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# Accessible Tourism 2024

A deep dive into accessible tourism in Australia

Tourism Research Australia

Australian Trade and Investment Commission (Austrade)

Email: [tourism.research@tra.gov.au](mailto:tourism.research@tra.gov.au)

Web: [www.tra.gov.au](http://www.tra.gov.au)

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### Acknowledgement of Country

We acknowledge the Traditional Custodians of lands throughout Australia and pay our respects to their Elders past and present. We recognise the enduring connection of First Nations people to land, sea and waters, and their deep care for Country over 65,000 years. We honour the enormous contribution First Nations cultures and traditions make to the visitor experience in Australia and commit to protecting and nurturing these cultures in partnership with First Nations communities.

This work should be attributed as *Accessible Tourism in 2024*, Tourism Research Australia, Austrade, Canberra.

This report is available at <https://www.tra.gov.au/en/economic-analysis/annual-benchmark-report>

Further enquiries are welcome at [tourism.research@tra.gov.au](mailto:tourism.research@tra.gov.au)

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## About this report: why accessible tourism matters

Tourism is an important industry that has environmental, social and economic benefits and implications. It allows people to explore new places, cultures, ideas and ways of being. It facilitates cultural exchange and social interaction by connecting people from around the world.

Such benefits are likely to be especially important to people with disability or long-term health conditions. However, access to the full suite of tourism options has not always been available to this cohort.

Increasing the accessibility of tourism options to people with disability or long-term health conditions is therefore an important societal goal. It is also a source of potential revenue and growth for the tourism industry.

This study provides detail about the current condition of accessible travel in Australia. This will be of interest to Government bodies, NGO’s and industry stakeholders as they build a better and more accessible tourism industry.

Australian Bureau of Statistics (ABS) data shows that there are 5.5 million Australians (21.4%) with a disability[[1]](#footnote-1). The same ABS report also shows that Australia has an ageing population (with the proportion of Australians aged 65 or older increasing from 13.3% to 17.1% between 2009 and 2022).

This ageing of the population is likely to increase the number of people with accessible needs into the future (as older people have a significantly higher rate of disability than younger people)[[2]](#footnote-2). This in turn will create extra demand for accessible tourism.

Additionally, the outcomes framework of Australia’s Disability Strategy identifies social inclusion and participation as Policy Priority 3. This outlines the need for a transformation of systems including social, recreational, sporting, religious and cultural organisations to increase accessibility to people with disability.

The need to prepare for increasing numbers of travellers with accessible needs means that the tourism industry must continue the improvements seen in recent years in this space. By continuing to advance accessibility, the tourism industry can meet the growing demand from travellers with accessible needs. Adopting available frameworks and action plans can help businesses create inclusive experiences that welcome a broader range of visitors.

This purpose of this paper then is to provide data and insights to industry stakeholders, Government bodies, NGO’s and the public to assist in these aims.

Notes:

1. All data and estimates presented in this report are for travel in calendar year 2024. The estimates for domestic trips are for people aged 15 or older.

2. In this report, the “travellers with accessible needs” group is inclusive of all respondents to Austrade’s National Visitor Survey or International Visitor Survey who identified as having a disability or long-term health condition or travelled with a person who did.

3. In this report “traveller types” refers to domestic day trips, domestic overnight trips and international visitors.

## Size and value ofaccessible tourismin Australia

Table 1: Overview of trips, nights, and spend by traveller type (travellers with accessible needs)

|  | Trips | Nights | Spend in Australia |
| --- | --- | --- | --- |
| Total | 70.5 million trips  (22% of total) | 97.1 million nights  (14% of total) | $29.2 billion  (17% of total) |
| International | 342,000 (4%) | 9.9 million (3%) | $1.1 billion (3%) |
| Domestic overnight | 23.9 million (21%) | 87.2 million (22%) | $21.5 billion (20%) |
| Domestic day trip | 46.3 million (23%) | - | $6.6 billion (21%) |

1. % figures in brackets show Travellers with accessible needs’ share of trips for each metric. Total trip spend includes spend in Australia only.
2. Total spend includes ‘short-term’ visitors only; those who stay in Australia for less than 12 months.

### International travellers with accessible needs spent $1.1 billion in 2024

In 2024, Australia received 8.3 million international visitors, 342,000 of whom had accessible needs.

The average trip length of this group was 31.5 nights, roughly 1 week shorter than other international travellers while spend per night between the 2 groups was almost equal ($113 for travellers with accessible needs vs $112 for other travellers). As a result, travellers with accessible needs had a lower average spend per trip than other travellers.

Most international travellers with accessible needs came from just 3 countries:

1. New Zealand (25%)
2. USA (19%)
3. UK (15%)

#### International travellers with accessible needs trips facts and figures (2024)

1. 342,000 accessible international trips in 2024 (4.1% of total international travellers)
2. International spend reached $1.1 billion for Travellers with accessible needs (3.4% of total international spend)
3. 9.9million accessible international visitor nights in 2024 (3.4% of total intl nights)
4. Average trip length for travellers with accessible needs was 31.5 nights (39.0 nights for other international travellers)
5. 43% overseas travellers came for a holiday, 43% for visiting friends and relatives, 6% for business and 4% for education
6. 28% of trip nights spent in regional areas (2.8 million nights)
7. Average spend per trip was $3,561 in 2024 ($798 less than other international travellers)

### Domestic overnight trips of travellers with accessible needs were 21%of total trips in 2024

Domestic overnight travellers with accessible needs are a large contributor to tourism in Australia. These travellers accounted for 1 in 5 trips and dollars spent by domestic overnight travellers in Australia in 2024.

Like other travellers, domestic overnight travellers with accessible needs are most likely to travel for a holiday or to visit friends and family. The majority (64%) of trip nights of domestic overnight travellers were spent in regional areas. This was equal to the figure for other travellers.

#### Domestic overnight travellers with accessible needs trips facts and figures (2024)

1. 23.9 million domestic overnight trips in 2024 (21% of total domestic overnight travellers)
2. Domestic overnight spend reached $21.5 billion (20% of total domestic overnight spend)
3. 87.2 million domestic overnight visitor nights in 2024 (22% of total domestic nights)
4. Average trip length was 3.6 nights (3.4 nights for other traveller domestic nights)
5. 43% domestic overnight travellers went for a holiday, 36% visited friends or relatives and 14% travelled for business
6. 64% of trip nights spent in regional Australia in 2024
7. Average spend per trip was $906 in 2024 ($73 less than other international travellers)

### Domestic day trips of travellers with accessible needs were 23% of total trips in 2024

Australians took over 200-million-day trips in 2024 - 23% of which were by travellers with accessible needs. Day trip travellers with accessible needs are slightly more likely than any other traveller type (domestic overnight or international) to travel for a holiday, and least likely to travel for business.

Day trips had slightly lower average spend than overnight trips. However, day trips by travellers with accessible needs still involved $6.6 billion of spend in 2024.

Over half of day trips taken by travellers with accessible needs were taken in regional Australia in 2024.

#### Domestic day trip travellers with accessible needs trips facts and figures (2024)

1. 46.3 million domestic day trip in 2024 (23% of total domestic day trips)
2. Domestic day trip spends reached $6.6 billion (21% of total domestic day trip spend)
3. The main reasons for day trips were holiday (46%), VFR (29%) and business (7%).
4. 55% trips were to regional Australia in 2024
5. Average spend per trip was $143 in 2024 ($15 less than other domestic day trip travellers)

## Understanding the accessible traveller

### Main purpose of travel

Holiday was the most common reason for travel among all traveller types for both travellers with accessible needs and other traveller types. Visiting friends and relatives was the next most popular reason for all traveller types. This reason accounted for a substantially larger proportion of travellers with accessible needs than of other travellers.

Conversely, the proportion of people with accessibility needs travelling for business, employment or education was smaller than that of other travellers.

Figure 2: Main reason for travel (% of trips)

Clustered column graph outlining the main reason for travel of international visitors by accessible and non accessible. Holiday is the highest proportion of all trips as 43% accessible travellers and 42% for other travellers. 
Clustered column graph outlining the main reason for travel of domestic overnight visitors by accessible and non accessible. Holiday is the highest proportion of all trips as 43% accessible travellers and 42% for other travellers. 
Clustered column graph outlining the main reason for travel of domestic day trips by accessible and non accessible. Holiday is the highest proportion of all trips as 46% accessible travellers and 50% for other travellers. 


1. NP = Not publishable (insufficient data)

### Trip origins and destinations

Across the 3 traveller types (domestic overnight, domestic day trip and international), travellers with accessible needs were more likely to spend time in regional areas than other travellers. Accessible travellers spent 58% of their nights/day trips in regional areas and 42% in capital cities (compared with 44% regional and 56% capital cities for other travellers).

International visitors spent a larger proportion of their time in capital cities than domestic travellers. However, those with accessible needs spent a higher proportion of their nights in regional areas than did other international travellers (28% vs 19%).

Figure 3: Capital cities vs regional Australia trips (% of nights or day trips)

A stacked bar graph outlining the differences in days/nights spent in regional Australia vs Capital cities. 
Accessible travellers spe
nd 58% of days/nights in regional Australia compared with 44% other travellers 

1. Number of trips has been used here for domestic day trip travellers because they do not stay overnight.

The share by state of domestic trips by travellers with accessible needs reflects state populations. For example, NSW and Victoria are Australia’s 2 most populous states and were the 2 states with the largest share of trips by home state.

Victoria and Queensland represent a slightly higher proportion of trips of travellers with accessible needs than their proportion of Australia’s population

* Victoria – 28% of Australia’s population; 26% of trips
* Queensland – 21% of Australia’s population; 23% of trips

Figure 4: Trip origins: Number of domestic trips by home state of traveller (number and % of trips – travellers with accessible needs)

A map of Australia highlighting the state of origin of trips taken as a number, and as a percentage. 
NSW has the highest number of trips taken from this state at 27.7%, followed by Victoria at 27.6%.

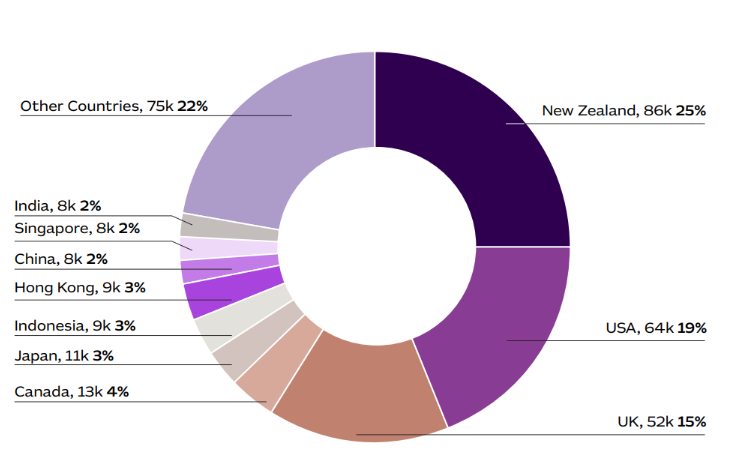
Most international travellers with accessibility needs came from NZ, the USA or the UK. The majority of international travellers with accessible needs came from just 3 countries:

* New Zealand (25%)
* USA (19%)
* UK (15%)

These 3 countries accounted for 202,000 international trips by travellers with accessible needs in 2024 (59% of total).

In general, Asian countries tended to constitute a lower proportion of travellers with accessible needs than their overall share of total international visitors to Australia. For example, Chinese travellers represented 11% of international visitors overall in 2024, but only 2% of international visitors with accessible needs.

Figure 5: Home countries of international travellers with accessible needs (number and % of travellers)



New South Wales, Queensland and Victoria were the 3 most popular destination states in terms of total trip nights (both for travellers with accessible needs and other travellers). Travellers with accessible needs spent 31% of their total nights in New South Wales, 24% in Queensland and 21% in Victoria.

While Victoria was the home state of 28% of travellers with accessible needs, its share of nights stayed was only 21%. By contrast, New South Wales and Queensland had a larger share of nights stayed than their share of travellers by home state (31% vs 28% for New South Wales and 24% vs 23% for Queensland).

Figure 6: Trip destinations: Stopover nights by state and territory (number and % of nights stayed by travellers with accessible needs)

A map of australia showing state share of nights of travellers with accessible needs.
NSW has the highest number of trips taken at 30.5% followed by Queensland at 24.3%.

### Case study: Story Bridge Adventure Climb, Brisbane

Artemus Group operates the Story Bridge Adventure Climb which includes the world’s first accessible bridge climb. By integrating universal design principles and cutting-edge adaptive technology, Artemus Group has cultivated an experience where individuals with accessibility requirements, including those who use wheelchairs, can now enjoy the thrill of scaling Brisbane’s iconic landmark.

Guests can experience the Story Bridge on a speciallydesigned wheelchair with a battery-operated caterpillar tread system allowing for a smooth ascent. The Motorised Stair Climber Wheelchair is of the highest safety standard and ensures individuals with accessibility requirements can expect smooth and safe movement over inclines, ergonomic design for participant comfort and integrated safety features.

Story Bridge Adventure Climb has partnered with Spinal Life Australia, Sporting Wheelies, and Queensland Tourism Adventure Council to ensure ongoing accessibility and support for participants with diverse mobility needs.  This pioneering initiative marks a significant milestone in accessibility and adventure tourism in Australia.

This is a breakthrough in tourism for Australia. Attractions like this position Brisbane as a world-class city with dynamic tourism offerings ahead of the 2032 Brisbane Olympic and Paralympic games.

## Travellers with accessible needs; how they travel (holiday, VFR and business travellers only)

Travellers with accessible needs are more likely to travel with other people and stay with friends and family.

* Average nights spent on a trip – 4.0 nights
* Nights spent at family or frieends for accommodation – 40%
* Less likely to travel alone compared to other travellers – 28% vs 36% respectively
* Drive themselves to their destination over other transport options – 87%

Note: this section focuses on holiday, business and business travellers in order to remove skews of the data caused by differences in the composition of the international visitor population.

Data is for domestic and international travellers travelling for business, holiday or visiting friends and relatives (where applicable).

### Trips spend

For all traveller types, travellers with accessibility needs spent less per trip on average than other travellers.

This may be partially because domestic travellers with accessible needs are less likely to travel interstate while international travellers with accessible needs tend to take slightly shorter trips than other travellers.

* Avg trip spend of international travellers with accessible needs ($2,516) was 92% of that of other international travellers ($2,744).
* Avg trip spend of domestic overnight travellers with accessible needs ($917) was 93% of that of other travellers ($987).
* Avg trip spend of domestic day trip travellers with accessible needs ($139) was 92% of that of other travellers ($152).

Clustered column graph for international average trip spend, Avg trip spend of international travellers with accessible needs ($2,516) was 92% of that of other international travellers ($2,744).
Avg trip spend of domestic overnight travellers with accessible needs ($917) was 93% of that of other travellers ($987).
Avg trip spend of domestic day trip travellers with accessible needs ($139) was 92% of that of other travellers ($152).Figure 7: Average spend per trip ($)

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AI-generated content may be incorrect.The proportions of trip spend by item were quite similar between travellers with accessible needs and other travellers. The most notable difference between the groups is that travellers with accessible needs spent a smaller proportion on airfares than do other travellers (9% vs 11%).

Food, drink and accommodation accounted for the majority of trip spend of travellers with accessible needs (with 53% of total spend). International travellers spend a higher proportion of trip spend on tours, but a lower proportion on domestic airfares than domestic travellers.

Figure 8: Expenditure items (% of total expenditure by item) Clustered bar chart outlining the expenditure items as a proportion of total expenditure by accessible travellers vs other travellers. 
All travellers spend the most on food and drink, followed by accommodation. 


### Trip length

Domestic overnight trips were longer for those with accessible needs (3.7 nights) than those without (3.4 nights). By contrast, international visitors with accessible needs on average had slightly shorter trips (26.1 nights) than those with no accessible needs (26.6 nights).

International travellers with accessible needs travelling for business had slightly longer trips (17.4 nights) than other travellers (13.2 nights). They also had shorter holiday trips than other travellers (21.6 nights vs 26.1 nights).

Figure 9: Average trip length (nights)

Clustered column chart outlining the average trip length of International visitors by trip reason. On average, intl visitors with accessible needs stay 26.1 nights compared to other travellers that stay 26.6nights. 
Average trip length of domestic overnight trips by trip reason. On average, visitors with accessible needs stay 3.7 nights compared to other travellers that stay 3.4 nights. 

### Accommodation

The most common accommodation type for travellers with accessible needs was “friends or relatives’ property” (accounting for 40% of all nights stayed). The next most common accommodation type was hotel, motel or resorts (25% of nights) and third was caravan parks or camping (15% of nights).

In comparison with other travellers, travellers with accessible needs were more likely to stay at friends or relatives’ property (40% vs 38%) or caravan park or camping (15% vs 9%). By contrast, they were less likely to stay at rented accommodation (9% vs 14%).

Figure 10: Travel accommodation: travellers with accessible needs vs other travellers (% of nights)

Clustered bar chart outlining the travel accommodation by travellers with accessible needs vs other travellers.
All travellers stay more at friends and families than other accommodations. 


### Travel party

Travelling alone was the most common travel party type for travellers with accessible needs (accounting for 28%). However, compared with other travellers, travellers with accessible needs were less likely to travel alone (28% vs 36%) but more likely to travel with friends and/or relatives (25% vs 18%) or with a family group (parents and children, 16% vs 14%).

The second and third most common travel party types were travelling with friends and/or relatives and adult couple (both with 25%).

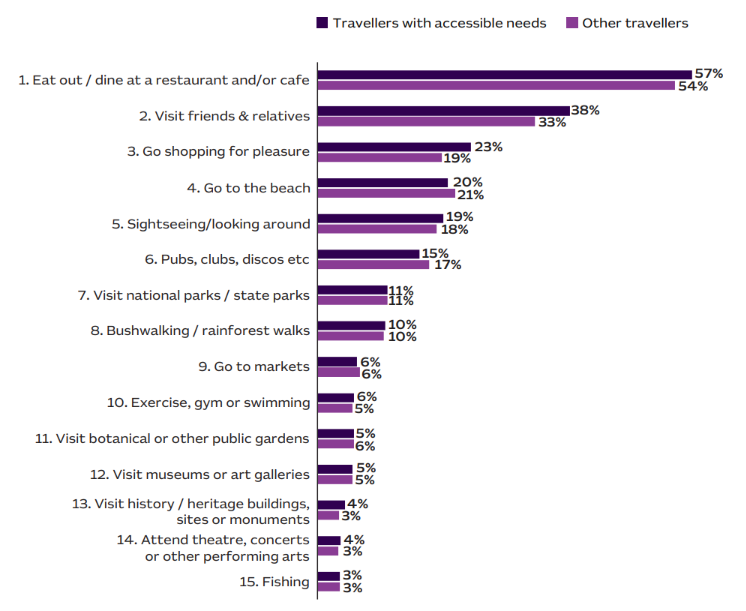
Figure 11: Travel party for trips for with accessible needs vs other travellers (% of trips) Clustered bar chart outlining the travel parties by travellers with accessible needs vs other travellers.
Travellers with accessible needs are more likely to travel with companions such as friends and or relatives than other travellers 


### Trip activities

Activities while travelling largely align with other travellers with eating, socialising and shopping. All traveller segments were most likely to have eating out/ dining at a restaurant as their top activity, with going shopping for pleasure and going to the beach featuring in the top 5 activities for all. For all travellers, visiting friends and family was the 2nd most common activity for holiday and business travel.

Taking in Australia’s beautiful natural landscape was also a key driver of activity with going to the beach, sightseeing, national parks, bushwalking, botanical gardens, and fishing being amongst the top 15 activities.

Figure 12: Top 15 trip activities of travellers (% of all trips involving activity)



### Trip transport

The most common mode of transport to a stopover destination for all traveller types was self-drive vehicle (i.e. a vehicle driven by the traveller or one of their parties). Travel by air was the second most common mode of transport for domestic overnight and international visitors. This was especially common for international visitors (as most would arrive at their first stopover by air transport from overseas).

Very few day trip travellers used air transport. Travellers with accessible needs used train, bus/coach or water transport to travel more frequently than other travellers.

Figure 13: Transport used by travellers to travel to stopover destination (%)

Clustered column chart for International travellers outlining travellers with accessible needs drive themselves to stopover destination 55%, vs other travellers 50%, which is the highest mode of transport.
Domestic overnight trips travellers with accessible needs drive themselves to stopover destination 78%, vs other travellers 73%, which is the highest mode of transport.
Domestic day trip travellers travellers with accessible needs drive themselves to stopover destination 92%, vs other travellers 94%, which is the highest mode of transport.

1. Self-drive vehicle refers to any vehicle driven by the traveller or a member of their party.
2. ‘Other transport’ includes ride share, taxi, walking, cycling etc.
3. Figures exceed 100% because travellers may use more than one transport mode

Most travellers (77%) with accessible needs did not use local transport modes (other than that in which they arrived at their stopover). This was higher than figure for other travellers (71%). This may indicate room for improvement in accessibility of local transport options. Of the travellers with accessible needs who did use local transport, the most common modes were:

* ride share service (9%),
* train (7%), and
* bus (6%).

Other travellers tended to use the same forms of local transport but were more likely than travellers with accessible needs to use each local transport mode.

Figure 14: Local transport used at stopover (% of trips)Clustered column graph for the local transport used at stopovers. All travellers are not very likely to use local transport, but those that do use ride share services, trains, and buses. 


## Accessible tourism around the world

UN Tourism positions accessible tourism as a business opportunity for destinations and companies. The opportunity to increase accessibility and cater to a large and growing market may position businesses to capitalise on the 1.3 billion people with disabilities internationally

Looking at tourism from multiple perspectives will allow for authentic experiences to enhance the tourism offer including:

* Managing natural resources
* Cultural tourism
* Accommodation, food and beverage
* Government and institutions
* Accessibility standards
* Collaboration for accessible tourism including conferences and forums
* Transportation
* Tour operators, travel agencies and agents
* Employment

Did you know...?

Almost 50% of people aged more than 60 have a disability (UNDESA, 2022)   
Travellers with disabilities tend to travel accompanied by 2 to 3 travel companions (Bowtell, 2015)

### Australia is seen as accessible compared to other destinations

According to Tourism Australia’s Consumer Demand Project 2024, Australia achieved the highest “NET Accessible rating” of the 15 countries surveyed. According to Tourism Australia data from 2024, Australia was perceived as “Net Accessible” (i.e. either “accessible” or “extremely accessible”) by 81% of survey respondents. This is ahead of Japan (80%), Canada and New Zealand (both at 79%).

The impact of these perceptions can form the basis of travel destinations for both domestic and international travel. This perception is underpinned by individual tourism operators creating experiences that can be enjoyed by all visitors, no matter their needs.

Equally, the higher the perception of Australia as an accessible destination, the more opportunity there is to share experiences with more visitors.

Figure 15: Travellers’ perception of accessibility by country, April – June 2024 (%)

Table 2: NET Accessibility score by country

|  | **NET Accessible (extremely accessible + accessible score)** |
| --- | --- |
| Australia | 81 |
| Japan | 80 |
| Canada | 79 |
| New Zealand | 79 |
| Italy | 69 |
| Hawaii | 67 |
| Thailand | 63 |

Australia's hotels have higher than global benchmark numbers for many of the accessible features. A 2021 international study by Fuentes et al on the prevalence of accessible facilities in hotels found that Australia scores above the global average in several areas such as:

* Wheelchair facilities (26% of hotels in the study had wheelchair facilities compared with 18% as a global average)
* Toilet with grab rails (19% for Australia vs 12% for the world average).

On the other hand, Australia lags the global average in terms of:

* Emergency cords (1% for Australia vs 6% as a global average)
* Audio guide (0.4% for Australia vs 2% as a global average).

Figure 16: Proportion of hotels with accessible facilities

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AI-generated content may be incorrect.

## Conclusions and resources

Accessible tourism is a valuable contributor to regional Australia and the wider visitor economy.

Main findings from 2024:

* Accessible tourism is a large and valuable sector of the visitor economy entailing 70.5 million trips worth $29.2 billion in 2024.
* Travellers with accessible needs spent most of their time (58% of nights/day trips) in regional areas.
* Travellers with accessible needs were more likely to travel in groups than other travellers.
* The expense items that consumed the largest proportion of travel budget were food & drink (30%) and accommodation (23%).
* The most common form of transport used by travellers with accessibility needs was self-drive vehicle followed by aircraft and trains.

Performance of the sector & recommendations

* Australia scores highly in terms of perception of accessibility compared with international comparators (81% score Australia as “accessible” or “highly accessible”).
* Australia also performs highly in terms of the prevalence of accessible facilities in hotels (compared with international comparators).
* Increased accessibility ensures everyone can enjoy the same tourism products, allowing businesses to accommodate a broader range of visitors.
* Frameworks and action plans are available for tourism businesses to implement change to enhance accessibility for a range of traveller needs.

### Government actions and further resources for accessible tourism

There are a number of Government actions and initiatives currently in place to assist with improvement and expansion of accessible tourism in Australia. There is also a range of further resources available to the sector provided by NGOs as well as government bodies.

Government actions

• THRIVE 2030 is the national strategy for the long-term and sustainable growth of Australia’s visitor economy. The strategy includes actions on accessible tourism.

• The Government has committed $17.1 million of funding to make national parks, beaches and playgrounds more accessible for people with disability under the ‘Accessible Australia’ initiative.

• The Government has also delivered grant programs that support tourism businesses to modernise their infrastructure, become more accessible and meet the emerging needs of visitors.

• Austrade has developed the WELCOME Framework - an entry level toolkit that complements industry products that support travellers with accessible needs.

• Tourism Australia has developed a Disability and Inclusion Action Plan 2025 – 2028, which outlines actions Tourism Australia has committed to support the adoption of inclusive practices throughout the tourism industry and in marketing processes.

Further resources for accessible tourism

Tourism Australia provides a list for tourism operators, travellers, and those looking for specific information regarding states and territories, and needs. This can be found at [Accessible Tourism Sector - Corporate - Tourism Australia](https://www.tourism.australia.com/en/about/industry-sectors/accessible-tourism.html).

### Tourism Australia is committed to Accessible Tourism

In 2024, Tourism Australia strengthened its strategic commitment to positioning Australia as an accessible and inclusive tourism destination. This included the development of an internal action plan to guide Tourism Australia’s approach to creating demand, supporting industry, and embedding inclusive practices across its work.

The Disability and Inclusion Action Plan 2025-2028 outlines Tourism Australia’s commitment to advancing inclusive practices across the tourism industry. Aligned with Australia’s Disability Strategy 2021-2031, the plan focuses on three key outcome areas identified as having the greatest potential for impact: Marketing; Industry; and Tourism Australia as an organisation.

The plan was co-designed with Get Skilled Access, a Disability Inclusion Consultancy Founded by Friend of Australia, multiple Grand Slam tennis champion, Paralympian, and disability advocate Dylan Alcott AO.

Tourism Research Australia is supporting this work by providing insights to better understand the needs of travellers with accessibility requirements and inform implementation of the action plan.

### The WELCOME framework

The WELCOME Framework encourages tourism operators to view accessibility and inclusivity as a universal approach to business.

The framework not only outlines the elements to influence and provides ‘ideas to try’ for businesses which may be relevant to tourism operators to apply directly or provide thought starters that allow for inspiration.

Welcome

Visitors should be able to find accessibility details easily. When visitors arrive onsite, the built environment needs to be welcoming including quality customer service supported by well-trained staff with inclusive attitudes.

Environment

Members of the accessible tourism community need to be familiar with the physical environment before they go. Information is key to make it easier for visitors to understand how they will experience your business and services including from the point of arrival.

Links

Each business represents one link in the tourism supply chain. It is critical to consider how local services, and other nearby operators support a visitor’s experience.

Communication

Everyone engages with businesses differently. Providing multiple points and methods of communication can support visitors through their journey – from research to visitation and onwards to repeat patronage.

Operations

Exceptional customer service lies in consistency. Internal training is important to ensure your entire team can understand and implement policies and procedures.

Marketing

Make promotional information easy to find and absorb. Structure the information well and refer to specific needs. It places a business in the best position to capitalise on visitation.

Experience

Barriers in the physical environment can be challenging and costly to overcome. However, by focusing on the customer experience, a business may find creative ways to work around these challenges.

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Tourism Australia: Consumer Demand Project 2024

Tourism Research Australia, IVS and NVS data, 2024.

[The WELCOME Framework | Austrade](https://www.austrade.gov.au/en/news-and-analysis/publications-and-reports/welcome-framework)

## Appendix 1: Categories of accessible needs captured in the IVS and NVS questionnaires

Data presented in this report is based on responses to the National Visitor Survey (NVS) and International Visitor Survey (IVS) for those who identified with at least one of the categories shown on this page.

The 3 most common conditions of travellers with accessible needs identified in survey responses were chemical sensitivity or food allergies, mental health conditions, and requiring other mobility aids or have other mobility limitations.

In 2024, IVS and NVS Survey respondents were asked the following question:

*Which, if any, of the following health conditions do you or any other person who went with you on the trips within Australia we talked about today have? (Multiple responses allowed)*

* Vision impairment (not corrected by glasses or contact lenses)
* Hearing impairment
* Require wheelchair or scooter
* Require other mobility aids or have other mobility limitations
* Difficulty understanding or learning
* Mental health condition
* Chemical sensitivity or food allergies
* None of the above
* Refused
* Don’t know

1. Australian Bureau of Statistics (2022), Disability, Ageing and Carers, Australia: Summary of Findings, 2022 | Australian Bureau of Statistics, accessed April 2025. [↑](#footnote-ref-1)
2. The Strategy and supporting documents | Disability Gateway [↑](#footnote-ref-2)