

Accessibility: Economic benefits and Financial challenges

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WFS Accessibility track



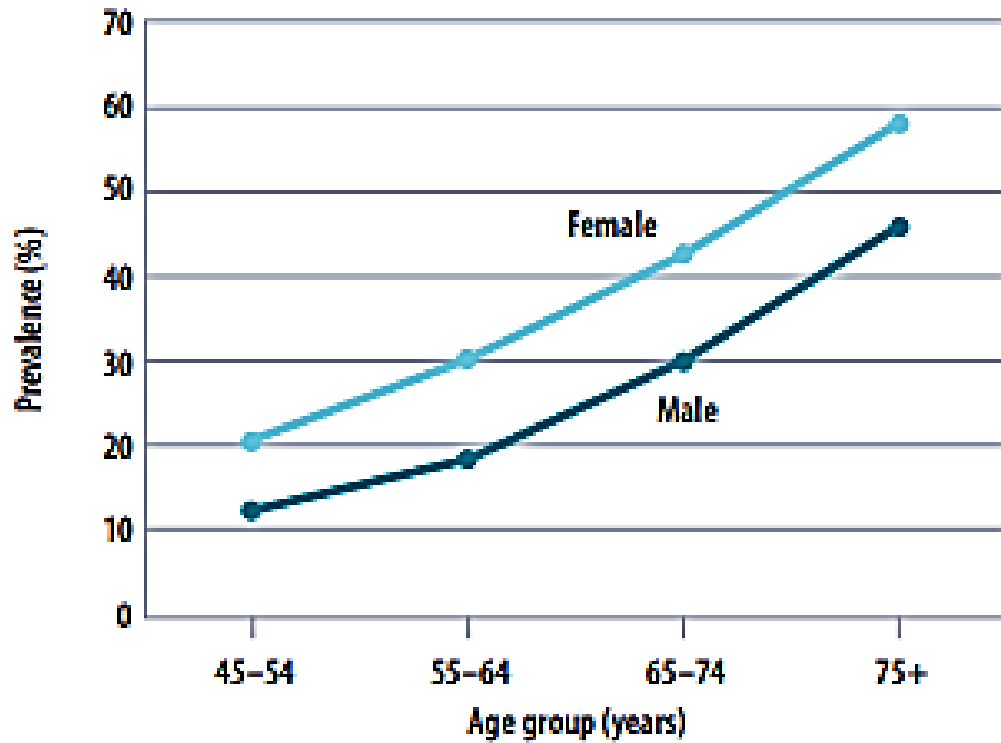
Accessible transport is a necessity today

...to allow *everyone* to participate fully in society and the economy

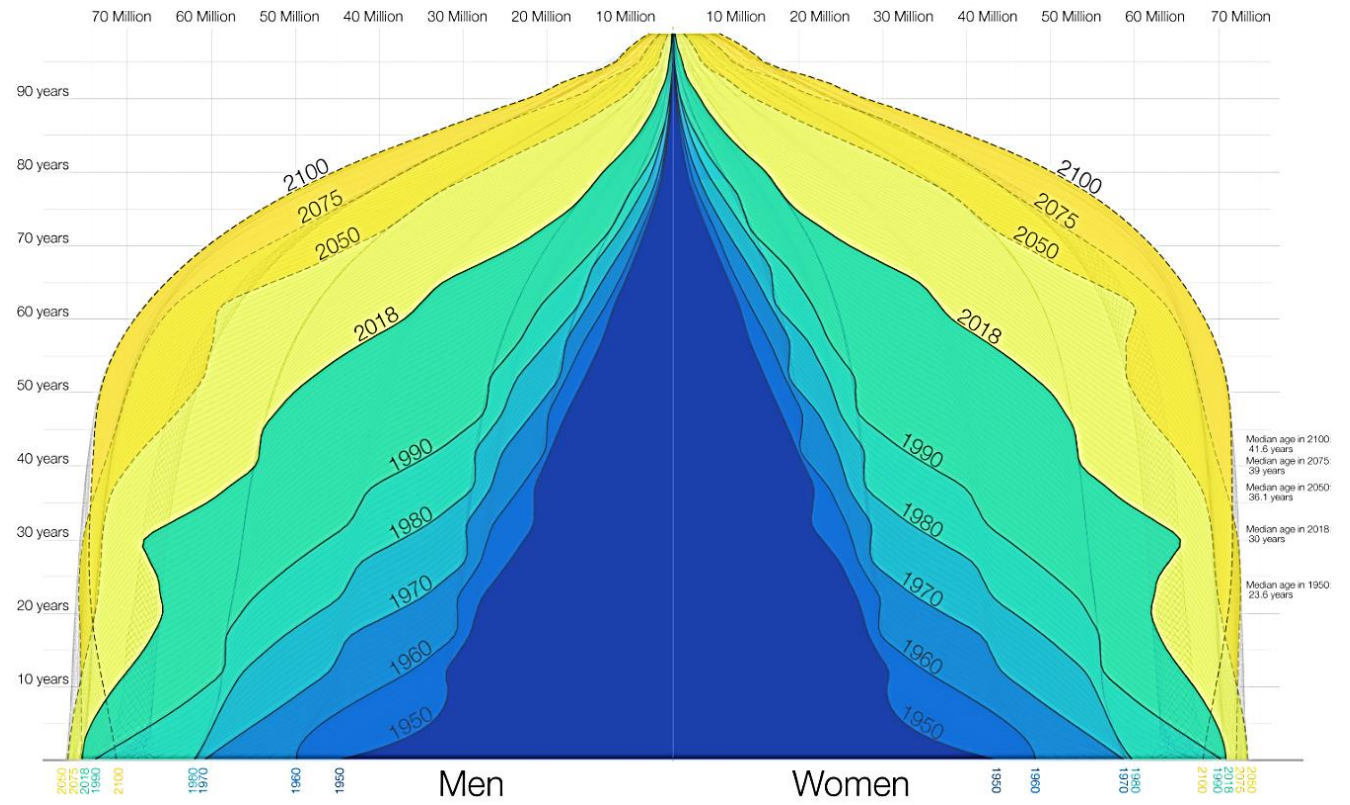
- Persons with disabilities find inaccessible and unaffordable transportation 15 times more difficult than for those without disabilities.
- An estimated 1.3 billion people (16% of the world's population) experience significant disability. This represents 1 in 6 of us.
- This number is expected to increase over time with a growing – and ageing – global population.

Accessible transport is a necessity today ...and will become even more important in the future

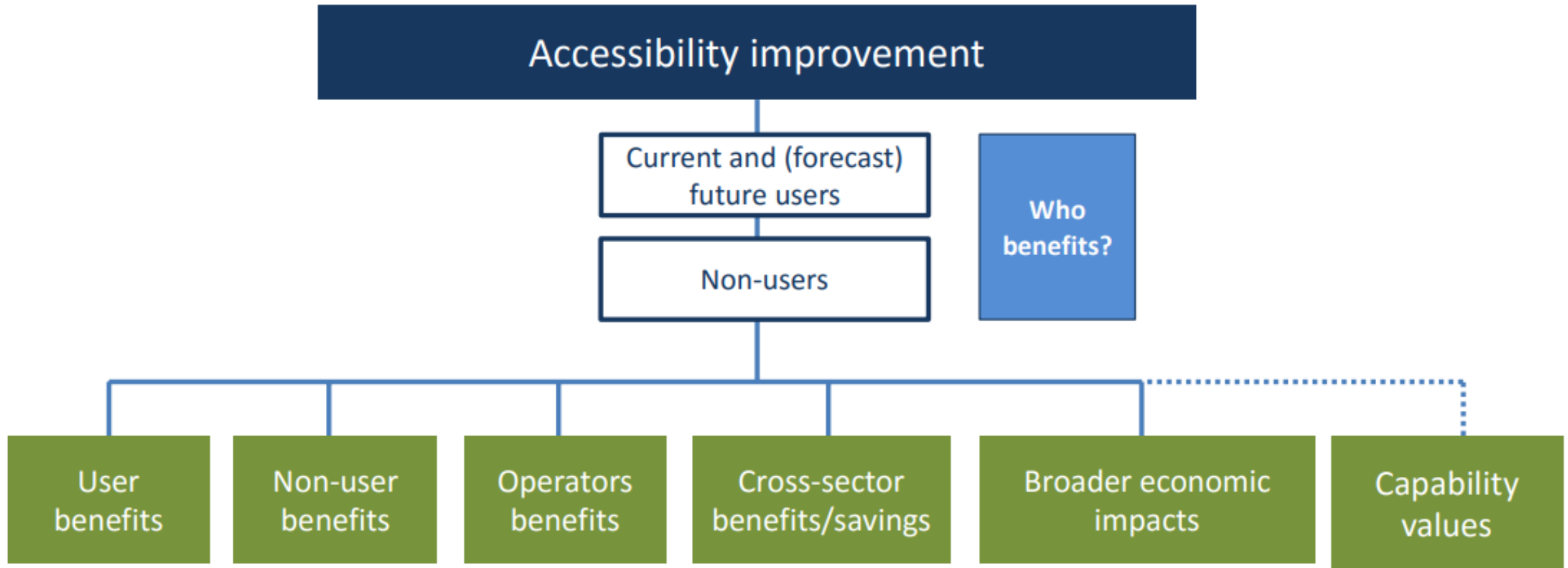
Global disability prevalence (WHO)



World demography from 1950-2050 (Our World in Data)



The frameworks & tools for assessing the economic benefits of increasing accessibility are well developed



Financial Costs of Accessibility for Airlines

Purpose of the study: to better understand the cost impact on airlines of accessibility provision which can help to inform decision-making by the industry and government

Scope

Financial costs only for airlines
Operations in North America (US and Canada): most stringent regulation

Method

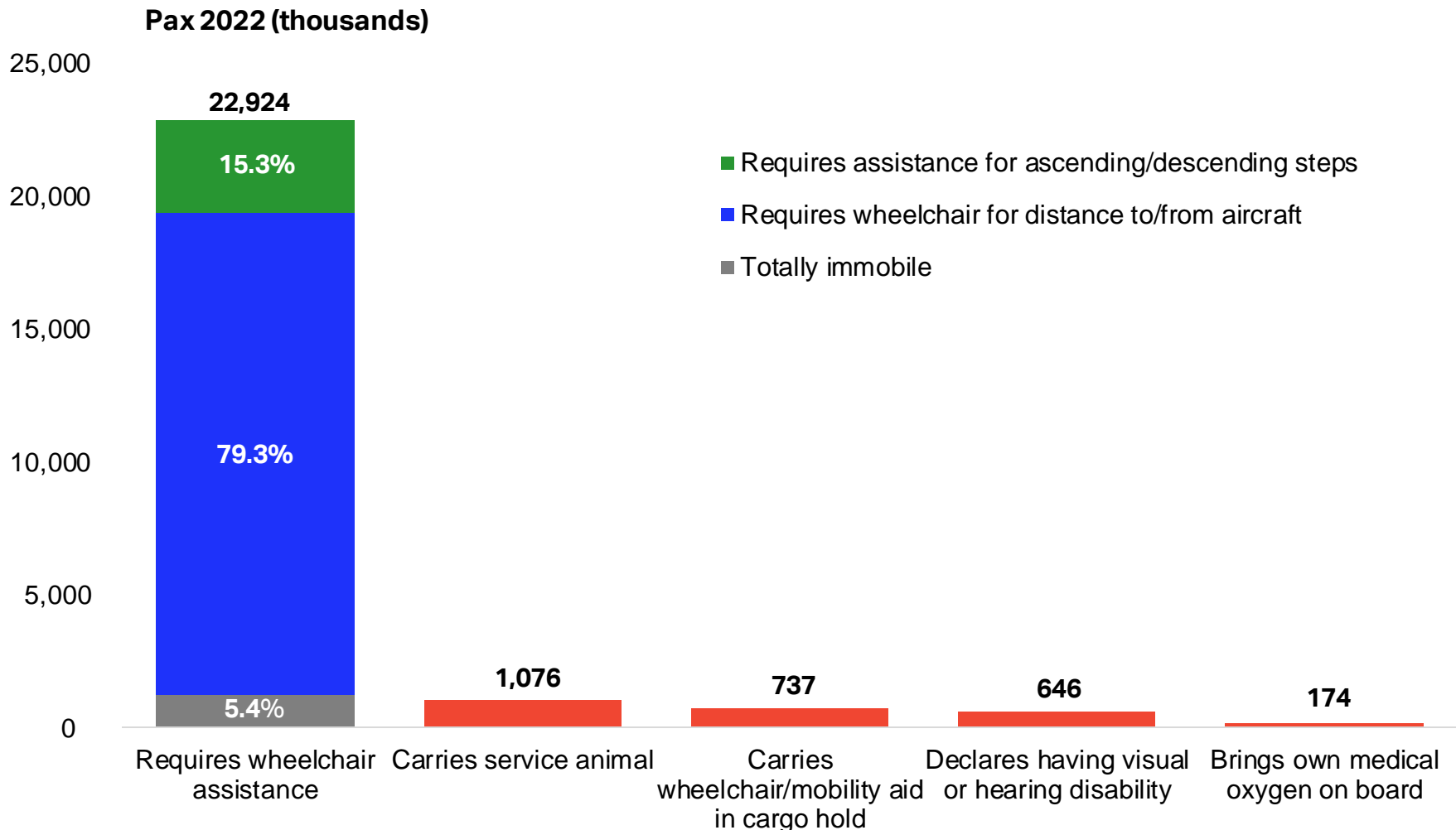
Survey for airlines
Expert steering and advisory group
Extrapolation of results to the North American air traffic market

Coverage

260 million air passengers to/from North America
29% of total pax carried to/from North America
42% of pax to/from North America on a network carrier pax

Financial Costs of Accessibility for Airlines

Volume of accessibility-related requests in North America



- **1 in 40** pax require wheelchair assistance (2.5%)
- **1 in 845** pax travel with a service animal (0.12%)
- **1 in 31** pax who require wheelchair assistance carry wheelchair/mobility aid in cargo hold (3.2%)

Financial Costs of Accessibility for Airlines

Accessibility-related aircraft costs (North America-based)

Airlines paid over **\$500 million** in installation/
purchase costs for
accessible lavatories

This corresponds
to **USD 53 million**
per year...

...and equates
to **20 USc** per
passenger

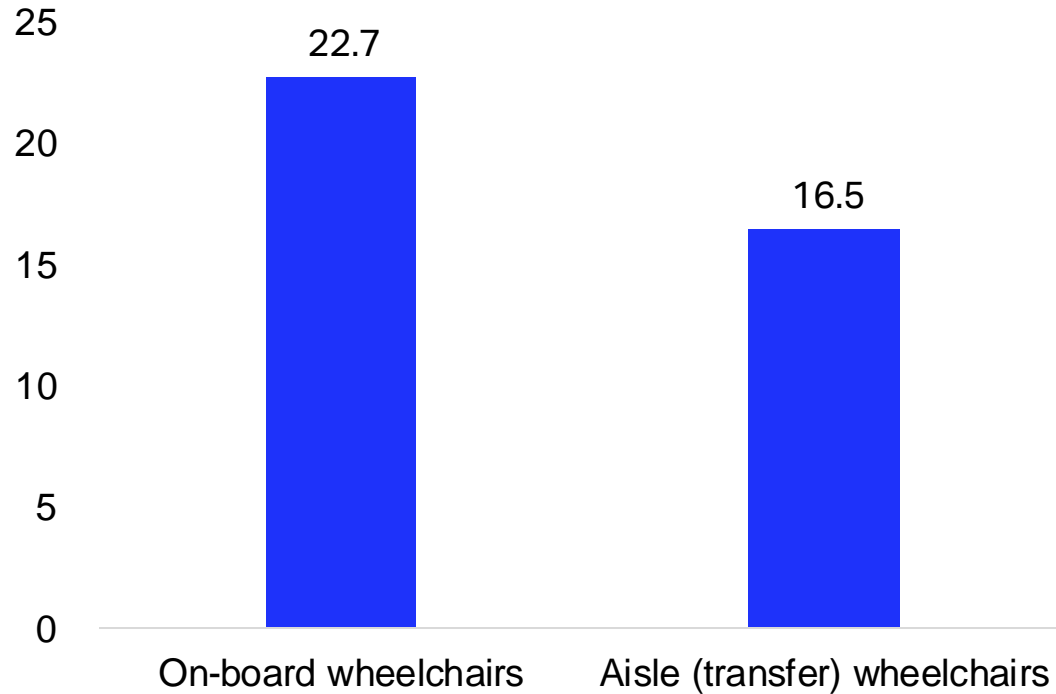
Financial Costs of Accessibility for Airlines

Accessibility-related aircraft costs (North America-based)

Wheelchairs

Total investment for on-board and aisle (transfer) wheelchairs

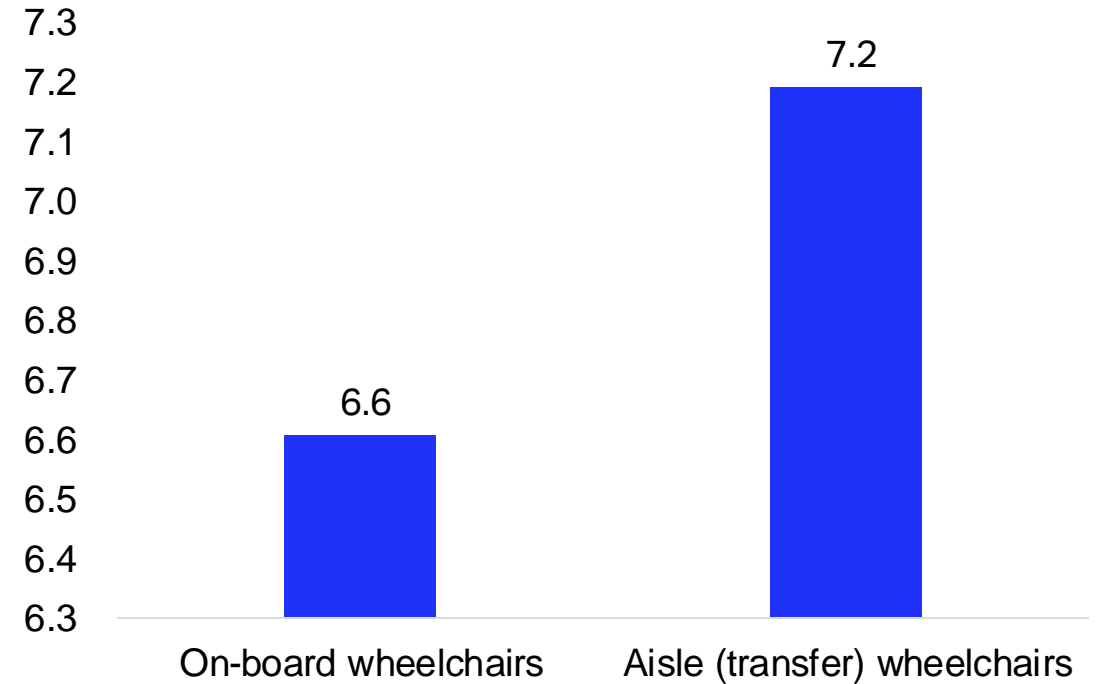
USD (million)



Wheelchairs

Annual investment/ pax requiring wheelchair assistance

USc



Financial Costs of Accessibility for Airlines

Costs for accessibility-related terminal and ramp activities in 2022

Airlines paid ~**\$600 million** for terminal & ramp activities

This corresponds to approx. **\$2.40** per passenger...

...and **\$28** per pax requiring wheelchair assistance*

Financial Costs of Accessibility for Airlines

Accessibility-related corporate (employment) costs in 2022

Employment cost related to accessibility:
approx. **USD 40 million** (around USc 17/pax)

This excludes other costs which could not be isolated because they are fragmented or intertwined with other activities, for example:

- Staff costs for occasional/irregular accessibility-related activities; and
- Training costs



Concluding thoughts

- Provision of accessibility services is **vital** to ensure that everyone can participate fully in society and the economy
- **Patchwork** of varied regulation is challenging and thus costly for airlines to navigate
- Public policy must be developed in close partnership with stakeholders – including airlines – to ensure that it **coherent, consistent and cost-effective**
- Annual investment in accessibility provision for airlines is **significant**
- Cost of accessibility provision should be **shared** appropriately across the value chain and the public sector

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