

## KEY FACTS AND FIGURES ABOUT ACCESSIBLE TOURISM

*This document presents facts and figures to support the social and economic imperative of ensuring Aotearoa New Zealand's visitor experiences deliver a 100% welcome to everyone, regardless of their age or ability.*

*Delivering a 100% welcome for all is premised on the fact that the global population is ageing. With age comes disability and the need for access and inclusion.*

*By 2025, one in eight international trips will be taken by a senior aged 60 years and over, and the size of this market will almost double by 2030.<sup>1</sup>*

*This document refers to the access tourist market, which comprises of people with access requirements, namely, people with disabilities and seniors. At a broader level, however, access and inclusion may also benefit the family members, friends, and carers who support and travel with people with access requirements, as well as parents travelling with children in prams and multi-generational groups.*

*Delivering a 100% welcome to this tourist market necessitates the provision of sufficient information that enables individuals to determine their own requirements around access not just for tourism facilities, services, and experiences but across the whole visitor journey.*

*50% of people with access requirements would travel more if tourism facilities, services, and experiences at each destination were perceived to be accessible and inclusive.<sup>2</sup>*

## SIZE AND VALUE OF THE INTERNATIONAL ACCESS TOURIST MARKET

- The access tourist market represents 25% of global tourism,<sup>3</sup> is larger than China and Europe combined,<sup>4</sup> and is growing three times faster than any other tourist market.<sup>5</sup>
- 1.8 billion people, or 15% of the global population, live with disability. When family, friends, and carers are considered, this number increases to 3.4 billion people.<sup>6</sup>
- By 2050, it is estimated that one fifth of the world's population will have some access requirement.<sup>7</sup>
- Access requirements correlate with age. By 2025, one in eight international trips will be taken by a senior aged 60 years and over, and the size of this market will almost double by 2030. By 2030, the global ageing population is expected to grow by 40% to 1.4 billion people.<sup>8</sup>
- People with disabilities are active travellers. Disability reaches 73% of consumers and influences over USD 13 trillion in annual disposable income.<sup>9</sup> People with disabilities who do not travel but want to, could contribute an additional 2% in spend if industry improvements were made.<sup>10</sup>
- People with access requirements travel with companions and carers, resulting in an economic multiplier effect of 2.5.<sup>11</sup>
- The retiring baby boomer generation will control over 50% of total tourism spend and demand different experiences to generations that have preceded them. While they might acquire age related disabilities, they will not necessarily identify with the traditional disability sector, meaning they will expect accessible and inclusive tourism facilities, services, and experiences to be provided by the mainstream industry.<sup>12</sup>

<sup>1</sup> <https://www.austrade.gov.au/news/insights/insight-the-accessible-tourism-opportunity>

<sup>2</sup> <https://www.belab.co.nz/items/the-business-case-for-accessible-tourism>

<sup>3</sup> <https://www.belab.co.nz/items/the-business-case-for-accessible-tourism>

<sup>4</sup> <https://scia.org.au/2023/02/16/an-untapped-3-3-billion-industry/>

<sup>5</sup> <https://getaboutable.com/businesses/>

<sup>6</sup> <https://scia.org.au/2023/02/16/an-untapped-3-3-billion-industry/>

<sup>7</sup> <https://amadeus.com/documents/en/airlines/research-report/voyage-of-discovery.pdf>

<sup>8</sup> <https://www.austrade.gov.au/news/insights/insight-the-accessible-tourism-opportunity>

<sup>9</sup> <https://www.rod-group.com/content/rod-research/edit-research-design-delight-disability-2020-annual-report-global-economics>

<sup>10</sup> <https://dsns.com.au/download/understanding-the-opportunity-for-australia-in-accessible-tourism-2018/>

<sup>11</sup> <https://www.tra.gov.au/Archive-TRA-Old-site/Research/View-all-publications/All-Publications/Destination-Visitor-Survey-results/Strategic-regional-research-reports/accessible-tourism-victoria-queensland>

<sup>12</sup> <https://travability.travel/2022/06/16/module-1-understanding-accessible-tourism/>

## CHANGING DEMOGRAPHICS OF NEW ZEALAND'S MAJOR INBOUND TOURIST MARKETS

- New Zealand's access tourist market is growing due to demographic shifts – namely ageing – and affects the visitor profiles of all major inbound tourist markets.<sup>13</sup>
- Pre-pandemic, 30% of New Zealand's international tourists were aged 55 years and over.<sup>14</sup>
- New Zealand's largest inbound market is **Australia**.<sup>15</sup> In Australia, 90% of people with disabilities take a holiday each year,<sup>16</sup> and in 2021, one million people with disabilities (19% of the total tourist market) took domestic trips and spent \$13.5 billion (17% of the total tourist revenue).<sup>17</sup> This percentage of national tourist revenue represents a bigger market than China and is predicted to increase to 25% in coming years.<sup>18</sup>
- The proportion of Australians aged 65 years and over will double over the next 40 years, and by 2055, will comprise 25% of the total population.<sup>19</sup> More than 40% of Australian baby boomers will be retiring with some form of disability,<sup>20</sup> and ageing baby boomers hold more than 50% of the country's wealth.<sup>21</sup>
- New Zealand's second largest inbound market is **China**, and over 40% of Chinese visitors to New Zealand are people aged 50 years and over.<sup>22</sup> In 2021, nearly 40% of the total population in China were people aged 65 years and over, and by 2060, this percentage is expected to increase to 38%.<sup>23</sup>

- New Zealand's third largest inbound market is the **United States**.<sup>24</sup> More than one third of US citizens with disabilities have travelled outside of the United States in the past five years, with a median spending of USD 3,000; 8% of these people visited New Zealand. The total tourist expenditure by people with disabilities in the United States was USD 58.7 billion in 2018, up from USD 34.6 billion in 2015.<sup>25</sup>
- The ageing baby boomer generation in the United States hold 60% of net wealth and control 40% of spending.<sup>26</sup>
- New Zealand also has significant inbound tourist markets from **Europe**. The United Kingdom, France, Germany, Italy, and Spain have the largest populations of people with access requirements, all above 10 million.<sup>27</sup> On average, in Europe, people with disabilities travel with 2.2 companions, and seniors with 1.6.<sup>28</sup>
- In the **United Kingdom**, total tourist expenditure by people with disabilities and their travelling companions was approximately £15.3 billion in 2021. Day visitor spending was particularly high for this group at around £11.6 billion (20% of day visits and expenditure). Spending on inbound travel and domestic overnight trips was also higher than the average spending of people without disabilities.<sup>29</sup>

<sup>13</sup> <https://doi.org/10.1108/JTF-04-2015-0013>

<sup>14</sup> <https://www.belab.co.nz/items/the-business-case-for-accessible-tourism>

<sup>15</sup> <https://www.tourismnewzealand.com/insights/markets-overview/>

<sup>16</sup> <https://business.vic.gov.au/business-information/tourism-industry-resources/accessible-tourism>

<sup>17</sup> <https://www.austrade.gov.au/news/insights/insight-the-accessible-tourism-opportunity>

<sup>18</sup> <https://theaccessagency.com.au/accessible-tourism/>

<sup>19</sup> <https://scia.org.au/2023/02/16/an-untapped-3-3-billion-industry/>

<sup>20</sup> [https://teq.queensland.com/au/en/industry/what-we-do/cruise\\_indigenous\\_nature\\_tourism/accessible-tourism#:~:text=The%20Queensland%20Government%20has%20declared,for%20people%20of%20all%20abilities](https://teq.queensland.com/au/en/industry/what-we-do/cruise_indigenous_nature_tourism/accessible-tourism#:~:text=The%20Queensland%20Government%20has%20declared,for%20people%20of%20all%20abilities)

<sup>21</sup> <https://scia.org.au/2023/02/16/an-untapped-3-3-billion-industry/>

<sup>22</sup> <https://www.tourismnewzealand.com/insights/markets-overview/>

<sup>23</sup> <https://www.statista.com/statistics/1149301/japan-share-of-population-aged-65-and-above/#:~:text=In%202021%2C%20people%20aged%2065,population%20in%20Japan%20by%202060>

<sup>24</sup> <https://www.tourismnewzealand.com/insights/markets-overview/>

<sup>25</sup> [https://opendoorsnfp.org/wp-content/uploads/2020/10/2020-Market-Study-Release\\_FNL.pdf](https://opendoorsnfp.org/wp-content/uploads/2020/10/2020-Market-Study-Release_FNL.pdf)

<sup>26</sup> <https://amadeus.com/documents/en/airlines/research-report/voyage-of-discovery.pdf>

<sup>27</sup> <https://webs.uab.cat/arsad/wp-content/uploads/sites/251/2022/10/ARSAD2019-Ambrose-Keynote.pdf>

<sup>28</sup> <https://webs.uab.cat/arsad/wp-content/uploads/sites/251/2022/10/ARSAD2019-Ambrose-Keynote.pdf>

<sup>29</sup> <https://www.visitbritain.org/business-advice/value-purple-pound>

## NEW ZEALAND'S ACCESS TOURIST MARKET

- In New Zealand, more than one million people, or 24% of the total population, live with disability, and 59% of people aged 65 years and over live with disability.<sup>30</sup>
- New Zealand's population is ageing. The number of people aged 65 years and over doubled between 1991 and 2020, to reach 790,000, and this number is projected to double again by 2056. By 2030, it is expected that 19-21% of New Zealanders will be aged 65 years and over, compared to 16% in 2020 (0.79 million). By 2048, this proportion is expected to reach 21-26% (1.36-1.51 million), and by 2073, 24-34% (1.61-2.22 million).<sup>31</sup>
- 83% of people with access requirements regularly engage in domestic travel, contributing to local economies, however, more than half are denied access to tourism businesses because of their inaccessibility.<sup>32</sup>
- To date, there has been little attempt to determine the size and value of New Zealand's potential domestic and international tourist markets of people with access requirements. In 2015, a conservative estimate put the value of New Zealand's domestic tourist market of people with disabilities at \$700 million, but this did not account for seniors and the ageing baby boomer generation.<sup>33</sup>
- [Research has shown that New Zealand has already fallen behind its competitors, in particular, Australia, even though New Zealand is more reliant on tourism as a major invisible export.](#)<sup>34</sup>

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<sup>30</sup> <https://www.stats.govt.nz/information-releases/disability-survey-2013>

<sup>31</sup> <https://www.stats.govt.nz/information-releases/national-population-projections-2020base2073#:~:text=In%202020%2C%2010%20percent%20of,79.1%E2%80%9383.3%20years%20in%202020>

<sup>32</sup> <https://www.belab.co.nz/items/the-business-case-for-accessible-tourism>

<sup>33</sup> <https://www.youtube.com/watch?v=xux0nKY2MQ0&t=10s>

<sup>34</sup> <https://doi.org/10.1016/j.tourman.2019.04.012>

<sup>35</sup> <https://partner.sciencenorway.no/nordland-research-institute/accessibility-issues-cost-the-tourist-industry-billions-in-lost-income/2178696>

## KEY CHARACTERISTICS OF THE ACCESS TOURIST MARKET

- [People with disabilities travel more often and in larger groups, stay longer and spend more money, return to the same destinations, and pass on good experiences through word of mouth to family and friends.](#)<sup>35</sup>
- Tourism businesses that embrace accessibility and inclusion benefit from access to new markets, greater visitor satisfaction, increased revenue, and economic sustainability.<sup>36</sup>
- The tourism industry benefits from added value, increased quality, and differentiation,<sup>37</sup> more visitors, new revenue, and longer seasons, while society benefits from new job opportunities, more tax revenue, and an accessible and inclusive environment for local communities and visitors alike.<sup>38</sup>
- *“You are not sustainable if you are not accessible”* says Ivor Ambrose (Managing Director, European Network for Accessible Tourism).<sup>39</sup> It is about *‘doing the right thing’* and providing a universal visitor experience that operates on the philosophy of welcoming everyone.<sup>40</sup>

<sup>36</sup> <https://www.linkedin.com/pulse/future-accessible-inclusive-tourism-unlocking-potential-dane-cross/>

<sup>37</sup> <https://amadeus.com/documents/en/airlines/research-report/voyage-of-discovery.pdf>

<sup>38</sup> <https://business.vic.gov.au/business-information/tourism-industry-resources/accessible-tourism>

<sup>39</sup> <https://partner.sciencenorway.no/nordland-research-institute/accessibility-issues-cost-the-tourist-industry-billions-in-lost-income/2178696>

<sup>40</sup> <https://theaccessagency.com.au/accessible-tourism/>