

# THE ACCESSIBLE TOURISM OPPORTUNITY IN SOUTH AUSTRALIA

SOUTH AUSTRALIAN TOURISM COMMISSION  
July 2022







## WHAT WE'LL DISCUSS

- Economic Outlook
- SA Visitor Economy Overview
- Accessible Tourism in SA
- The Opportunity
- What we are Doing



# ECONOMIC OUTLOOK





# ECONOMIC OUTLOOK

- **Australian economy** is in a state of flux, impacted by a range of competing forces:
  - Overall demand is recovering from COVID and remains strong in 2022
  - Concerns shifting from COVID restrictions to cost of living concerns. Consumer optimism fading rapidly with inflationary pressures, coupled with increasing interest rates, fuel prices and cost of basic goods.
- **Visitor Economy:** Tourism demand strong, with pent up demand being realised.
  - Interstate market in particular is surging
  - Intrastate market is softening with open borders and a return to competition.
  - International still in early stages.
- **Visitor Economy** risks in the coming year:
  - Demand: cost of living
  - Supply: Labour force





# THE *ULTIMATE* THRILL

FOLLOW US ON  

## SA VISITOR ECONOMY



# THE SA VISITOR ECONOMY | DRIVING DEMAND

## December 2019

# \$8.1B

INDUSTRY

↑ 20% \$1.4M

\$1.2B

INTERNATIONAL

↑ 9% \$104M

\$2.7B

INTERSTATE

↑ 20% \$449M

\$2.6B

INTRASTATE

↑ 34% \$654M

\$1.7B

DAY TRIPS

↑ 9% \$142M



# THE SA VISITOR ECONOMY | DRIVING DEMAND

March 2022

# \$6.1B

INDUSTRY

↓ 25% Australia ↓ 42%

**\$128M**

INTERNATIONAL

↓ 89%

**\$1.8B**

INTERSTATE

↓ 30%

**\$2.5B**

INTRASTATE

↑ 1%

**\$1.5B**

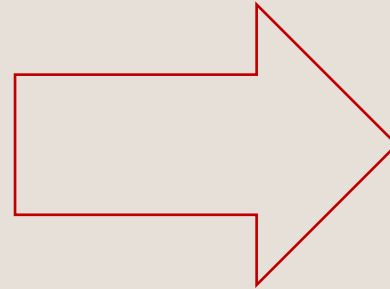
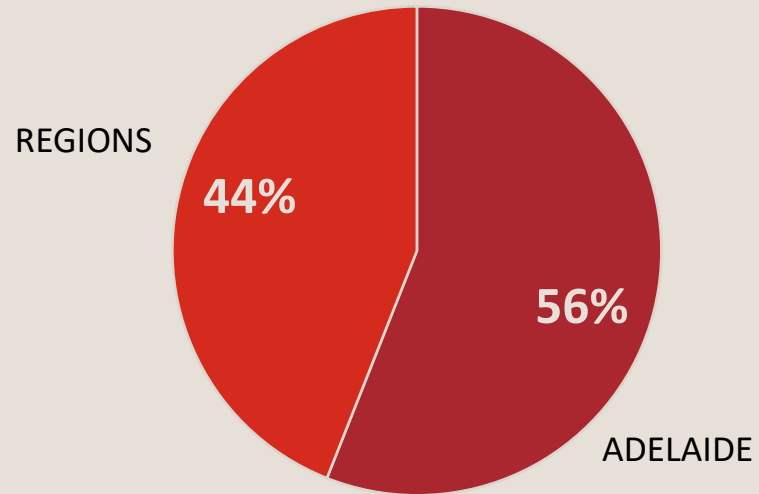
DAY TRIPS

↓ 9%

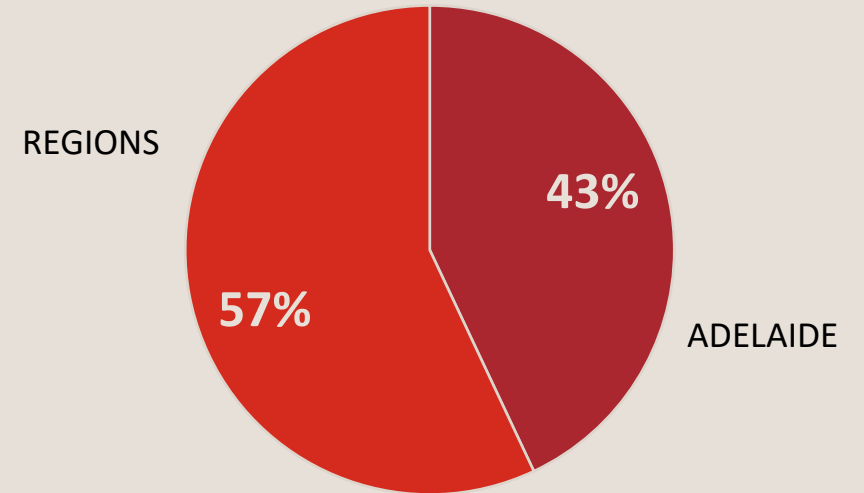


# EXPENDITURE | CHANGING MARKETS

## DESTINATIONS - 2019

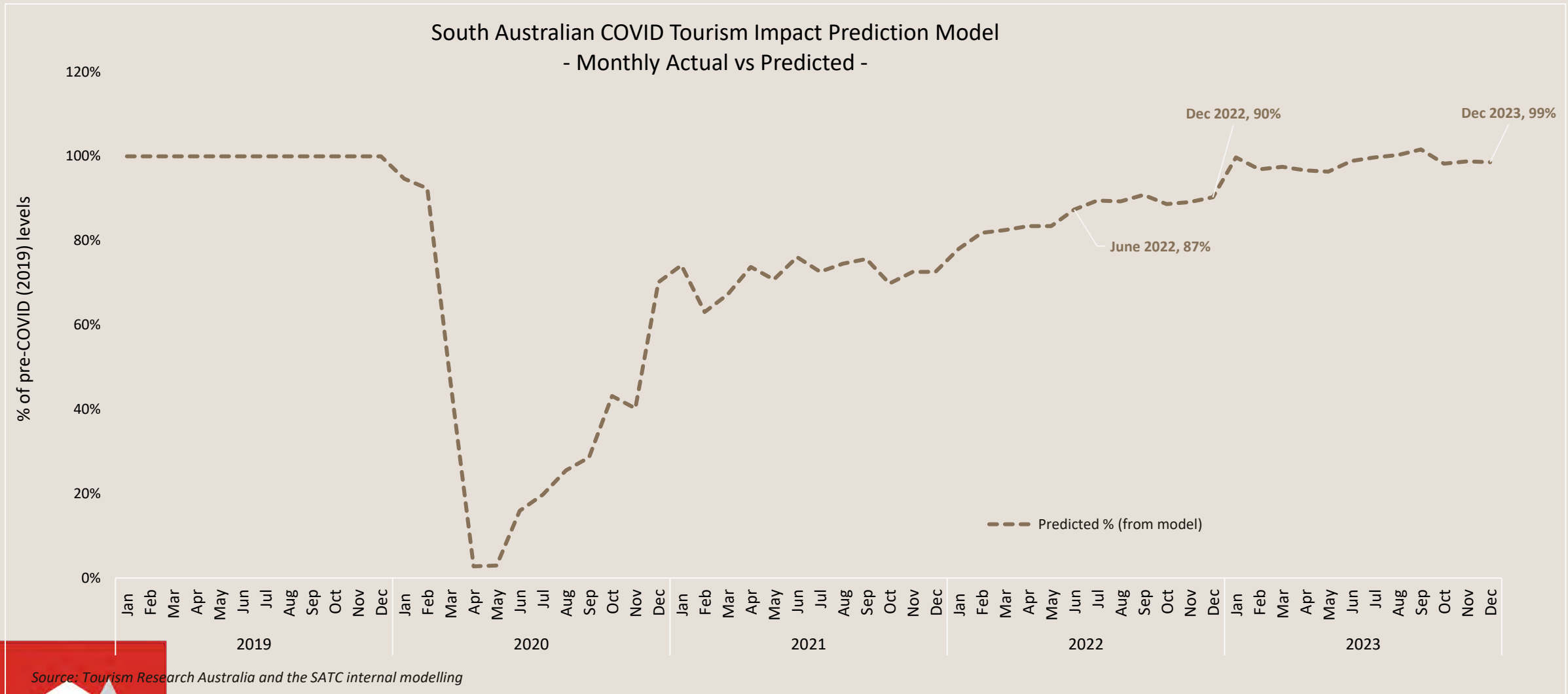


## DESTINATIONS - 2022

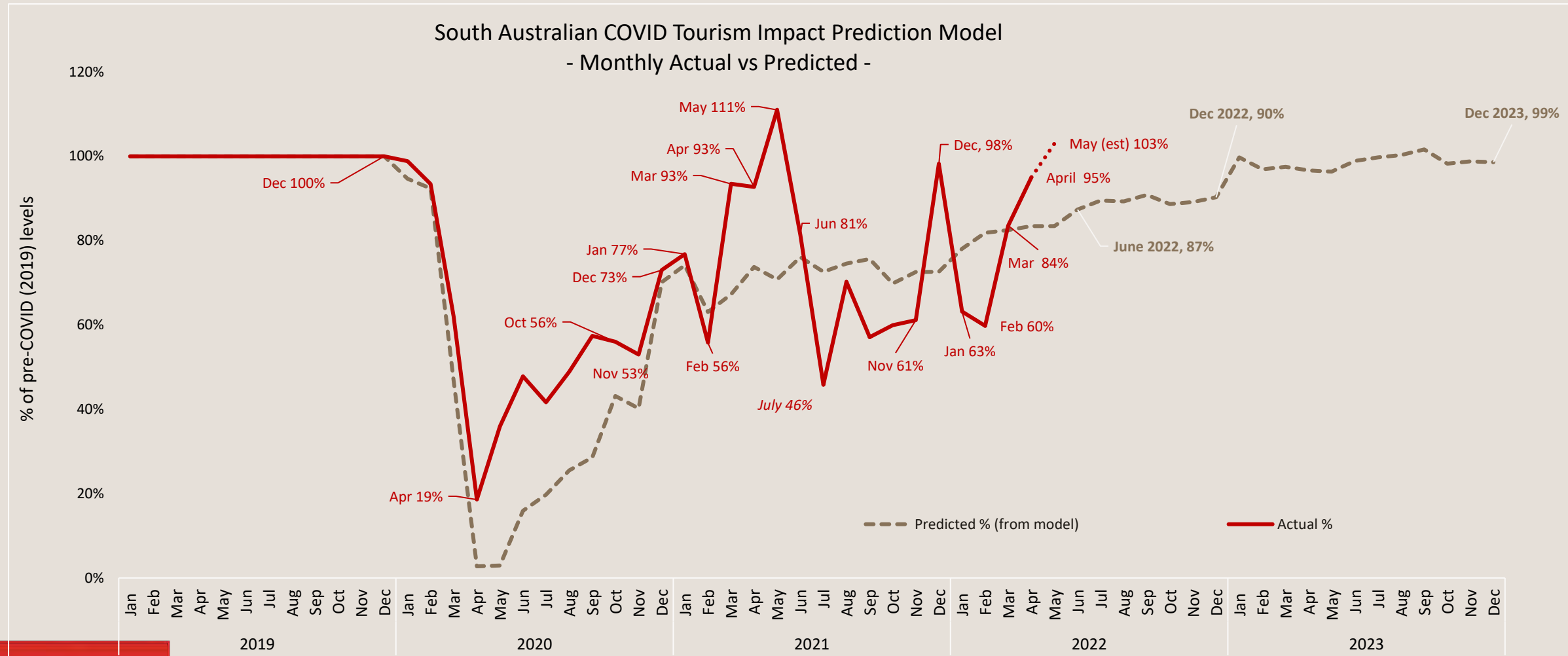




# SA VISITOR ECONOMY | ANTICIPATED IMPACTS



# SA VISITOR ECONOMY | ANTICIPATED IMPACTS VS ACTUALS



Source: Tourism Research Australia and the SATC internal modelling





# ACCESSIBLE TOURISM: VALUE



A F A R I P A R K



## WHY ACCESSIBLE TOURISM?

- Opportunity to create immersive experiences for all - e.g engaging multiple senses means that visitors can participate in a way that suits their needs, encouraging meaningful participation
- Ensure that tourism in South Australia is accessible to all members of the community and inclusive
- For a more prosperous tourism industry
- Help local communities thrive
- Promote social inclusion and build trust with the accessible travel community
- Duty of care



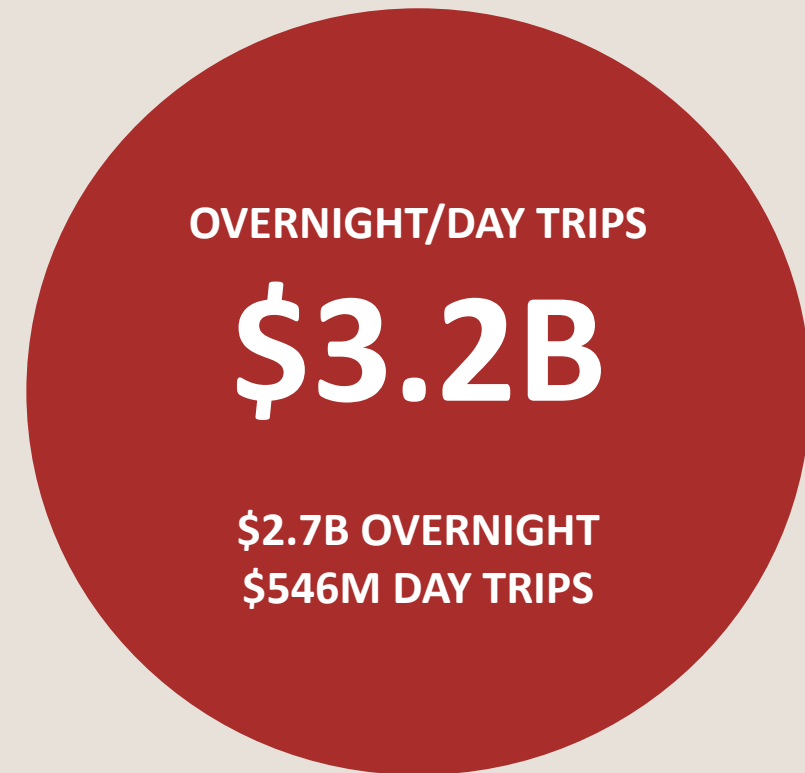


# SIZE OF THE CURRENT MARKET: AUSTRALIANS TRAVELLING WITH A DISABILITY

## Size of Market



## Annual expenditure



# SIZE OF MARKET INCREASES WHEN INCLUDING TRAVEL PARTY (inc. CARERS)

Size of  
Market



Visitor  
Expenditure

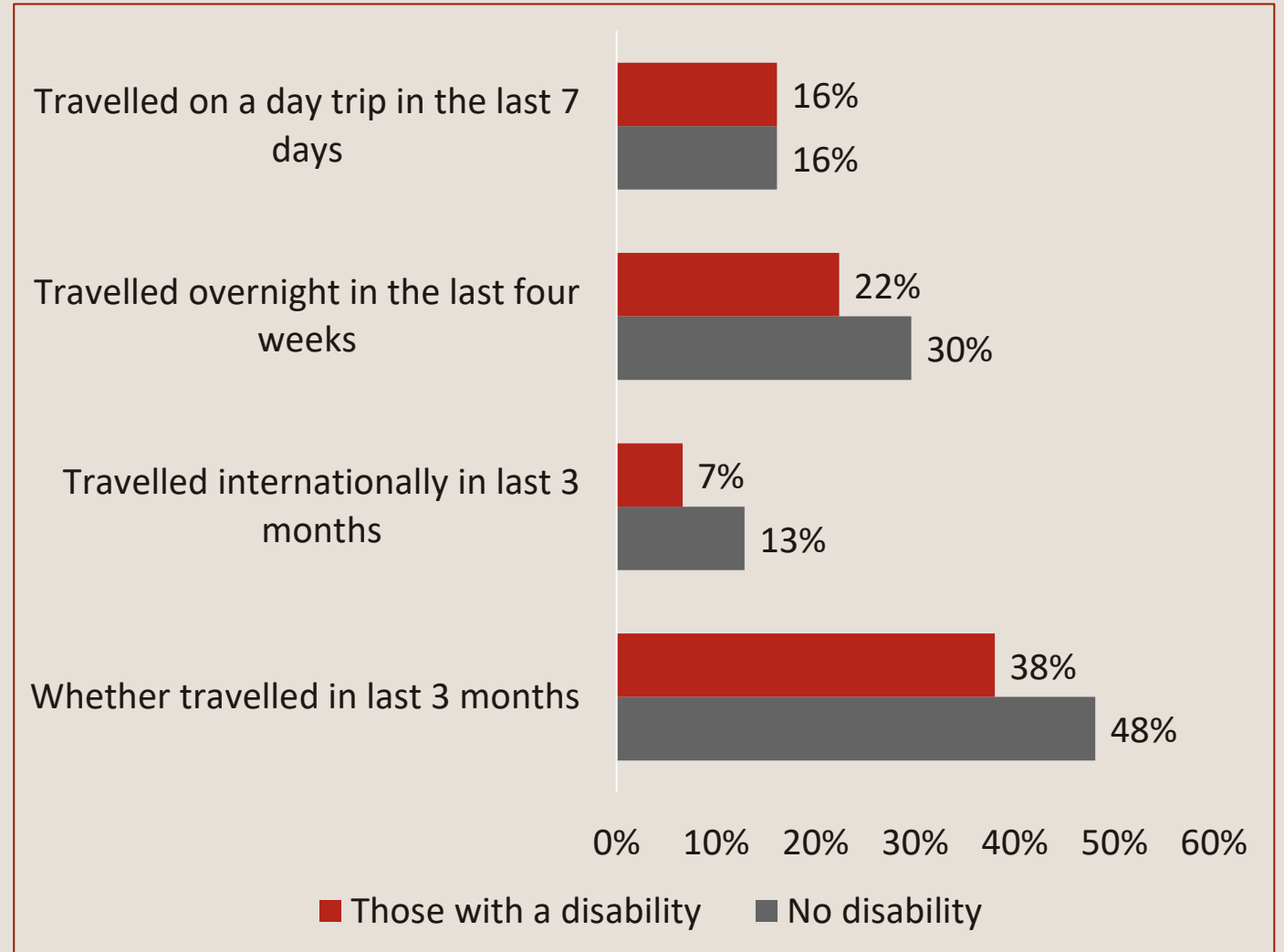




# ACCESSIBILITY | INCIDENCE OF TRAVEL

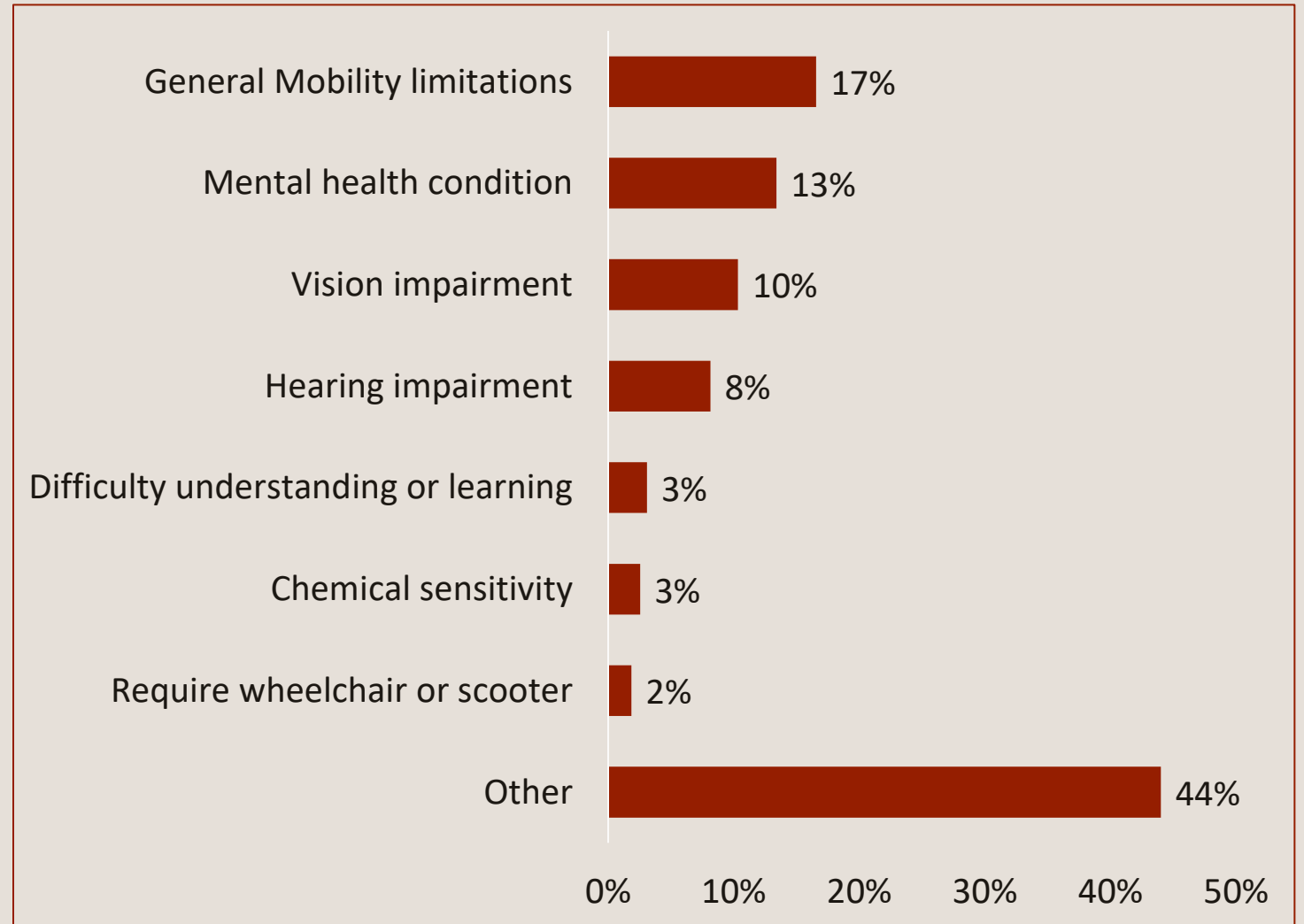
People with accessibility needs are most under-represented for international travel.

They are also under-represented for overnight travel.



# ACCESSIBILITY | TYPE OF DISABILITY

There are a range of disabilities among those traveling with accessibility needs. Some of the more common conditions are other mobility limitations, mental health conditions and vision impairment.

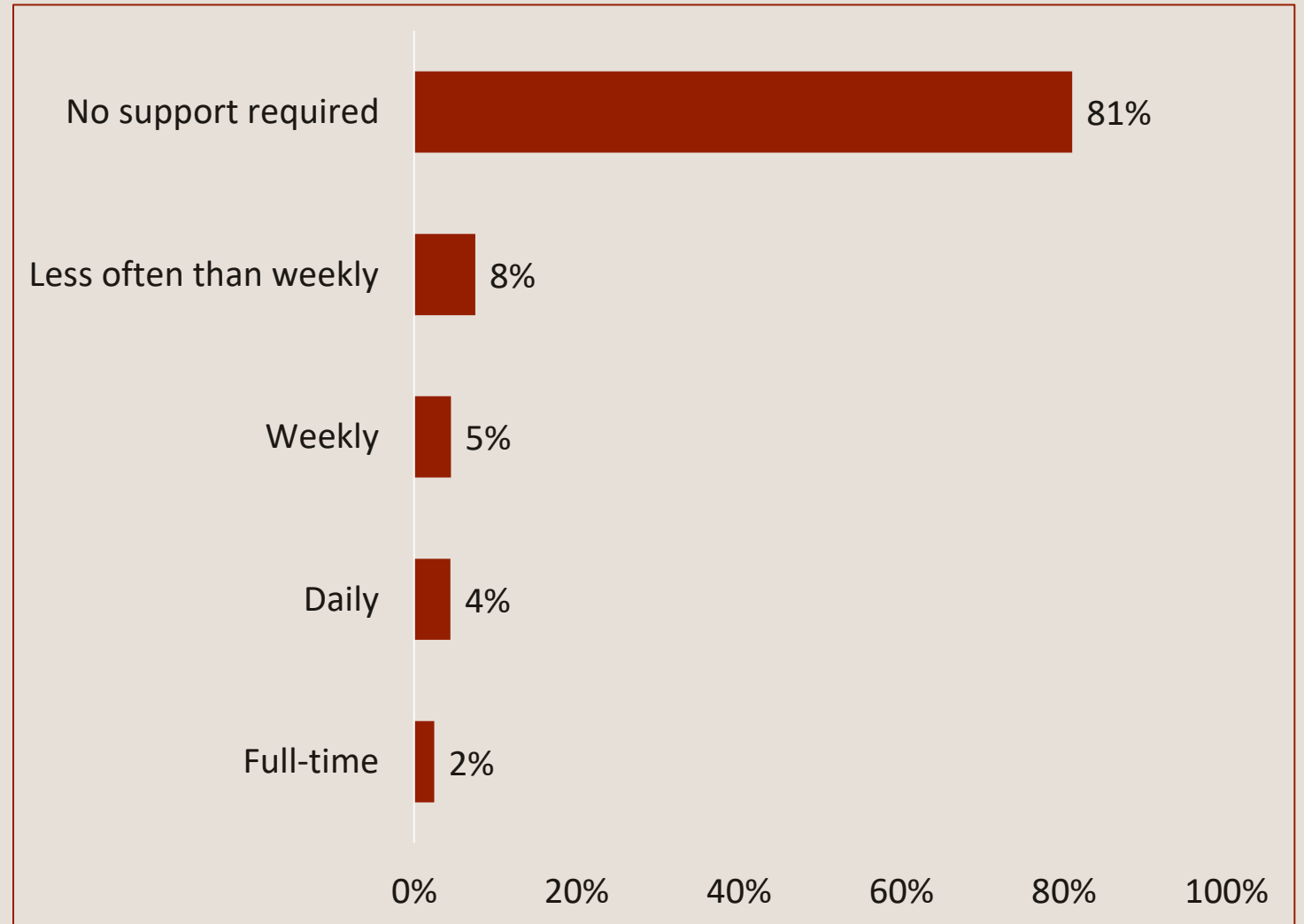


Data source: NVS Demographics Year Ending March 2018. Incidence among those with a disability who have travelled. National representation.



# ACCESSIBILITY | SUPPORT REQUIRED

However, most people travelling with a disability do not require any level of support.



*Data source: NVS Demographics Year Ending March 2018. Incidence among those with a disability who have travelled. National representation.*

## THE OPPORTUNITIES

- There is a whole range of needs, not only physical accessibility.
- Accessible experiences provide benefits to travellers beyond their intended audience
- Australians with a disability not currently travelling
- Short (single night trips or day trips) and/or local trips (within 40 kilometres of home)
- VFR
- Better utilising/promoting services and assets we already have within market





# AUSTRALIANS LIVING WITH A DISABILITY NOT ALREADY TRAVELLING

Potential

**\$735M**

A number of Australians living with a disability (as well as adults caring for a child with a disability) who are not currently travelling provides potential market of \$735M.

With the travel party factored into the spend this increases to \$1.8B.

These people would be more likely to travel with certain industry improvements (in accommodation, transport, current technologies).

## INTRASTATE DAY TRIPS OR OVERNIGHT STAYS

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).

**23%**

**OF NOT ALREADY  
TRAVELLING**

Day trips to iconic locations close to home would be particularly engaging for those with very high support needs.

- **Easier to get there**
- **Less planning is required**
- **More is known about the area** (and therefore less information searching is needed)



## VFR

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)

VFR hosts are a key conduit for information



## BETTER UTILISING EXISTING ASSETS & INFRASTRUCTURE

“The biggest gaps in the information provided by a lot of accommodation properties is what “ACCESS” really means. 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*

Many opportunities to meet the needs of specific groups e.g.

- **Mobility Issues**
  - hotel rooms could have more categories beyond the standard 'fully accessible'
- **Autism Spectrum Disorder**
  - Wi-Fi is vital to an even greater extent than for most travellers, as interacting with phones and tablets is an important tool in helping to manage a change in environment using entertainment.

# GROWING AND ENHANCING THE MARKET

## CONSULT

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.

## INSPIRE & EDUCATE

Ensure that the industry has an understanding of the potential of this sector and is provided support on how to start targeting it. Further, we should be encouraging travellers to be curious, explore and test their boundaries.

## COLLATE

Bringing experiences together to provide a holistic offering in key destinations will help the traveller plan and navigate their trip. This includes improving standards and identifying new areas for accessibility infrastructure and offerings.

## PROMOTE

Promote what is available to generate demand. 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.



**WHAT ARE WE DOING NOW?**



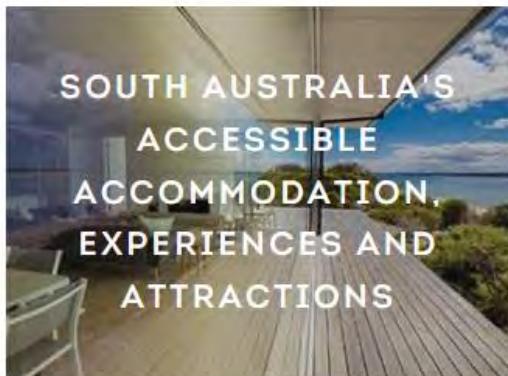
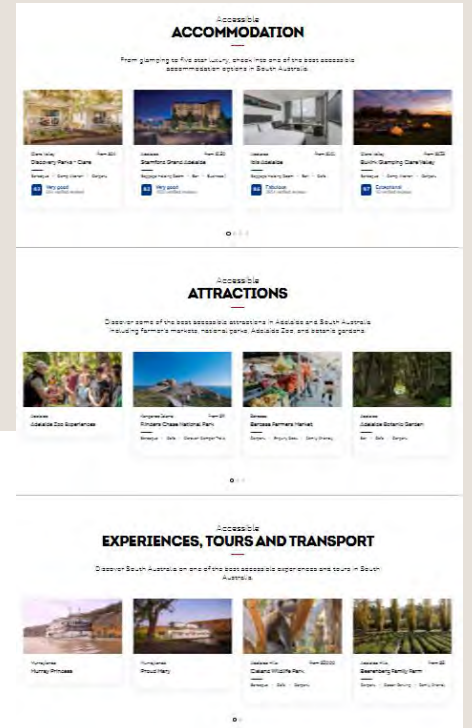


# WEBSITE UPDATES: [southaustralia.com/plan-a-trip/accessibility](https://southaustralia.com/plan-a-trip/accessibility)



## Plan your accessible holiday to **SOUTH AUSTRALIA**

Find all the information you need to make the most out of your trip to South Australia.



# SOCIAL

- Image descriptors in the alt text of all of our Instagram posts



**southaustralia**  • Following   
Whyalla, South Australia, Australia

**southaustralia**  While it might be known for the famous cuttlefish migration in the cooler months, the waters off #Whyalla on the @eyrepeninsula are truly a sight to behold in summer 🤩 Leave the winter wetsuit at home, inflate the paddle board and cruise out into the shallow waters of the foreshore where you'll find an abundance of fish and crustaceans on the low tide as you glide over the glass-like surface of the ocean! 🗣️📷 @q\_frd

#SeeSouthAustralia #SouthAustralia #EyrePeninsula #LoveWhyalla

[Image description in alt text]

2d

 Liked by **louloumagor** and 13,188 others

2 DAYS AGO



# JIMMY JAN ON TIK TOK





## SOUTH AUSTRALIAN OPERATORS: EXAMPLES

- Adelaide Zoo – early opening
- Monarto safari park – lions 360 accessible
- Adelaide zoo light creatures Auslan friendly event





A photograph showing two people from behind, looking out over a savanna enclosure. One person is standing, wearing a white jacket and a dark beanie, with their hand on a wooden post. The other person is seated in a wheelchair, also wearing a white shirt. They are on a wooden walkway with a metal mesh fence. In the background, several giraffes are grazing on a green field with dirt paths. The text "THE FUTURE" is overlaid in white, bold, sans-serif font in the center of the image.

THE FUTURE





## ACTIONS

### CAPACITY BUILDING

- Staff across industry need to be educated to raise awareness of the importance of accessible tourism for the community
- Key step to ensure sustainable tourism

### MEDIA GALLERY ADDITIONS

- Additional imagery will be sourced
- Travellers with a disability will be top of mind for casting when new shoots are commissioned

### ACCESSIBLE TOURISM MENTORING PLAN

- Federal project that is aimed at mentoring tourism operators
- DD team linking up our providers within hub region





**SOUTH**  
AUSTRALIA