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The Disability Travel Market-Diverse, Growing and Increasingly Mainstream

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Marketing Outlook Forum 2013— Open Doors Organization (ODO) Forecast

The Disability Travel Market—Diverse, Growing and Increasingly Mainstream

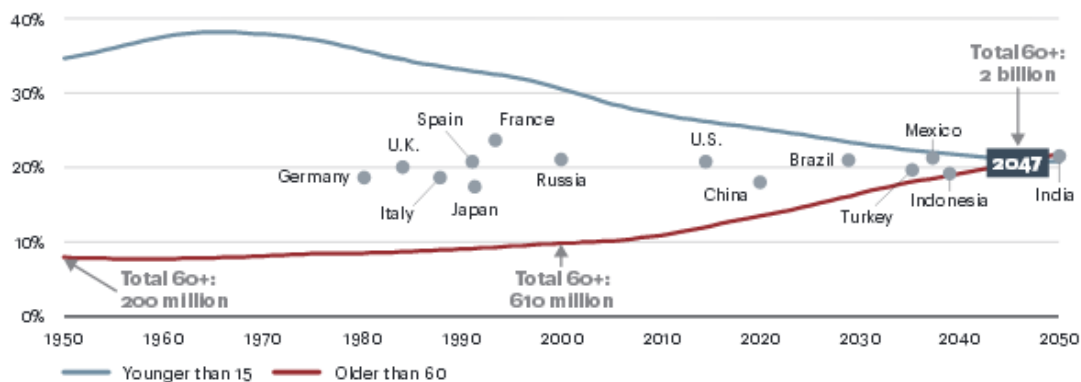
As the population in the United States and worldwide continues to age, businesses in travel and tourism will increasingly be called on to accommodate customers with some degree of functional limitation—physical, sensory, psychological or cognitive—but who may not even self-identify as having a disability. How well we meet their needs will determine how frequently they travel or, indeed, if they continue to travel at all. And the stakes are high since the Baby Boomers now swelling the ranks of the 65+ population are estimated to control 80% of personal financial assets in the US and over 50% of discretionary spending (Janger, 2011). Disability is definitely going mainstream.

Disability, of course, affects all age groups, although its prevalence rises steeply with age. According to the US Census Bureau (2012), 18.7% of Americans (56.7 million people) report having some degree of disability. For those 15 and under, 8.4% are affected. By age 45-54, almost one fifth (19.75%) have a disability. By age 65-69, this jumps to more than one-third (35%) and by 80 and older to more than two-thirds (70.5%). Among Americans 65 and older, more than half (51.8%) have a disability, 36.9% have a severe disability. With the 65+ population projected to jump a staggering 78% (from 40.2 to 71.5 million) from 2010 to 2030, it's clear that products, facilities, services and marketing will all need to be adapted and the sooner the better (2005). This paper will look at some initiatives already taking place.

Worldwide the travel industry is facing the same challenge and opportunity. Based on current demographic trajectories, by 2047 there will be more people older than 60 than younger than 15 worldwide (A.T. Kearney, 2013).

Share of total world population

(%, 1950-2050)



Note: Country position on the chart represents the year in which the over-60 group overtakes the under-15 group.

Sources: United Nations: World Population Prospects, the 2010 Revision; A.T. Kearney analysis

As the chart above shows, this mark was already reached by Japan and Western Europe in the 1980's and 90's, hence the much greater attention paid in those countries to Universal Design (UD). UD aspires to create products and environments that are usable by all, regardless of age or ability, and without adaptation. By enabling people to function as independently as possible, UD has been shown to simultaneously minimize costs to businesses. True inclusion, rather than reliance simply on compliance with minimum accessibility standards set by governments, will undoubtedly be the way forward as the travel industry comes to terms with changing demographics and customer needs.

Another segment of the disability market presenting unique challenges to the travel industry and also on the rise is made up of families who have children with autism and other developmental disabilities. According to the Centers for Disease Control and Prevention, 1 out of 6 children in the US had a developmental disability in 2006-2008. Over a 12-year period, the prevalence of developmental disabilities increased 17.1% while that of autism increased a shocking 289.5%. Autism spectrum disorder now affects 1 in 88 children in the US, 1 in 54 boys (Boyle et al, 2011). Traveling for these families can be very difficult, and coping strategies that work for one child may not work for another. Staff can, however, be taught a range of interventions to calm a stressful situation and enable families to enjoy a holiday like everyone else.

Let's look now at recent developments in accessible travel and tourism sector by sector, in the US and elsewhere. Thanks to our earlier and stronger disability rights legislation, the US remains the world leader in accessibility and offers travel opportunities, in particular for wheelchair users, that are unsurpassed, and we should be marketing that fact. In a world where disability is on the rise, we still hold the competitive advantage, although Europe and the UK are now working hard to catch up. As an example of destination marketing that targets travelers with disabilities, see the Open Britain website (www.openbritain.net) launched this March.

AVIATION

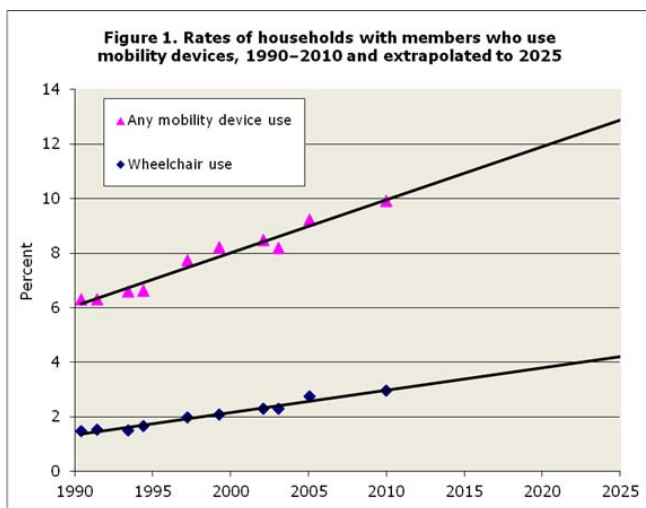
The aviation industry is already facing the realities of an aging population. From 2002 to 2011, requests for wheelchair assistance increased 13% year over year according to records from six major US airline service companies. For one airline alone at Newark International Airport, "wheelchair assists" currently average 35,000 per month. While many requests are from younger people with disabilities including those using wheelchairs full-time, most are from older travelers who simply cannot walk the long distances to gates, stand in long lines or navigate the complex airport environment. In the 2005 ODO Market Study of Adult Travelers with Disabilities, 82% of respondents stated that they experienced obstacles at the airport, either physical, service/personnel or communication-related. Without better, more inclusive design, airlines risk being overwhelmed by the coming "silver tsunami."

To help address the problem, Open Doors Organization since 2006 has hosted Universal Access in Airports, a biennial conference which brings together airports, airlines, service companies and suppliers to share best practices and find solutions to the problems facing air travelers with disabilities. In 2013 ODO also launched an Aviation Access Certification Program for employees of airline service companies since the bulk of disability-related complaints to airlines stem from service failures at the airport. This comprehensive, full-day training addresses the needs of older travelers and

people with a wide variety of disabilities including autism. A new ODO training program for Airport Access Coordinators is also in the works for 2014.

Security screening can present a major problem for individuals with disabilities. The Transportation Security Administration (TSA) now has a TSA Cares Helpline that travelers with disabilities or medical conditions can call for information or to arrange checkpoint support. The TSA, with the help of disability organizations including ODO, has also trained over 3,000 Passenger Support Specialists, the agency's new disability experts. To expedite and make screenings easier for the oldest and youngest travelers, those over 75 years or under 12 no longer have to remove jackets and shoes.

The use of mobility aids by Americans is on the rise, as shown in the following chart (LaPlante and Kaye, 2013).



Note: Author's analysis of the Survey of Income and Program Participation. Includes adult household members ages 18 and older.

Damage to wheelchairs, electric scooter and walkers is not only expensive for the airlines but a disaster for the individuals who rely on these devices. Many wheelchairs are custom-made and, if destroyed, can take months to replace. To help reduce damage in transit, Open Doors Organization offers free wheelchair stowage training for ground handlers at airports nationwide. The program, sponsored by Global Repair Group (GRG, www.globalrepairgroup.com), went international for the first time at London's Heathrow Airport in preparation for the 2012 Olympics and Paralympics. Another first was the onsite repair service run by GRG at Heathrow during the Paralympics. In some cases, mobility devices were already repaired before the travelers were ready to leave the airport. ODO has also designed an inexpensive belt loader device that holds wheelchairs in place during loading and unloading, reducing potential damage to both devices and planes as well as injuries to employees.

Other new and positive developments at US airports include the provision of service animal relief areas within the secure zone and improvements in visual paging, with

announcements in easy view on flight information displays. At Minneapolis-St. Paul Airport, all pages are posted on a live website. Accessible charging stations are also becoming more common, allowing people to recharge not just cell phones but also mobility devices and portable oxygen concentrators. For families affected by autism, airlines are now working with and learning from disability organizations such as Autism Inclusion Resources (www.autismir.com), which brings family members, clinicians and trainers to the airport and provides individualized assessments and strategies for coping with the stresses of air travel. New federal accessibility requirements for check-in kiosks and airline and third-party websites are due out shortly, primarily benefitting travelers with vision loss.

RAIL

Amtrak continues to improve service for its customers with disabilities and to renovate stations across the country. A new, improved website allows passengers with disabilities to book online like everyone else. While many stations still lack full access, the website lists wheelchair accessible features, if any, at each location. At the US Access Board, a new Rail Vehicles Access Advisory Committee, meeting for the first time this October, will recommend updates to guidelines covering transportation vehicles for intercity, rapid, light, commuter and high speed rail. Customers and their mobility aids are becoming larger and heavier, necessitating changes to the old standards.

MOTORCOACH

Now that the Federal Motor Carrier Safety Administration is overseeing compliance with the Americans with Disabilities Act (ADA), the motorcoach industry is finally paying more attention to its legal requirements, although a welcome mat for passengers with disabilities is not yet in sight. Few company websites include any mention of the ADA or services and facilities for customers with disabilities. Another contributor to low ridership may be the motorcoach lifts themselves which are not only unreliable but beep loudly and tend to make a spectacle of the passenger. Megabus, which operates double-decker coaches that feature a ramp rather than a lift, appears to be attracting more wheelchair users. On another positive note, large carriers such as Greyhound, Peter Pan and Megabus are now 100% accessible. This means that passengers who need level boarding are no longer required to give 48-hour advance notice unless they need to interline with a small carrier.

In response to industry requests, Open Doors Organization in 2012 launched a full-day ADA training program for drivers, managers and sales staff that covers disability awareness, customer service, marketing and a detailed analysis of the regulations. Since bus charters and tours are popular with older customers, the class addresses their needs and preferences as well. ODO has conducted trainings in numerous states coast to coast, primarily sponsored by state bus associations and attended by hundreds of companies.

Recognizing that access is also for people with hearing loss and not just those using wheelchairs, the DOT in Michigan funded installation of FM loops in a fleet of coaches operated by Indian Trails. A more widespread innovation benefitting travelers with disabilities is the provision of 110 electrical outlets. Now individuals using medical devices such as portable oxygen concentrators can plug in rather than rely on a host of heavy, expensive batteries.

PASSENGER VESSELS

At a public hearing this June on newly-proposed passenger vessel guidelines, Ted Thompson, a spokesman for Cruise Line International Association (CLIA), commented that “the cruise industry continues to proactively improve access to meet the needs of our guests and does so in the absence of regulations. Our members and the cruise industry in general recognize the very important segment of the American population that has some sort of a disability and that wants to travel and wants to see exotic locations and experience new and different things. And I think you will find that in looking at the newer cruise ships that they have become considerably more accessible. It’s important to us to be able to draw persons with disabilities with the idea that they can come to a location and unpack once and visit many different venues and experience many different cultures and varieties of life” (US Access Board, 2013).

While the lodging industry in the US fought to delay the requirement to install pool lifts, the cruise lines did not hesitate to voluntarily install lifts since this was a feature that their customers wanted. CLIA is now a truly international trade association, representing members in North and South America, Europe, Asia and Austral-Asia. We hope that the proactive attitude and efforts of members serving the North American market will rub off on their colleagues elsewhere, since ships in other regions remain largely inaccessible.

Because of its convenience as well as relative affordability, cruising is arguably the most popular type of international travel among Americans with disabilities. It’s also family-friendly, with activities available for every age group. An organization called “Autism on the Seas” (www.alumnicruises.org/Autism) offers group cruises for adults and families and assistants for families traveling alone. It now seems there is a specific group cruise for every type of disability, from wheelchair users, amputees and persons who are deaf to those with medical disabilities such as cancer, diabetes or kidney failure. One advantage of group cruises is that support staff such as personal care assistants can come along to provide respite for spouses and other family members so that they, too, can enjoy the vacation. The problem of inaccessible cruise excursions is also being addressed by the cruise lines with more accessible tours offered in-house.

Not surprisingly, demand from travelers with disabilities continues to grow in the US, UK and Europe. One major cruise line estimates its annual increase at 8-10% per year, noting that its capacity is also expanding. Since many individuals with disabilities do not self-identify or request any special assistance, this figure is likely even higher.

The issue of safety and evacuation has come to the forefront in the industry in the wake of the Costa Concordia disaster. Just by chance, Royal Caribbean Cruise Lines that week released two new videos by Open Doors Organization on safe assistance for guests with disabilities during boarding and disembarking and during evacuation. A CLIA committee is revising standard procedures for evacuation that address the needs of passengers with disabilities. Mobile mustering equipment that accounts for passengers requiring special assistance is already in use in the industry.

SPECIALIZED TRAVEL AGENTS/TOUR OPERATORS

While the disability travel market continues to grow, the number of travel agents and tour operators specializing in this market segment has declined over the years. Both older companies and new entrants now focus almost exclusively on cruise travel which is easier and less labor-intensive to plan. Some international, land-based trips are still available to destinations such as the UK and Italy, but even Europe is easier to visit via a

cruise ship. In the US, land-based travel by groups with disabilities is largely a thing of the past since accessible transportation, lodging and attractions are now so readily available to the individual traveler or family. In any case, accommodating groups with reduced mobility is very difficult since only two wheelchair securement locations are provided per coach.

The large US mainstream tour companies have historically shied away from travelers who use wheelchairs, both at home and abroad. Such travelers slow down the tour, require additional planning and research and in overseas locations are more expensive to accommodate, especially if they require adapted vehicles. In 2012 for the first time ever, the US government fined a major tour operator, Grand Circle, for discriminating against a customer who uses a wheelchair. Hopefully this will deter other companies from turning away such customers, at least on domestic tours.

CONCLUSION

Travel by people with disabilities is on the rise both in the US and overseas, fueled by an aging population and advances in accessibility and technology. The spread of families across not just countries but also continents has the world's older individuals, whether from small-town USA or village India, heading for the airport to visit their children and grandchildren. Baby Boomers will still want to take those extended foreign holidays they postponed until retirement, whatever their age-related disabilities.

The rate of travel may have slowed in recent years due to economic downturns and worries over government cuts in social spending, but the trajectory is definitely up. As the sector analysis above indicates, barriers to travel continue to fall while opportunities and incentives rise. Based on shared data and anecdotal evidence, ODO estimates that annual travel expenditure by American adults with disabilities now exceeds \$15 billion, up from the \$13.6 billion first reported by ODO and Harris Interactive (2002). Open Doors Organization's next Market Study of Adult Travelers with Disabilities is planned for 2014.

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