



Travelers with Disabilities

Original Research, Analysis & Recommendations

October 12, 2023

Future Partners **miles**
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Today

1. Travelers with Disabilities Original Research
2. The Last Untapped Travel Demographic with Sage Inclusion
3. The Importance of Digital Accessibility
4. Q&A





**The State of the American Traveler:
Travelers with Disabilities**

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Methodology

- Monthly tracking survey
- Representative sample of adult American travelers in each of four U.S. regions
- Tracks traveler sentiment to generate insights into domestic travel trends
- Survey collected: [July 18 – 22, 2023](#)
- 4,000+ fully completed surveys collected each wave
- Confidence interval of +/- 1.6%
- Data is weighted to reflect the actual population of each region

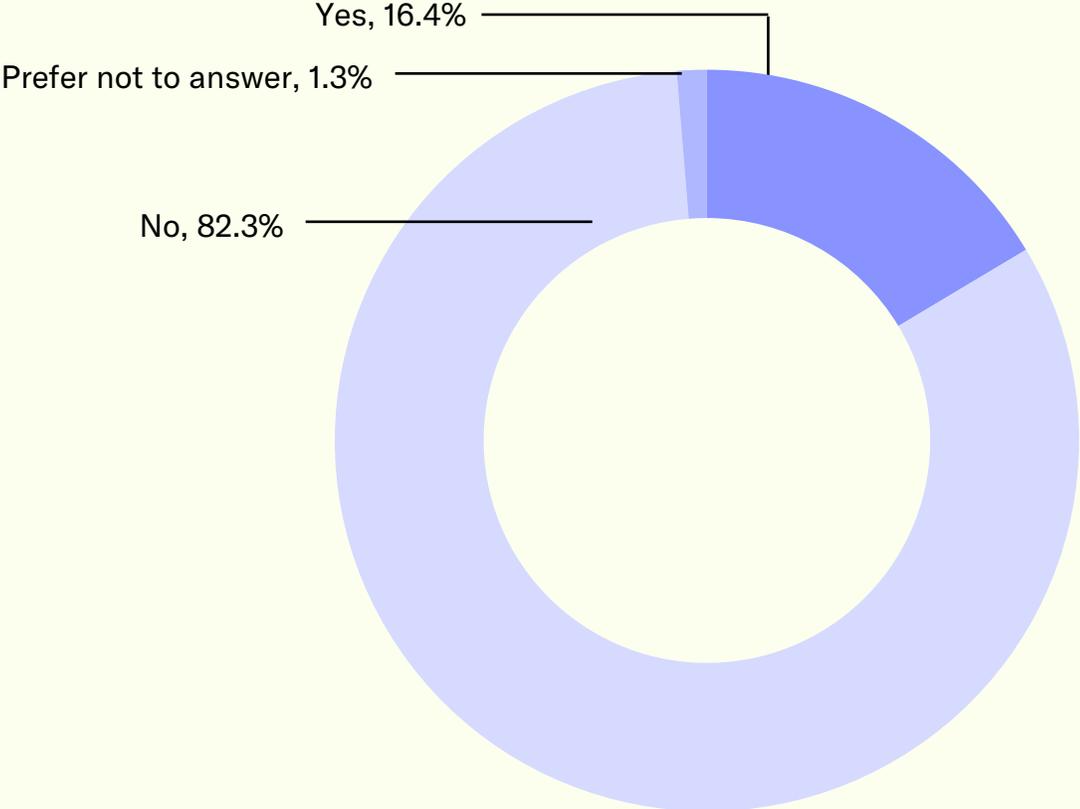
United States Census Regions



- 1. Travelers with disabilities are **big dreamers** but were more limited by financial concerns and constraints.**
- 2. Social **acceptance and support** is the most difficult challenge while traveling.**
- 3. Online information is perceived as good and specialized websites have **room for growth**.**
- 4. Destinations can set themselves up as **leaders for inspiration** and travel planning.**

Travelers with Disabilities

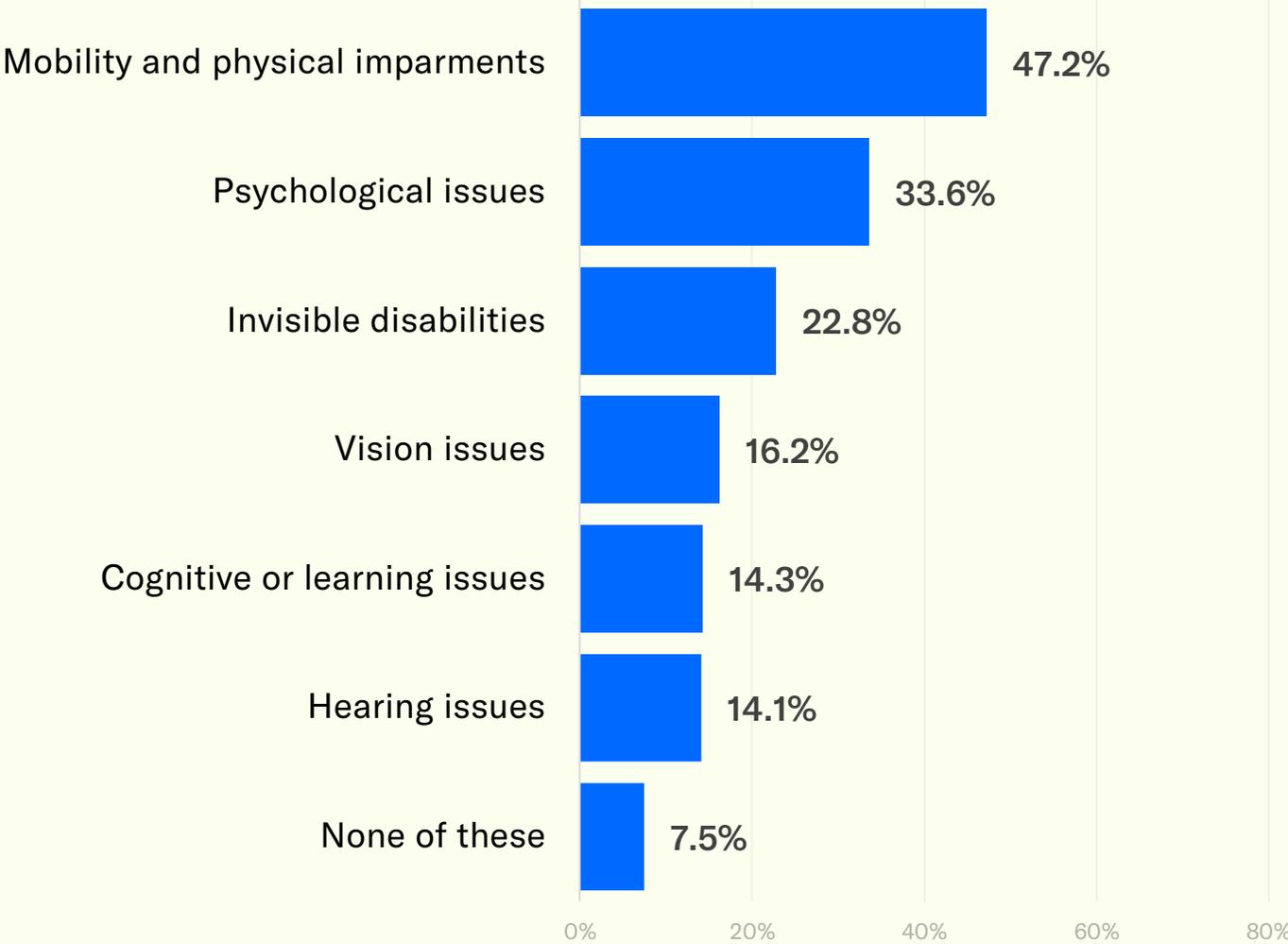
One-in-Six Travelers Indicate Challenges



Question: Because of a physical, mental, or emotional issue do you (or anyone you regularly travel with) have difficulties or face challenges traveling?

Wide Range of Issues

Question: Which best describe the issues that cause you (or anyone you regularly travel with) to have difficulties or challenges while traveling? (Select all that apply.)



Wide Range of Difficulties

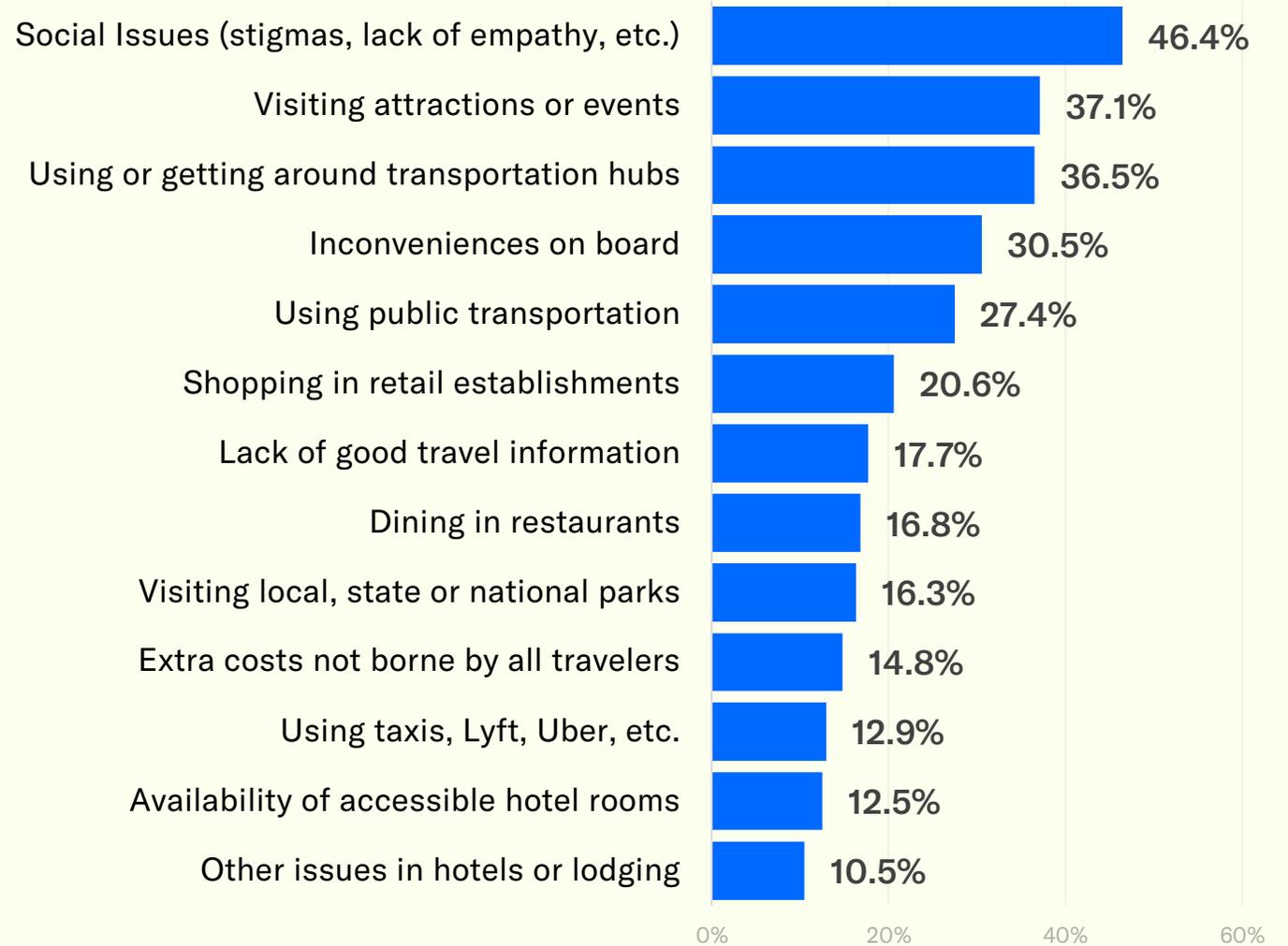
% Top-Two Box Score



Question: Thinking about the difficulties or challenges that come with traveling with disabilities, how difficult or challenging do you generally find each of the following aspects of travel?

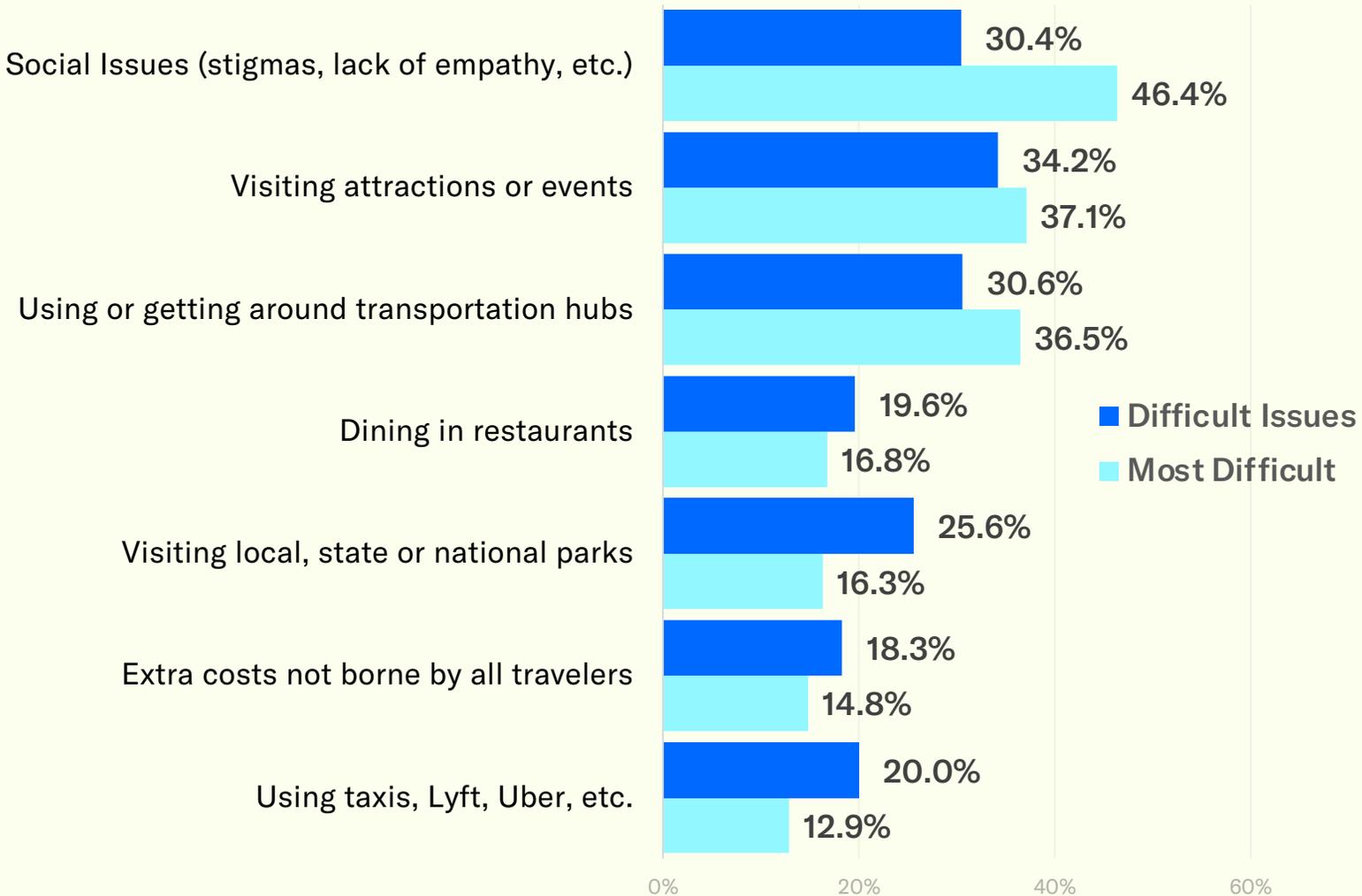
Social Acceptance and Support

Question: From this list, please rank the three you generally find most difficult or challenging while traveling.



Wide Range of Difficulties

Importance of Challenges



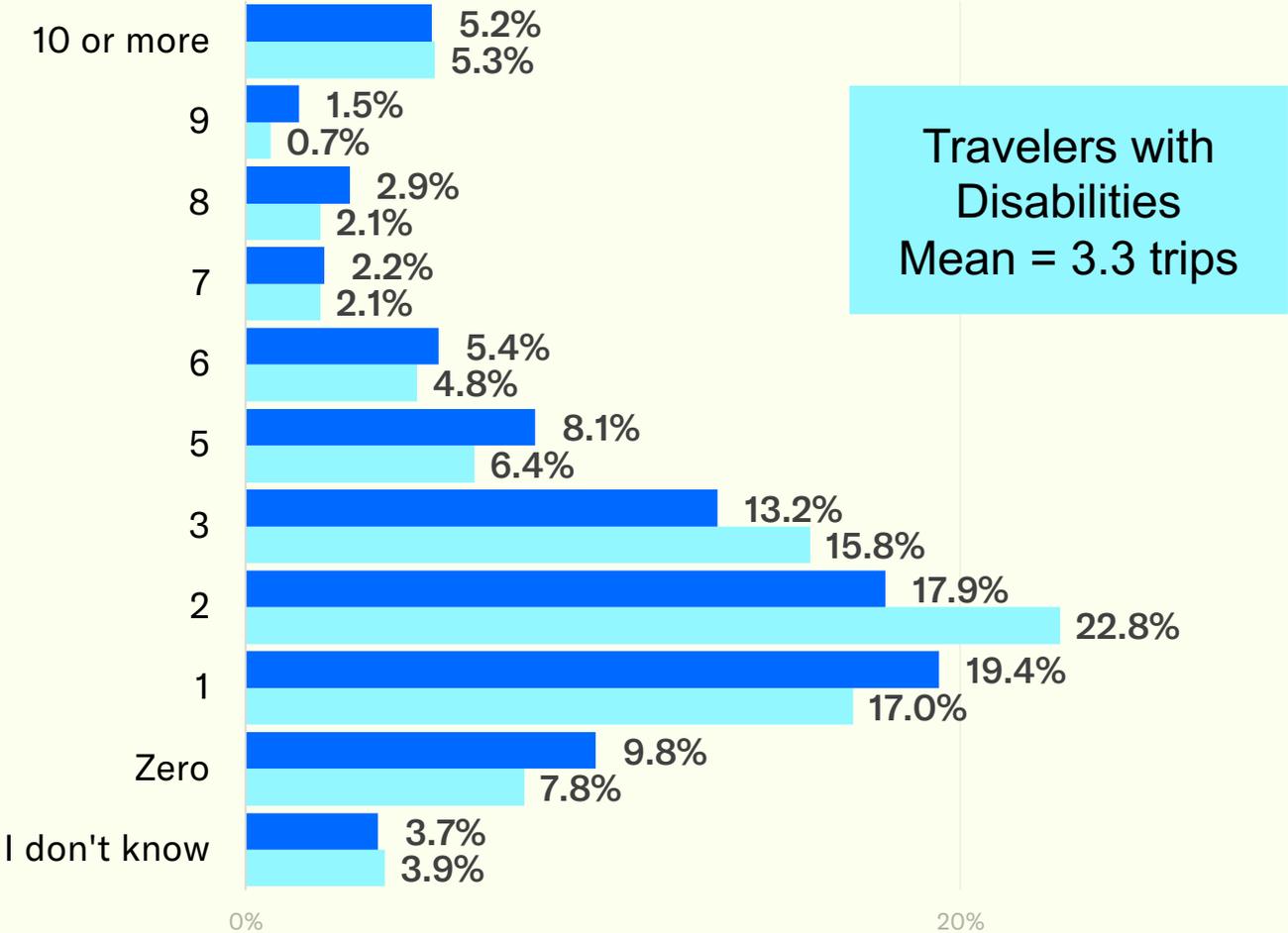
Question: From this list, please rank the three you generally find the most difficult or challenging while traveling.

Travel Characteristics

Similar Trips to Other Travelers

Number of Leisure Trips

Travelers with Disabilities All Other Travelers

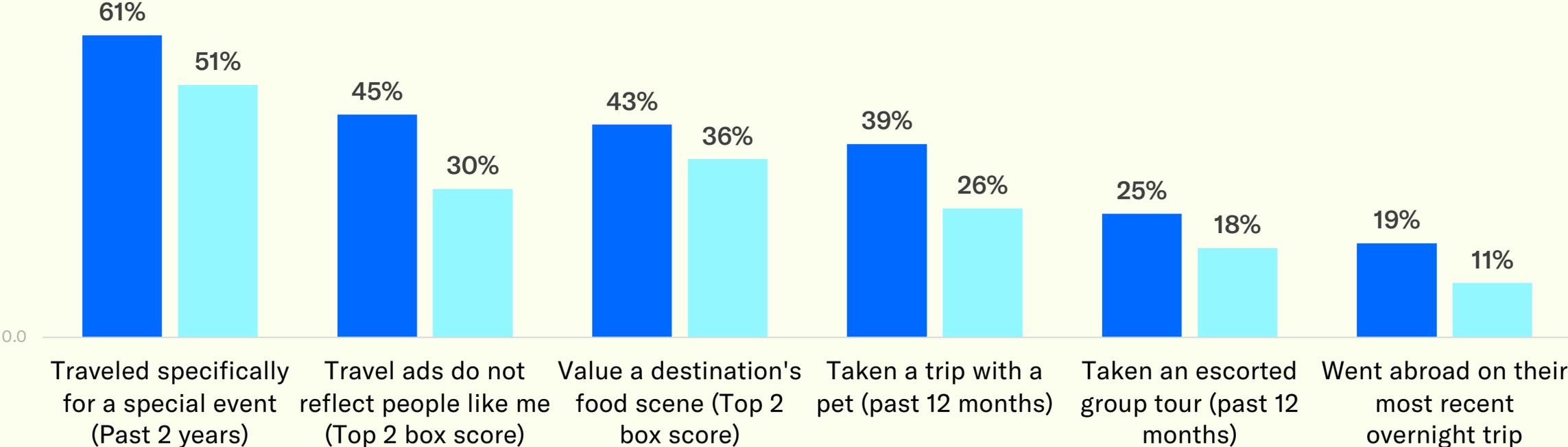


Question: In total, how many leisure trips (of 50 miles or more from your home) do you expect to take in the NEXT TWELVE (12) MONTHS? (Select one.)

More Active and Engaged Travelers

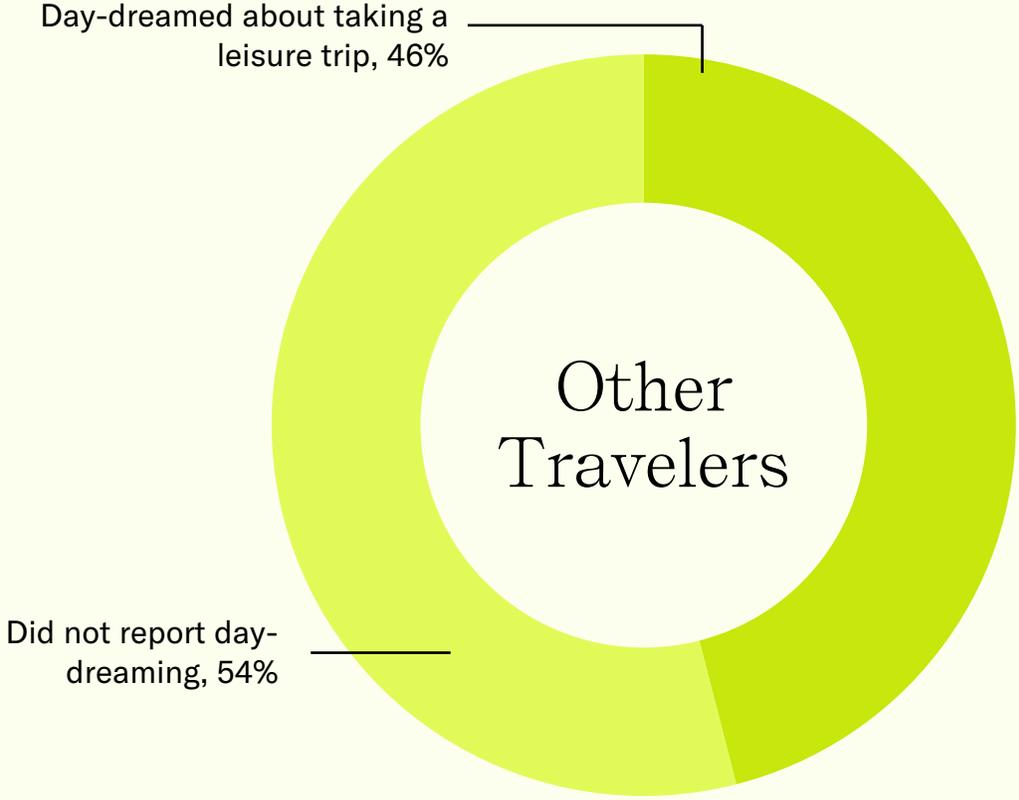
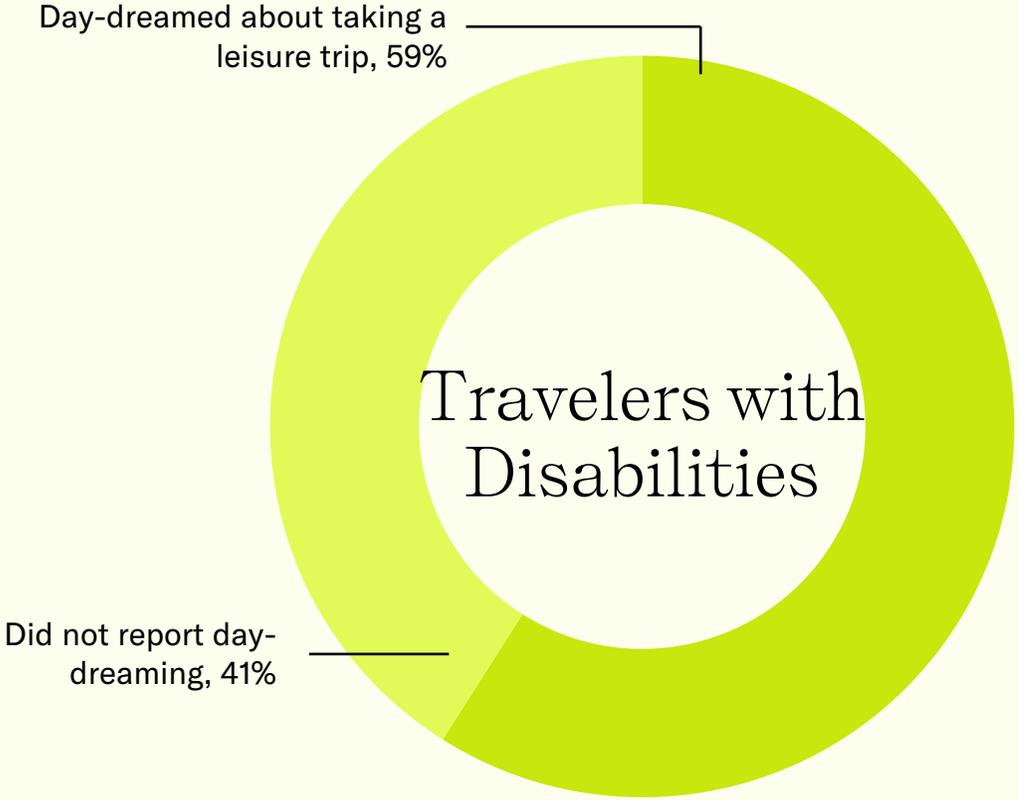
Traveler Characteristics

Travelers with disabilities All other travelers



Travel Dreaming and Spending

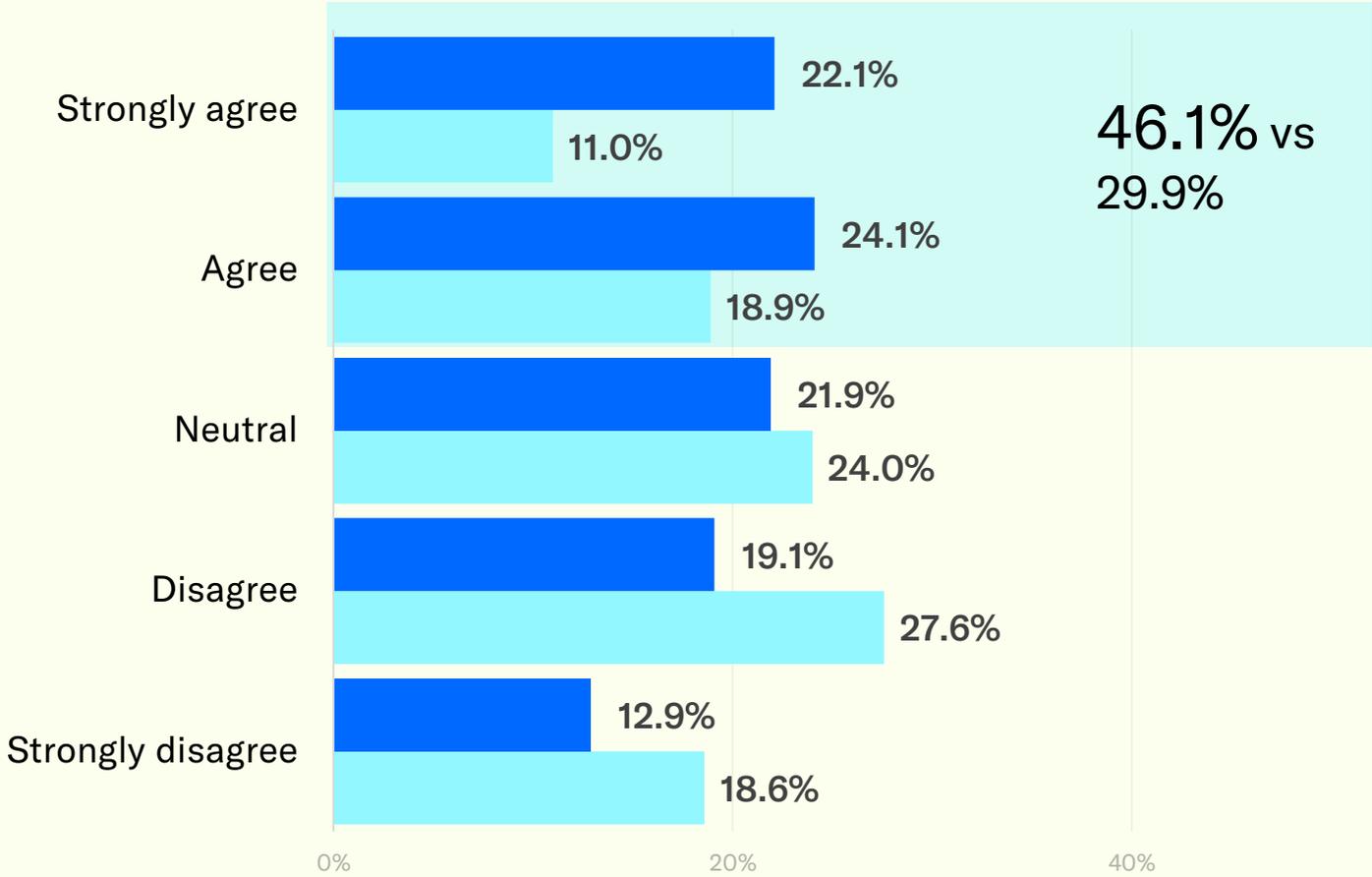
More Likely to Day-Dream About Travel



More Cost Conscious Traveler

Inflation and Trip Cancellation

Travelers with Disabilities All Other Travelers



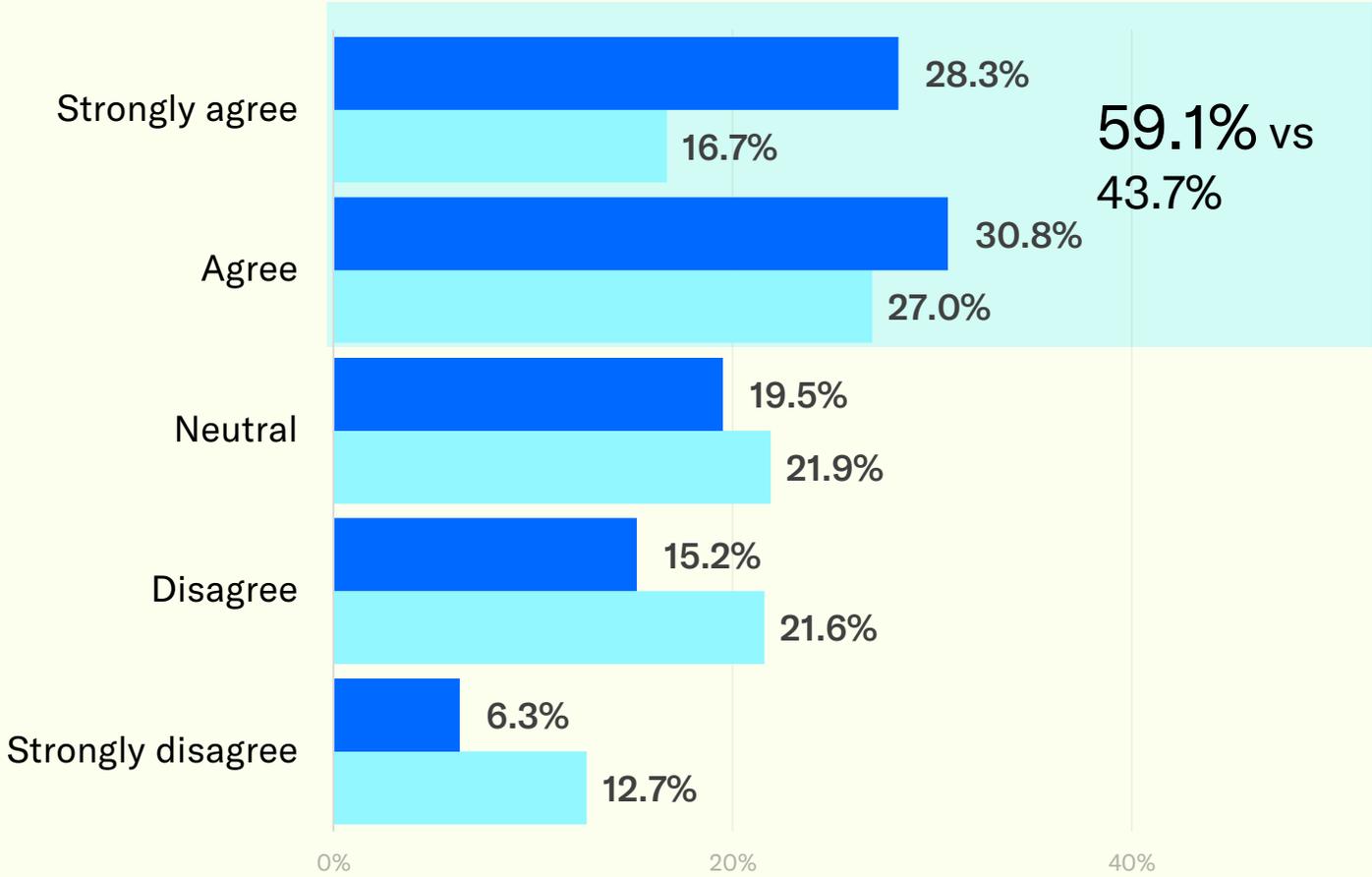
Question: How much do you agree with the following statement?

Recent inflation in consumer prices has led me to cancel an upcoming trip.

Cost Are Impacting Travel

Inflation and Trip Cancelation

Travelers with Disabilities All Other Travelers



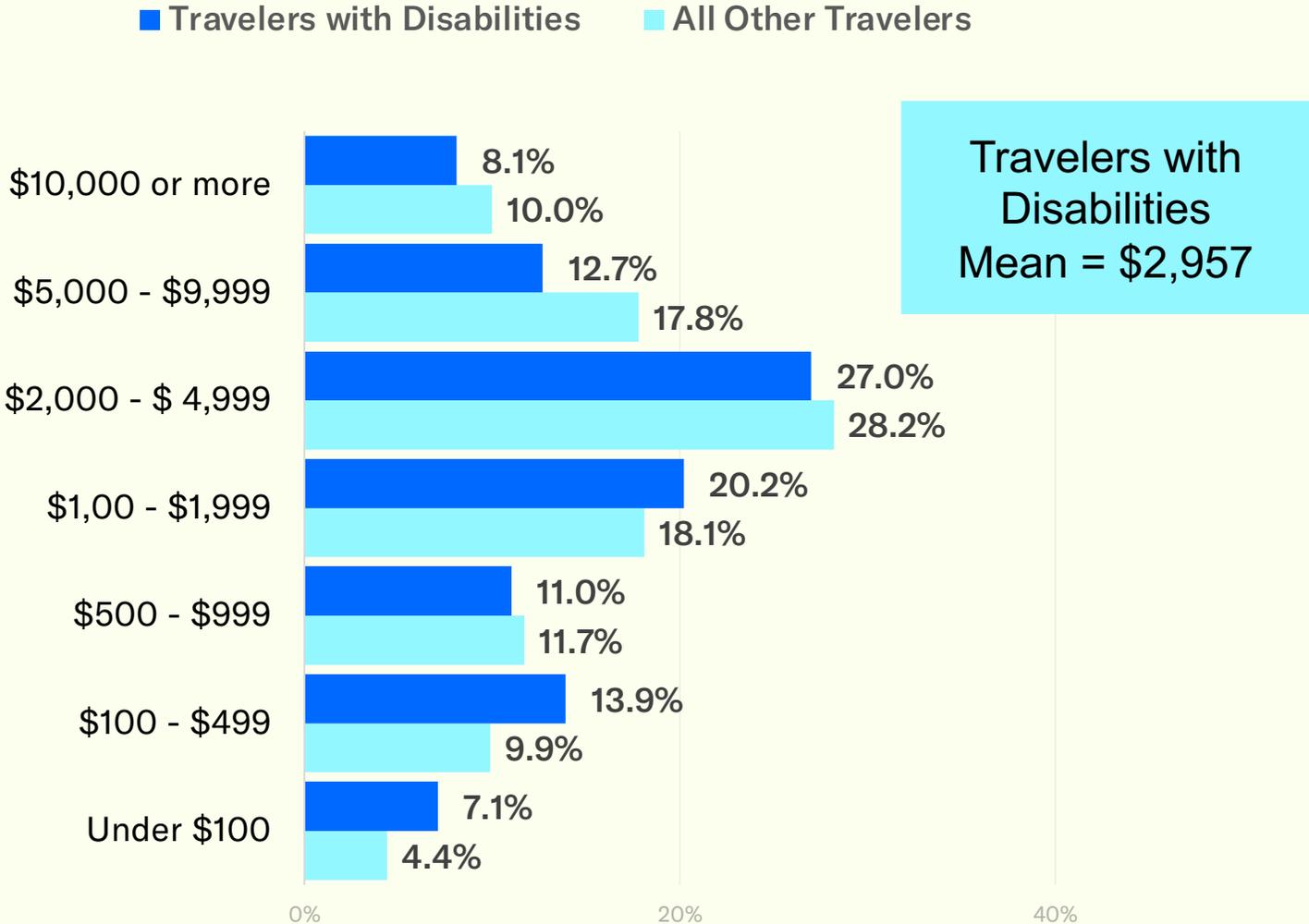
Question: How much do you agree with the following statement?

High travel prices have kept me from traveling in the past month.

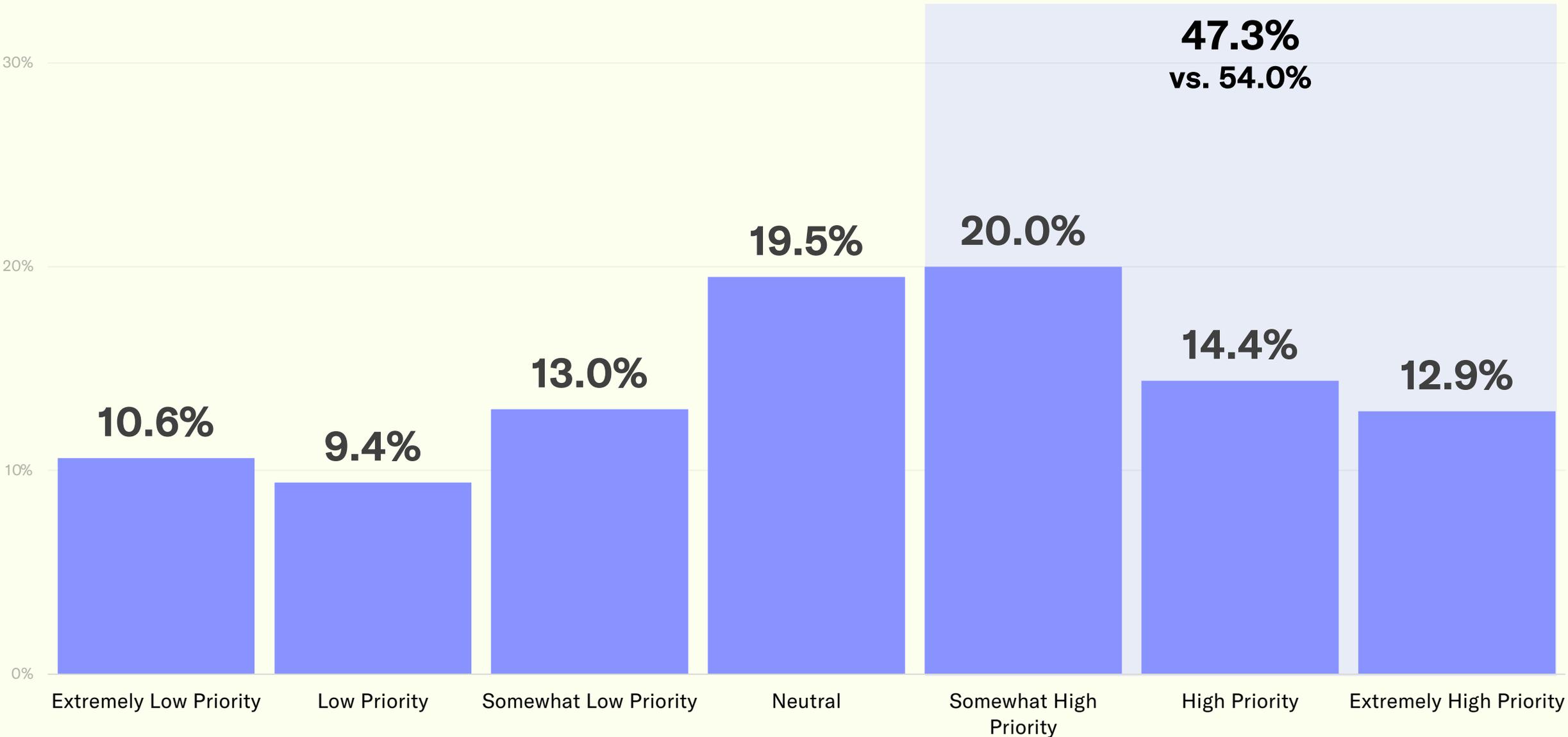
Limited Budgets for Travel

Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations, and all other trip-related spending) during the NEXT 12 MONTHS?

Maximum I would spend on leisure travel (next 12 months): ____

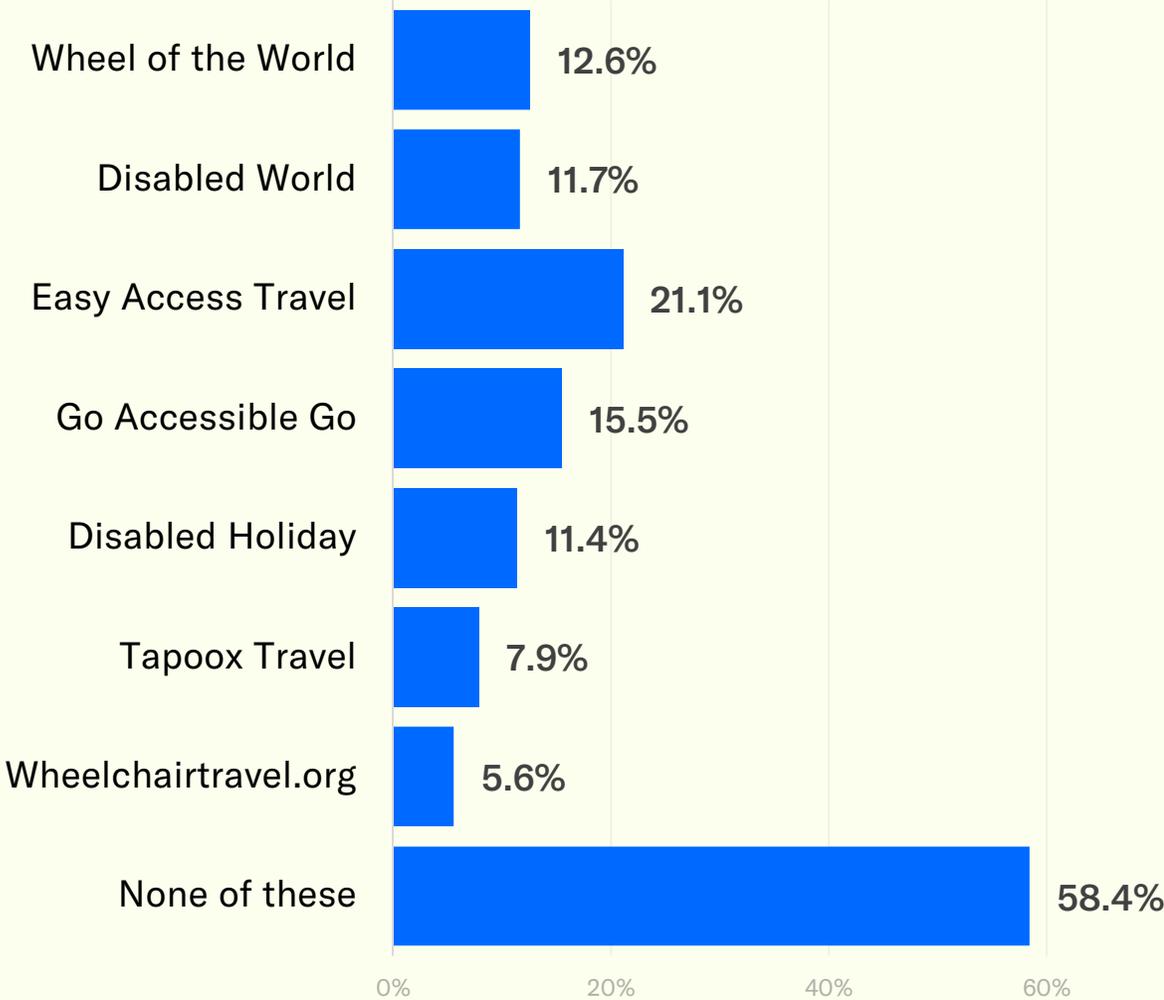


Travel as a Budget Priority



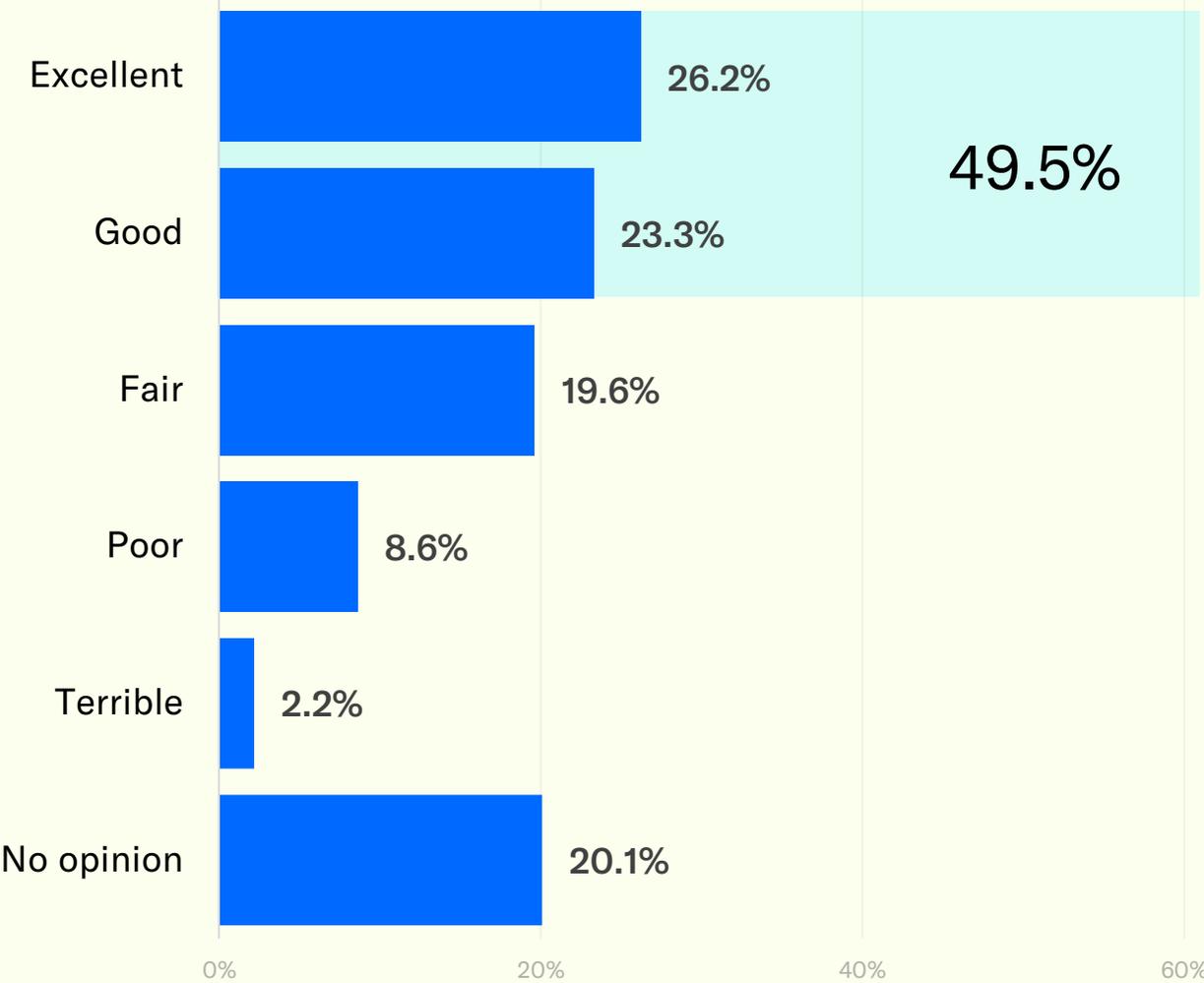
Wide Range of Specialist Websites

Question: In the PAST 12 MONTHS, which of these websites have you used to help plan your travel? (Select all that apply.)

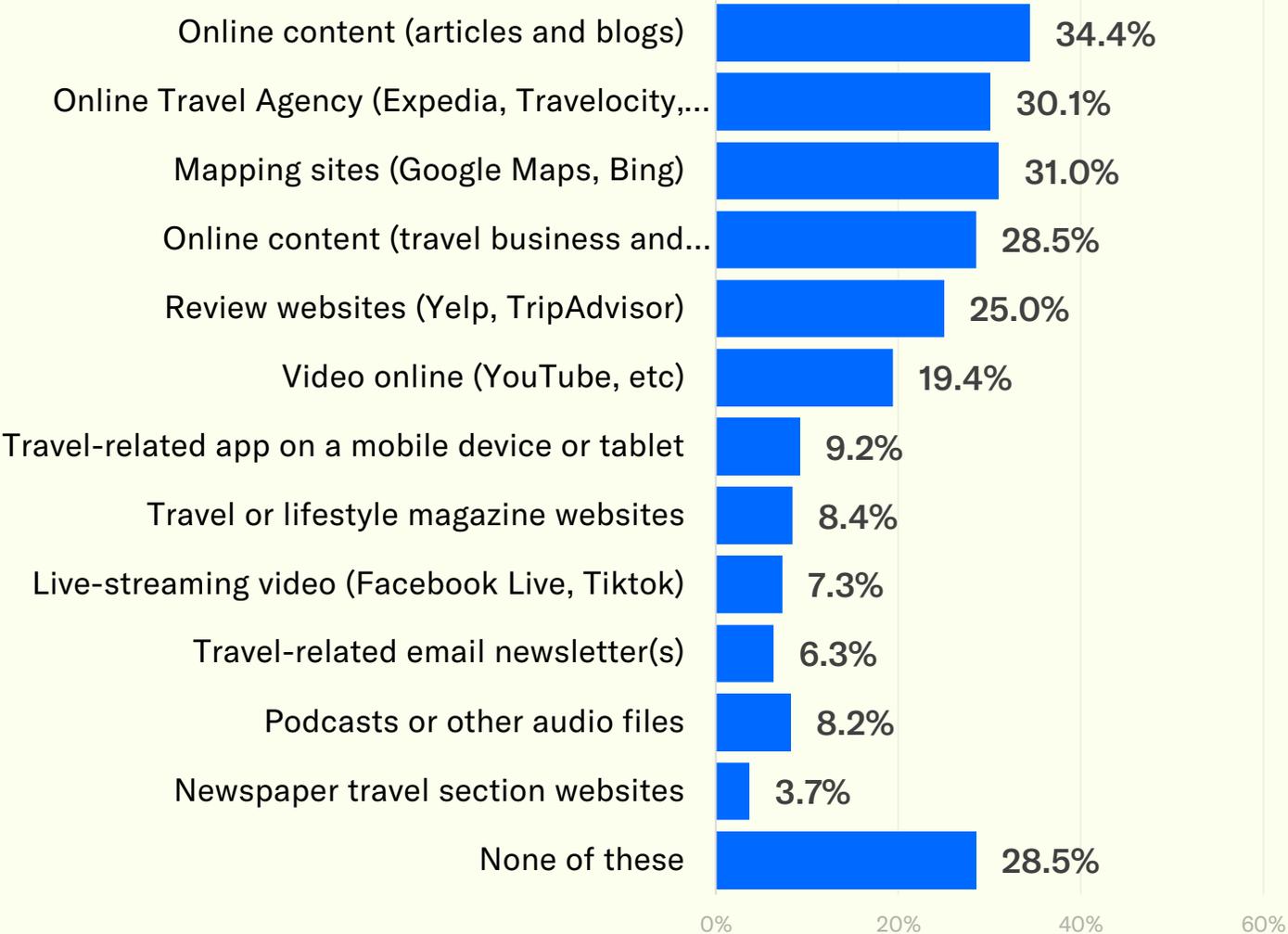


Half Rank Online Information as Quality

Question: How would you rate the quality of information available online for disabled travelers?



Online Resources Used on Travel Planning



Question: In the PAST 12 MONTHS, which of these resources have you used to help plan your travel? (Select all that apply.)

Please only check if used for travel planning, ideas or inspiration.

Online Resources Used on Travel Planning



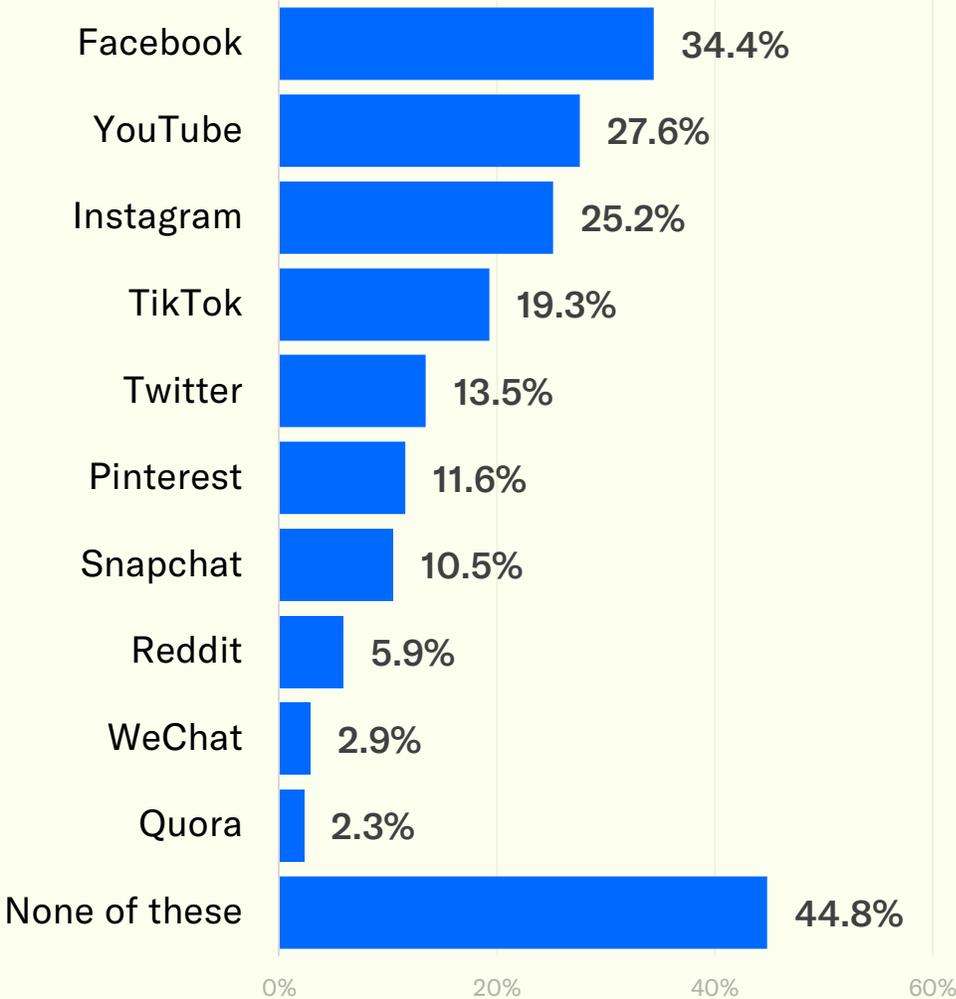
Question: In the PAST 12 MONTHS, which of these resources have you used to help plan your travel? (Select all that apply.)

Please only check if used for travel planning, ideas or inspiration.

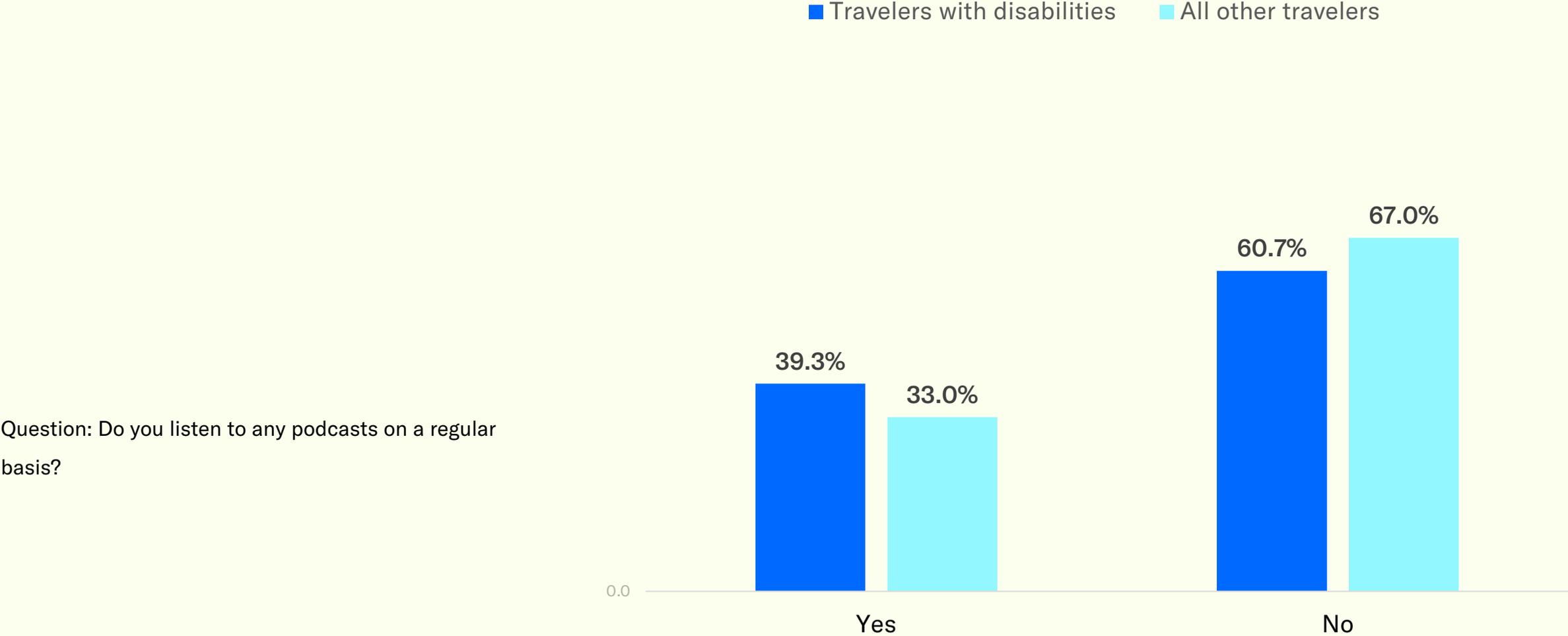
Social Media is More Important

Question: In the PAST 12 MONTHS, have you used any of the following social media platforms TO PREPARE FOR OR PLAN YOUR TRAVELS? (Select all that apply.)

Please only check if used for travel planning, ideas, or inspiration.

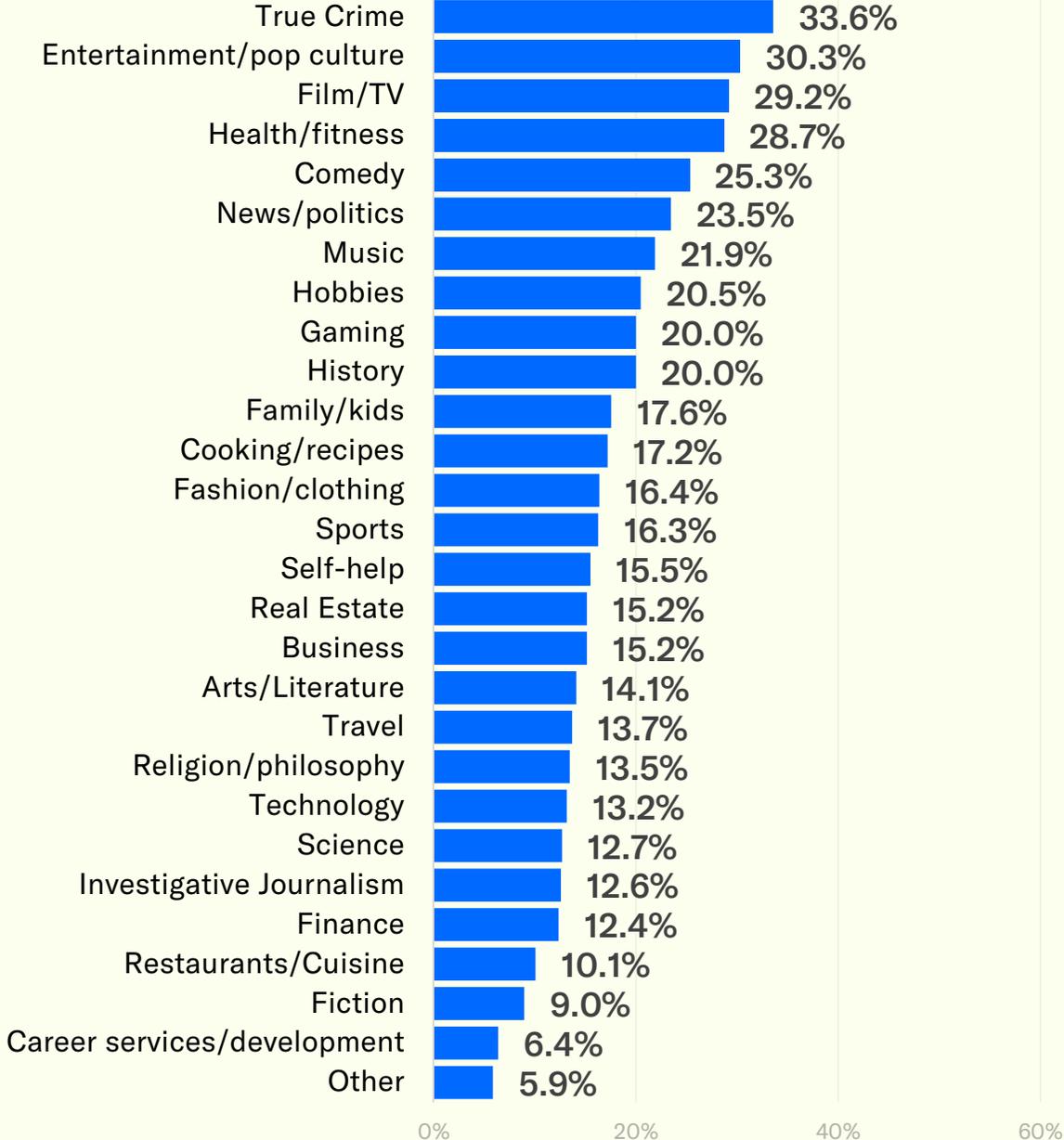


Travelers with Disabilities Listen to Podcast



Question: Do you listen to any podcasts on a regular basis?

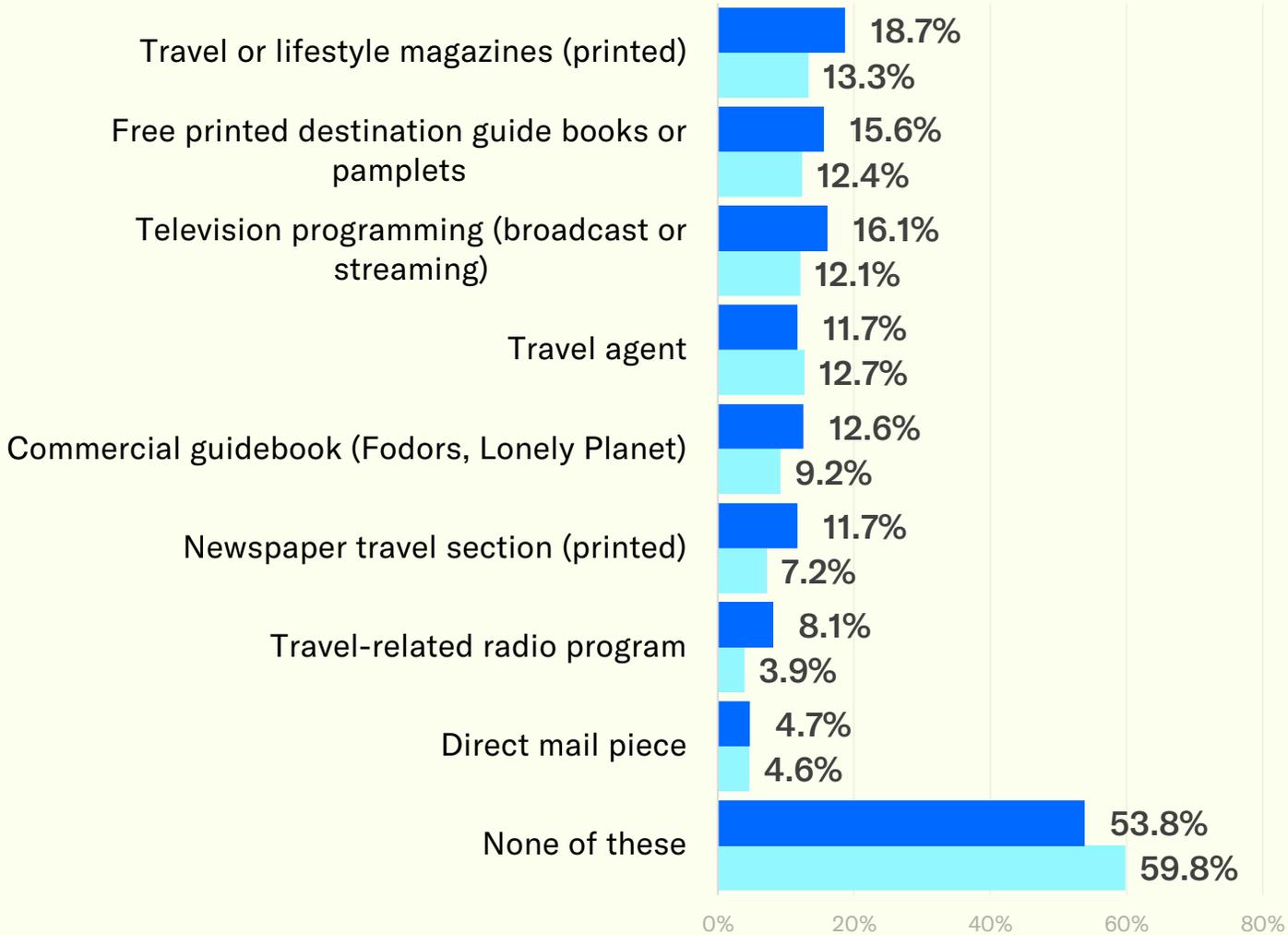
Podcast Genres



Question: What podcast genres do you listen to on a regular basis? (Select all that apply.)

Offline Resources Used on Travel Planning

■ Travelers with Disabilities ■ All Other Travelers

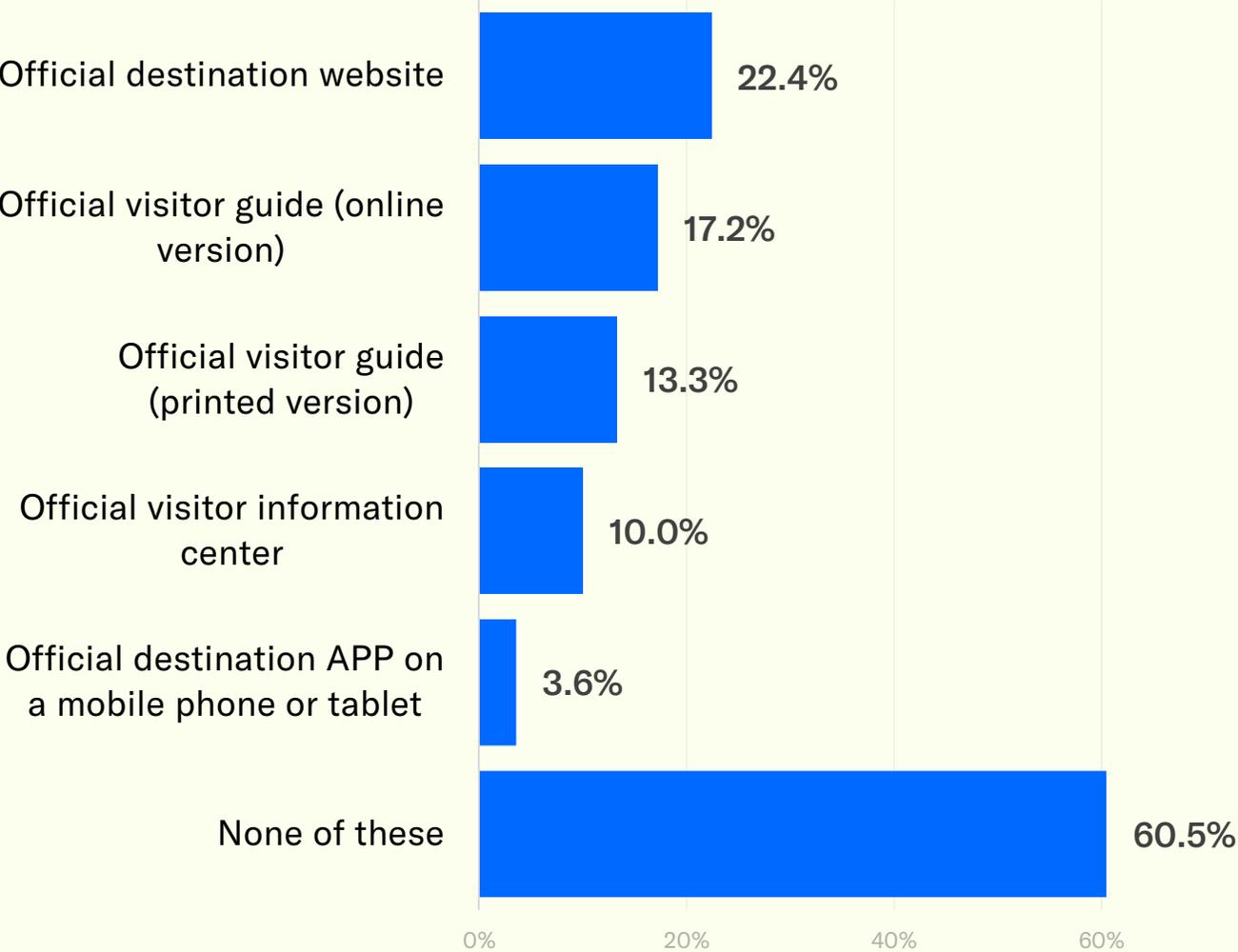


Question: In the PAST 12 MONTHS, which of these resources have you used to help plan your travel? (Select all that apply.)

Please only check if used for travel planning, ideas or inspiration.

Engaged with Official DMO Sources

Question: In the PAST 12 MONTHS, have you used a destination’s official local Visitors or Convention Bureau (or Chamber of Commerce) or state or national government tourism office to help plan any travel? If so, which resource did you use? (Select all that apply.)



Thank You!

POLL

How are you supporting
travelers and locals
with disabilities?



THE LAST UNTAPPED
TRAVEL
DEMOGRAPHIC:
WHAT'S IN IT FOR YOU?



BY JOHN SAGE, CEO &
October 2023
Founder

Mid-Week & Off-Season Visitors
Stay Longer & Spend More
Loyal, Repeat Customers
50% of Seniors, 20% of population
Overlooked by Travel Industry

Feeling Disabled

Comfortable at Home

"I do not feel disabled"

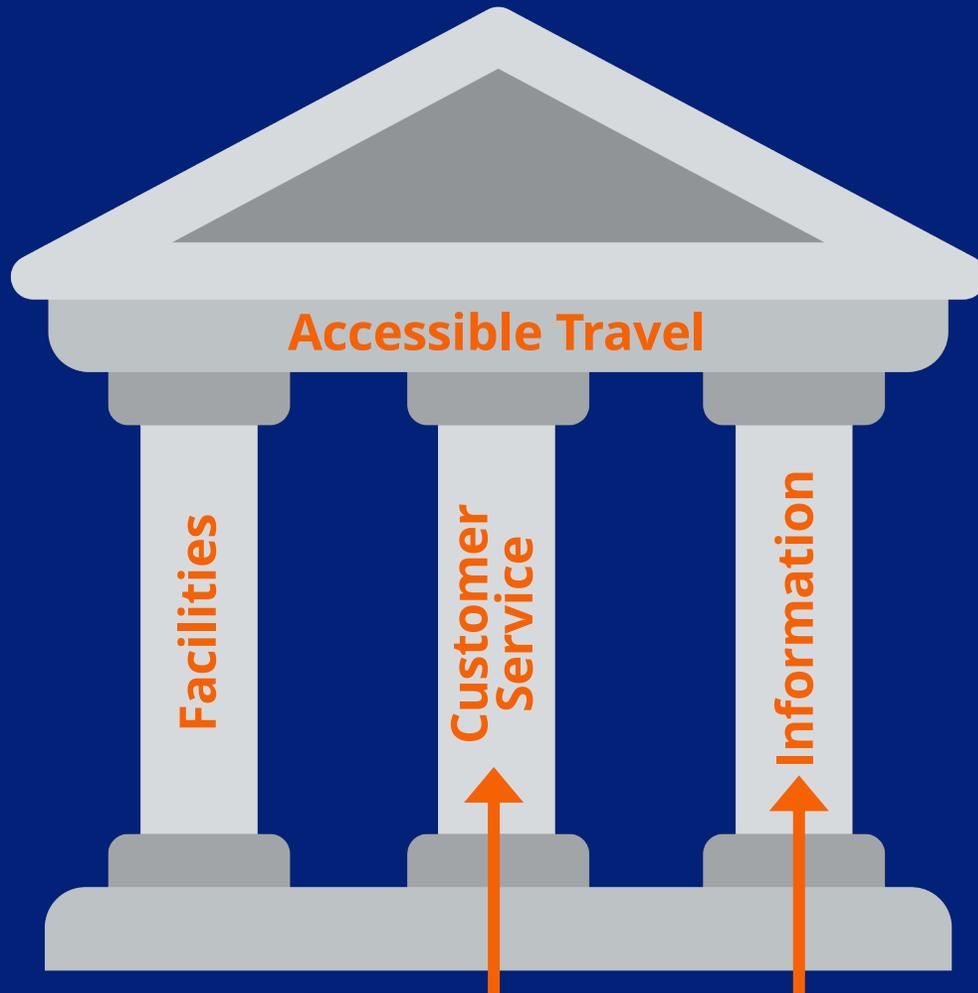


Enjoyable Vacation

"I easily avoided accessibility frustrations"

Fear Physical Pain
Embarrassment
Loss of
Independence
Anxiety Anger

Caused by Accessibility Barriers
NOT the Disability!



Legal compliance does not address these

What Disabled Travelers Need: The Three Pillars of Accessible Travel

- **Facilities**
 - **Built environment & technology**
- **Customer Service**
 - **Training & processes**
- **Information**
 - **Before booking, PwD's must know their accessibility needs will be met**
 - **84% of PwD's want destinations to provide increased accessibility information**

Sources: European Network of Accessible Tourism, World Travel and Tourism Council, Visit England, Expedia, Amadeus, and MMGY Portrait of Travelers with Disabilities

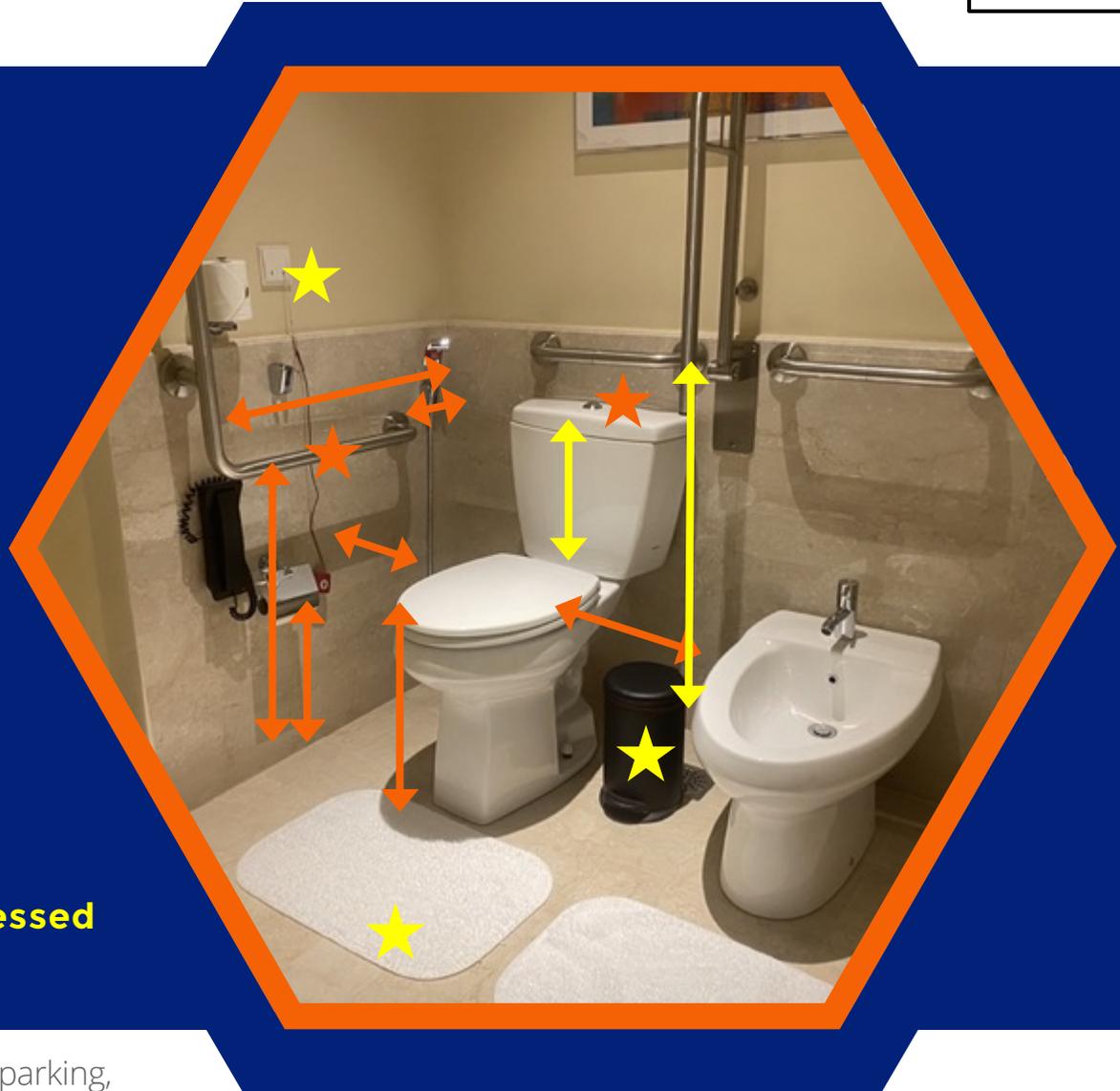
#1 Accessible Facilities

More Complex Than Many Realize



For example, an accessible toilet should take into account the following accessibility features:

- Space between toilet and wall
- Space on opposite side of toilet
- Height of toilet seat
- Height of toilet paper dispenser
- Height of grab bar on wall
- Length of grab bar on wall
- **Height of grab bar away from wall ***
- **Length of grab bar away from wall ***
- Diameter of grab bars
- **Height of back support ***
- Location of toilet flushing mechanism
- Type of toilet flushing mechanism
- **Obstructions including mats and trash cans * Not addressed by ADA or Architects**
- **Emergency notification type ***



Also need accessible sink, roll-in shower, doors, bed, desk, closet, minibar, balcony, parking, building entrance, lobby, front desk, elevator, restaurant, pool, fitness center, and more

#2 Accessible Customer Service

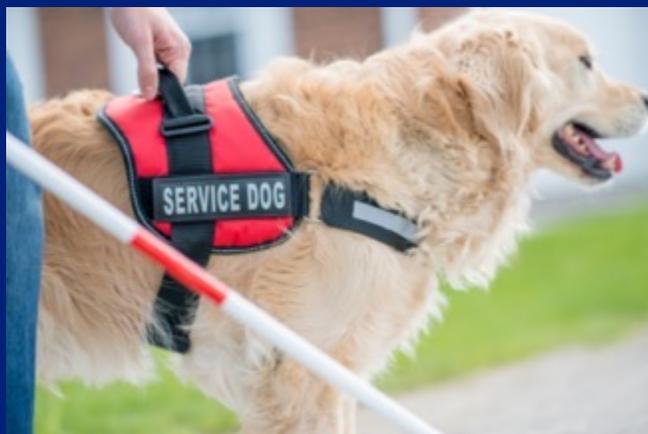
Three Types of Accessibility Training

1. Disability Awareness Training

2. Role-Specific Training

- Reservation agent, front desk, housekeeping, F&B, destination manager, and travel agent

3. Executive-level workshops (vision and strategy)



Accessibility Information

Hilton
SINGAPORE Orchard

KING ACCESSIBLE ROOM

34 sq. m./365 sq. ft. Accessible, Wi-Fi, 49-inch TV

Enjoy your stay in this modern accessible room with one king bed and accessible amenities. Unwind and watch your favorite programmes on the 49-inch LED TV and stay connected with Wi-Fi. Freshen up in the specially **fit roll-in** marble bathroom with Crabtree & Evelyn bulk bath amenities and **lowered sink**. The room also features **lowered closet shelves**, **accessible hand rails**, **rest bar** and **panic button** to make you feel at home.

[Check Availability](#)

WELCOME TO ROYALTON BLUE WATERS MONTEGO BAY, AN AUTOGRAPH COLLECTION ALL-INCLUSIVE RESORT

Find paradise at the Royalton Blue Waters Montego Bay Resort

Accessible Hotel Features

- Accessible on-site parking
- Property has elevators
- Valet parking for vehicles outfitted for drivers in wheelchairs
- Van Accessible on-site parking

Accessible Areas with Accessible Routes from Public Entrance

Guest Room Accessibility

- Accessible Vanities
- Adjustable Height Hand-Held Shower Wand
- Bathtub Grab Rails
- Bathtub Seat
- Close Caption TV
- Deadbolts on Guest Room and Suites Doors
- Electronic Room Key
- Guest Room and Suites Doors Self-Closing
- Hearing Accessible Rooms and/or Kits
- Lever Handles on Guest Room Doors
- Lowered Deadbolts on Guest Room Doors
- Lowered Electrical Outlets
- Lowered Night Guards on Guest Room Doors
- Lowered Viewports in Guest Room Doors
- Room Windows Open
- Safety Chains and/or Latches on Guest Doors
- Secondary Locks on Room Windows

TRIP IDEAS

Accessible and Inclusive Travel on the Oregon Coast

Outdoor enthusiasts can find a number of destinations across Oregon ideal for accessible adventures. Now visitors to the Oregon Coast can enjoy even more accessibility and inclusivity at its state parks — and more upgrades. [MORE](#)

Accessible Travel in Eugene

For decades, Eugene has advocated for accessibility as a core community value. [MORE](#)

Accessible Trails

FOUR SEASONS HOTEL NEW YORK

HOTEL OVERVIEW ACCOMMODATIONS PHOTOS & VIDEOS OFFERS

BUSINESS CENTRE

WHEELCHAIR-ACCESSIBLE ROOMS

VALET PARKING

FIFTY7 EVENT SPACE

How is the Musee d'Orsay accessible for disabled visitors?

Seniors and guests with disabilities or special needs are welcomed to enter the museum directly without waiting in line (Entrance C). The Musée d'Orsay provides free entrance for guests with special needs with one accompanying guest or helper. Wheelchairs are available from the cloakrooms on deposit of an identity document. Folding chairs are available as well for those who have difficulty standing. The whole of the museum area, temporary exhibitions and commercial areas can be accessed using elevators and access ramps.

Burj Al Arab

OFFERS DINING SUITES EXPERIENCES WELLNESS EVENTS

Guests with special needs

We have a number of support services to assist guests with special needs. Please contact our Concierge for more details.

Five Requirements for Effective Accessibility Information

1. Accurate

- Verified (not self-reported) and up-to-date

2. Detailed

- Measurements

3. Clear

- Photographs

4. Comprehensive

- All areas & trip components

5. Trusted

- International standards



Marketing to People with Disabilities (PwD's)

Maslow's Hierarchy of Needs



Destination Marketing Focus

- Inspiration, Experiences, Itineraries

Disabled Traveler Primary Needs

- Accessibility Details

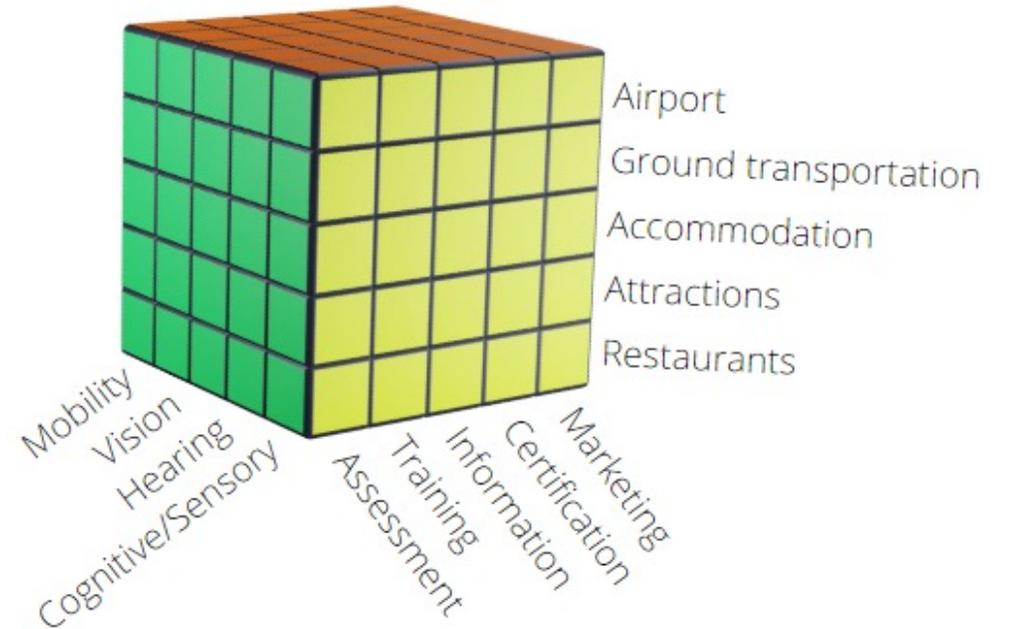
Budgeting for Accessibility



What are we currently spending marketing to 80% of the population?

What are we currently spending marketing to 20% of the population?

The Sage Accessible Destination Marketing Cube



The DMO Path to Accessible Travel Success

5. Market to PwD's

4. Document & Publish

3. Train Staff

2. Collect & Assess

1. Budget

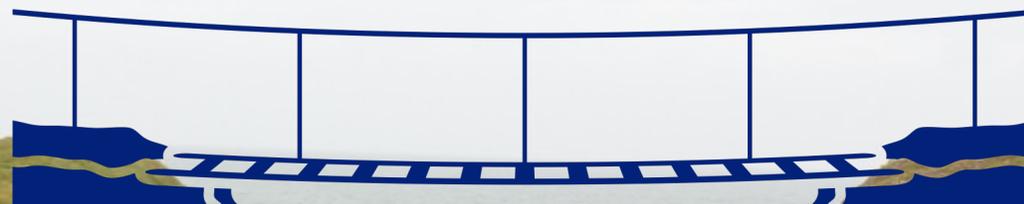
You Can Be the Hero!

Comfortable at Home

"I do not feel disabled"

Enjoyable Vacation

"I easily avoided accessibility frustrations"



You



You Can Eliminate the
Feeling of Disability!



The Importance of Digital Accessibility

August Erickson

Accessibility Program Manager

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Important Acronyms:

ally » Accessibility

ADA » Americans with Disabilities Act

WCAG » Web Content Accessibility Guidelines

W3C » World Wide Web Consortium



The History of Digital Accessibility:

- » **1990:** The ADA is signed into law by George H.W. Bush
- » **1991:** The first website goes live on the world wide web
- » **1996:** The DOJ takes the “position” that the ADA applies to web content
- » **1999:** The Web Content Accessibility Guidelines (WCAG 1.0) are introduced by W3C



What Are the Web Content Accessibility Guidelines (WCAG)?

- Internationally recognized **guidelines** to ensure digital products (primarily websites) are accessible to those with disabilities
- WCAG outline specific success criteria which are designed to remove digital barriers for individuals with disabilities, and ensure digital content can be analyzed by assistive technology
- WCAG are published and maintained by W3C, a non-profit organization formed to establish standards for the World Wide Web



What Are the Web Content Accessibility Guidelines (WCAG)?

- The current version of WCAG is 2.2, which was just finalized by W3C on October 5, 2023.
- Each version of WCAG outlines 3 separate conformance levels:
 - A
 - AA
 - AAA



How to Analyze

Digital Content

Use a combination of automated scans and manual user testing

- Automated scans look for code/structure-based issues based on the WCAG success criteria
- Manual user testing consists of individuals with disabilities testing your website (relying on keyboard navigation and/or assistive technology)



How to Prioritize

AIly Efforts

When conducting remediations, ensure you're following a prioritized approach

- **Phase #1:** Component-based remediations
- **Phase #2:** Homepage remediations
- **Phase #3:** Template-based remediations
- **Phase #4:** Individual remediations



The Curb-Cut Effect

By prioritizing digital accessibility, you're creating a better user experience for ALL.



Digital Accessibility should be viewed as a process, not a project

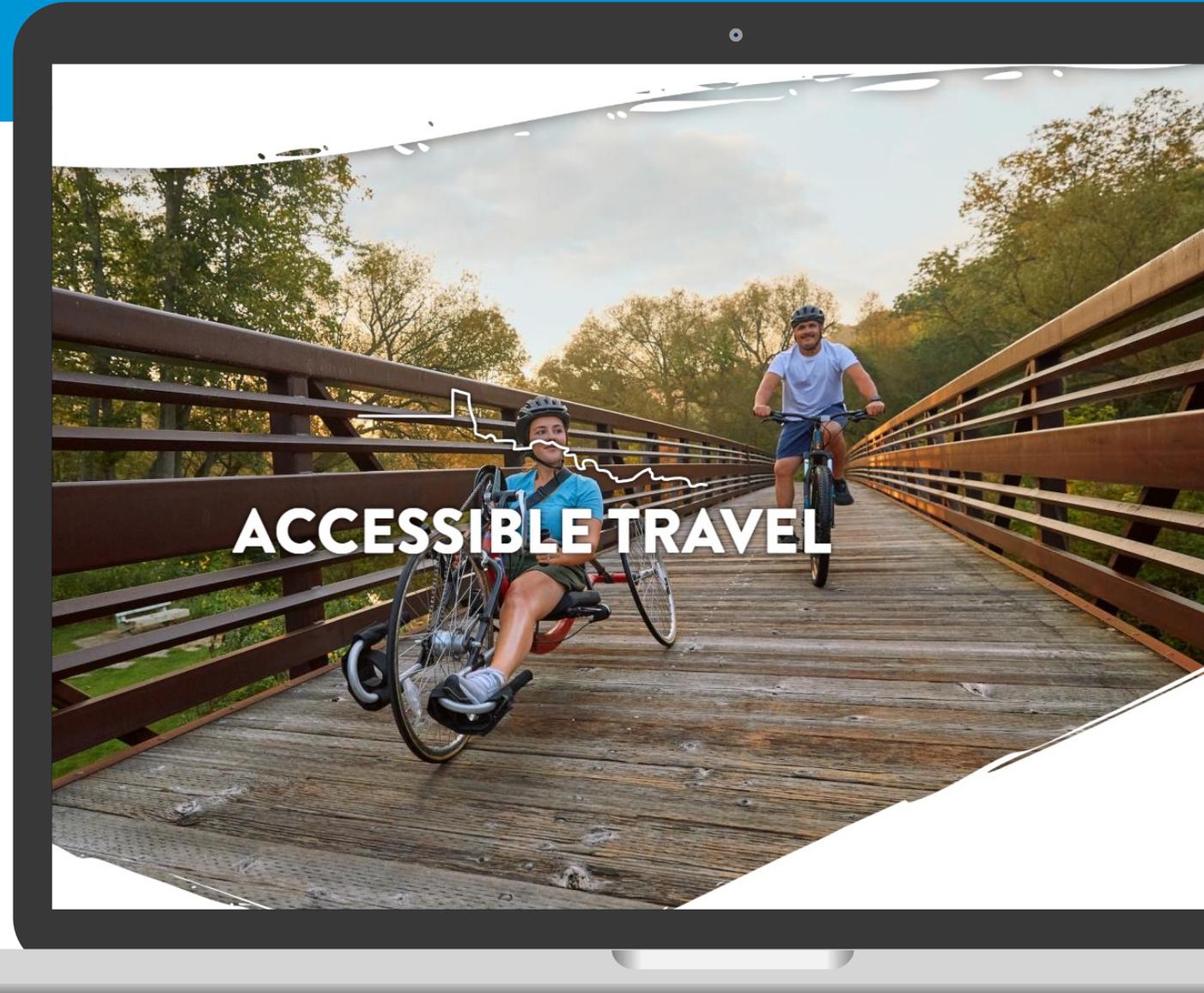
- Digital accessibility is an ongoing initiative
 - Modern websites are incredibly dynamic
 - Accessibility guidelines change over time
- It's best to address new accessibility issues as they arise, to continue to facilitate the best user experience possible for those with disabilities



Custom Content

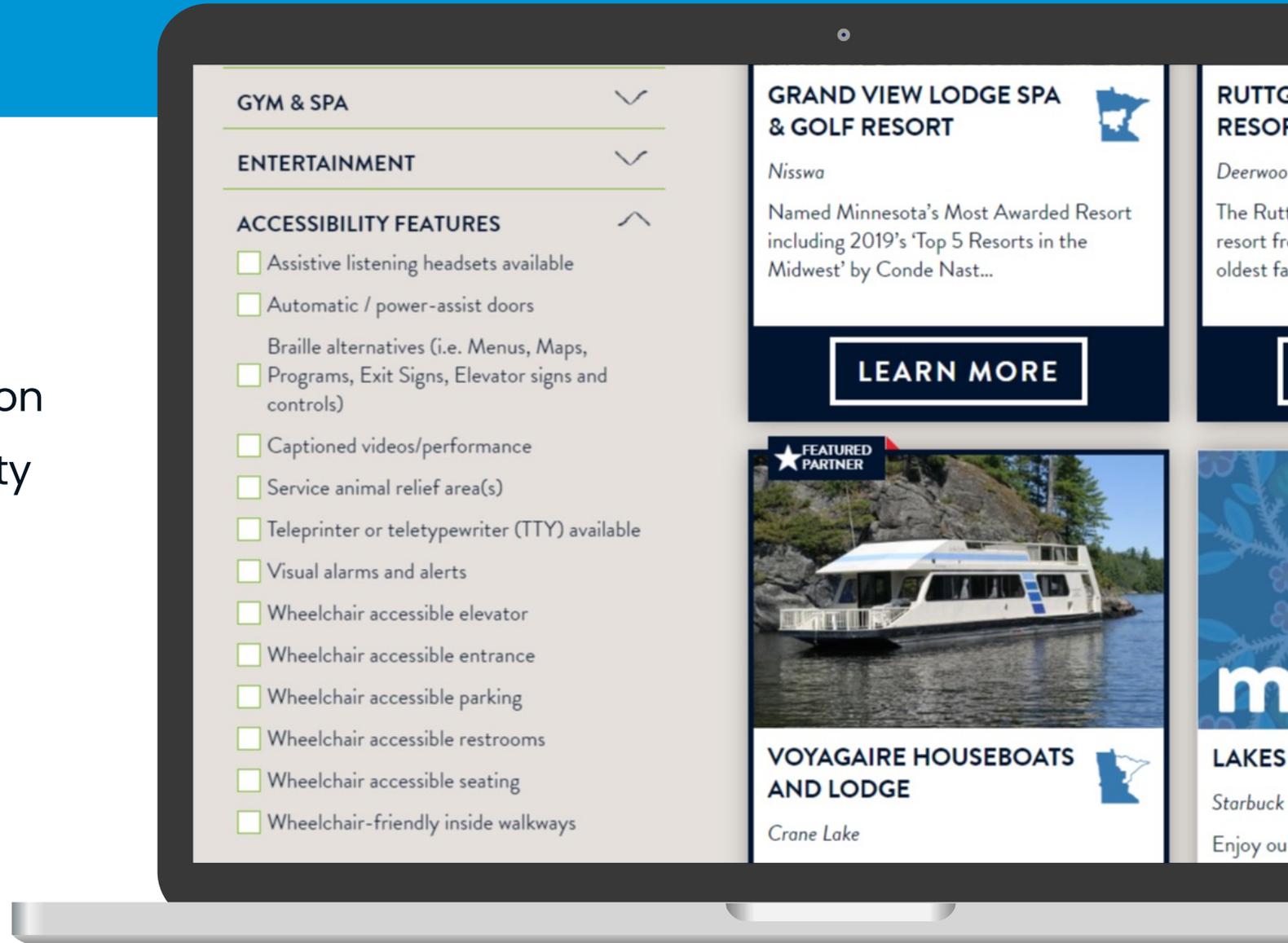
Create custom content for travelers with disabilities.

- Blog posts
- Itineraries
- Planning resources



Search Interfaces

Update search interfaces present on your website to include accessibility features / amenities.





August.Erickson@MilesPartnership.com

Q&A

Additional Resources



UPCOMING QUARTERLY EDITIONS

THE STATE OF THE AMERICAN TRAVELER

MilesPartnership.com/SAT

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Meet Miles What We Do How We Think Join Us

The State of the American Traveler: Traveler Segments Edition 2023

✓

This year's Traveler Segments Edition of The State of the American Traveler study explores travelers by three groupings: affluent, generations and foodies. What sets affluent travelers (those with an HHI of \$200,000+) apart from other travelers? What marketing channels best reach each of the different generational segments? And, what role does food play when it comes to travel? This edition takes a special look at travelers who identify

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Meet Miles What We Do How We Think Join Us

The State of the American Traveler: Technology Edition 2023

✓

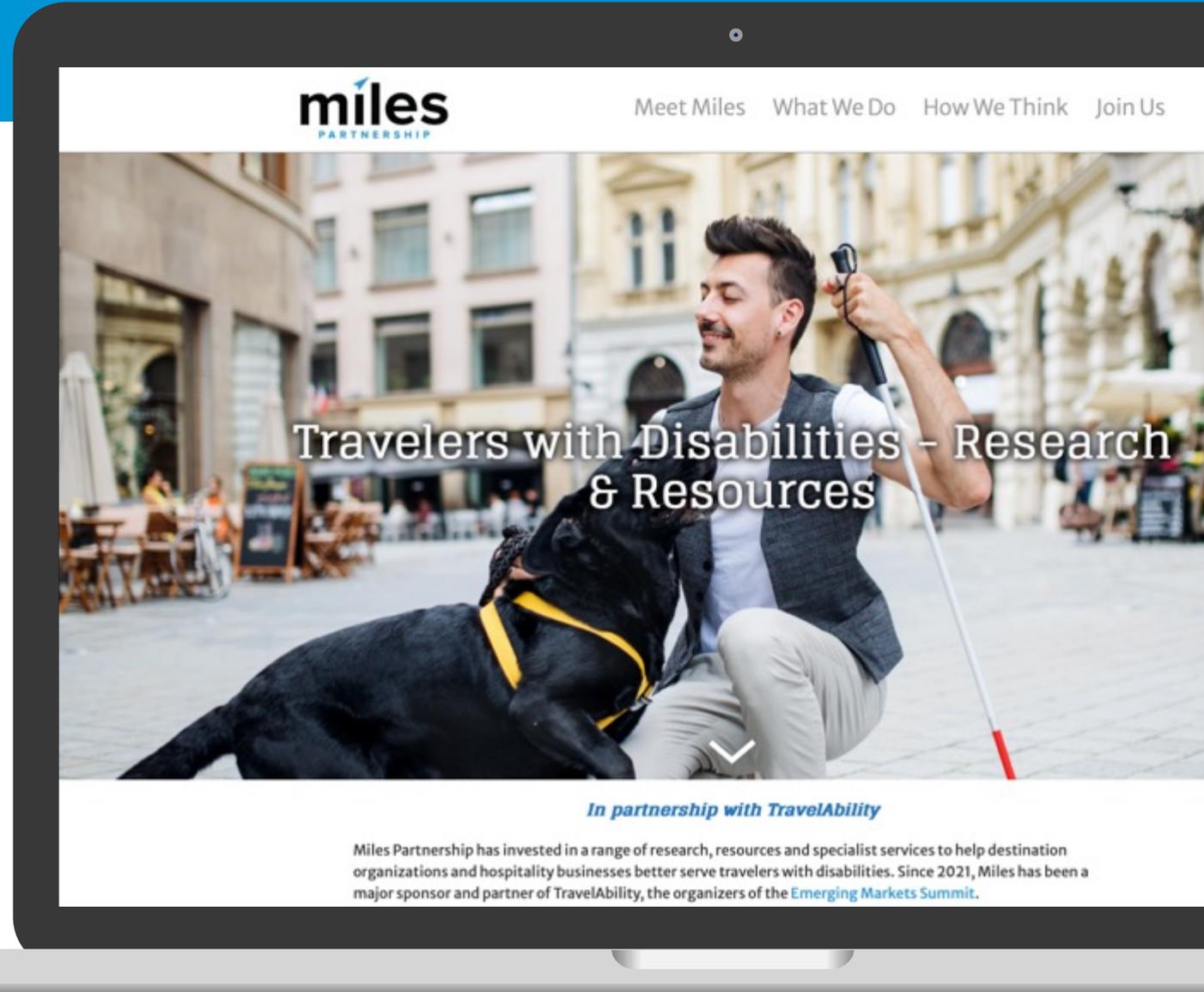
The 2023 Technology Edition of The State of the American Traveler explored current traveler sentiment and some of the most critical questions and trends facing travel today, including ChatGPT, generative AI and all of the buzz around vertical and short-form video.



ADDITIONAL RESOURCES

Slide deck, research and additional resources will be available at

MilesPartnership.com/travelers-with-disabilities





Q&A

Thank you!