

Persons with Disabilities (PwD) are defined in this report as people who identified themselves as having a disability or any long term health condition that has lasted six months or more.

According to the Australian Bureau of Statistics' (ABS) 2015 *Survey of Disability, Ageing and Carers*, there were 1.4 million people with disability in NSW, 32% share of the Australian population with disability (4.3 million). The number of PwD in NSW increased by 12% between 1998 and 2015 (1.2 million) while the Australian growth was 19% in the same period.

Almost one in five people in NSW had a disability in 2015 (18.1%), similar figures for Australia (18.3%). The disability prevalence rates in NSW and Australia have remained relatively stable over time, with 19% of NSW reporting disability in 1998.

In 2017, Tourism Research Australia (TRA) added questions related to disability in the *National Visitor Survey (NVS)*. **This report profiles domestic overnight visitors to NSW who have disabilities or long term health conditions based on the NVS.**

Analysis of the March Quarter 2017 NVS results found that PwD domestic overnight visitors to NSW:

- required less assistance in everyday living than PwD in the Australian population
- accounted for nearly a third of all PwD domestic overnight visitors in Australia and 15% of domestic overnight visitors to NSW
- were older with '60+ years being their largest age group while it was '15 to 29' for all domestic overnight visitors to NSW
- travelled mostly to 'Visit Friends and Relatives' while 'Holiday' was largest purpose of visit for all domestic overnight visitors to NSW
- were similar to all domestic overnight visitors to NSW in terms of Travel Party, Accommodation and Transport used.

VISITOR MARKET SIZE AND EXPENDITURE

There were 1.2 million PwD domestic overnight visitors to NSW in March Quarter 2017. These PwD visitors stayed 4.6 million nights and spent \$757 million in NSW. PwD domestic overnight visitors to NSW accounted for 15% of domestic overnight visitors to NSW, 16% of domestic nights and 14% of domestic overnight expenditure in the March Quarter 2017.

NSW is the number one Australian State in PwD Domestic overnight visitors, nights and expenditure. PwD domestic overnight visitors to NSW accounted for nearly a third of PwD domestic overnight visitors, nights and expenditure in Australia for the quarter (31%, 29% and 33%, respectively.)

The average length of stay in NSW of PwD domestic overnight visitors was 3.9 nights and they spent \$165 per night in the State. By comparison, domestic overnight visitors to NSW stayed on average 3.3 nights and spent on average \$173 per night in the State in the year ended March 2017.

Table 1. PwD Domestic Overnight Visitors, Nights and Expenditure

Visitors	Visitors (million)	Nights (million)	Average Length of Stay	Total spend (\$ million)	Spend per visitor	Spend per night
NSW	1.2	4.6	3.9 nights	757	\$647	\$165
AUS	3.8	15.8	4.2 nights	2,316	\$614	\$146

Most PwD domestic travellers to NSW required minimal everyday support. Over three quarters of PwD domestic overnight visitors to NSW with disabilities did not require any support in their everyday living and 11% required less than weekly support. In the ABS' 2015 *Survey of Disability, Ageing and Carers*, around 60% of people with disability who are living in households needed assistance with at least one activity of daily life.

Nearly 60% of PwD domestic overnight visitors to NSW did not identify their type of disability. Of those who did, most nominated other mobility limitations (i.e. not requiring wheelchair or scooter), followed by mental health conditions, hearing and vision impairments. In the ABS' 2015 *Survey of Disability, Ageing and Carers*, 22% said they had mental or behavioural disorders and 78% identified physical conditions.

Table 2. Dimensions of Disability and Support needed – PwD Domestic Overnight Visitors to NSW

Dimensions	Visitors (000)	%	Level of Support in everyday living	Visitors (000)	%
Other disabilities	687	59%	No support required	891	76%
Other mobility limitations	244	21%	Less often than weekly	125	11%
Mental health condition	197	17%			
Hearing impairment	136	12%			
Vision impairment	126	11%			

There were very few domestic overnight visitors to NSW who identified themselves as 'requiring wheelchair or scooter', 'having difficulty understanding or learning' or 'having chemical sensitivity'.

SOURCE MARKETS

Table 3. Origin of PwD Domestic Overnight Visitors to NSW

Region	Share of visitors
Sydney	24%
Regional NSW	45%
Intrastate	70%
Victoria	11%
Queensland	12.5%
Other States	7%
Interstate	30%

Around a quarter of PwD domestic overnight visitors to NSW came from Sydney (24%), followed by the South Coast (8.5%), Central Coast (8%) and the Hunter (7.5%). From interstate, Queensland and Victoria were top source markets (12.5% and 11%, respectively).

Nearly half of PwD domestic overnight visitor were Regional NSW residents (45%), where more than half have 'other disabilities' (59%), followed by 'other mobility limitations' (23%) and 'mental health condition' (20%).

NSW DESTINATIONS

Table 4. Top NSW Destination of PwD Domestic Overnight Visitors

Destination	Share of visitors
1. Sydney	32%
2. North Coast NSW	16%
3. South Coast	14.5%
4. Central NSW	9%
5. The Hunter	8%

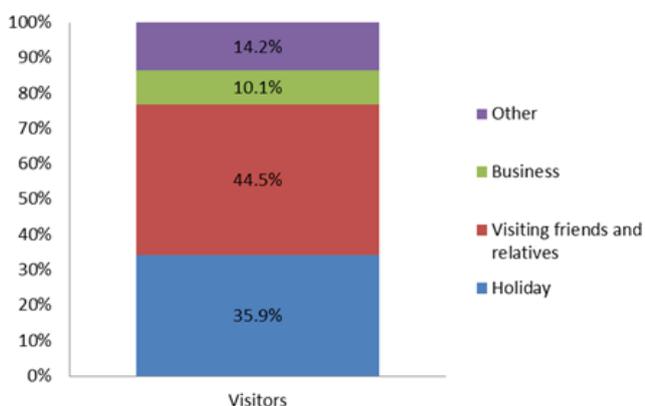
The majority (70%) of PwD domestic overnight visitors travelled to Sydney (32%), North Coast (16%) and South Coast (14.5%).

Of those visiting Sydney, two-thirds have 'other disabilities' (64%), followed by 'other mobility limitations' (22%).



PURPOSE OF VISIT

Chart 2. Purpose of visit of PwD Domestic Overnight Visitors to NSW



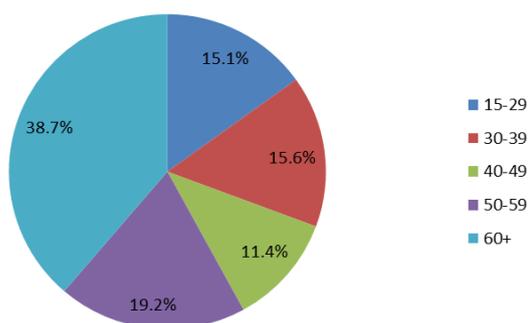
‘Visiting Friends and Relatives’ (44.5%) was the largest purpose of visit for PwD domestic overnight visitors to NSW, followed by ‘Holiday’ (36%). By comparison, ‘Holiday’ was top purpose of visit of all domestic overnight visitors to NSW.

More than half of ‘VFR’ visitors have ‘other disabilities’ (52%), followed by ‘mental health condition’ (23%) and ‘other mobility limitations’ (21%).

Two-thirds of ‘Holiday’ visitors have ‘other disabilities’ (68%), followed by ‘other mobility limitations’ (16%).

AGE GROUPS AND GENDER

Chart 3. Age Groups of PwD Domestic Overnight Visitors to NSW



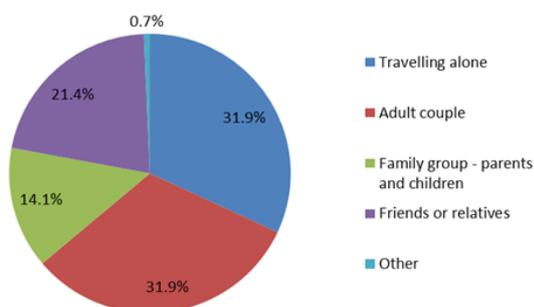
‘60+ years’ (39%) was the largest age group of PwD domestic overnight visitors to NSW, followed by ‘50-59 years’ (19%).

Of those aged ‘60+ years’, 62% have ‘other disabilities’ followed by ‘other mobility limitations’ (29%), ‘hearing impairment’ (19%) and ‘vision impairment’ (16%).

As for gender, slightly more females (51%) than males (49%) PwD domestic overnight visitors travelled to NSW.

TRAVEL PARTY

Chart 4. Travel Party of PwD Domestic Overnight Visitors to NSW



Travelling ‘alone’ and ‘adult couple’ (32% each) were the most common travel parties amongst PwD domestic overnight visitors to NSW, followed by travelling with ‘friends or relatives’ (21%).

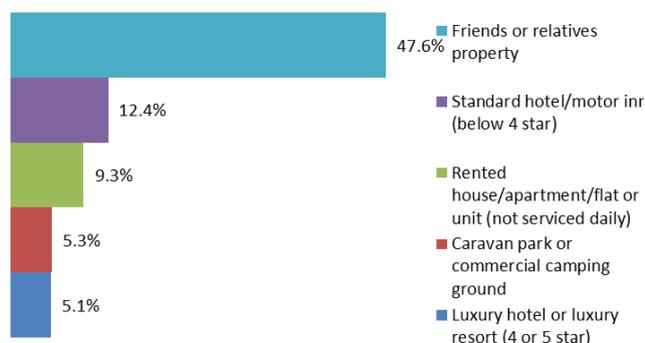
Most PwD domestic overnight visitors with ‘no support required’ were adult couples (35%).

Of those ‘travelling alone’ and ‘adult couples’, most did not identify their disabilities or have ‘other mobility limitations’.



ACCOMMODATION

Chart 5. Most popular Accommodation type of PwD Domestic Overnight Visitors for nights in NSW

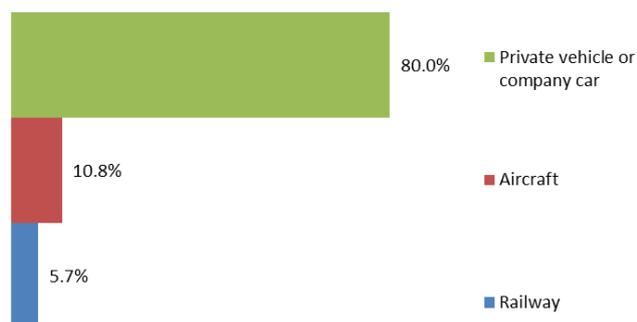


'Friends or relatives property' (48%) was the most popular accommodation type used by PwD domestic overnight visitors in NSW, followed by 'standard hotel/motor inn' (12%).

Of those that stayed at 'friends or relatives property', 53% have 'other disabilities' followed by 'mental health condition' (22.5%) and 'other mobility limitations' (21%).

TRANSPORT

Chart 6. Main Transport in NSW used by PwD Domestic Overnight Visitors to NSW

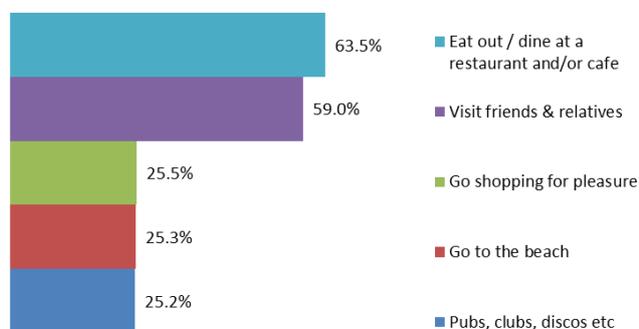


'Private vehicle or company car' (80%) was the most popular form of transport used by domestic overnight PwD visitors to NSW, followed by 'aircraft' (11%) and 'railway' (6%).

Of those that used 'private vehicle or company car', 58.5% have 'other disabilities' followed by 'other mobility limitations' (22%) and 'mental health condition' (18%).

ACTIVITIES

Chart 7. Top Activities in NSW by PwD Domestic Overnight Visitors



'Eating out, dine at a restaurant or café' (63.5%) was the most popular activity undertaken by PwD domestic overnight visitors to NSW, followed by 'visiting friends and relatives' (59%).

'Eating out, dine at a restaurant or café' was the most popular activity undertaken in NSW by those with 'vision impairment' (54%) and those that did not require support (66%).

'Visiting friends and relatives' was the most popular activity undertaken in NSW by those with 'hearing impairment' (58.5%), 'other mobility limitations' (63%) and those that require 'less often than weekly' level of support (64%).