

Value of the Accessibility Market

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venture
TARANAKI
Te Puna Umanga

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Introduction

Accessibility has been identified as a key focus area of the Taranaki region's visitor sector and economy. In May 2022, Venture Taranaki commissioned Auckland University of Technology (AUT) to provide a clear understanding of the value of the access market, best practice models, the actions required (based on the current status in Taranaki) to position the region as a leader in the field, and an incorporation of educational initiatives to start the process. The aim of this report is to ensure the tourism industry in the region is ready for the access market through an understanding of the value of the accessibility market, which draws upon available data from New Zealand and abroad.

This report is divided into three sections. In part A, we explore international data on the market potential, highlighting the size and value of the accessible tourism market overseas, as well as important market insights. In part B, we focus on national and regional data, considering patterns of disability and ageing, and determining the potential size and value of the accessible tourism market in New Zealand and to the Taranaki region. In appendix 1, we provide a sheet containing summary information.

Defining accessible tourism

Accessible tourism enables people with access requirements to engage independently and with equity and dignity in tourism. This definition is inclusive of all people, including those travelling with children in prams, seniors, and people with disabilities, as well as the carers and companions who may travel with them¹. Other terms, like barrier-free tourism or inclusive tourism, are sometimes referred to, but accessible tourism subsumes the notion of being both barrier-free and inclusive.

Disability reflects the interaction between features of a person's body and features of the society in which he or she lives². Within an everyday as well as a tourism context, people with disabilities will have various types of impairments (i.e., physical, sensory, intellectual, mental, or other), varying levels of support needs (i.e., independent, low, medium, high, or severe), as well as a variety of motivations and desired experiences.

A note on language

While the use of 'disabled person/people' aligns with the legislative nomenclature of New Zealand, we give preference in this report to 'people with disabilities,' which aligns with the social model of disability and its discourse around person-first language³. In practice, it is ultimately up to the individual in question as to how they wish to be addressed or referred to.

Disclaimer

This report has been prepared for internal use by Venture Taranaki. Statistics presented are based on limited and piecemeal available information. The lack of a systematic methodology for evaluating the accessible tourism market in New Zealand, as well as the often outdated and ad hoc research from overseas, should be recognised as a limitations when reading the report.

1 Darcy, S., & Dickson, T. (2009). A whole-of-life approach to tourism: The case for accessible tourism experiences. *Journal of Hospitality and Tourism Management*, 16(1), 32-44. <https://doi.org/10.1375/jhtm.16.1.32>

2 Office for Disability Issues. (2022). *The new disability strategy*. <https://www.odi.govt.nz/nz-disability-strategy/about-the-strategy/new-zealand-disability-strategy-2016-2026/the-new-disability-strategy-download-in-a-range-of-accessible-formats/>

3 Gillovic, B., McIntosh, A., Darcy, S., & Cockburn-Wooten, C. (2018). Enabling the language of accessible tourism. *Journal of Sustainable Tourism*, 26(4), 615-630. <https://doi.org/10.1080/09669582.20171377209>



Part A: International data on the market potential

Approximately one billion people, or **15% of the world's population**, experience a form of disability which may affect where they decide to stay or visit. Globally, it is estimated that people with disabilities have a spending power of USD1.2+ trillion⁴. Noting the size of the potential market opportunity, accessible tourism is being increasingly seen as an economic opportunity worldwide, and one which destination management organisations, such as those in Britain, Europe and Australia have invested resources into to help visitors with access requirements plan their trips and to access tourism experiences.

The importance of accessible tourism for tourism business recovery and sustainability strategies has also been noted by non-governmental organisations such as the United Nations World Tourism Organisation, World Travel & Tourism Council, International Air Travel Association, Pacific Asia Tourism Association, and Asia Pacific Economic Cooperation. There has also been international collaboration to establish best practice standards for accessible tourism.

The accessible tourism market is loyal, stays longer, spends more than the average visitor, and continues to be seen as a growing market opportunity

Size and value of the accessible tourism market

International data shows that the accessible tourism market is neither niche nor small. The market reflects a sizeable population of people with access requirements, and an ageing but affluent demographic. As such, it is seen as a large market that is set to grow. The following information provides an overview of what is known about the size and value of the accessible tourism market overseas, and the recorded number of people living with disabilities and their characteristics.

The statistics show a compelling business case, noting that the accessible tourism market is loyal, stays longer, spends more than the average visitor, and continues to be seen as a growing market opportunity. International research highlights, in particular, the potential for short breaks and day trips as major growth potential for the accessible tourism market. This is a growth opportunity because, for this market, it's easier for them to get there, and less planning is required if the destination is known; hence, less information searching is needed - overcoming some of the most common barriers, including not knowing what to expect or lack of available accessibility information.

⁴ Return on Disability. (2014). Insights. <http://www.rod-group.com/insights>

Size and value of the accessibility market

Worldwide/Region/Country	Number of people with disabilities	Total value of accessible tourism
Worldwide	1 billion ⁵	Not known
Europe ⁶	80 million	€89 billion
US	61 million ⁷	USD59 billion ⁸
UK	11 million ⁹	£15.3 billion ¹⁰
Australia ¹¹	3.4 million	AUD8 billion
New Zealand	1 million ¹²	NZD700 million ¹³

Australia

Australian visitors with disabilities spend an estimated AUD3.2 billion in Australia. Allowing for an average of 2.5 members of their travel party who accompany them, this total expenditure is said to reflect a wider value of approximately AUD8 billion¹⁴. The accessible tourism market in Australia is found to be larger than the inbound China market.

84% of Australian visitors with disabilities or their carers take an overnight trip away from home. There are a number of Australians who do not currently travel but would like to travel if industry improvements were made. The value of this potential market is AUD735 million, an additional 1% in spend. When travel companions are considered, this increases to AUD1.8 billion, or an additional 2% in spend¹⁵.

UK

In 2018, total tourism expenditure by visitors with disabilities and their travelling companions in the UK was approximately £15.3 billion. Day visitor spending was particularly high for this group at around £11.6 billion (20% of day visits and expenditure). The average spend for this market on inbound travel and domestic overnight trips in the UK was also higher than the average spend for visitors without disabilities¹⁶.

Since 2010, inbound visits by UK visitors with access requirements increased 16% in volume and 42% in value. Growth in visitors requiring a wheelchair (from 2010 to 2018) saw the biggest increase, up 136%¹⁷. A further study by Visit Britain highlighted the potential value of the UK domestic accessible tourism market if accessibility barriers were removed; 430,000 adults with disabilities did not take a domestic trip in the last 12 months because of lack of accessibility provision – if each of these adults took a domestic holiday, the value would be approximately £116.7 million¹⁸.

5 World Health Organization & World Bank. (2011, December 14). *World report on disability. (Full Report)*.

6 Bowtell, J. (2015). *Assessing the value and market attractiveness of the accessible tourism industry in Europe: A focus on major travel and leisure companies. Journal of Tourism Futures*, 1(3), 203-222. <https://doi.org/10.1108/JTF-03-2015-0012>

7 CDC. (2018, August 16). *CDC: 1 in 4 US adults live with a disability*. <https://www.cdc.gov/media/releases/2018/p0816-disability.html>

8 Open Doors Organization. (2020, October 28). *Economic impact of disability travel reaches \$58.7 billion*. https://opendoorsnfp.org/wp-content/uploads/2020/10/2020-Market-Study-Release_FNL.pdf

9 Visit England. (2017). *At your service: Your business case and guide to improving accessibility for customers. (Report)*.

10 Visit Britain/Visit England. (2022). *The value of the purple pound*. <https://www.visitbritain.org/business-advice/value-purple-pound>

11 Tourism Research Australia, Victorian Government, & Tourism and Events Queensland. (2018, January). *Destination visitor survey: Accessible tourism in Victoria and Queensland. (Summary Report)*.

12 Stats NZ. (2014, June 17). *Disability Survey: 2013*. <https://www.stats.govt.nz/information-releases/disability-survey-2013>

13 New Zealand Tourism For All. (2015, November 12). *Take the time – New Zealand tourism for all [Video]*. YouTube <https://www.youtube.com/watch?v=xuxOnKY2MQ0&t=10s>

14 Tourism Research Australia, Victorian Government, & Tourism and Events Queensland. (2018, January). *Destination visitor survey: Accessible tourism in Victoria and Queensland. (Summary Report)*.

15 Childs, C. (2018, January 9). *Understanding the opportunity for Australia in accessible tourism. (Final Report)*. MyTravelResearch.com.

16 Visit Britain/Visit England. (2022). *The value of the purple pound*. <https://www.visitbritain.org/business-advice/value-purple-pound>

17 Visit Britain. (2020, August). *Inbound visitors to the UK with a health condition or impairment. (Foresight – Issue 171)*.

18 Visit England. (2018, May). *Accessibility – non-participation. (Report)*.

USA

In the USA, the total tourism expenditure by US visitors with disabilities in 2018 was USD58.7 billion, up from USD34.6 billion in 2015. In 2018, 27 million US visitors with disabilities took 81 million trips with 59% of US adults with disabilities taking at least one night away from home, amounting to 23 million visitors taking 68.7 million hotel-based trips, spending on average USD100 per night on accommodation. More than one third of visitors with disabilities in the USA have travelled outside of the USA in the past five years, with a median spending of USD3000; 8% of these said they had visited New Zealand. The vast majority of US visitors with disabilities (91%) plan to travel again once covid restrictions have been lifted¹⁹.

Important accessibility market insights

ACCESSIBLE INFORMATION IS CRUCIAL

International research highlights the importance of tourism businesses having accurate, up-to-date information about accessibility, particularly on their website, to attract the accessible tourism market. A UK study showed that 70% of people with access requirements will click away from an inaccessible site²⁰. Similarly, 40% of domestic visitors with disabilities in Australia said that 'not knowing what to expect' was the main barrier to travel, requiring more information to plan their travel²¹. Information portals at the destination level are also crucial to attracting this market.

For this market, previous experience and friends and family are still the most important sources of travel information about trip accessibility, but research in the USA shows that websites and apps are now used by half (55% in 2020) when booking a trip. This proportion is said to be higher than the general population²². Having accessible website information is thus important to the accessible tourism market.

Operators who do not cater to visitors with disabilities may lose the business of, on average, 2 to 4 people in total



A LOYAL VALUABLE MARKET

Visitors with disabilities are known to be a loyal customer market, returning to venues and experiences that support their requirements. They also are generally found to stay longer, spend more and travel in larger groups (on average 2.5 people)²³. If operators therefore do not cater to visitors with disabilities, they may lose the business of, on average, two to four people in total²⁴. That said, it should be noted that, research in Australia, found that one quarter to one third of domestic visitors with access requirements travel alone²⁵.

Research from Visit England shows that tourism operators who provide accessibility provision notice increased customer satisfaction (61% of operators), and 53% noticed repeat business. Other benefits include better engagement with customers, increased turnover and better reputation²⁶.

The accessibility market is also known to make longer trips. Research by VisitBritain shows that the average length of stay per inbound visit by UK visitors with disabilities and their companions was 11.6 nights, compared to 7.3 nights for all trips. The average length of stay per domestic overnight trips was 3.3 nights for those visitors with disabilities and their companions, compared to 2.9 nights for all trips²⁷.

19 Open Doors Organization. (2020, October 28). Economic impact of disability travel reaches \$58.7 billion. https://opendoorsnfp.org/wp-content/uploads/2020/10/2020-Market-Study-Release_FNL.pdf

20 APEC Tourism Working Group. (2022, April). Tourism access and inclusion: Best practice guidelines for tourism MSMEs in APEC. (Report).

21 Childs, C. (2018, January 9). Understanding the opportunity for Australia in accessible tourism. (Final Report). MyTravelResearch.com

22 Open Door Organization. (2020). The 2020 Market Study. (Report).

23 Tourism Research Australia, Victorian Government, & Tourism and Events Queensland. (2018, January). Destination visitor survey: Accessible tourism in Victoria and Queensland. (Summary Report).

24 APEC Tourism Working Group. (2022, April). Tourism access and inclusion: Best practice guidelines for tourism MSMEs in APEC. (Report).

25 Childs, C. (2018, January 9). Understanding the opportunity for Australia in accessible tourism. (Final Report). MyTravelResearch.com

26 Visit England, Visit Scotland, Visit Wales. (2015, December). National Survey on Accessibility Provision 2015. (Report). Strategic Marketing.

27 Visit Britain/Visit England. (2022). The value of the purple pound. <https://www.visitbritain.org/business-advice/value-purple-pound>



A study in Australia also showed the visitor with access requirements to be a frequent traveller, taking an average of four domestic overnight trips in the previous 12 months, and 6 trips over a two-year period²⁸.

ACCESS REQUIREMENTS ARE INCREASING AS POPULATIONS AGE

International research shows a clear correlation between age and a visitor reporting an access requirement; specifically, a greater proportion of visitors with access requirements are aged 65 years and above. Research by Visit Britain shows that 39% of inbound visits to the UK are made by UK visitors with disabilities and their travel companions aged over 65 years, compared to 7% of all inbound visits. Similarly, 35% of all domestic overnight trips in the UK are made by visitors with disabilities and their travel companions aged over 65 years, compared to 16% of all domestic overnight trips. The most prevalent impairments among this group were mobility (but not requiring wheelchair use), deafness/partial hearing loss and having a long-term illness²⁹.

A study on Accessible Tourism in Australia also highlighted mobility issues as the most prevalent type of access requirement. The study also illustrated the diversity of access requirements with many visitors having multiple challenges. For example, 24% of people with a mobility issue also had difficulty with memory, learning or understanding, while 13% had a hearing difficulty. Hidden disabilities also require consideration³⁰.

As the world's population ages, accessibility is not just for people with disabilities, but for all of us.

CHARACTERISTICS

The accessible tourism market is generally found to share similar characteristics as the wider visitor population in terms of motivation, activities and accommodation types. The top two things visitors with access requirements in Australia wished for to improve travel were: deals and offers for those travelling with a carer (43%) and more accessibility information (41%)³¹.

Accessibility is not just for people with disabilities, but for all of us.

28 Childs, C. (2018, January 9). *Understanding the opportunity for Australia in accessible tourism. (Final Report).* MyTravelResearch.com
29 Visit Britain/Visit England. (2022). *The value of the purple pound.* <https://www.visitbritain.org/business-advice/value-purple-pound>
30 Childs, C. (2018, January 9). *Understanding the opportunity for Australia in accessible tourism. (Final Report).* MyTravelResearch.com
31 Childs, C. (2018, January 9). *Understanding the opportunity for Australia in accessible tourism. (Final Report).* MyTravelResearch.com

Part B: The accessibility market in New Zealand

The accessibility market in New Zealand can be understood through a focus on data about people living with disability in New Zealand, as well as the ageing nature of the population, and approximations of the size and value of the accessible tourism market. Our review of available data revealed a dearth of up-to-date or available data to inform an exact understanding of the accessibility market in New Zealand, noting in particular, the lack of a systematic methodology to measure the size and value of New Zealand's accessible tourism market. We therefore provide, in appendix 1 below, an example of an accessible tourism module that could be implemented to measure the size and value of New Zealand's accessible tourism market.

Disability and ageing in New Zealand

There are over one million people, 24% of the population, or roughly **one in four people who identify as living with disability** in New Zealand. More than half (53%) of all New Zealanders who identify as living with disability have more than one impairment. For people with disabilities, physical impairments were most common (64%), followed by hearing impairment (34.5%) and vision impairment (15%)³².

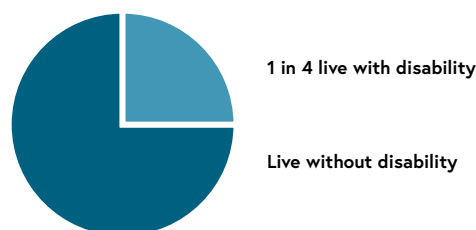
Disability and age are closely correlated; people aged 65 years and over are much more likely to identify as living with disability (59%). This is significant because **New Zealand's population is ageing**. The number of people aged 65 years and over doubled between 1991 and 2020, to reach 790,000, and 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)³³.

Taranaki has one of the highest average rates of disability (30%) compared to the national average

The Taranaki region has one of the highest average rates of disability (30%) compared to the national average. In 2013, there were approximately 36,000 people who identified as living with disability in the Taranaki region. All three districts – New Plymouth, South Taranaki, and Stratford – all exhibited a higher prevalence of all age groups living with disability compared to the total number in New Zealand. With a population of approximately 126,400 people, or 2.4% of New Zealand's population, of which nearly 25,000 (20%) are aged 65 years and over, and 37,500 (30%) are limited in their daily lives by long-term impairment, the Taranaki region has a greater accessibility market compared to other regions³⁴. This has implications for tourism too in the region.

We Create Futures identifies two key visitor profiles as future focal points for the region. These are the 'intergenerational group' and 'elderly couples,' which reinforce the need to focus on age and accessible tourism experiences³⁵. As visitors to the Taranaki region are predominantly domestic (80%), the prevalence of disability and ageing among the New Zealand population must be considered for this market³⁶.

Disability in New Zealand



32 Stats NZ. (2014, June 17). Disability Survey: 2013. <https://www.stats.govt.nz/information-releases/disability-survey-2013>

33 Stats NZ. (2020, December 8). National population projections: 2020(base)–2073. <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%202073>

34 Venture Taranaki. (2022). Taranaki trends winter 2022 (Taranaki Facts & Figures report).

35 We Create Futures. (2021, July). Designing the visitor futures of Taranaki (Report for Venture Taranaki).

36 Venture Taranaki. (2022). Annual report 2021 (Annual report).



Accessibility market spend potential

For the June 2021 quarter, it was reaffirmed that adults with disabilities (aged between 15 and 64 years) are more likely to have lower incomes than people without disabilities. Adults with disabilities median weekly income was \$962, compared with \$1,106 for adults without disabilities (a \$144 difference per week). Adults with disabilities are more than twice as likely to be unemployed as adults without disabilities; 42.5% of adults with disabilities are in employment compared to 80% of adults without disabilities. Adults with disabilities are also more likely to be in part-time work (28.7%) than adults without disabilities (18.5%)³⁷.

That said, as many as **83% of New Zealanders with disabilities and other access requirements regularly engage in domestic travel**³⁸.

The Taranaki region attracts around one million visitors per annum, and visitors stay for an average of two guest nights each³⁹. Visitor spend for the year ending June 2021 was \$253 million (up 18.6% from the year before)⁴⁰. Prior to the pandemic, however, visitor spend for the year ending March 2020 was \$428 million⁴¹. There is a need therefore to closely consider the Taranaki region's accessible tourism market potential in light of current regional demographics and future focal points.

Size and value of the accessible tourism market in New Zealand

If New Zealand, and in this case, the Taranaki region, are to become accessible tourist destinations, then there must be recognition and appreciation of the market's current and future potential importance. To date, there has been little attempt to determine the size and value of New Zealand's domestic and international access markets, nor their travel needs, motivations and behaviours⁴². This is despite acknowledgement that this market is potentially large and growing, given that both New Zealand's domestic market and major inbound markets are ageing⁴³.

There are limitations in estimating the potential size and value of New Zealand's domestic and international accessible tourism markets due to the lack of relevant disability and travel-related data⁴⁴. Of note, the next Disability Survey is not expected to run until 2023, the Domestic Travel Survey has not run since 2012 (only 2008 results were published), and the International Visitor Survey does not include a disability variable.

In 2015, a conservative estimate showed **the value of New Zealand's domestic accessible tourism market is \$700 million**⁴⁵.

37 Stats NZ. (2021, August 18). *Less than half of disabled people under the age of 65 are working*. <https://www.stats.govt.nz/news/less-than-half-of-disabled-people-under-the-age-of-65-are-working/#:~:text=Disabled%20people%20also%20tended%20to,difference%20of%20%24144%20per%20week>.

38 Be. Institute Charitable Trust. (2019). *The business case for accessible tourism*. <https://www.belab.co.nz/items/the-business-case-for-accessible-tourism>

39 Infometrics. (2021). *Regional economic profile: Taranaki region*. <https://ecoprofile.infometrics.co.nz/Taranaki%2bRegion/Tourism/TourismGdp>

40 Venture Taranaki. (2022). *Annual report 2021 (Annual report)*.

41 Infometrics. (2021). *Regional economic profile: Taranaki region*. <https://ecoprofile.infometrics.co.nz/Taranaki%2bRegion/Tourism/TourismGdp>

42 Rhodda, S. (2012). *Accessible tourism in New Zealand*. In D. Buhalis, S. Darcy, & I. Ambrose (Eds.), *Best practice in accessible tourism: Inclusion, disability, ageing population and tourism* (pp. 114-123). Channel View Publications.

43 Gillovic, B., & McIntosh, A. (2015). *Stakeholder perspectives of the future of accessible tourism in New Zealand*. *Journal of Tourism Futures*, 1(3), 223-239. <https://doi.org/10.1108/JTF-04-2015-0013>

44 Rhodda, S. (2012). *Accessible tourism in New Zealand*. In D. Buhalis, S. Darcy, & I. Ambrose (Eds.), *Best practice in accessible tourism: Inclusion, disability, ageing population and tourism* (pp. 114-123). Channel View Publications.

45 *New Zealand Tourism For All*. (2015, November 12). *Take the time – New Zealand tourism for all [Video]*. YouTube. Retrieved from <https://www.youtube.com/watch?v=xuX0nKY2MQ0&t=10s>

Whether organisations realise it or not, by 2030, we are going to have one quarter of the population over 65, of which we know at least 50% will have at least one impairment. It's inevitable that if you're not thinking about accessibility, then somebody else is going to. There is actually a real opportunity to be competitive and differentiate yourself. Right now, we are starting to get the leaders in this space, the ones that are realising its important and good for business. Then there are other people maybe ignoring it. I think it is something that eventually, everybody, organisation and business will have to do. It's just the reality of the way the worlds going, the way the population is going." (Social Change Organisation in New Zealand)⁴³

More recently, it has been suggested that as many as 83% of New Zealanders with disabilities and other access requirements regularly engage in domestic travel. While we are not aware of comparable figures for the international market, pre-pandemic, 30% of international arrivals were aged 55 years and over, suggesting the potential for a higher prevalence of accessibility needs⁴⁶.

Few academic studies on accessible tourism in New Zealand exist. In a study examining stakeholder perspectives of the future of accessible tourism in New Zealand, tourism stakeholders argued that a strong business proposition supports accessibility. The business benefits of providing accessibility included: a value-added, diversified product offering; enhanced brand and reputation; empowered staff and customers; competitive advantage; increased revenue potential; business longevity and long-term sustainability⁴⁷.

Potential value of the accessible tourism market in the Taranaki region

Assuming 83% of New Zealanders with disabilities and other access requirements regularly engage in domestic travel⁴⁸, a crude estimate for the Taranaki region shows the **total value of the domestic accessible tourism market is as high as \$47 million, and up to \$117 million** (46% of total visitor spend in the region), taking into account the multiplier effect of their travel party.

46 Be. Institute Charitable Trust. (2019). *The business case for accessible tourism*. <https://www.belab.co.nz/items/the-business-case-for-accessible-tourism>

47 Gillovic, B., & McIntosh, A. (2015). *Stakeholder perspectives of the future of accessible tourism in New Zealand*. *Journal of Tourism Futures*, 1(3), 223-239. <https://doi.org/10.1108/JTF-04-2015-0013>

48 Be. Institute Charitable Trust. (2019). *The business case for accessible tourism*. <https://www.belab.co.nz/items/the-business-case-for-accessible-tourism>



ESTIMATED VALUE OF THE ACCESSIBLE TOURISM MARKET TO THE TARANAKI REGION

Number of domestic visitors with disability visiting Taranaki	Average spend per visitor	Multiplier to account for travel companions	Total spend
105,600 (55%) ⁴⁹	x \$294	x 2.2 ⁵⁰	\$68,302,080
159,360 (83%) ⁵¹	x \$294	x 2.5 ⁵²	\$117,129,600

This calculation is based on the following data and assumptions:

- 800,000 domestic visitors visiting the Taranaki region⁵³.
- 24% of New Zealanders live with disability (192,000 potential visitors with disabilities in the region)⁵⁴.
- Assume at the low end, 55% of New Zealanders with disabilities travel⁵⁵, or at the high end, 83%⁵⁶, meaning anywhere between 105,600 and 159,360 estimated potential domestic visitors with disabilities to the Taranaki region.
- \$235 million total domestic visitor spend in the region⁵⁷, divided by 800,000 total domestic visitors, means \$294 average spend per visitor.
- This means spend by the domestic visitor with access requirements is anywhere between, at the low end, \$294 x 105,600 = \$31,046,400, and at the high end, \$293 x 159,360 = \$46,851,840.
- With a multiplier effect to account for travel party size of, at the low end, 2.2⁵⁸ x \$31,046,400 = \$68,302,080 (27% of total visitor spend), or at the high end, 2.5⁵⁹ x \$46,851,840 = \$117,129,600 (46% of total visitor spend).

49 Stats NZ. (2014, June 17). Disability Survey: 2013. <https://www.stats.govt.nz/information-releases/disability-survey-2013>

50 Tourism Research Australia, Victorian Government, & Tourism and Events Queensland. (2018, January). Destination visitor survey: Accessible tourism in Victoria and Queensland. (Summary Report).

51 Be. Institute Charitable Trust. (2019). The business case for accessible tourism. <https://www.belab.co.nz/items/the-business-case-for-accessible-tourism>

52 Tourism Research Australia, Victorian Government, & Tourism and Events Queensland. (2018, January). Destination visitor survey: Accessible tourism in Victoria and Queensland. (Summary Report).

53 Venture Taranaki. (2022). Annual report 2021 (Annual report).

54 Stats NZ. (2014, June 17). Disability Survey: 2013. <https://www.stats.govt.nz/information-releases/disability-survey-2013>

55 Stats NZ. (2014, June 17). Disability Survey: 2013. <https://www.stats.govt.nz/information-releases/disability-survey-2013>

56 Be. Institute Charitable Trust. (2019). The business case for accessible tourism. <https://www.belab.co.nz/items/the-business-case-for-accessible-tourism>

57 Ministry of Business, Innovation & Employment. (2022). Data download for Tourism Electronic Card Transactions. <https://www.mbie.govt.nz/immigration-and-tourism/tourism-research-and-data/tourism-data-releases/tourism-electronic-card-transactions/data-download/>

58 Tourism Research Australia, Victorian Government, & Tourism and Events Queensland. (2018, January). Destination visitor survey: Accessible tourism in Victoria and Queensland. (Summary Report).

59 Tourism Research Australia, Victorian Government, & Tourism and Events Queensland. (2018, January). Destination visitor survey: Accessible tourism in Victoria and Queensland. (Summary Report).

Appendix 1 – Summary information sheet

A growing tourism market

Accessible tourism is not a niche market, nor just about disability – it unlocks older people and young families, and better customer service for everyone

Domestic visitors with disabilities and their companions contribute

46%

of total tourism spend in the region

Average travel group size is

2.5 people

– multiplier effect means larger travel parties¹⁴

A growing market of

loyal customers

who stay longer and spend more than the average visitor²³

1 IN 4 KIWIS LIVE WITH DISABILITY¹²

83%

of people with disabilities take a domestic holiday every year³⁸

59%

of people aged 65 years+ have a disability; the number of over 65s is projected to keep doubling³³

70%

of customers with accessibility requirements click away from websites that are inaccessible²⁰

INTERNATIONAL VISITORS WITH DISABILITIES

Globally there are

1.3 billion

people with disability with a spending ability of USD1.2+ trillion⁴

AUD8 billion

was spent by people with disabilities on travel in Australia¹¹

People with disability who do not travel, but want to, could contribute an

additional 2%

in spend if industry improvements are made¹⁵

"This is money, this is a source of income, this is a source of repeat clients, this is a source of referral clients, and we need to look after them" (New Zealand Travel Broker)⁴³

ABOUT VENTURE TARANAKI

Venture Taranaki is the regional development agency for Taranaki. The organisation is responsible for regional development strategy, enterprise and sector development, investment and people attraction, and major project initiatives which contribute to the inclusive and sustainable growth of the region. Venture Taranaki is a registered charitable trust and a New Plymouth District Council Controlled Organisation, supported by the three District Councils of the Taranaki region.

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