



Acknowledgements

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- Deem
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Summary

This research was conducted to provide a clear picture of the accessibility opportunity for business travel in a way that would allow companies to build solid business cases and focus their efforts where they are needed most.

Hundreds of US-based travel managers from all types of companies and sizes of travel programs were surveyed, along with over 100 travelers. The online surveys were complemented with in-depth interviews of over a dozen travel managers and travelers.

There are many more travelers with accessibility requirements than travel managers think.

70% of travel managers don't know or would not estimate how many of their travelers have accessibility requirements, with a number believing that they have none. Most of the remainder, 24% of the total, estimated the population at 5-10%, many times lower than the 47% of travelers who self-identify as having requirements. Travelers use a much broader definition that includes temporary conditions, food allergies, size, chronic pain and more.

As a result, there has been little focus on accessibility, with just 15% of travel management teams having a part or full-time person dedicated to accessibility and 69% saying they don't spend time making arrangements. Over 40% do not make policy adjustments.

Accessible business travelers travel as much and spend more per trip, but they are less satisfied.

Almost as many travelers with accessibility requirements took trips in 2019 as those without, and their total number of trips is comparable. Average spend per trip is likely higher, with more accessible travelers booking premium air and higher star-rated hotels, and the percentage that travel internationally is nearly equal.

But satisfaction with their business travel experience is a full 17 points lower among those with accessibility requirements (57% vs. 74%). And far fewer feel included and valued by their companies (44% vs. 66%). Improvement to the accessible travel experience can play an important role in supporting corporate DEI efforts.



Travel Managers would like to address accessibility, and there are clear opportunities.

30% of travel managers are currently working on accessibility or would like to by year end. Another 22% would like but are currently focused on other priorities. Accessibility is starting to gain awareness and focus.

Several areas are prime for immediate attention. Communication is the natural starting point. But communication builds expectation, so it is important to link this to tangible improvement. Ensuring that the right information is captured and easy to find creates the foundation for service improvement, which creates further communication opportunities. This improvement cycle of Communicate-Capture-Deliver can be applied to programs overall, or focused on specific areas, like navigating the airport or hotel accommodations.

Duty of care/disruption management and travel policy are important places to start because they offer great impact, apply to all accessible travelers and have relatively simple, low-cost actions that can have immediate benefits.

Introduction

“It feels like a niche.”

“We absolutely want to support this, but we need a business case and have no idea how big this is.”

There was universal agreement with the social importance of serving travelers with accessibility requirements, how consistent it is with corporate values and there was a genuine desire to act. But in today’s environment, companies need rock-solid justification for every bit of resource commitment. And they lacked the data to get started.

So we, Accessio, decided to end the cycle of indecision.

What is accessibility for business travel?

Accessible travel means addressing the physical and/or cognitive requirements that enable travel in a safe, comfortable and optimal manner.

Methodology

We created two online surveys, one targeting travel managers and the other directed at travelers. The surveys were distributed by our partners to their North American clients and prospects, as well to our own network of travel manager contacts, with data collected from June 8- September 7th, 2022.

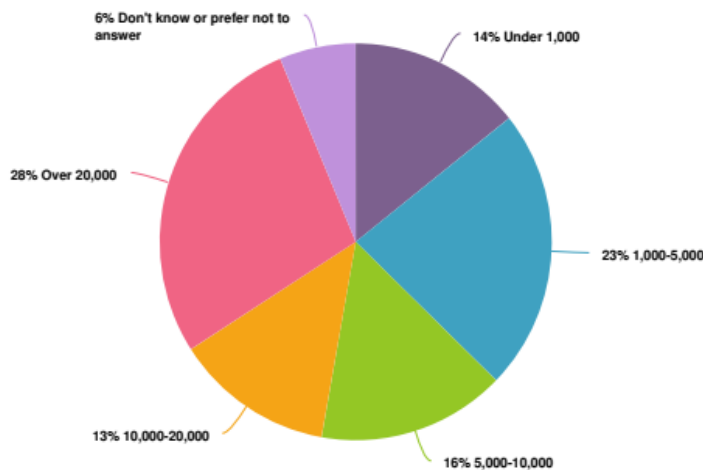
We also conducted thirteen video interviews to personalize the data.

Objective

To assess the composition and attributes of the US-based Accessible Corporate Travel market, including

- Size and characteristics
- Travel frequency & spend
- Main requirements
- Satisfaction
- Top opportunities

Sample Size



346 travel managers from 130 companies responded to all or substantially all the questions. There was a broad representation of company size, industry sector and 2019 (pre-Covid) air spend. This represents an estimated 2.5 million employees and \$3.5 billion in 2019 air spend (pre-Covid) - greater than the top nine corporate travel accounts worldwide, based on

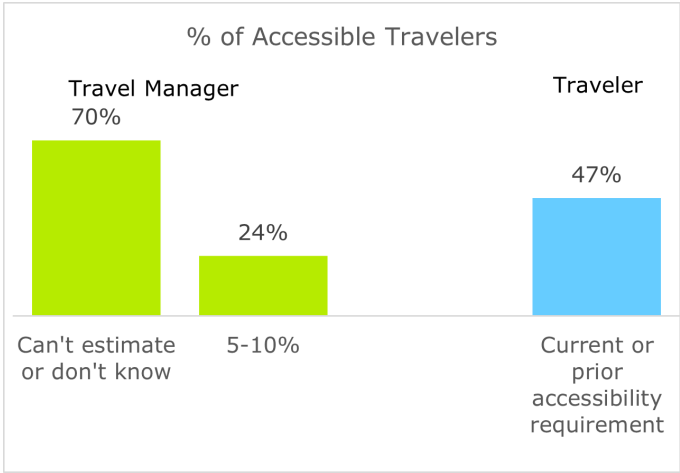
the BTN Corporate 100 for that period.

102 travelers responded to all or substantially all the questions. Because of the low sample size relative to the total number of US-based business travelers, and the small number of companies represented, the traveler data should be seen as more directional and qualitative.

Section 1 – Travel Manager Perspective

There are many more travelers with accessibility requirements than travel managers think.

The overwhelming majority of travel managers cannot estimate or do not know how many travelers with accessibility requirements they are serving. Of those who did answer, 24% chose the lowest category of 5-10%. But a full 47% of travelers self-identify as currently having or having had an accessibility requirement in the past.



- Reasons Travel Managers may not ask about accessibility
- Privacy
 - HIPAA
 - Lack of awareness
 - Lack of coordination with suppliers, TMCs
 - No systems to capture requests or requirements

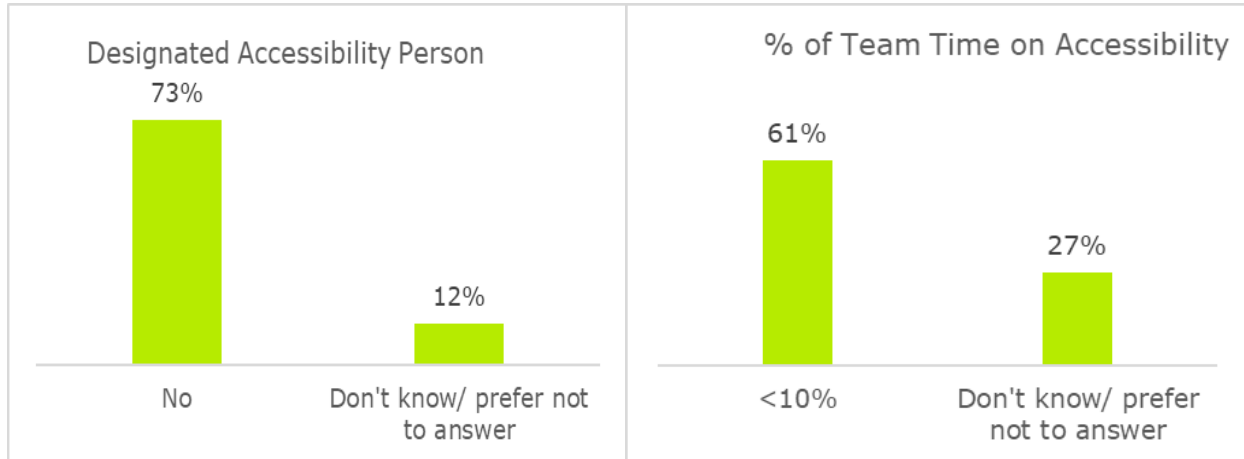
Why the gap? In addition to general lack of awareness, travel managers are sensitive to privacy issues and may be uncertain of how to ask respectfully. They also define the group more narrowly, tending to exclude temporary conditions, like people recovering from surgery or pregnancy, and a wide range of other challenges like size, food allergies and chronic pain. Many assume people with accessibility requirements choose not to travel at all.

But the biggest issue by far is a communication disconnect. 29% of travel managers don't identify travelers with accessibility requirements and 50% say their travelers tell them. But 50% of accessible travelers say they don't know who to contact at their company to discuss their requirements.

Accessibility simply has not been an area of focus for most travel programs.

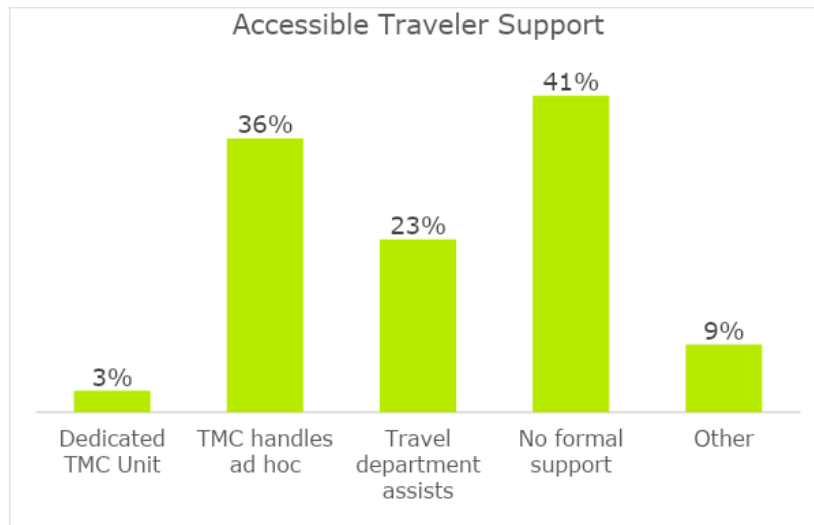
It is hardly surprising that most travel managers have not focused on accessibility given the stress placed on travel departments throughout Covid and the lack of awareness of the size and composition of the accessible traveler segment. Nearly three-quarters do not have a

designated part or full-time resource, and over six out of ten spend under 10% of the team's time focused on accessibility.



Though there is little focus, most likely driven by lack of awareness, Travel Managers do a good job of tapping into specialized accessibility resources, with 50% working with HR, and 20% each with DEI resources and their TMC.

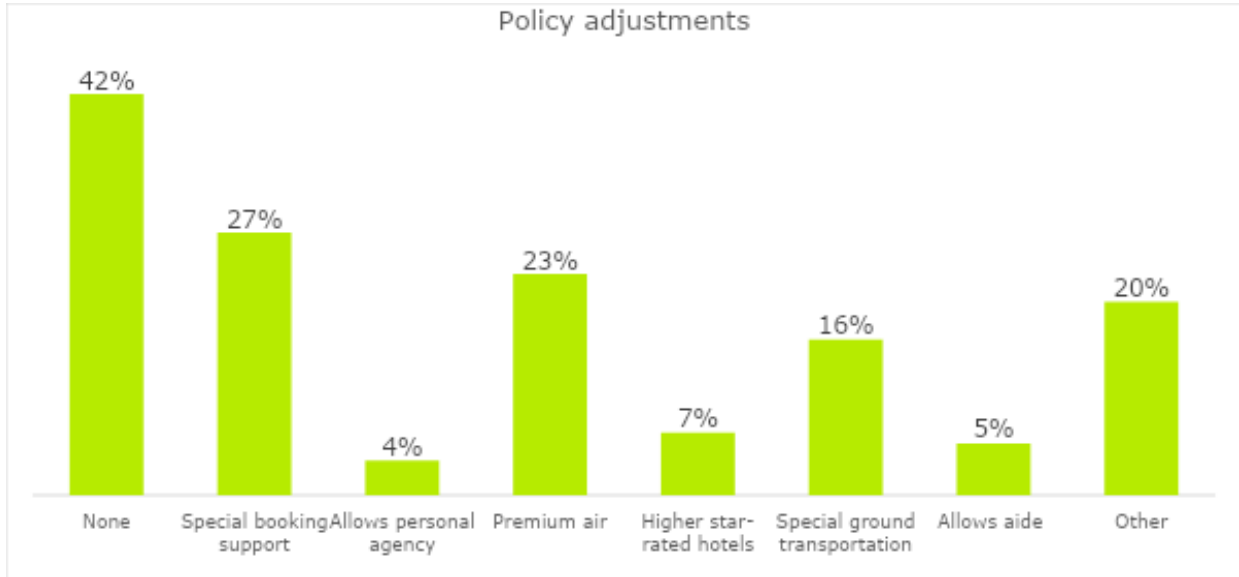
Specialized support is generally either missing (41% provide no support), or ad hoc through the TMC (36%).



While formal support is limited, many companies make accommodations for accessibility requirements.

It is encouraging to note that a high number of companies provide special support and services (27%), premium class of air travel (23%) and special ground transportation (16%).

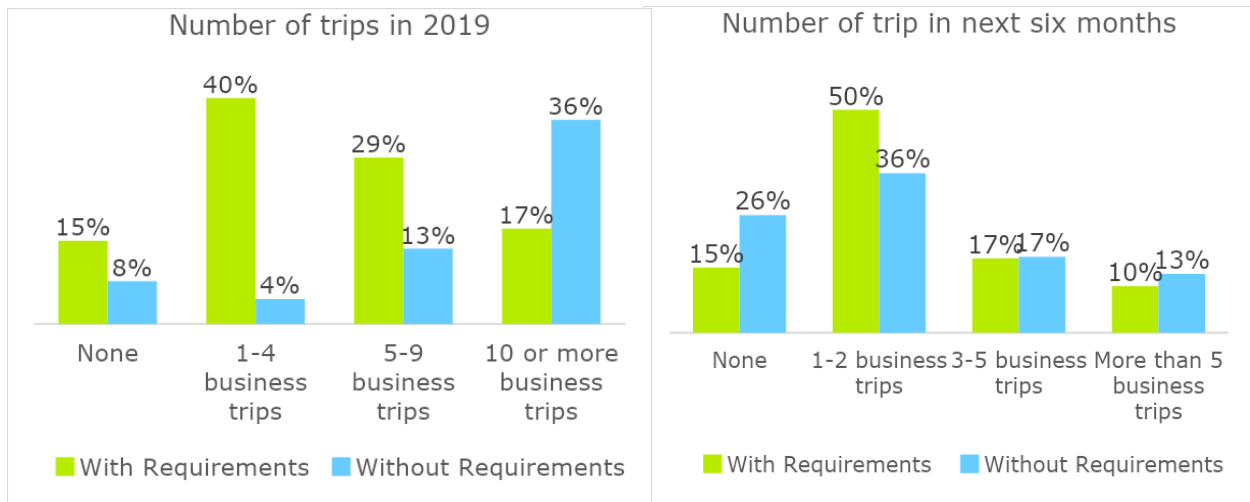
Travel Manager remarks also reinforce this. Often, support is provided on a case-by-case basis. Though this is positive, it also points to the overall lack of standard processes. That in turn detracts from the customer experience, decreases efficiency, and increases cost.



Section 2 – Profile of the Accessible Traveler

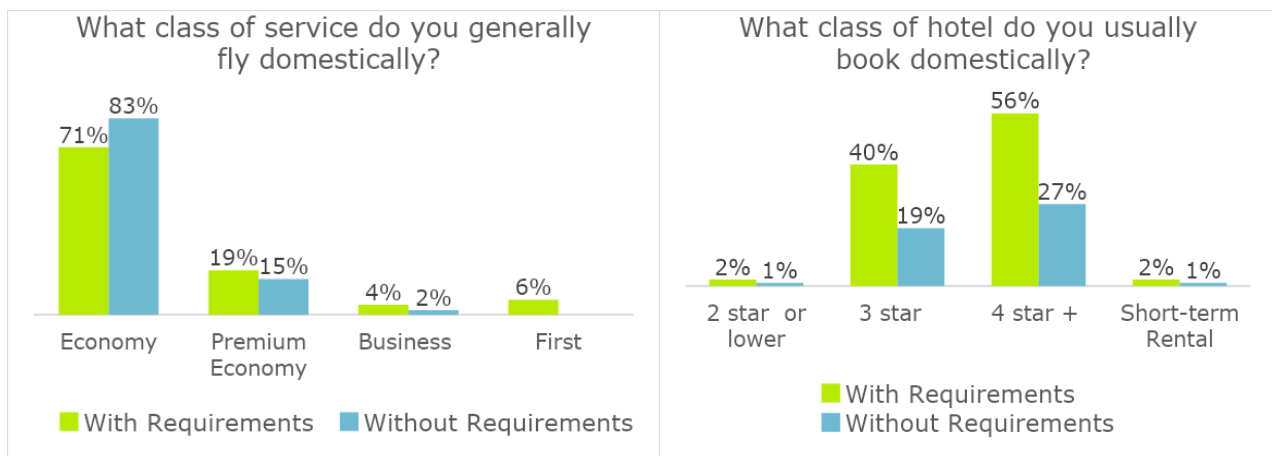
Accessible travelers travel frequently and spend more.

68-70% of travel managers also did not estimate travel frequency and spend patterns. 20% assumed that accessible travelers travel much less than other business travelers. Travelers tell a very different story, with above-average frequency and spend - a very attractive segment.

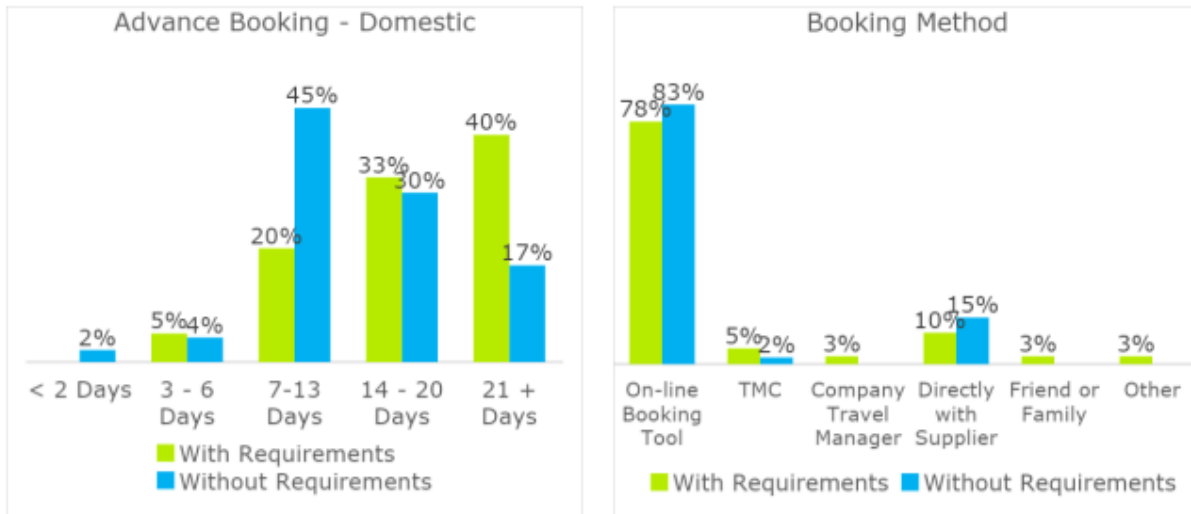


The assumption that Accessible Travelers are more likely to be immunocompromised and therefore less likely to return to the road is not accurate. In fact, more plan to travel in the near future.

Accessible travelers are also more likely to book premium class air and higher star-rated hotels, both domestically and internationally.

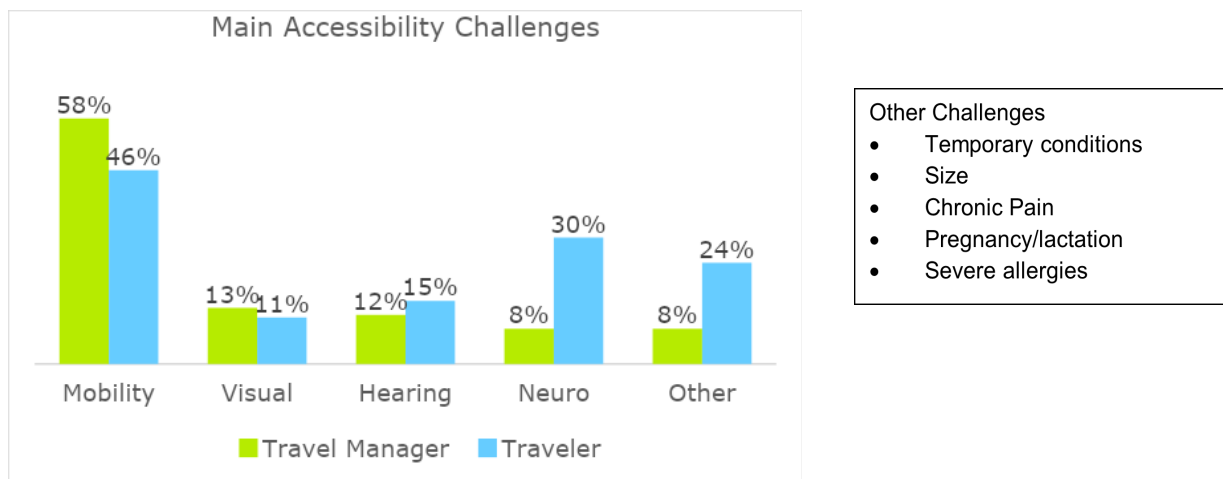


Accessible travelers also tend to exhibit good booking behavior. They book much further in advance on both domestic and international trips, and almost as many use their company’s online booking tool or travel management company. Surprisingly, fewer book directly with suppliers.



Travel managers focus on mobility, but accessibility is much broader.

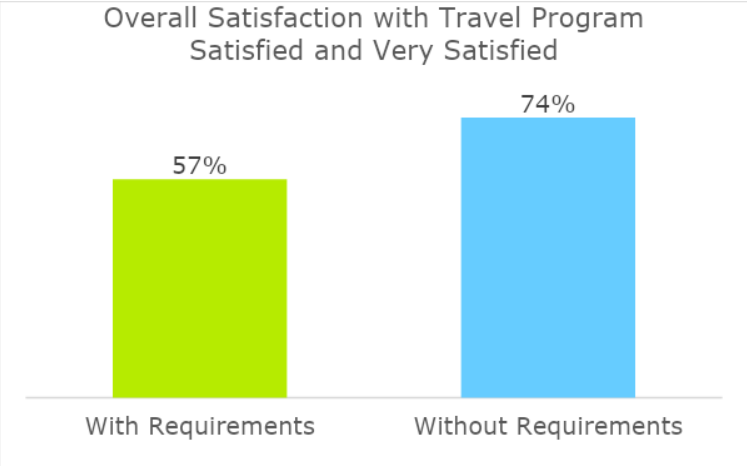
60% of travel managers would not estimate the types of accessibility challenges their travelers face. Those who did overestimated Mobility and underestimated Neuro and Other challenges. This could lead to solutions that do not adequately address the needs of those with Neuro and other challenges.



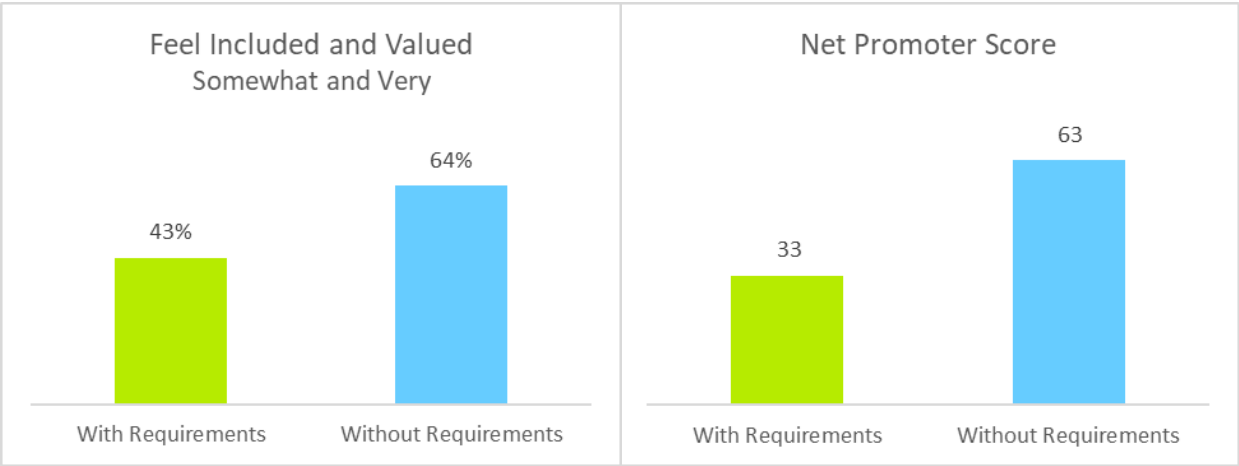
Note: Total exceeds 100% since people may have more than one challenge. Travel Manager results exclude "Can't estimate or don't know".

Travelers with accessibility requirements are much less satisfied and feel less valued and included.

Travelers with accessibility requirements score a full 17 percentage points lower in overall satisfaction vs. those without. This should be an area of focus given how much they travel and the significant DEI efforts by their employers.



A similar gap exists in feeling valued and included by their company, and in Net Promoter Score, which measures likelihood to recommend, a strong loyalty indicator. The data cannot establish how much the business travel experience impacts these scores, but the difference shows a real opportunity for improvement.

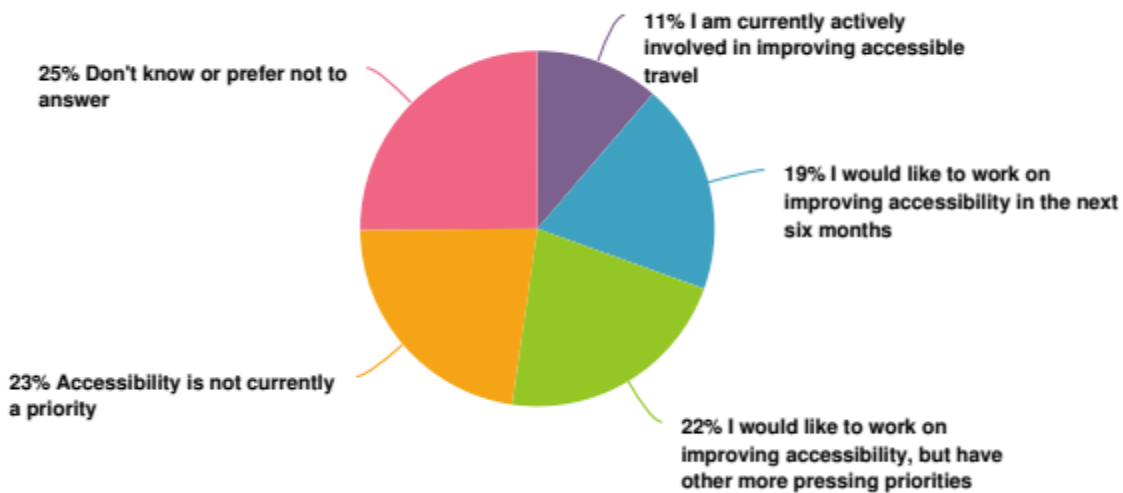


Section 3 – Improvement Priorities and Recommendations

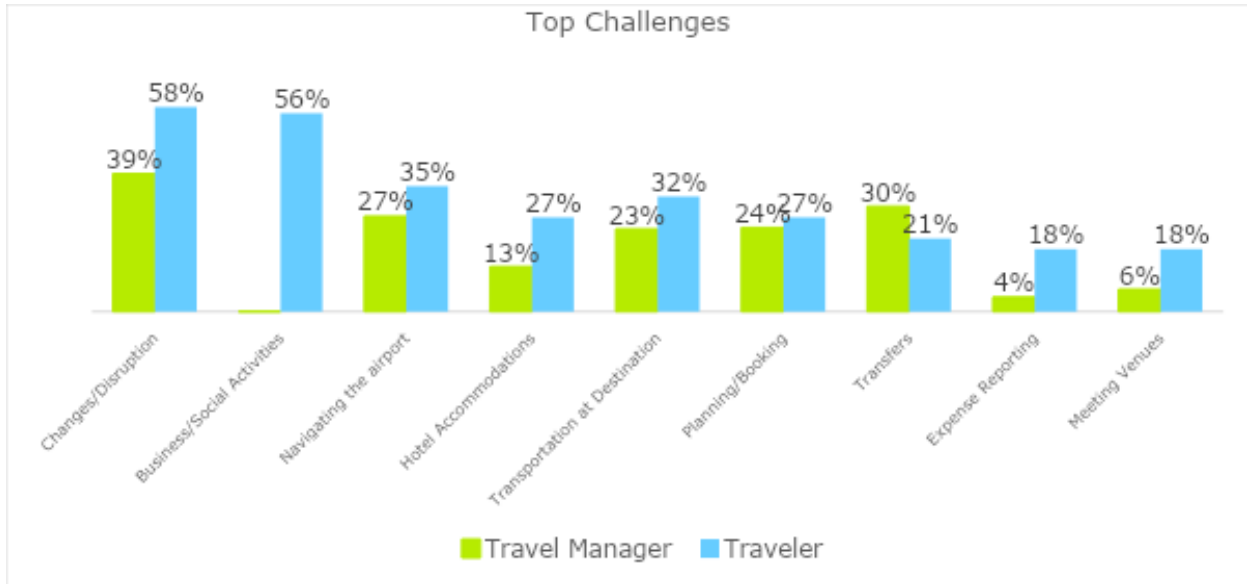
Most travel managers would like to address accessibility, and there are clear opportunities.

Over 50% of travel managers would like to improve accessible travel support, with 30% currently active or planning to be by year end. This is very encouraging and indicates a solid acknowledgment that accessibility matters, in particular when compared to the 23% that do not see accessibility as a priority.

How high a priority is improving your accessible travel support?



More good news: travel managers and travelers tend to agree on the main business travel accessibility challenges, though there are some notable exceptions.



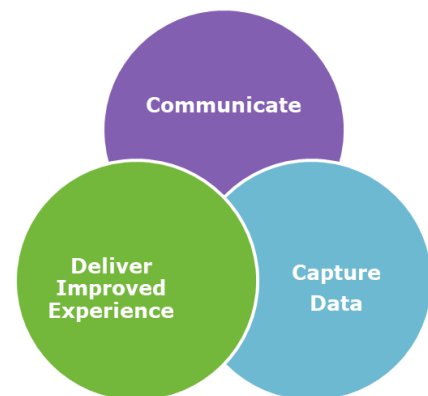
“Changes/Disruptions” is highest rated for both, though travel managers may be less aware of the duty of care implications and the difficulties these pose for accessible travelers. There is also general agreement on the “on-trip” challenges booking process.

The areas that traveler managers are less focused on: hotel accommodations, expense reporting and meeting venues. Being switched to a different accessible room, waiting several months to be reimbursed because checking a wheelchair is a policy exception, having to wheel long distances in a short time across carpeted (exhausting) hallways all can make the accessible traveler less effective during their trip, and feel less valued.

Business and social activities were second only to disruptions for travelers. This is normally outside the scope of travel manager responsibilities but should be addressed.

The Cycle of Improvement

Communication is the natural starting point. Lack of communication results in vastly underestimating the size, composition, and requirements of the accessible community. This leads to lack of focus and prioritization. Travelers don’t know who to communicate with, and what current policies and services are there to assist them.

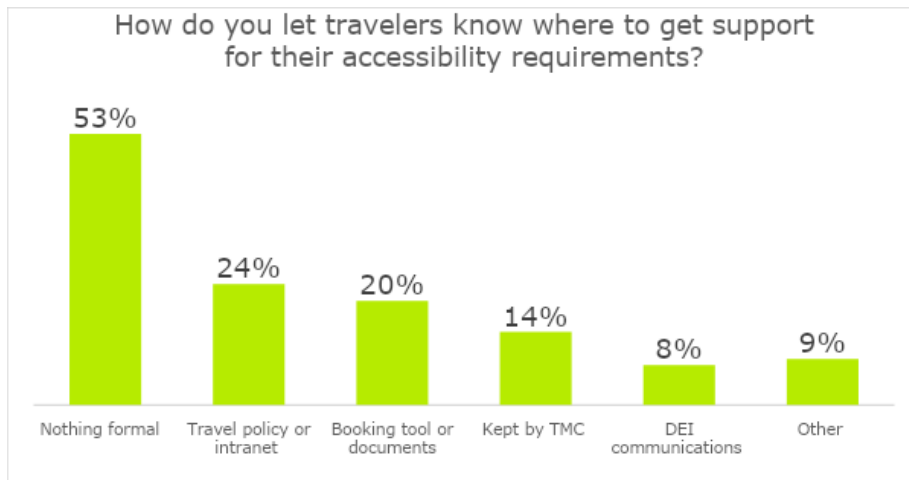


Communication is critical, but without improving the experience itself it can actually decrease satisfaction. Improved communication creates an obligation, or at least an expectation, of action and improvement.

A holistic cycle of Communicate – Capture – Deliver will have the greatest synergies and most immediate, lasting impact.

Communicate

The clearest place for communication to start is the simplest: opening a respectful, non-intrusive dialog with travelers who may have accessibility requirements. This two-way communication opens the door to informing travelers of the services, policy exceptions and accommodations available to them, another major opportunity.



There are important privacy considerations. This was frequently mentioned as a reason that travel managers don't engage in conversation. Rather than avoid these important conversations, we recommend that travel managers work with HR, DEI, legal or

"The person with the disability knows what works and what doesn't work. It's most important to trust that the person with the disability knows the best solution for them."

- Blind executive

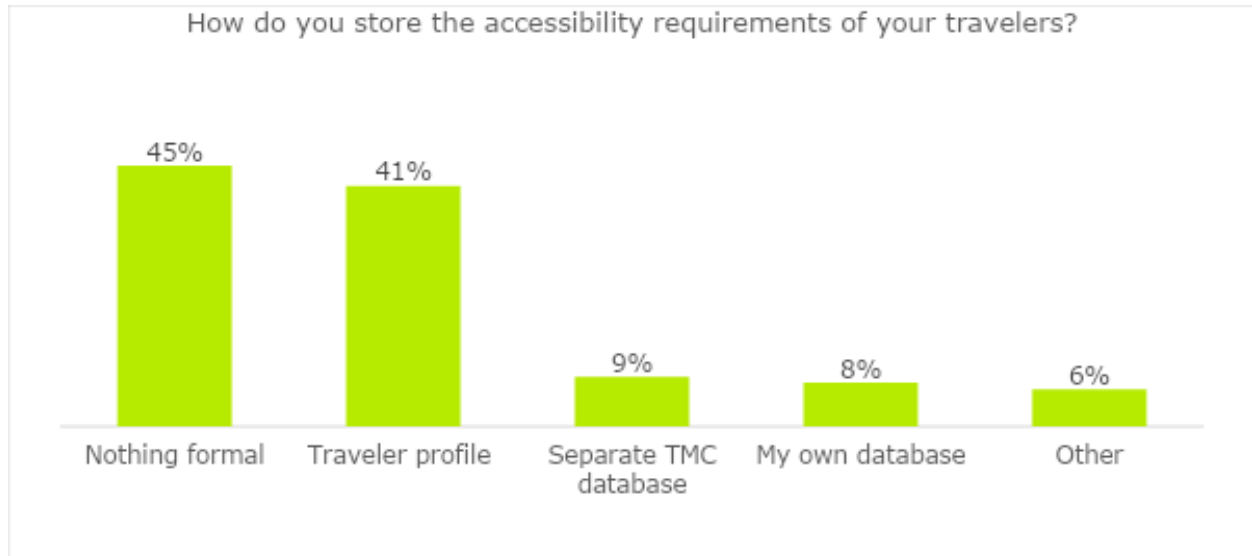
specialized accessibility experts to ensure the best approach.

The impact? Ability to size the opportunity and understand the needs, while helping travelers take advantage of the benefits and support that are available to them today.

Capture

The survey shows that travel managers and suppliers don't systematically track the information they gather within specific transactions. Privacy and legal concerns such as Personal Health Information regulations are especially important here and can prevent the degree of information capture and sharing.

But permission-based data storage is worth exploring. Several airlines, for example, store preferences such as traveling with service dogs in their loyalty profiles. Some hotel loyalty programs capture requirements as free-form text in their loyalty systems. If travelers offer information to get special services or support, why not ask if they would like this added to their profiles?



Capturing traveler data in a structured, searchable way and using it in the booking and delivery process takes development. But a simple, common-sense start can be done quickly with relatively low effort. Privacy and compliance are paramount, so a sensitive, permission-based, opt-in approach that is developed with legal and HR partners is critical.

Many accessible travelers are unaware of the support available to them, whether they are travel policy accommodations like allowing premium class air or finding contacts and forms to arrange special services like boarding assistance. This can begin with static information on company, TMC and supplier sites, then evolve to more context-triggered communications at the point-of-sale, mobile tools and confirmations.

The other main opportunity is supplier coordination. A travel manager of a \$20M program said they spend about four hours per traveler per trip making arrangements to accommodate their accessible travelers. Finding the right contacts and conveying the right information in the right way is an on-going challenge because there is no systematic set of contacts or standardization of the information. In other words, a knowledge base.

This is truly low-hanging fruit since the actual services are already in place. Organizing the information into an easy-to-find, searchable database is another simple, relatively low-cost approach.

Deliver Improved Experience

The final piece is using the learnings and structured data to improve the booking and on-trip experience. This has the greatest potential return on investment in terms of impact on traveler and employee sentiment, and financial performance.

The simplest opportunity is service training and workflow. Customer-facing associates should be trained on the basics of accessibility, how to access the content mentioned above, and how to sensitive serve travelers with accessibility requirements.

A specialized service desk, basically an accessibility “easy button”, offers a great blend of service and efficiency. Most of the TMCs and suppliers we spoke with have associates who either have requirements themselves or have a strong interest in accessibility. It’s a relatively small step to organize and train a unit and work it into the workflow. This is an ideal way to manage changes and disruptions, too. The next, longer term, opportunity is integration into self-service tools.

Keeping it Real(istic)

The cycle can be applied to travel programs across-the-board, or more narrowly to specific areas like meetings, navigating the airport or lodging. We recommend an agile approach that starts with general discovery, then targets smaller but still impactful pain points. Short sprints allow more immediate effect, and learnings from the first project can be applied to the next and so forth. The overall program improves with each new component, and over time can cover the entire experience

Low Hanging Fruit

Two areas deserve immediate attention. Both are high improvement priorities and companies can get started with low investment. We recommend starting by understanding current policies and processes and talking to travelers and key suppliers. Simply communicating what is currently available will, in most cases, be a step forward. Improvements can then be prioritized and implemented from this foundation.

Duty of Care and Disruption Management

Duty of care is a basic ethical and legal requirement. In the extreme, lives can be on the line. On the disruption side, missed connections, rebooking, lodging changes are costly, inefficient and can make the traveler less effective from a business perspective, and leave them feeling less valued as a colleague.

Duty of care providers, the TMC, and company travel management and risk functions can ensure that proper procedures are in place and that accessibility requirements and any medical conditions can be addressed while respecting privacy considerations. Alerts and case management can then be examined, adjusted where necessary, and communicated.

Travel Policy

Many companies accommodate the accessibility needs of their travelers to some degree. It is often ad hoc, though sometimes formalized in their travel policies. Travelers seem largely unaware of the benefits and support available to them.

Conclusion

Accessibility is an important part of corporate values and enterprise-level strategy. Awareness of the impact of business travel, though, has been limited and that results in a lesser experience that can undermine these efforts. We have been overwhelmed by the positive response from the community once they become aware of the magnitude of the segment and the issues.

The needs are clear. And the business case is unassailable. The segment is large, spend is significant and the current ad hoc approaches are inefficient, less effective, and straightforward to resolve. And there is a growing community of travelers, suppliers, TMCs and travel managers all committed to improvement.

The time to act is now.