

Capitalising on the Grey-haired Globetrotters

Economic Aspects of Increasing Tourism
among Older and Disabled People

11

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CONTENTS

1. Executive summary
2. Introduction
3. Facts and Trends
 - 3.1 Ageing populations and travel trends
 - 3.2 Spending power
 - 3.3 Understanding older people
 - 3.4 The link between age and loss of mobility
4. The wider market
 - 4.1 The case for accessibility
 - 4.2 The impact on tourism demand and revenue
 - 4.3 The impact on tourism jobs
5. Harnessing the power of accessible tourism
 - 5.1 Joining up the supply chain
 - 5.2 Design for All
 - 5.3 The accessibility springboard
6. Thoughts for the future

EXECUTIVE SUMMARY

The global demographic trends are well known and well established. The numbers of older people are increasing across the world as the ageing post-war generation moves into retirement.

There is also a growing body of evidence that many of the current generation of older people are keen and frequent travellers. For the tourism industry this is both a challenge and an opportunity.

The challenge is that the majority of older people rate comfort and ease of travel highly and that their choice of destination will be determined both by the ease with which they can arrive and leave and the convenience with which they can move around the resort or city at their destination.

A further challenge is that, while many people retain good health and mobility into old age, there is a strong correlation between age and disability. This means that the tourist industry needs to provide services and facilities to meet their needs.

The opportunity is that many older people have disposable incomes that they are willing to spend on travel and tourism. They also bring the added benefit to tourist providers that they will often prefer to travel off season so generating welcome business at times that are otherwise economically difficult.

There is also a major opportunity in the scale of the market. In addition to older people, there is a very significant population of people with disabilities, across the age spectrum, for whom accessibility will be a determining factor in making holiday choices. And of course, like other tourists, older people and people with disabilities will generally travel with friends or family so the multiplier effect benefits those who can meet the needs of the whole party.

Both governments and tourism providers are increasingly recognising that this is no longer a specialist or niche market but a major business opportunity. There remains, however, little evidence that the recognition is yet being turned into investment in improving the accessibility of airports, train or bus stations or transport services.

The exception is where major sporting events, like the Olympic and Paralympic games, provide a major impetus for investment in accessibility which not only benefits those attending that one event but also provides a strong and sustainable legacy for the people of the city or region.

The concept of Universal Design, which focusses on the need for products, services and environments which are intuitive and stress free for everyone

provides a strong basis for the accessible tourism market. It has the added benefit that the same simplicity of approach benefits all tourists who are unfamiliar with the environments, systems or language of the place they are visiting.

Capitalising on the grey-haired globetrotters, through investment in making every aspect of the travel chain stress free and accessible can not only generate significant tourism revenues and job opportunities but can also benefit local populations of older and disabled people and increase opportunities for independent living.

CAPITALISING ON THE GREY HAIREG GLOBETROTTERS

2. Introduction

This paper explores the impact of demographic trends on the market for tourism and considers how the economic power of older tourists is being – or could be – harnessed to maximise the potential both for visitors and domestic populations.

The paper also suggests strategies to capitalise more effectively on this significant and growing market for the benefit, not only of the tourism market but also for domestic populations.

3. Facts and Trends

3.1 Ageing populations and travel trends

"Between 2000 and 2050, the proportion of the world's population over 60 years will double from about 11% to 22%. The absolute number of people aged 60 years and over is expected to increase from 605 million to 2 billion over the same period. In parallel the "oldest old", those aged over 80, will have almost quadrupled in number to 395 million."

World Health Organisation (WHO)

As the WHO makes clear the number of older people in our populations will continue to rise over the coming years¹. They also note that low- and middle-income countries will experience the most rapid and dramatic demographic change.

While it took more than 100 years for the share of France's population aged 65 or older to double from 7% to 14%, it will take countries like Brazil and China less than 25 years to reach the same growth.

These growth trends have indeed been reflected in travel patterns for some years now. A 2009 publication on outbound travel by New Zealand residents² indicated that the age group which had shown the fastest rate of growth over the previous ten years was those aged 60-69 years (up 131%). This was followed by those aged 70 years or older (up 81%).

¹ World Health Organisation, Facts about Ageing (2014)

² Ministry of Business, Innovation and Employment (NZ): Outbound travel by New Zealand Residents (2009)

Data from Canada shows similar current trends. According to Industry Canada³ forecasts for the Canadian tourism sector, total arrivals in Canada by all modes of transportation are expected to increase by 21% between 2010 and 2020, while travel by seniors (those 65 and over) during the same period is expected to increase by 45%—an increase from 19% to 23% of the total number of travellers entering Canada.

Recent evidence from a leading European air carrier confirms this trend. They have seen a 70% increase in passengers aged 65 and above over the past five years.

All of these data sources point to the same inescapable fact: there will be more and more older people in the world over the coming years and many of them want to travel and have the means to do so.

Failure to recognise this fact will trigger very significant economic and social problems. Enabling older people to remain independent and self-sufficient for as long as possible is crucial to minimising the additional burden on health and welfare services.

By contrast, in the context of tourism, the growing population of older people offers a significant economic opportunity for those who are ready to recognise it and to understand how to rise to the challenge of meeting it.

3.2 Spending power

"... boomers will have significant amounts of time and money at their disposal. For many, travel is a high priority and is likely to top their list of desired retirement activities."

Deloitte Hospitality 2015

The baby boomer generation (those born in the 1950s and 1960s) will have more disposable income than previous retired generations. According to a Deloitte report⁴, US boomers are reported to own 60% of the nation's wealth and to account for 40% of spending.

This same point was made in a 2012 Communication on Tourism from the European Commission⁵:

³ Transport Canada, Outlook, Trends and Future Issues (2011)

⁴ Hospitality 2015: Game Changers or Spectators ,Deloitte (2014)

⁵ Eurostat, Statistics in Focus (Eurostat 43/2012) (2012)

*"... the number of persons aged over 65 is expected to reach 20 % of the population in 2020. This population group, consisting of individuals with both purchasing power and leisure time, represents significant market potential **but also requires changes in the sector to meet its particular needs.***

As the Communication sets out, older people are often *"individuals with both purchasing power and leisure time."*

Similar patterns emerge across the world. In New Zealand for example, the over 50s are responsible for purchasing, among other products:

- 45% of all new cars sold, and 80% of top end cars
- 35% of total travel and 80% of all cruise bookings

In addition, they have an intangible influence on both younger and older family member purchasing decisions.

At a time when, in many countries, working age people are still affected by the economic downturn and will be cutting back on leisure travel and tourism, the relative importance of the baby boomers as prime tourism consumers is increasing.

3.3 Understanding older people

"The key to attracting boomers is appealing to their "forever young" attitude and desire for experiential travel."

Deloitte Hospitality 2015

The mistake that is often made by those planning or offering facilities or services to older people is, first to think of them as a homogeneous group and, second, to assume that they will be like previous generations of older people.

Many of the current ageing generation – the baby boomers - think of themselves, as Deloitte puts it, as "forever young". One has only to look at the numerous examples of ageing rock bands: the Rolling Stones generation, to see this phenomenon in action!

Linking that with greater disposable incomes than many in previous generations enjoyed, we start to see a generation which is up for everything from scuba diving to hang gliding – as well as exploring every corner of the world.

As Travel Weekly Asia has observed:

"The typical tourist in Asia used to be a young backpacker in need of a shower, but these days there are just as many older and retired people roaming the continent seeking its secrets".

For those thinking about attracting this market, it is essential not to make assumptions about what "older people" want to do. Many will have the opportunity and money for the first time in their lives to see the world and expand their horizons.

3.4 The link between age and loss of mobility

"It is extremely likely that a larger proportion of customers will need some form of assistance in the years ahead, not just 'step free access', but facilities and attitudes that aid independently minded older customers with mobility, eyesight or hearing difficulties to travel independently."

Overseas Visitors to Britain: Understanding Trends, Attitudes and Characteristics

While many older people now retain good health and active lifestyles for many years, there is also a strong correlation between age and disability, or loss of mobility. It is estimated that about two thirds of disabled people are over pension age and that one third of older people have some form of disability.

Many older people experience some loss of visual acuity, some degree of hearing loss, reduced strength and agility in their hands and a loss of stamina that affects their ability to walk long distances.

Loss of short term memory and more acute forms of dementia are also increasing and highlight the need for stress free environments.

All of these factors can affect the confidence with which people travel and so their choice of where and how to travel.

The clear message here, re-inforced in the statement above from Visit Britain⁶ is that to meet the needs of the older tourism market, there must be investment and care in ensuring that every aspect of the tourist offer will tick the boxes that matter to older people in terms of ease of use, comfort and confidence.

⁶ Overseas Visitors to Britain: Understanding Trends, Attitudes and Characteristics (2010)

4. The wider market

4.1 The case for accessibility

"By now, the tourism industry will recognize that people with disabilities have equal rights to tourism services and opportunities: independent travel, accessible facilities, trained staff, reliable information and inclusive marketing.

As the demand for accessible tourism for all is growing, it is now seen as an opportunity rather than an obligation."

UNWTO Recommendations on Accessible Tourism

As UNWTO recognise⁷, in addition to the large and growing numbers of older people in our populations, there are, of course, many people with disabilities across the age spectrum who are actual or potential tourists and who will take their spending money to the places that meet their needs.

And of course, like most other tourists, people with disabilities are generally part of a family or other social group when they go on holiday, so accessibility affects the travel and destination choices of a much greater number of people.

According to Travability⁸, an Australian NGO, research data on the Australian market for accessible tourism found that:

- Some 88% of people with disability in Australia take a holiday each year; that accounts for some 8.2 million overnight trips.
- The average travel group size for people with a disability is 2.8 people for a domestic overnight trip and 3.4 for a day trip.
- The total tourism expenditure attributable to the group is \$8bn AUS per year or 11% of overall tourism expenditure.
- The \$8 billion AUS is expenditure by people with a disability only. If expenditure by people travelling in the group is factored in, it is \$24 billion AUS or 30% of the total tourism market.

A 2012 analysis⁹ of the potential revenue that could be generated by European tourists with accessibility needs produced an estimated spend per person, per

⁷ World Tourism Organization, Recommendations on Accessible Tourism, UNWTO, Madrid (2013),

⁸ Travability, Occasional Paper No. 4. An Economic Model of Disability (2011)

⁹ Alén, E. Domínguez, T and Losada, N New Opportunities for the Tourism Market: Senior Tourism and Accessible Tourism, Visions for Global Tourism Industry - Creating and Sustaining Competitive Strategies, (2012).

vacation of 620 €. The report also made the point that many of us do not travel alone on holiday and so there is an additional multiplier effect of friends and family travelling with the disabled person.

This indicates very clearly that the potential market for tourism that meets the needs of people with reduced mobility is not – as has so often been assumed – a narrow and specialist one. It is, on the contrary, a major growth area in tourism and with the multiplier effect of friends and family becomes a very significant sector. The potential scale of the demand in Europe alone lies between 83 billion € and 166 billion €.

4.2. The impact on tourism demand and revenue

"Due to the ageing population in industrialized countries, the rate of disability among people with the capacity to travel is increasing, adding to the demand for an accessible environment, transport and services - which adds to the market value of the accessible tourism segment. "

UNWTO

A 2013 report to the European Commission¹⁰ points out that older tourists are less likely to be affected by economic crises than younger people of working age.

Between 2006 and 2011, when the tourism market in Europe was hit by the economic downturn, the 65 plus age group contributed significantly to the sector's survival. In that period there was an overall drop in all age groups except for the over 65s whose numbers increased by 10% over their level in 2006.

Estimates of the potential revenue that could be generated from better accessibility vary considerably. However, by way of illustration, the European Commission funded report cited above estimates that the European tourism sector is missing out on up to 142 billion € every year due to poor infrastructure, services and attitudes towards travellers with access needs.

The research found that travellers within the EU who needed accessible facilities and services (whether through disability or age) made 783 million trips in 2012 within Europe, contributing 394 billion €.

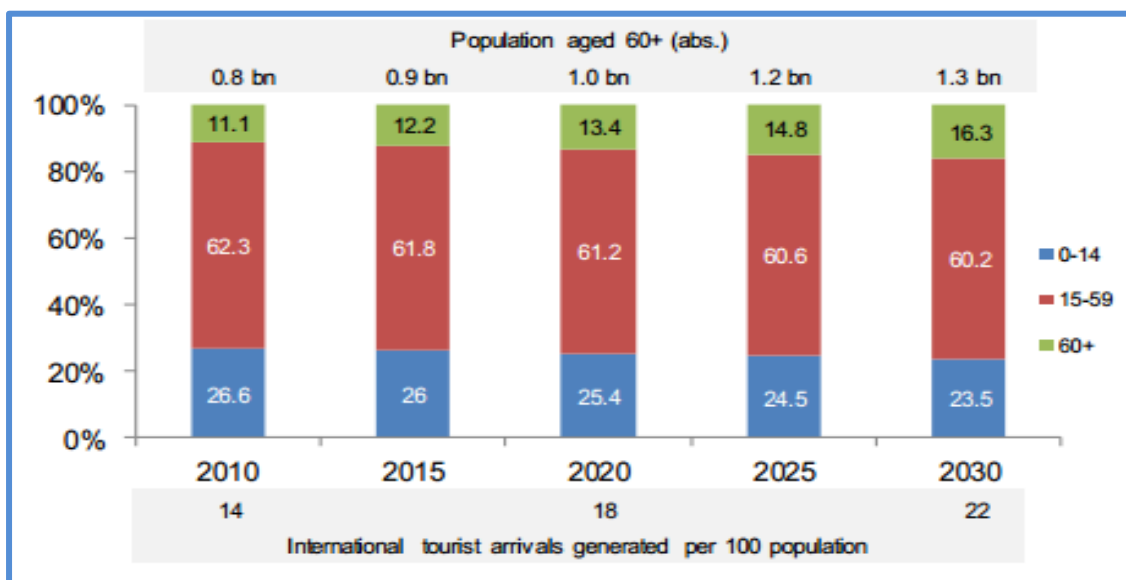
¹⁰ Economic impact and travel patterns of accessible tourism in Europe – final report ,Service Contract SI2.ACPROCE052481700 – European Commission, DG Enterprise & Industry

The report goes on to suggest that if European destinations were fully accessible, this demand could increase by 44% a year, which would lead to an additional 142 million € GDP.

Different studies and reports produce slightly different estimates of the likely future impact of the demographic trends and wider accessibility market, but all show the same very clear direction of travel.

Figure 1 below shows the world population by age group and international tourist arrivals per 100 population (based on data from UNDESA and UNWTO) and shows a 50% growth in tourism among people aged over 60 by 2020.

Figure 1: World population by age group and international tourist arrivals per 100 population



In summary, this is a strengthening and resilient market.

4. 3. The impact on tourism jobs

"The market for mature tourists provides a good example of an opportunity for New Zealand, both domestically and internationally. A tourism industry that responds to the changing demands of baby boomers over 65 could have spin-off effects for other industries and stimulate regional economic growth."

The Business of Ageing: realising the economic potential of older people in New Zealand 2011 - 2051

This report commissioned by the New Zealand Ministry of Social Development and the Office for Senior Citizens¹¹ identifies tourism among older people as a key growth area.

A study commissioned by the German Federal Government in 2009¹² notes that as well as impacting on tourism demand, the changing demographics also have an indirect impact both on jobs within the tourism industry and on the infrastructure and services that tourists need (including transport).

The European Commission report (already cited) estimates that trips taken by tourists with access needs generated 8.7 million jobs to the European economy. The report also makes the projection that its destinations were fully accessible a further 3.4 million jobs would be generated for the European economy.

There is growing recognition in the tourism industry that older people are more likely to be low season tourists and so to boost revenues at otherwise unprofitable times of the year for many. Malta¹³, for example, has noted that:

"People with access needs mostly do not travel alone and are big spenders. If more tourists visit Malta in the low season, it means that we are accessing tourism potential... The effect of increased low season tourism will help create jobs indirectly elsewhere in the economy as well."

Accessible transport infrastructure and vehicles and well trained staff will all play a major part in the attractiveness of a destination.

A report in 2010 from the Barbados Council for Disabled People to the Caribbean Tourism Organisation¹⁴ said:

"Collectively 75% of Canadians, Americans and Europeans with disabilities who are physically and financially able to travel do so with their care givers, family and friends. The current economic climate dictates that we target this emerging market."

¹¹ The Business of Ageing: realising the economic potential of older people in New Zealand 2011 – 2051, Ministry of Social Development (2011)

¹² The impact of demographic change on tourism and conclusions for tourism policy Federal Ministry of Economic and Technology, Germany (2009)

¹³ Accessible Culture for All project <http://www.accessibletourismmalta.eu/>

¹⁴ Accessible Tourism: Presented to the Caribbean Tourism Organization (CTO) by Barbados Senate Vice President and Research Project Officer of the Barbados Council for the Disabled (BCD), Sen. Kerryann Ifill, (2010)

As a result, Barbados has launched a “Fully Accessible Barbados” campaign to realise the full potential of accessible tourism and it is being seen as the catalyst that creates the new norm for accessible destinations in the Caribbean.

In summary, the flexibility of older tourists in terms of the time of year they travel and the time they spend at their destination, have a significant impact on the ability of tourist resorts and cities to retain staff through the low season and to continue to operate at a viable level throughout the year.

5. Harnessing the power of accessible tourism

5.1 Joining up the supply chain

“The overall experience of people with disabilities demonstrates that the accessibility and reliability of transport is the facilitating link among tourism industry sectors (transport – accommodation – attractions – hospitality – intermediaries)”.

Barrier-free tourism for people with disabilities in the Asian and Pacific Region, United Nations

This report from the United Nations¹⁵, looking at tourism opportunities in the Asia and Pacific regions, highlights the importance of accessible transport and transport related infrastructure to the ability and willingness of people with mobility difficulties to choose a particular tourism destination.

The report also notes that:

“Countries with a high degree of transport infrastructure such as Australia, New Zealand, Singapore and Japan have an established barrier-free tourism industry. Accessible transport embraces all elements in the transport equation from arrival to long and short haul transport.”

The statistics and trends outlined above make it clear that any country, region or city interested in promoting itself as a tourist destination, needs first to understand the changing nature of tourism and to recognise that to capitalise on these growing markets will take more than 5 star hotels, great beaches or historic city centres.

The choice which older and disabled tourists make of holiday destination will be influenced much more strongly than other age groups by concern for the total accessibility of the trip from the airport of departure to the hotel at the destination as well as ease of getting around the destination, city or resort.

¹⁵ Barrier-free tourism for people with disabilities in the Asian and Pacific region , United Nations, (2003)

2012 research from Germany¹⁶, indicates that the top three priorities for tourists with disabilities are: accommodation, ease of movement around the holiday destination and ease of travel for arrival and departure.

Unless the long distance and local transport connections can provide comfortable and hassle free access to the destination, it will not be a preferred option for many. For the young agile tourist with little more than a backpack, airport queues, cramped seating, intimidating security, lack of information, unreliable and unpleasant taxis and so on may all be part of the fun. For anyone with a disability and for most travellers over the age of 60, the risk of bad experiences like these simply mean that destinations are crossed off the list of holiday options.

“The design of products, services and environments to be usable by all people, to the greatest extent possible, without the need for personal adaptation or special provision.”

Ron Mace. Founder and program director of the Center for Universal Design

5.2 Design for All

It is also important to understand that we are not talking about separate or specialised facilities for older people or those with a disability. We are talking simply about applying good design that enables everyone to travel without stress.

The concept of Universal Design¹⁷ is well established but has to date failed to be recognised in many areas as the most effective – and cost effective – way to address the needs of the population as a whole.

Travel, for example, shouldn't be a constant struggle to understand how ticket vending machines work or where to find the nearest toilet. The core concept of “intuitive” design means starting to think about transport infrastructure and systems from the point of view of the end user, not the engineer or designer.

Perhaps the best known example is the low floor bus which is now almost universal in Europe. Instead of having to clamber up the steps to get on the bus – clutching heavy shopping, a small child or a walking stick – you simply walk or roll on. Not only has this increased bus patronage in many places (primarily

¹⁶ Neumann, P Impacts of Accessible City Tourism (2012)

¹⁷ <http://www.ncsu.edu/ncsu/design/cud/index.htm>

among parents travelling with baby buggies) it has also significantly reduced boarding and alighting times overall, so increasing operational efficiency.

Another prime example comes from the major tourist city of Barcelona. Here the designers of the metro ticket machines engaged with older people, blind people and others with disabilities to come up with a design that is intuitive to use both by local people and tourists. It includes a feature that enables you simply to insert an old used ticket in order to be issued with a new ticket to the same destination. This is particularly helpful to older people and those with dementia as well as to people with learning disabilities. An additional economic benefit has been a reduced requirement for staff to stand near the machines to help tourists and others who used to be confused about how to operate the system.

Information and signage are also fundamental to stress-free travel – particularly to those who are unfamiliar with an area. And of course, in countries where we do not speak the local language we are all “disabled” by our inability to read signs or follow information. Again, the concept of Universal Design would lead towards clear and unambiguous pictograms which convey a simple message.

5.3 The accessibility springboard

"London has used the 2012 Games not only to set new standards in the design of sporting venues but also as a springboard for transforming the UK capital into one of the most accessible cities on earth."

Boris Johnson, Mayor of London 2012

Often good practice lessons can be learned from staging major international events where the need to move large volumes of people unfamiliar with the area focusses the minds of planners in a way that day to day travel needs do not seem to do.

There is also a good track record of using major events – such as the Olympic Games - to leverage longer term accessibility improvements. Barcelona, for example, became one of the first cities to have low floor buses in any number as a legacy of the 1992 Olympics. London now has raised sections on Underground platforms, introduced to provide wheelchair access for Games participants and spectators in 2012 and now retained by popular demand for disabled Londoners and visitors.

There is evidence too from Brazil that the pace of accessibility improvement is picking up, spurred on by the recent football World Cup and the coming of the Olympic and Paralympic Games.

Japan has already announced plans, in preparation for the 2020 Olympics and Paralympics, to expand accessibility for people with disabilities at train stations, bus terminals and airports. An advisory body to the Transport Minister has compiled a list of 56 items in need of improvement at transport facilities used by more than 3000 people a day.

Making accessibility an integral part of the development of tourism planning and investment can also bring economic and social benefits to areas where traditionally only the more intrepid tourist has ventured.

A World Bank report on the potential for tourism in Sub Saharan Africa¹⁸ notes that poor access by air from long haul destinations and poor road connections and conditions are among the priorities that need to be addressed to increase the number of tourists.

Where development is taking place to capitalise on new tourist markets, building in accessibility from the outset involves minimal extra costs and provides a legacy that benefits local people as well as attracting tourists of every age group, including older people.

Accessibility standards are being driven up by the growing expectations of the market, particularly among older and disabled tourists from the USA and Europe where legislation exists to deliver “rights” in the form of accessible facilities and services. Many now expect and demand the same level of accessibility when they travel abroad.

The world’s cruise industry has grown 125% and launched 143 new cruise ships, since 2000.¹⁹ 21.3 million passengers took cruises during 2013 and that figure is set to continue rising. Although cruise passengers are of all ages, there is a large market segment represented by older people and people with disabilities.

Hong Kong too has fully recognised the impact of accessibility on the tourism market. The new cruise terminal recently opened on the site of the old airport at Kai Tak has been built to meet the demand for accessible services and facilities. A report to the Hong Kong Legislative Council Panel on Economic Development²⁰ in 2012 noted that:

"The Government is fully committed to ensuring that our tourism facilities are accessible to all. It is the Government’s established policy objective to provide barrier-free access and facilities for people in need (including persons with

¹⁸ Tourism in Africa: The World Bank, Christie, I. Fernandes, E. Messerli, H and Twining-Ward, L. Harnessing Tourism for Growth and Improved Livelihoods (2014)

¹⁹ South Pacific Tourism Organisation, Cruise Market Analysis, (2012)

²⁰ Legislative Council Panel on Economic Development Barrier-free Access and Facilities of the New Cruise Terminal at Kai Tak (2012)

disabilities (PWDs) and the elderly) to allow equal access to and enjoyment of tourism facilities. "

There is evidence too of accessibility to services providing vital links both for tourists and for local residents. The purchase of new more accessible ferries for the Scottish islands is one such example. As the only transport link for many of the islands' populations (who are predominantly older people), the introduction of new vessels with improved access will provide a better service for them as well as opening up a new international tourist market among older and disabled people.

Similarly, a recent announcement about new "disabled friendly" ferries operating out of Istanbul, focusses on meeting the needs of older and disabled tourists as well as of local people with mobility needs.

All of these examples provide evidence of the wider benefits that can accrue from thinking about the needs of older tourists and those with mobility difficulties. Investment to capture tourist markets can benefit local people for whom resources might not otherwise have been made available.

6. Thoughts for the future

As this paper has illustrated, there is clear evidence of the actual and potential commercial benefits of ensuring that tourist destinations meet the needs of older tourists and those with disabilities.

There are also clear indications that transport and travel – both to and from and around a holiday destination – are regarded by many older and disabled tourists as key determinants in choosing a holiday destination or in recommending it, or not, to others.

There is evidence that the needs of this market are increasingly recognised and provided for in some parts of the world – in some cases by Governments and in others by the tourist industries themselves.

The impact of major sporting or other events on levels of accessibility – to the built environment as well as to transport services and facilities – is significant and well documented.

There is, however, less evidence of a recognition that even without a major event such as the Olympics, there is a need for day to day transport accessibility to be improved as part of the tourist package. Some examples exist, but in many cases, while hotels and resorts are upgraded, facilities to enable people to get around are not and tourists with access needs still have to rely on hiring expensive taxis or foregoing opportunities to enjoy the city or country and to contribute to its economic wellbeing.

Where investment has been made, there is evidence that it benefits older and disabled people in the local population as well as tourists. It will be the case in some areas that small and ageing populations, such as island communities, do not, in themselves, have the economic muscle to justify investment in accessibility. But tourists with accessibility needs start to make the numbers stack up more effectively.

In summary, greater attention needs to be paid to the critical importance of transport accessibility in attracting the ever growing number of greyhaired globe trotters to the world's shores and shops.

Capitalising on this important market will also bring day to day long term benefits to resident populations of older and disabled people (also growing in number) whose opportunities for employment, education and independent living will be significantly enhanced.