at all? Please select UP TO 5 sources that would be most important at this stage UNLESS SELECT NONE OF THESE CHECK BOX. RANDOMISE (RANDOMISE FOLLOWING CODES AS GROUPS (2-5) (6+7) (12+13) i.e they will always appear alongside one another, EXCEPT NONE AND OTHER
b) Now which do you think would be most helpful in **planning the trip** once you had decided where to go or what to do? Again you can select up to 5 sources UNLESS SELECT NONE OF THESE CHECK BOX. RANDOMISE RANDOMISE FOLLOWING CODES AS GROUPS (2-5) (6+7) (12+13) i.e they will always appear alongside one another, EXCEPT NONE AND OTHER
c) Which of these would you use to **book** any elements of your trip before you left home? For this please select your TOP 3 choices [Must have one code selected] UNLESS SELECT NONE OF THESE CHECK BOX. RANDOMISE (RANDOMISE FOLLOWING CODES AS GROUPS (2-5) (6+7) (12+13) i.e they will always appear alongside one another, EXCEPT NONE AND OTHER
d) And which of these would you use whilst **away on your trip**? For this please select your top 3 choices [Must have one code selected] UNLESS SELECT NONE OF THESE CHECK BOX. RANDOMISE RANDOMISE FOLLOWING CODES AS GROUPS (2-5) (6+7) (12+13) i.e they will always appear alongside one another, EXCEPT NONE AND OTHER

Review sites (e.g. TripAdvisor)	1
Visit a travel agent specialising in travellers with a disability in person	2
Phone or email a travel agent specialising in travellers with a disability	3
Visit a standard travel agent in person	4
Phone or email a standard travel agent	5
Tour companies – specialising in travellers with a disability	6
Tour companies – general	7
Peak body for relevant disabilities e.g. MS Society or Vision Australia	8
NDIS or programme co-ordinators	9
Destination websites (towns, cities, states etc.)	10
Online Travel Agent websites (e.g. Webjet)	11
Word of mouth (colleagues, friends and family - general)	12
Word of mouth (colleagues, friends and/or family with a disability)	13
Social media (e.g. Facebook, Snapchat, YouTube)	14
Tourism Offices/Visitor Information Centres	15
Deal sites or emails (e.g. Groupon)	16
Traditional advertising – TV, Print, Radio, Online	17
Documentaries or articles – TV (e.g. travel or cooking shows), Print, Radio, Online	18
Previous experience of the destination	19
Internet search	20
Long distance transport providers (e.g. airlines, rail or coach operators)	21
Local transport providers (e.g. buses, rail)	22
Community groups/Social clubs (e.g. Church, University)	23
Online disability forums	24
Other	98
None of the above	99

IF OTHER SELECTED AT ANY STAGE ASK TP2. Otherwise, SKIP TO TP3

TP2. You mentioned there were some other sources of information you would like to use. What are the most important ones we didn't include? O/E

DT8a. Have you recommended or shared favourable comments on any of the following to (other) travellers with a disability in the past 12 months? Select all that apply MR

An airline	1
An airport	2
A travel agent	3
A hotel or accommodation provider	4
An attraction	5
An experience	6
A destination (city, region or state)	7
A tour company	8
A cruise company or ship	9
Another transport provider (bus, rail, coach)	10
None of the above	99

IF DT8a = CODE 99, SKIP TO TP3
IF ONLY ONE OF CODES 1 TO 10 SELECTED SKIP TO DT8c

DT8b. You mentioned that you had recommended the following, which ONE was the stand out for you? SR [SHOW SELECTED CODES FROM DT8a]

An airline	1
An airport	2
A travel agent	3
A hotel or accommodation provider	4
An attraction	5
An experience	6
A destination (city, region or state)	7
A tour company	8
A cruise company or ship	9
Another transport provider (bus, rail, coach)	10

DT8c
You said you had recommended <DT8b CATEGORY> Who (i.e. which service provider or location) did you recommend and Why? OPEN ENDED COMMENT BOX 1 SMALL FOR WHO, ONE LARGER FOR WHY

TP3. How important are each of the following when you are planning a holiday, trip or break <QCARERS ADD: with the person you care for> – even if it is only for a day trip? SR per row

Column
Extremely important (5)
Important (4)
Neutral (3)
Not very important (2)
Not at all important (1)
Don't know [check box = 0]

Rows
1. That it is quick and easy to find information for travellers with a disability among more general information
2. Ability to find information that is specific to <QPWD: my>/<QCARERS: the person I care for's> disability
3. Ability to access very detailed or specific information on things like steps, distances, room layouts at each stage
4. Information is well structured with clear headlines and then the ability to access more detailed information
5. Relatable images of people with disabilities are included Ability to plan EVERY detail of my trip in advance so I can feel confident
6. Ability to find out easily what specialist facilities like hoists, hearing loops, Braille signs etc are available at EACH stage of the trip

Desired travel experiences

DT1 to DT3 moved to section on last trip

DT4. If we think of our ideal holiday we probably have one or two motivations that are very important to us. Below are some motivations for a holiday, trip or a break, please select up to 4 that really matter to you RANDOMISE LIST

Holidays for me are about relaxing – I just want to switch off and do nothing	1
When I travel, I really want to get into the place I am visiting – ideally I would like to live like a local	2
I think we should experience Australia before we travel overseas	3
Holidays are spending time with the people I care about	4
Holidays are about revisiting places I love	5
Holidays are about trying new things	6
Holidays are when I reflect on what is important to me	7
I really like to challenge myself when I am on holiday – it should be an adventure	8
A holiday should leave me feeling reinvigorated	9
Holidays are a chance to spoil myself	10
Holidays are about recharging my batteries – life is so hard these days	11
I should feel enriched by a holiday	12
A holiday is about getting/giving respite	13
I don’t really mind where I go, as long as I get away	14
I tend to go back to the same places because I know that they can meet my needs	15
Other (please specify)	16
Don’t know/None of these	99

DT6. Here are some potential improvements or additional products that could be offered to travellers with a disability. Please select the 3 that are most relevant to your needs DRAG AND DROP BOXES. RANDOMISE

More information for accessible/inclusive travel on review sites	1
Dedicated review sites or information for specific disabilities (e.g. kids with Autism Spectrum Disorder)	2
Deals and offers for those travelling with a carer	3
Better access to water sports e.g. via beach matting	4
Specialist planning tools so could map out the entire journey	5
Accreditation or recognition of businesses that do a great job for travellers with disabilities	6
Trail rides that meet the needs of travellers with disabilities	7
Access to all terrain wheelchairs when you travel	8
Case studies or stories that show what can be done by people with a disability	9
Availability of specialist tours with special wheelchairs that enables access to difficult or uneven sites e.g. historic precincts	10
None of the above	99

DT9. What is the MOST important thing we could do to facilitate travel for people with disabilities? OPEN ENDED LARGE COMMENT BOX

DT10. Please rate the importance of improvements in the following areas. SR per row RANDOMISE LIST. SHOW ONE AT A TIME

Column
Extremely important (5)
Important (4)
Neutral (3)
Not very important (2)
Not at all important (1)
Don't know [check box = 0]

Row

1. More toilets/more accessible toilets
2. Lifts
3. More changing facilities
4. Better information on practicalities (e.g. location of toilets)
5. Better access to aircraft (eagle hoists)
6. Better access at airports (more wheelchairs, more assistance for all travellers with a disability)
7. Better public transport access (buses, trains)
8. Broader range of accommodation options for people with a disability
9. Better promotion of options available for people with a disability
10. Better access at places like beaches
11. Access to free WiFi
12. Access to fast WiFi
13. More information/more prominent information for travellers with disabilities on websites for destinations, attractions or experiences
14. More information/more prominent information for travellers with disabilities on websites for transport (airlines, rail)
15. Better training for tourism and hospitality staff on interacting with travellers with a disability

Barriers to Travel

B1. Here are some issues that travellers with a disability have told us either prevent them from travelling or mean they travel less often than they would like to. Please select up to 3 of the MOST SIGNIFICANT BARRIERS from your point of view RANDOMISE

Travelling is just too hard	1
Not knowing what to expect in sufficient detail which impacts on the experience	2
Travelling is so stressful it's not worth it	3
Worry about being stared at/standing out	4
Attitude of airline, tourism and hospitality staff to travellers with a disability	5
Lack of skills among airline, tourism and hospitality staff in dealing with travellers with a disability	6
Not aware of what is on offer for people with a disability like <QPWD: mine>/<QCARER: theirs > due to lack of information	7
Absence of marketing or promotion for people with a disability/featuring people with a disability	8
None of the above	99

B2. Here is another set of more practical barriers to travel that you might have encountered. This time please select up to 3 of the MOST SIGNIFICANT ones from your point of view. RANDOMISE

Inadequate facilities for people with a disability like <QPWD: me>/<QCARER: the person I care for> when travelling	1
Not enough accessible rooms in accommodation	2
Not enough different types of rooms in accommodation for people with different levels of disability	3
Higher costs specifically for travellers with a disability (e.g. takes longer to travel so need to stay longer or need for travel with a carer)	4
Too expensive as many travellers with a disability have low disposable income (spare money)	5
Not enough experiences that are available to people with a disability like <QPWD: mine>/<QCARER: theirs >	6
Takes too long to get there	7
Too difficult to get there	8
Need to be near my own medical specialists/ medical facilities as they know <QPWD: my specific circumstance>/<QCARER: the specific circumstance of the person I care for>	9
Need to be near specialist medical facilities (even if not my own)	10
No one to travel with	11
Availability of adequate information to make decision to travel/knowing where to find information	12
None of the above	99

And finally, just a few questions to enable us to put your views in context.

D1. Which of these best describes the structure of the household you live in? SR

Single/living alone	1
Share house with non-related persons	2
Live with my parents	3
Couple, no children	4
Family, young children (eldest under 13 years)	5
Family, older children aged 14+ at least some living at home	6
Empty nesters, children have moved out	7
Family/relationship with dependent relatives (e.g. parents)	8
Other	98

D2. How long have you lived in Australia? SR

Born here	1
More than 20 years	2
11-20 years	3
5-10 years	4
Less than 5 years	5
Don't know	98

D5. What day-to-day medical/support needs <QPWD: do you> OR <QCARER: does person you care for> need? OPENENDER, LARGE TEXT BOX

IF QPWD and AGED UNDER 65 (CODES 1 TO 7 AT S7) Skip to D9
IF QPWD AND AGED OVER 65 (CODES 8 OR 9 AT S7) GO TO D10

D6. What is the nature of your relationship with the person you care for? SR

Spouse or Partner	1
Parent	2
Child	3
Grandparent	4
Grandchild	5
Brother or sister	6
Other family member	7
Friend	8
Neighbour	9
Client (I am a paid carer not otherwise related to client)	10
Other (please specify)	97

D7. What age is the person you care for? SR

Under 16	1
16-24	2

25-34	3
35-44	4
45-54	6
55-64	7
65-74	8
75 or over	9
Prefer not to say	10

D8. How long have you cared for them? SR

Less than 1 year	1
2-4 years	2
5 – 9 years	3
10-19 years	4
20 years or more	5
Prefer not to say	6

D9. The National Disability Insurance Scheme (NDIS) is increasingly being rolled out across Australia. Which of these best applies to <QPWD: you> OR <QCARER: the person you care for>? SR

I've never even heard of the NDIS	1
I've heard of the NDIS but know very little about it	2
I've heard of the NDIS but it doesn't apply to me	3
I've heard of the NDIS and qualify, but don't yet have a plan	4
I have only just got an NDIS plan	6
I have had a NDIS plan for 6 months or longer	7
None of the above	8

D10. Finally, is there anything you would like to add on the subject of travel with disabilities? OPEN-ENDED LARGE COMMENT BOX, MAKE THIS QUESTION OPTIONAL

THANK YOU

CLOSING SCREEN

DISCUSSION GUIDE

4 active days, 3 catch up days

INTRODUCTION (Email to participants)

Hello and welcome to this exciting forum about inclusive and accessible travel. The project is being conducted under the Destination Visitor Survey programme from Tourism Research Australia and sponsored by two state tourism organisations (see if you can guess which ones!). Thank you so much for agreeing to take part in this forum, we are looking forward to hearing your views and ideas.

Let's introduce ourselves....

My name is Carolyn and I'm a researcher who specialises in travel and tourism. I'll be managing our discussion along with my business partner Bronwyn and our colleague Bill Forrester who is an inclusive tourism expert. We think we have one of the best jobs in the world as we get paid to talk to people about doing something they enjoy! During the course of this discussion, we will be posting daily activities for you to participate in. Occasionally, one of us will ask you specific questions about what you've said, what you think and how you feel.

Remember that we LOVE hearing about travel and we are passionate about bringing it to everyone. So please make your views heard and provide us as much detail as possible. If you have any questions, including those of a technical nature, just drop us an email at travelresearch01@studyspace.net

What we need from you

The discussion forum starts today: **Monday May 15th**

The forum is open for a week. We have 4 days of daily activities lasting between 15 and 30 minutes – on average it should work out at about 20 minutes. We also have a couple of days for you to think about things and add more feedback – or share comments with others you meet on the board. The questions are staggered so that you have time to think about them. This isn't a test! There are no right or wrong answers; we want to hear your honest opinions and attitudes.

When you're on the forum:

- Illustrate your answers by **uploading your own photos and videos**. Go ahead and be as creative as you want. It will really help us understand your views – and the images can make the conversation much more fun.
- **Talk to others on the forum**. Because the subject is travel, people often feel like they have their own personal travel consulting team when participating (a fabulous perk!).
- Payment for the forum is staggered, so the more you complete the more you earn. Remember there is a $25 bonus for completing all the days – bringing the total thank you gift to $125.

Getting started

You will receive an automated email message from the board inviting you to participate in the project. To ensure that the email is not sent to your spam folder, we suggest that you add '**studyspace.net**' as a safe domain to your email whitelist. Otherwise, if you have not received your invitation take a quick look in your Spam folder.

Once you receive the email, click on the link provided to access the project website.

When you follow the invitation link, you will need to fill in a few details to complete your registration. You'll be asked to agree to the terms of the project, upload a picture of yourself or some other image to act as an avatar and create your unique password. Some of the clients for this study will be viewing the discussion, so please use your first name or a nickname only. But that is just because they are passionate about this topic too! Remember there are no right or wrong answers – we want you to tell us honestly what you think: the highs, the lows and the in-betweens.

Day 1 is normally a pretty easy day, where we get to know you.

Communication

Over the course of the forum, you will receive a number of emails from me, Bill and Bronwyn, as well as some notifying you when other people leave comments. These will include links to the comments, which we'd very much like you to follow and respond to accordingly. In order that these do not get sent to your Spam folder or Trash, please add this email address to your address book: MyTravelResearch01@studyspace.net

Questions will be posted by 09.30 am AEST (Brisbane/Melbourne/Sydney time) each day.

One final thing

There are a number of you taking part in this project. Some of the comments you share will be private and the rest will be public. We will highlight this as we go along, so you always know.

Thanks again for joining us to chat travel – we look forward to getting to know you.

Carolyn and Bronwyn

MyTravelResearch.com

LOG IN

Terms and Conditions screen (SEPARATE)

MONDAY DAY 1

ACTIVITY 1

Activity Title Getting to know you

Day and time you want activity to launch (Day 1 0700 AEST)

Type of Activity: (One-time activity, Desktop and Mobile Enabled)

Sharing: Private

Welcome to the first day of the travel forum. Let's start by getting to know one another a little. As you can see this part of the forum is Private which means only you and the research team can see it!

[Programming note: Make this Instruction Text]

Question 1. Tell us a little about yourself? If we met at a party and I asked that question, how would you answer it? **[Programming note: Open end text box collector]**

Question 2. Who else shares your household? Does that include any carers or support staff? If you are a carer, do you live with them? Please also include any pets **[Programming note: Open end text box collector]**

Question 3.

If you work, what do you do for a living? **[Programming note: Open end text box collector]**

Question 4. How long have you lived in Australia?

I was born here
More than 20 years
11-20 years
6 – 10 years
5 years or less
Prefer not to say

[Programming note: Single Choice]

Question 5. What ethnic groups do you identify with? **[Programming note: Open end text box collector]**

ACTIVITY 2

Activity Title Getting to know you a bit better

Day and time you want activity to launch (Day 1 0700 AEST)

Type of Activity: (One-time activity, Desktop and Mobile Enabled)

Sharing: Private

Everyone participating on this board either lives with a disability or is a carer for someone with a disability. We'd like to understand how that disability impacts your life. Again, you'll note that this section is also Private. **[Programming note: Make this Instruction Text]**

Q1. How long have you (or the person you care for) lived with this disability? If more than one form of disability is involved, have you (or the person you care for) faced all these different disabilities for the same amount of time? **[Programming note: Open end text box collector]**

Q2. How does it affect your life both everyday and overall? If you'd like to post images or video that help me understand this feel free to do so, these could be photos of your life, or they could be other images that tell me how you feel about things. (For example, I once did a discussion forum like this on public transport and someone posted an image of a skeleton to show how late buses were in their area.) If you do post images, please explain why you chose that image. **[Programming note: Open end text box collector, Optional Photos collector box, Optional Video collector box]**

Q3. What support needs do you (or the person you care for) have? How wide is your support network? Again you can post images if it helps explain it more easily. **[Programming note: Open end text box collector, Optional Photos collector box]**

<u>ACTIVITY 3</u>

Activity Title The National Disability Insurance Scheme

Day and time you want activity to launch (Day 1 0700 AEST)

Type of Activity: (One-time activity, Desktop and Mobile Enabled)

Sharing: Uninfluenced

The National Disability Insurance Scheme (NDIS) is increasingly being rolled out across Australia. I'd like to understand your views and experience on this a little. This is a big topic and I want to save your valuable time and effort to talk travel so I don't need a lot of depth, just a quick overview. **[Programming note: Make this Instruction Text]**

Question 1. What do you know about the NDIS so far? **[Programming note: Open end text box collector]**

Question 2. Which of these best applies to you?

The NDIS roll out hasn't reached my area yet
The NDIS roll out has reached my area but I (or the person I care for) do not yet have a plan
I (or the person I care for) currently have a plan under the NDIS scheme
I don't qualify for/ the person I care for doesn't qualify for the NDIS but are covered by a different

funding programme
I don't qualify for/ the person I care for doesn't qualify for the NDIS and are not covered by another funding programme
None of the above

[Programming note: Single Choice]

Question 3. If you have a plan under the NDIS or are funded through another programme how is that working for you (If it doesn't apply to you then just type Not applicable)

[Programming note: Open end text box collector]

Question 4. How, if at all, do you expect the NDIS to change things for you (or if you are unlikely to qualify) for people with a disability generally? Again if it helps, feel free to add some images to convey this **[Programming note: Open end text box collector, Optional Photos collector box]**

Question 5. Has it impacted your expectations of travel in any way? If so, how? **[Programming note: Open end text box collector, Optional Photos collector box]**

<u>ACTIVITY 4</u>

Activity Title What's important to you?

Day and time you want activity to launch (Day 1 0700 AEST)

Type of Activity: (One-time activity, Desktop and Mobile Enabled)

Sharing: Uninfluenced

Before we talk travel, I'd like to know a little more about what's important to you more generally. Much as I love travel, I know there's a lot more to me and my life than that! **[Programming note: Make this Instruction Text]**

Question 1. What do you like to do with your spare time? This would of course include holidays, trips and breaks but also what you like to do when you are at home. That could include the little things (like reading a book or sitting over a nice coffee) as well as the big ones (like competing in a marathon or writing a novel) Again you could post images if it helps. **[Programming note: Open end text box collector, Optional Photos collector box]**

Question 2. Which of the activities you just mentioned most important to you and what makes them so important? **[Programming note: Open end text box collector]**

Question 3. What's important to you in your life right now? What are your priorities? Again, what is it that makes them so important? Please tell me as much as possible – again if you want to post pictures that express that feel free to do so but please help me understand why you chose those images? **[Programming note: Open end text box collector, Optional Photos collector box]**

Question 4. Let's look ahead 5 years from now. What are your hopes and fears for the future? What do you think will be important to you then? Will your priorities have changed and, if so, in what ways? **[Programming note: Open end text box collector]**

Thanks for today

That's everything for today, thank you so much for sharing. I look forward to hearing more and I promise we will start talking travel tomorrow!

[**Programming note: Make this Instruction Text]**

TUESDAY – DAY 2

ACTIVITY 1

Activity Title Introduction

Day and time you want activity to launch (Day 2 0700 AEST)

Type of Activity: (One-time activity, Desktop and Mobile Enabled)

Sharing: Influenced

Hello, and welcome to Day 2 of our forum on accessible and inclusive travel. I really enjoyed getting to know you yesterday and can't wait to hear your views on travel. So let's get right down to it!

[**Programming note: Make this Instruction Text]**

ACTIVITY 2

Activity Title Travel

Day and time you want activity to launch (Day 2 0700 AEST)

Type of Activity: (One-time activity, Desktop and Mobile Enabled)

Sharing: Influenced

OK, let's talk about travel now. I know some of you have travelled in the past 2 years and some haven't. That means some of the questions in this section may not apply to you. If it doesn't then type 'NA' and move to the next question. However, you must either answer the questions that relate to your trips or answer those about why you don't travel. **[Programming note: Make this Instruction Text]**

Question 1. Firstly, tell me about any trips, holidays or breaks you have taken in Australia in the past 2 years that involved an overnight stay.

You can include trips to visit friends and relatives, but you should only include any business trips or trips for medical reasons if you did some fun stuff as well OR if these were the only trips you took. Don't forget to include what Bronwyn and I call 'hidden travel' – those little breaks of a night or two. Where do you go? Who do you go with? How long for? Where did you stay? How did you get there? What did you do whilst you were there? What aids and supports did you take with you? Did you use any funding from a programme to facilitate the trip?

If you are a carer, then please only include those trips that involved travelling with the person you care for or if you haven't taken any with them about any respite trips you may have taken.

Remember, I love hearing about your experiences so tell me as much as possible. Again, if you want to post images we'd love to see them

[Programming note: Open end text box collector, Optional Photos collector box]

Question 2. Think about which of these trips you enjoyed most, or if you can't pick between them choose your most recent one? What were the highlights? What made it special or unique? What would have made it even better? **[Programming note: Open end text box collector]**

Question 3. Now tell me about any trips, holidays or breaks you have taken <u>overseas</u> in the past 2 years. This can include trips to visit friends and relatives, but you should only include any business trips if you did some fun stuff as well! Where did you go? Who did you go with? How long for? Where did you stay? How did you get there? What did you do whilst you were there? Again, we want to hear all about it and if you want to post images we'd love to see them. What aids and supports did you take with you? Did you use any funding from a programme to facilitate the trip? If you haven't made an overseas trip in the past 2 years, let me know about the last overseas trip you made.

[Programming note: Open end text box collector, Optional Photos collector box]

Question 4. What were the highlights of your most recent overseas trip? What made it special or unique? What would have made it even better? **[Programming note: Open end text box collector]**

Please answer this question even if you haven't travelled in the past two years. [**Programming note: Make this Instruction Text]**

Question 5. Travel can have a different meaning to different people and different types of holidays or trips can play a different role in your life. What does travel mean to you? How does it make you feel? Does this change for different types of trips e.g. overseas versus in Australia, or for an inland area vs. a coastal one, or shorter versus longer trips? Has this changed for you over time? Again, if you think images or video can help explain, please feel free to post these but let me know why you chose them.

[Programming note: Open end text box collector, Optional Photos collector box, Optional video collector box]

Question 6. This question is for those that haven't travelled in the past 2 years at all. You've told us what travel means to you. We'd also like to know what **being able to travel** would mean to you. Why is it important?

Question 7. Tell me more about what gets in the way of your travelling or travelling more? Do you think it is possible to do something about those things? What? Again feel free to post images that explain this more. **[Programming note: Open end text box collector, Optional Photos collector box]**

Question 8. If we were able to change things, how would we get the message to you about those changes? What should we say? **[Programming note: Open end text box collector, Optional Photos collector box]**

ACTIVITY 3

Activity Title Deciding where to go

Day and time you want activity to launch (Day 2 0700 AEST)

Type of Activity: (One-time activity, Desktop and Mobile Enabled)

Sharing: Influenced

Today we want to learn a little more about how you plan your travel or how you think you might if you were to travel. We are really going to focus on Australian trips, holidays and breaks. However, if you think a comparison with overseas holidays is relevant in any way, that's good too. [**Programming note: Make this Instruction Text]**

Question 1. What inspires/or would inspire you to take trips, holidays or short breaks in Australia? Do you tend to have definite plans or a time of year? Or is it more spontaneous? Are there particular images, advertising or things you have heard, seen or read that inspire you? Let us know (e.g. in magazines, from community groups). Again if you want to provide examples of things you can post them as images or videos – but don't forget we need to know why you chose them. **[Programming note: Open end text box collector, Optional Photos collector box, Optional video collector box]**

Question 2. As a person with a disability or someone who travels with a person with a disability, is there specific information you are looking for to help inspire you or to plan your trip that someone who didn't have that disability would not need? Please tell me what they might be?

ACTIVITY 4

Activity Title Planning a trip

Day and time you want activity to launch (Day 2 0700 AEST)

Type of Activity: (On going activity, Desktop and Mobile Enabled)

Sharing: Influenced

I'd like to understand how you go about planning a trip in Australia

If you are a carer for someone with disabilities don't forget that we want to focus on travel with the person you care for.

If you have travelled in the past two years, please answer for your most recent trip.

If you haven't travelled in the past 2 years, either talk about the last trip you did or please imagine that you are planning a trip of between 2 and 6 nights in either New South Wales, Queensland or Victoria.

[**Programming note: Make this Instruction Text]**

Question 1. Where did/would you first start looking for information? Was the initial search in just one place, or more than one? Please provide specific details.... **[Programming note: Open end text box collector]**

Question 2. Did/would you use search to help you (i.e. typing terms into a search engine like Google or Bing to help you)? What search terms did/would you use first? What was/would be next? Please type in the phrases or words you did/would use? **[Programming note: Open end text box collector]**

Question 3. What websites or types of websites did/might you use or visit? If you know the address (URL) please give us that? Can you also tell us why you use these and which are most valuable? **[Programming note: Open end text box collector]**

Question 4. Did/would you book any elements of the trip before you left? If so, which ones and how did/would you book? Please tell me why you use those sources? **[Programming note: Open end text box collector]**

Question 5. What information or booking sources did/would you use whilst travelling to your destination or on your trip? Tell me what the benefits and drawbacks of these are? **[Programming note: Open end text box collector]**

Question 6. As someone with a disability or who cares for someone with a disability do you think there are any gaps in the information you need to plan travel? What are they? Which are the most important? **[Programming note: Open end text box collector]**

Thank you

That's given me a really good feel for how you plan travel.

There won't be any new activities posted on the forum tomorrow. But I would like you to log into the site and review what is happening and what is being said. Please add any further thoughts you have on sources of information for planning travel. Please also feel free to chat to your fellow forum members about what you have seen and read. Often people find they learn a lot from doing this – it's good to share.

I'll be on the forum tomorrow as well – and look forward to more comments. See you Thursday when we will start doing some fun stuff including planning our ideal trip!

[**Programming note: Make this Instruction Text]**

WEDNESDAY – DAY 3

Activity Title Catch up and reflection

Day and time you want activity to launch (Day 3 0700 AEST)

Type of Activity: (One-time activity, Desktop and Mobile Enabled)

Sharing: Uninfluenced

Activity 1

Hello, thanks for all the great comments and feedback so far. As I say, today is a bit of a catch up day. Feel free to add anything, share comments and so on. I may also come back to a few of you separately!

[Programming note: Make this Instruction Text]

THURSDAY – DAY 4

ACTIVITY 1

Activity Title Welcome to Day 4

Day and time you want activity to launch (Day 4 0700 AEST)

Type of Activity: (One-time activity, Desktop and Mobile Enabled)

Sharing: Influenced

Welcome back! I hope you enjoyed yesterday and the opportunity to reflect and share views. Now let's get back into talking about travel.

Today we're going to start with some fun and talking about what we really want and then look at what is currently available for travellers with disabilities.

[Programming note: Make this Instruction Text]

ACTIVITY 2

Activity Title Your ideal trip

Day and time you want activity to launch (Day 4 0700 AEST)

Type of Activity: (One-time activity, Desktop and Mobile Enabled)

Sharing: Influenced

I'd now like you to imagine your ideal Australian trip, break or holiday. If you are a carer for someone with a disability, please think about an ideal trip travelling with that person (or people). Close your eyes and take a moment to think about it. There are no limits on where it could be, what you would be doing?

[Programming note: Make this Instruction Text]

Question 1. Tell me about the destination and the type of trip. Where would you go? How long would you go for? What would you be doing whilst there? Would it be action-packed or a complete 'veg out'? Feel free to post images or website URLs that show me what your ideal trip would be like/ **[Programming note: Open end text box collector, Optional Photos collector box]**

Question 2. Here are some different types of activities and experiences that the trip could include. Which THREE would be most attractive to you?

Food and wine experiences (e.g. wine tasting, farm tours or stays, cooking classes)
Amazing natural landscapes
Historical and cultural experiences (e.g. historic buildings, museums, trails and sites)
Where relevant Indigenous history (e.g. natural sites, interpretive trails, indigenous food)
Adventure or physical activities (e.g. kayaking, bushwalking)
Culture (art galleries, concerts, museums)
Other nature experiences (bird watching, wildlife parks, interpretive trails)
Rest and relaxation
Family friendly activities
Attend an event or festival – cultural, historic or local
Participate in an event or festival – cultural, historic or local

Attend an event or festival – sporting
Participate in an event or festival — sporting
Chance to do a short study break

[Programming note: Multiple Choice]

Question 3. Now tell me about who you would be travelling with? **[Programming note: Open end text box collector]**

Question 4. And now a little about the logistics of the trip. How would you get there? What sort of accommodation would you be staying in? Would it be an organised trip or more open? Why would you choose that sort of trip? **[Programming note: Open end text box collector]**

Question 5. What specific support needs you might have either on the way or once you got there. If you have very specific support aides would, you prefer to bring your own or have these provided? What should be provided? **[Programming note: Open end text box collector]**

Question 6. What were your reasons for choosing this as your ideal trip? Help me understand what makes this ideal for you? **[Programming note: Open end text box collector]**

<u>ACTIVITY 3</u>

Activity Title How close are we to the ideal?

Day and time you want activity to launch (Day 4 0700 AEST)

Type of Activity: (One-time activity, Desktop and Mobile Enabled)

Sharing: Influenced

I'd like to understand how close what is currently available or on offer in Australia to the traveller with disabilities is to your ideal trip. Even if you haven't travelled in Australia in the last two years, we would still like your impressions. If it helps, take a moment to read back what you told us above.

[Programming note: Make this Instruction Text]

Question 1. Where does it come closest? **[Programming note: Open end text box collector]**

Question 2. Where are the biggest gaps? **[Programming note: Open end text box collector]**

Question 3. How could we get closer to the ideal? Is it more about what's available to help you plan, the logistics/journey, the activities and experiences or the practicalities? What is most important to solve? **[Programming note: Open end text box collector]**

Question 4. Do you think any states or territories are better than others in catering for travellers with disabilities? If so, which one(s)? What makes them better? What are they doing right? **[Programming note: Open end text box collector]**

Question 5. Are you aware of any businesses or organisations that are doing a particularly great job? It might be a tour company, a hotel group or transport provider? Again tell us what makes them better than others? **[Programming note: Open end text box collector]**

Question 6. Is there anyone who is really getting it badly wrong? If you can think of lots, which are the worst offenders and why? **[Programming note: Open end text box collector]**

Thank you

That's great, thanks for sharing your views on what we should be aiming for. It was quite a bit to get through but so valuable.

Just one more day of activities to go and they will be a bit less involved. Tomorrow, we'll be doing some fun activities that put you in the driving seat! **[Programming note: Make this Instruction Text]**

FRIDAY – DAY 5

ACTIVITY 1

Activity Title Your mission should you choose to accept it (Part 1).....

Day and time you want activity to launch (Day 5 0700 AEST)

Type of Activity: (One-time activity, Desktop and Mobile Enabled)

Sharing: Influenced

Welcome back. Hope you enjoyed the rest day. Today we'll be asking you to use your imagination and travel planning skills.

[Programming note: Make this Instruction Text]

ACTIVITY 2 (with two sub-segments)

Activity Title Become a Personal Travel Planner Part 1.....

Day and time you want activity to launch (Day 5 0700 AEST)

Type of Activity: (One-time activity, Desktop and Mobile Enabled)

Sharing: Influenced

Your first mission is to become a personal travel planner. You've been asked to plan a trip for a client. That client is actually quite similar to you or the person you care for (that's why you're their personal travel planner – they think you will really understand their needs) in terms of age, where they live, lifestyle, the disability they live with, income and holiday tastes. The trip would be for around 4 nights (excluding any travel to get there). They would like to go to [Queensland/Victoria – assign to segment] Please go off and do some research for them and put together a short plan for the trip. Then come back and answer the questions which follow. It's fine to look at the questions if you want to do so to help you think about what to do.

[Programming note: Make this Instruction Text]

Question 1. What kind of accommodation and food options would you take up and why? If you would choose particular places, please include links, images or anything else that would help us understand your choices?

[Programming note: Open end text box collector, Optional Photos collector box, Optional Video collector box]

Question 2. What sort of activities and experiences would you include? Again, feel free to share links, images etc

[Programming note: Open end text box collector, Optional Photos collector box, Optional Video collector box]

<u>Question 3. What would you advise your client would be the 'must dos'?</u>

[Programming note: Open end text box collector, Optional Photos collector box, Optional Video collector box]

Question 4. Bearing in mind your client lives with a disability, is there any special advice or information you would include? Are there any areas you would need to tell them they don't know? **[Programming note: Open end text box collector, Optional Photos collector box, Optional Video collector box]**

Question 5. Let's imagine your client comes back from the trip and you catch up. How do you expect they would feel after the trip? Again you can use images or videos to help us understand

[Programming note: Open end text box collector, Optional Photos collector box, Optional Video collector box]

<u>ACTIVITY 3 (with two sub-segments)</u>

Activity Title Become a Personal Travel Planner Part 2.....

Day and time you want activity to launch (Day 5 0700 AEST)

Type of Activity: (One-time activity, Desktop and Mobile Enabled)

Sharing: Influenced

Question 1. Imagine that instead of your client saying that they wanted to go to [Queensland/Victoria], they had come to you for advice on whether to go to Queensland OR Victoria. Which state would you have chosen for your client? What made you choose that state? Please include links, images or anything that would help us to understand your choice. For example, if you found a helpful website you could include both its address (URL) or a screenshot of particularly useful questions. **[Programming note: Open end text box collector, Optional Photos collector box, Optional Video collector box]**

Question 2. If you chose a different state this time, is there anything different about any of your recommendations for types of accommodation, activities or experiences. What would you choose instead? **[Programming note: Open end text box collector, Optional Photos collector box, Optional Video collector box]**

Question 3. What about any special recommendations for travelling to that state? Would they be different? **[Programming note: Open end text box collector, Optional Photos collector box, Optional Video collector box]**

ACTIVITY 4

Activity Title Your chance to be Undercover Boss

Day and time you want activity to launch (Day 5 0700 AEST)

Type of Activity: (One-time activity, Desktop and Mobile Enabled)

Sharing: Influenced

Let's imagine that a new job has been created: Head of Accessible Tourism Australia. You've just landed the job to make Australia the world leader in travel for people with disabilities. As a new job a lot is expected of you. You'll get an amazing bonus if you can make changes that increase the number of people with disability travelling, get them to stay longer and/or spend more. But you're not just driven by money; you know this can make a real difference to people's lives. **[Programming note: Make this Instruction Text]**

ACTIVITY 5

Activity Title Priorities

Day and time you want activity to launch (Day 5 0700 AEST)

Type of Activity: (One-time activity, Desktop and Mobile Enabled)

Sharing: Influenced

Question 1. What do you think is the most important task for you in your new role? For example, is it more about moving aside the barriers or is it about creating more exciting opportunities?

[Programming note: Open end text box collector]

Question 2. Can you tell us more about how you would do that? Please give us as much detail as possible. For example, is it about new policies or new products?

[Programming note: Open end text box collector]

ACTIVITY 6

Activity Title The barriers and challenges

Day and time you want activity to launch (Day 5 0700 AEST)

Type of Activity: (One-time activity, Desktop and Mobile Enabled)

Sharing: Influenced

So far, we've focused on the holiday experience (with a few asides on challenges), but before we finish we want to focus on the barriers that people with a disability who travel face or those who want to.

[Programming note: Make this Instruction Text]

Question 1. What are the biggest challenges you face with travel as a person with a disability or a carer travelling with someone with a disability? Are they different if you are travelling for a holiday, to visit friends, for business or for medical reasons? If so, How? If you would like to add images, please feel free to do so. **[Programming note: Open end text box collector, Optional Photos collector box, Optional Video collector box]**

Question 2. Below are some practical changes that could be introduced to make travelling with a disability easier. Which THREE would be of most benefit to you?

Dedicated changing places for people with a disability at sports facilities or beaches
An eagle hoist for aircraft embarkation at all airports
Hoists at destinations so you could visit difficult or challenging sites
Beach wheelchairs
Wheelchair matting at beaches or in natural locations that could open up new areas
Easy-to-read signage and wayfinding (including in Braille)

Light controlled road crossings and dropped kerbs
Reducing obstacles / clear path of travel
Improved lighting
Access to a quiet area
A device that all guides could have that links to looped hearing aids
All terrain wheelchairs available
Better designed public areas in hotels and other accommodation sites e.g. with facilities like places to hang a walking stick at reception or put a mobility aid by other seating
Pool lifts at hotels and public pools
Other

[Programming note: Multiple Choice]

Question 3. If you mentioned an 'other' option at the previous question what was it?

Question 4. Are you aware of any initiatives from anywhere in the world that offer greater access for people with disabilities when they travel or for making travel easier? Again if you have images feel free to share them. **[Programming note: Open end text box collector, Optional Photos collector box, Optional Video collector box]**

Question 5. Is there anything else you would like to add on the subject of the barriers people with a disability face when they travel?

[Programming note: Open end text box collector]

<u>ACTIVITY 7</u>

Activity Title And finally....

Day and time you want activity to launch (Day 5 0700 AEST)

Type of Activity: (One-time activity, Desktop and Mobile Enabled)

Sharing: Influenced

So that's everything. Once again, thank you. We'll be keeping the board open for a couple of days (till midnight Sunday) so if you want to come back in and add comments, exchange views with other members or say goodbye to the other members of our little community feel free.

Thanks from Carolyn, Bronwyn and Bill. Or email us your comments at MyTravelResearch01@studyspace.net

[Programming note: Make this Instruction Text]

Accessible Tourism Consumer discussion guide

Interview Discussion Guide

<table>
<tr><th>AIM</th><th></th><th>OUTLINE OF DISCUSSION TO BE COVERED</th></tr>
<tr><td>Introduction and Profile

Objectives:

To settle, build rapport, explain research process and provide context

(3 mins, 57 minutes remaining)</td><td></td><td>Confirm expectations of timing
Reassure of confidentiality, explain recording, role of moderator, purpose of the discussion, etc.
Taping – audio.
Introduction to project – Trying to understand how can make tourism inclusive for everyone – need to provide guidelines for Tourism industry to make travel engaging, exciting and practical for people with disabilities and their carers
For paired depths, want to hear both views
For carers, tell us both your needs and those of the person you support</td></tr>
<tr><td>Their background

Objectives:

Ground the discussion in the context of the participant’s lives – understand why they hold their views

(10 mins, 47 minutes remaining)</td><td></td><td>Before talking about travel specifically, I’d like to get to know you a little bit better. Tell me about yourself/yourselves?

What’s important to you in your life? What are your priorities?

Help me understand how your disability impacts your life. Is it a lifelong situation? If not, tell me about the circumstances? How does it affect your life both everyday and overall?

The National Disability Insurance Scheme (NDIS) is increasingly being rolled out across Australia. I’d like to understand your views and experience on this a little (AVOID GETTING TOO DEEP – THIS IS JUST TO UNDERSTAND THE CONTEXT).
What do you know about the NDIS so far? Is it available to you yet? Do you have a plan? How is that working for you?
IF THEY DON’T KNOW EXPLAIN: The NDIS is a new way of providing disability support. It will provide all Australians under the age of 65 who have a disability that is likely to be permanent and significant with the supports they need to live an ordinary life. The NDIS funds supports that are</td></tr>
</table>

		reasonable and necessary. It is flexible around your needs. • How do you expect it to change things for you – if at all? PROBE beyond rational – greater recognition, more possibilities • Has it impacted on your expectations of travel in any way? If so, how?
Current Travel Situation? **Objectives:** Understand their current and planned travel behaviour *(10 mins, 37minutes remaining)*		ASK TRAVELLERS - Tell me about any trips or breaks involving an overnight stay that you have taken in the past 2 years for holiday, to visit friends and relatives, undertake a sporting or cultural activity or for medical reasons. Let's start with the most recent? ○ Probe for: where you went, why purpose, travel party, how travelled, where stayed, what you did. highlights, lowlights, how you plan travel – where do you get information PROBLE FULLY ○ To what extent did you factor considerations relating to your condition into your planning? Were you able to find the information you needed? - How many other trips have you taken? Do you mean 'how do these differ to your most recent trip?' [Note language they use to talk about holidays, trips etc. If necessary, probe with] do you tend to think of them as holidays, trips or breaks? How do you discuss them? Do you have any trips planned in the next 2 years? Can you tell me about those? ○ Details on the trips: purpose, travel party, how they will travel, where they will stay, what they plan to do. How they are planning it ○ Again, to what extent did you factor considerations relating to your condition into your planning? Were you able to find the information you needed? ASK NON-TRAVELLER - You mentioned when we contacted you that you would like to travel but currently don't. What would being able to travel mean to you? Why is it important? - Tell me more about what gets in the way of your travelling? - Based on what you have mentioned above, If we were able to change things, how would we get the message to you about those changes? Which channels? What should the messaging say?

Travel Aspirations **Objectives:** *See the world through their eyes, understand what we really should be aiming for* *(10 mins, 27 minutes remaining)*		I'd like you now to imagine your ideal trip. Take a moment to think about it and imagine it. Think about where it would be? What would you be doing? Who would be with you? Details – accommodation, experiences etc., Tell me about your reasons for choosing this trip... What makes it ideal IF NOT IN Australia, ASK: what would your ideal Australian trip be? Again, take a moment to think about it...REPEAT QUESTIONS ABOVE o CURRENT TRAVELLERS How close are your current travel experiences to this ideal trip in Australia. Where is the highest overlap? Where are the biggest gaps? How could we get closer to the aspiration? o Probe the journey, the product and things like planning, information sources Again, to what extent did you factor considerations relating to your condition into your planning? Were you able to find the information you needed? If we were to close that gap, where would we do it best. How often should we travel?
Perceptions of current offer **Objectives:** *Understand how well we are doing? What is working? Where are improvements needed?* *Who are the role models and benchmarks* *(15 mins, 12 minutes remaining)*		I'd like to explore what you think about the experiences, accommodation or transport options currently available to you in Australia? What are the strengths and weaknesses? How does it compare with what is on offer overseas? Is this more about what's on offer, or about how this is communicated to it PROBE FULLY Who does the best job of meeting the needs, travel aspirations and challenges of people with disabilities? Are there particular destinations, experiences or operators that you see as doing it well? IF NOT ALREADY COVERED: Can you tell me what your perception of the experiences, accommodation or transport [ALWAYS START WITH INTERSTATE OPTION FIRST, IN NSW ROTATE BETWEEN INTERVIEWS: Victoria, Queensland. What is the offer? What interests you? Desired experiences there? o How does this compare to the ideal experience we discussed?

		○ Where are the gaps relative to the ideal experience? Again, to what extent did you factor considerations relating to your condition into your planning? Were you able to find the information you needed? Which are most important? REPEAT FOR OTHER STATE
Barriers and Challenges **Objectives**: *Understand what we MUST change to achieve* *(10 mins, 3 minutes remaining)*		- What are the biggest challenges you face with travel as a person with a disability or a carer travelling with someone with a disability? NOTE: Check whether they are perceptual, practical (e.g. changing places, eagle hoist for aircraft embarkation, equipment availability at destinations e.g. hoist, commodes, recreational equipment eg beach wheelchairs, pool lifts, all terrain wheelchairs etc.,) or about product gaps? What could be done to solve these? - Are you aware of any initiatives there are for greater access for people with disabilities when they travel or for making travel easier? - [Projection technique] If you were put in charge of Tourism in Australia and charged with making it as inclusive as possible for people like you where would you start?
End (3-5 mins, 0 remaining)		Are there any other comments you would like to add on the subject Thank and Close

Accessible Tourism Stakeholder discussion guide

Interview Discussion Guide

AIM		**OUTLINE OF DISCUSSION TO BE COVERED**
Introduction **Objectives:** *To settle, build rapport, explain research process and provide context* *(3 mins, 45 minutes remaining)*		• Confirm expectations of timing • Reassure of confidentiality, explain recording, role of moderator, purpose of the discussion, etc. • Taping – audio. • Introduction to project – Trying to understand how can make tourism inclusive for everyone – need to provide guidelines for Tourism industry to make travel engaging, exciting and practical for people with disabilities Results of findings to be used for both policy, product and marketing • Check any questions or concerns

Their background and involvement
 	
Objectives:
 	
Ground the discussion in the context of their background, history and role – understand why they hold their views
 	
(10 mins, 47 minutes remaining)
		Before talking about travel specifically, I'd like to put your views in context, by understanding your background and then also more about your organisation. Although I can learn some of this, it is always helpful to hear this in your words
		
		• Tell me about your current role within your organisation.
		    ○ What does it entail?
		    ○ How long have you been doing it?
		    ○ If relevant, how does accessible tourism fit within it?
		    ○ What about where accessible tourism sits within the broader context of your organisation? (Try to understand relative priority, weight, how close the fit to the organisation's overall objectives)
		• And before this role, what was your previous connection to the topic?

Current State of Accessible tourism **Objectives:** *Understand their views on the nature of the opportunity and the challenges that we face* *(15 mins, 32 minutes remaining)*		- How do you think Australia is currently performing on accessible tourism? How do you assess this: PROBE FOR: international comparison, relative to the challenges, relative to the opportunities, relative to best practice? - If best practice, how do we know what best practice is, how is this defined and who defines it? - Are any destinations, businesses or elements of the travel chain (e.g. airports) doing it particularly well? Who would be our role models? - Where are the gaps between best practice and current practice largest or the highest priorities for change? - What are the unmet needs? - Do you have a sense of the 'size of the opportunity' in terms of the market for accessible tourism if we get it right? What do you think the current market or situation looks like? How much room for growth is there?
Closing the gap to best practice **Objectives:** *Identify practical means to close the gap and more on the priorities* *(20 mins, 12 minutes remaining)*		- What are our most important priorities in maximising that opportunity? - What are the enablers to drive that? PROBE FOR policies, infrastructure, education or communication about what is available, product that will drive this (2) - Who needs to be involved in this? Who should lead the project? What are the roles of each of the key stakeholders? PROBE FOR STOs, TOURISM BUSINESSES, STATE, FEDERAL LOCAL POLICY AND PLANNING, PEAK BODIES (which ones?) - How do these roles interconnect? What role do you believe an organisation like yours has in this? - IF NOT ALREADY COVERED: What are the longer term opportunities that would require investment, but be game changers? - Are there any quick wins? What are three things that we could do now or in the very near future that would have an impact and create momentum for accessible tourism but which are not necessarily costly to implement? - In particular, are there opportunities for innovation in product? In practical enablers that will generate true 'equality of experience (e.g. beach matting, all terrain wheelchairs, visual impairment GPS trackers)
Barriers and Challenges		- What are the biggest challenges we face in seeking to close that gap? - How do we overcome these? - Again, whose role is it to do this?

Objectives: *Identifying barriers to success* *(10 mins, 2 minutes remaining)*		- And in this context, what role do you believe an organisation like yours has in this?
End (3-5 mins, 0 remaining)		Thank participant and ask: Is there anything that I should have asked you that I haven't yet done? Are there any other comments you would like to add on the subject? Thank again and close

NVS Survey DISABILITY SECTION (F.16AA-F.16C) TO BE ASKED IN QTR1 2017 ONLY

ASK ALL - EXCEPT THOSE AGE UNDER 18

F.16aa I now have some questions about disability or long term health conditions. Are you comfortable answering these?

Yes **- GO TO F.16a** 1
No **- GO TO SECTION J** 2
Refused **- GO TO SECTION J** 98

F.16a Do you identify as having a disability or any long-term health condition that has lasted six months or more? **DO NOT INCLUDE TEMPORARY CONDITIONS SUCH AS A BROKEN LEG**

Yes **- GO TO F.16b** 1
No **- GO TO SECTION J** 2
Refused **- GO TO SECTION J** 98

Record time now: ____________

ASK IF 1 AT F.16a
F.16b Which of the following disabilities or long term health conditions do you have?

READ OUT CODES 1-96. MULTIPLE RESPONSE

Vision impairment 1
Hearing impairment 2
Require wheelchair or scooter 3
Other mobility limitations 4
Difficulty understanding or learning 5
Mental health condition 6
Chemical sensitivity ~~or food allergies~~ 7
Other 96
Refused DO NOT READ OUT 98

ASK IF 1 AT F.16a
F.16c What level of support, if any, do you need in everyday living? Do you need support…

IF NECESSARY: Support means physical help rather than medication.

READ OUT CODES 1-5. SINGLE RESPONSE

Full-time 1
Daily 2
Weekly 3
Less often than weekly 4
No support required 5
Refused (DO NOT READ OUT) 98

Record time now: ____________