

Accessible Tourism

- Target Markets, Trends & Insights

Accessible Tourism Target Markets

In general tourism terms, visitors with access needs exist in all areas of the community and across all regions of Australia and the world, with significantly increased representation in the aged market. Marketing activities for the accessible visitor should be approached from a consumer needs basis and aligned with general marketing activities.

Understanding the Access Visitor

The following priority segments have been identified as Queensland's target access visitors:

- Australians with a disability (almost 4 million people ABS 2006)
- Australians over the age of 65 (2.7 million in 2006 and increasing)

For some regions the following segment may also be a priority segment:

- International visitors from developed countries with a disability or aged over 65

Target markets will vary for each destination in Queensland and as stated should be considered in tandem with general tourism target markets and destination attributes.

Trends and Insights

Outlook for Accessible Tourism in Australia and Queensland

Tourism is vital for Queensland's economic and social prosperity. Tourism is the State's second largest export sector and contributes \$8.4 billion to the economy. Tourism related industries employ approximately 136,000 Queenslanders ⁽¹⁾. Queensland is located in one of the fastest growing tourist regions of the world, forecast to achieve average annual regional tourism growth of 6.5 per cent to 2020 ⁽²⁾. The State, however, faces increasing competition for both domestic and international visitation from emerging destinations such as China, India, Africa and South-East Asia.

The tourism industry has a legal, economic and social responsibility to ensure travel is available to all members of the community. More than 3.9 million people in Australia have a disability, or almost 20 per cent of the population ⁽³⁾. Additional to this the number there are Australians that have access needs but do not designate themselves as having a disability. Combining this number with the identified 3.9 million people would see the figure increase significantly. Further to this, with Australia's ageing population, this figure will continue to increase significantly over the coming decades.

1 Office of Economic and Statistical Research, The Contribution of International and Domestic Visitor Expenditure to the Queensland Economy 2003-04.

2 World Tourism Organisation, Tourism 2020 Vision, www.world-tourism.org/facts/menu.html (website accessed 20 April 2006)

3 Australian Bureau of Statistics 2006. *Australian Social Trends 2006 7/02.0*.

Market Intelligence and Insights

Australians with Disabilities

Almost four million people in Australia have a disability ⁽¹⁾. In 2003, over two-thirds of people with a disability left their homes as often as they liked ⁽²⁾.

The proportion of Australians with a disability is 20 per cent in 2003 (3.9 million people). Of these, 2,556,000 people were aged under 65 years, representing 14.8 per cent of the population in that age range.

These estimates cover a broad spectrum of disabilities, in terms of the nature and extent of the effects on the person. The extent to which these disabilities affect every day life is indicated by the presence of a core activity limitation. The core levels of restriction are whether a person needs help, has difficulty or uses aids or equipment with a core activity task (namely communication, mobility and self care). 3.3 million people (17.1 per cent of the total population) say they are restricted in carrying out one or more daily activities.

Most people with a disability have physical conditions (83.9 per cent). Over 11 per cent of people with disabilities have mental and behavioural disorders and 4.8 per cent have intellectual and developmental disorders. The disability rate increases with age from 4 per cent of 0-4 years olds to 41 per cent of 65-69 years old to 92 per cent of people 90 years and older.

The proportion of males and females with a disability is similar; but disability rates vary across age groups.

- 19.8 per cent of all males, compared with 20.1 per cent of all females reported having a disability.
- Young males (5-14 years) had almost double the disability rate than females in the same age group, (12.4 per cent and 7.5 per cent respectively).
- In contrast, females aged 80 years and over had a much higher rate (52 per cent) of disability than males of the same age (34 per cent).

South Australia, Tasmania and Queensland have the highest disability rates (23%), while the Australian Capital Territory has the lowest (16%).

In a 2003 ABS survey ⁽³⁾ a number of questions were asked about the social activities of people over the preceding 12 months. The responses showed that they had undertaken a wide range of activities including: visited family and friends, attended church, eaten out, gone to the movies, played or watched sports, or been involved in art, craft, drama and other special interest groups.

1 Access for All Alliance 2006. *A survey and report on the barriers confronted by people with disabilities when they travel on holidays and visit tourist venues.* www.accessforall.org.au (website accessed 20 July 2006)

2 Australian Bureau of Statistics 2006. *Australian Social Trends 2006 7/02.0.* <http://www.abs.gov.au/AUSSTATS/abs@.nsf/Latestproducts/4102.0Contents12006?opendocument&tabname=Summary&prodno=4102.0&issue=2006&num=&view=>. (website accessed 21 July 2006)

3 Australian Bureau of Statistics, 2003 Survey of Disability, Ageing and Carers

The Ageing Population in Australia

Even though stereotypes portray the aged as frail and housebound, the majority of older Australians are physically well and engage in a variety of activities. Australians over 50 years of age already account for nearly half the spending in consumer segments including health, transport, housing and food ⁽¹⁾.

Australians are living longer, with life expectancies among the highest in the world. In 2006, it is estimated that 2.7 million, or 13.3% of the total Australian population, are aged 65 years and over. By 2026, it is estimated that this group will make up nearly 21% of the total population as the 'baby boomers' reach retirement. The largest portion of baby boomers will reach 65 years of age in 2011. Ageing creates special needs for such travellers including mobility concerns, health problems, and dietary needs, and there is often an increased incidence of disability within the aged population.

It is estimated that there are currently 5.3 million baby boomers in Australia, who have assets worth an estimated \$1 trillion. Most boomers believe they can financially afford to enjoy themselves in their retirement, and 85% expect to travel within Australia or overseas – possibly making up to 10 domestic trips a year.

Research shows the senior market is varied, with differing socio-economic backgrounds, lifestyles, interests, and attitudes. The senior market is not one-size-fits-all and this study segments the seniors into demographic groups. The priority of segments targeted will be determined by the individual regions' prerogative.

Commonalities for all segments include: security, safety and confidence that they will be satisfied with the travel experience.

1 Baby boomers united in plan for retirements (4 May 2006) *Australian Associated Press*.

People with a Disability Internationally

10 percent or 600 million of the world's population have a disability ⁽¹⁾. While a large number of these people are not in a position to travel due to financial considerations, there is merit in considering people with a disability in developed nations (highlighted below) as a market for Queensland.

1 Office of the United Nations High Commissioner for Human Rights 2000. <http://www.unhcr.ch/disability/index.htm>.

Prevalence of Disability in Selected Countries by Source

Censuses			Surveys		
Country	Year	Percent of population with a disability	Country	Year	Percent of population with a disability
United States	2000	19.4	New Zealand	1996	20.0
Canada	2001	18.5	Australia	2000	20.0
Brazil	2000	14.5	Uruguay	1992	16.0
United Kingdom	1991	12.2	Spain	1986	15.0
Poland	1988	10.0	Austria	1986	14.4
Ethiopia	1984	3.8	Zambia	2006	13.1
Uganda	2001	3.5	Sweden	1988	12.1
Mali	1987	2.7	Ecuador	2005	12.1
Mexico	2000	2.3	Netherlands	1986	11.6
Botswana	1991	2.2	Nicaragua	2003	10.3
Chile	1992	2.2	Germany	1992	8.4
India	2001	2.1	China	1987	5.0
Colombia	1993	1.8	Italy	1994	5.0
Bangladesh	1982	0.8	Egypt	1996	4.4
Kenya	1987	0.7			

Source: United Nations Statistics Division; IBGR (Brazil), INEC (Nicaragua), INEC (Ecuador), INEGI (Mexico), Statistics New Zealand, INE (Spain), Census of India 2001, SINTEF Health Research (Zambia) 2006, <http://siteresources.worldbank.org/DISABILITY/Resources/Data/MontPrevalence.pdf>

Valid data on people with a disability varies from country to country, with limited current statistics available. Three key markets - Japan, USA and New Zealand - have been highlighted below. Please note that each country defines and collects data through different processes and as such consistent comparable information is not available.

Japan

The National Census of Japan does not include questions on disability. Instead, a variety of surveys are used to estimate the size of the disability populations.

According to the Ministry of Internal Affairs and Communications, as of October 2004, the population of Japan was estimated at 127,660,000. The 2003 Whitepaper on Disability, published by the Cabinet Office, reported that approximately 6,559,000 people, or 5.1% of the population, had some type of disability. Among them, 3,516,000 had physical disabilities, 459,000 had intellectual disabilities, and 2,584,000 had psychiatric or mental disabilities ⁽¹⁾.

¹ Cabinet Office Japan 2003. *Annual Report on Government Measures for Persons with Disabilities*. <http://www8.cao.go.jp/shougai/english/annualreport/2003/mokuji.html>. (website accessed 2 August 2007)

United States of America

In 2002, 51.2 million people (18.1 percent of the population) had some level of disability and 32.5 million (11.5 percent of the population) had a severe disability.

About 10.7 million people aged 6 and over needed personal assistance with one or more activities of daily living or instrumental activities of daily living.

The population represented in this data is the civilian non-institutionalised population living in the United States. Thus, disabilities of the institutionalized population, such as those in nursing homes, are not reported. ⁽¹⁾.

¹ US Census Bureau. 2006. *Americans with Disabilities: 2002*. <http://www.census.gov/prod/2006pubs/p70-107.pdf> (website accessed 29 August 2007).

New Zealand

A total of 743,800 New Zealanders reported some level of disability in 2001. This was an increase of 41,800 since 1996–1997. However, the overall disability rate of 1 in 5 has not changed ⁽¹⁾.

¹ Statistics New Zealand 2001. *New Zealand Disability Survey Snapshot 1 (Key Facts)*. <http://www2.stats.govt.nz/domino/external/pasfull/pasfull.nsf/web/Media+Release+2001+Disability+Survey+Snapshot+1+Key+Facts?open>. (website accessed 2 August 2007).

The Ageing Population Internationally

As demonstrated in the table below, the growing ageing population trend is not restricted to Australia and is taking place in the priority international markets for Australia and Queensland of Asia, Europe, North America and Oceania.

Percentage distribution by broad age group for the world, development groups and major areas, 2005 and 2050 (medium variant)

<i>Major area</i>	<i>Percentage distribution in 2005</i>				<i>Percentage distribution in 2050</i>			
	<i>0-14</i>	<i>15-59</i>	<i>60+</i>	<i>80+</i>	<i>0-14</i>	<i>15-59</i>	<i>60+</i>	<i>80+</i>
World	28.3	61.4	10.3	1.3	19.8	58.3	21.8	4.4
More developed regions	17.0	62.9	20.1	3.7	15.2	52.2	32.6	9.4
Less developed regions	30.9	61.0	8.1	0.8	20.6	59.3	20.1	3.6
Least developed countries	41.5	53.4	5.1	0.4	28.2	61.5	10.3	1.1
Other less developed countries	29.1	62.3	8.6	0.9	18.4	58.7	22.9	4.3
Africa	41.4	53.4	5.2	0.4	28.0	61.7	10.4	1.1
Asia	28.0	62.7	9.2	1.0	18.0	58.3	23.7	4.5
Europe	15.9	63.5	20.6	3.5	14.6	50.9	34.5	9.6
Latin America and the Caribbean	29.8	61.2	9.0	1.2	18.0	57.8	24.3	5.2
Northern America	20.5	62.7	16.7	3.5	17.1	55.6	27.3	7.8
Oceania	24.9	61.0	14.1	2.6	18.4	56.9	24.8	6.8

Source: Population Division of the Department of Economic and Social Affairs of the United Nations Secretariat (2007). World Population Prospects: The 2006 Revision. Highlights. New York: United Nations.