

INCLUSIVE TOURISM ECONOMIC OPPORTUNITIES

AUSTRALIANS WITH DISABILITY

SIZE OF THE MARKET



4.2 MILLION OR ALMOST 20% OF TOTAL POPULATION



80% HAVE A PHYSICAL DISABILITY



20% HAVE A SENSORY, MENTAL OR INTELLECTUAL DISABILITY



77% PARTICIPATED IN SOCIAL ACTIVITIES*

* such as visiting a public place or going on a holiday or camping

Q1 2017 TOURISM TRENDS

3.8 MILLION TOTAL OVERNIGHT TRIPS BY PEOPLE WITH DISABILITY

ACCOUNTING FOR

PEOPLE WITH A DISABILITY ON AVERAGE SPEND

WITH TOTAL OVERNIGHT AND DAY TRIP EXPENDITURE OF

17% OF ALL OVERNIGHT TRIPS

\$615 ON OVERNIGHT TRIPS

\$3.3 BILLION ACCOUNTING FOR **17%** OF ALL TOURISM EXPENDITURE FOR THE QUARTER

LARGE TRAVEL PARTIES - THE MULTIPLIER EFFECT



AVERAGE TRAVEL GROUP SIZE FOR PEOPLE WITH A DISABILITY IS

2.8 PEOPLE FOR A DOMESTIC OVERNIGHT TRIP

AND **3.4** PEOPLE FOR DAYTRIPS



OLDER PEOPLE AND YOUNG FAMILIES



CATERING SERVICES AND PRODUCTS TO MEET THE NEEDS OF PEOPLE WITH DISABILITY

UNLOCKS THE OLDER PEOPLE AND YOUNG FAMILY MARKET



AUSTRALIA HAS AN AGEING POPULATION: CURRENTLY THERE ARE AROUND

8.2 MILLION

PEOPLE AGED OVER 50, ANTICIPATED TO INCREASE BY ALMOST 50% BY 2037

PREVALENCE OF DISABILITY INCREASES WITH AGE: A PERSON IS

14 TIMES MORE LIKELY

TO HAVE A DISABILITY AT AGE 65 THAN THEY ARE AT 4 YEARS OLD

IN 2013 THERE WERE

1.2 MILLION FAMILIES WITH CHILDREN UNDER 5, WITH THIS DEMOGRAPHIC PREDICTED TO INCREASE

Q1 2017 TRAVEL EXPENDITURE WAS

\$2.9 BILLION FOR OLDER PEOPLE AND **\$2.7** BILLION FOR YOUNG FAMILIES

INCLUSIVE TOURISM ECONOMIC OPPORTUNITIES

INTERNATIONAL MARKETS

INTERNATIONAL INCLUSIVE TOURISM MARKET



MORE THAN

1 BILLION

PEOPLE WITH DISABILITY
WORLDWIDE

50% OF WHOM
ARE IN ASIA



UNITED KINGDOM

SIMILAR PREVALENCE OF DISABILITY
AS AUSTRALIA AT AROUND

20%
OF THE POPULATION

THE VALUE OF THE UK TOURISM
MARKET ASSOCIATED WITH PEOPLE
WITH DISABILITY INCREASED BY

20%
IN RECENT YEARS AND IS NOW WORTH OVER
\$21 BILLION



EUROPEAN UNION

IN 2011 APPROX.

140 MILLION
EUROPEANS WITH ACCESS NEEDS OF WHICH
40%

WERE PEOPLE WITH DISABILITY
UNDER 65 YRS

INCLUSIVE TOURISM DEMAND WAS
ESTIMATED TO GENERATE OVER
\$500 BILLION
IN DIRECT ECONOMIC BENEFITS &
\$1 TRILLION
IN INDIRECT BENEFITS



UNITED STATES

AROUND
54 MILLION
AMERICANS REPORT SOME
FORM OF DISABILITY

ESTIMATED TOTAL SPEND OF
\$34.6 BILLION
BY TRAVELLERS WITH DISABILITY

REFORMS OPEN NEW OPPORTUNITIES



THE AUSTRALIAN DISABILITY SECTOR IS CHANGING, WITH THE POTENTIAL
OF **INCREASED SPENDING CAPACITY** IN THE INCLUSIVE TOURISM SECTOR



INTRODUCTION OF THE NATIONAL
DISABILITY INSURANCE SCHEME (NDIS)
IS EXPECTED TO CREATE
NEW OPPORTUNITIES
FOR PEOPLE WITH DISABILITY
TO SPEND THEIR FUNDING PACKAGES ON
RECREATIONAL ACTIVITIES,
INCLUDING TRAVEL

NDIS TRIAL SITE DATA SHOWS
THAT PEOPLE WITH DISABILITY
SPENT
ALMOST 20%
OF THEIR FUNDING
ON COMMUNITY PARTICIPATION

FURTHER DATA FROM THE NDIS TRIAL
SITES ALSO SHOWS
CONSISTENTLY
HIGH SPENDING
ON RECREATION