

Open Doors Organization 2024 Market Study

Research Among Adults with Disabilities: Travel and Hospitality



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Background and Objectives

The Open Doors Organization commissioned The Harris Poll to conduct a quantitative study among U.S. adults with disabilities (aged 18 and older) to identify the general travel habits and patterns of adults with disabilities.

Key objectives of the study are to:

- Measure general travel behaviors including how often adults with disabilities are traveling, how much money they spend, and which sources of information they rely on to make decisions;
- Gauge experiences with airlines, airports, hotels, and cruises;
- Determine the obstacles that adults with disabilities encounter with airlines, airports, hotels, and cruises;
- Compare the 2024 findings to the 2020, 2015, 2005, and 2002 studies, where possible, to uncover possible trends and differences over time.
 - Due to changes in research method, survey content, etc., year-over-year results are to only be reviewed directionally.



Research Method

The 2024 Market Survey was conducted online and by telephone* by The Harris Poll on behalf of Open Doors Organization between June 3 and June 27, 2024, among 1,108 adults who:

- ✓ Reside in the US
- ✓ Are ages 18+
- ✓ Have a disability**, defined as: blindness, deafness, a learning condition, or a condition that substantially limits one or more basic physical activities such as walking, climbing stairs, reaching, lifting or carrying.

Results were weighted by education, age by sex, race/ethnicity, region, income, household size, marital status, disability type, phone status, and smoker status to bring them in line with their actual proportions in the population. Telephone respondents were also balanced on the number of phone lines in household to account for probability of selection. Weighting targets were sourced from the 2022 Behavioral Risk Factor Surveillance Systems (BRFSS) data.

According to the most current US Census Bureau (2022) estimate, there are 256,066,836 American adults. Sixteen percent of American adults have some form of disability, amounting to more than 40 million people.***

*1,007 completes were conducted online and 101 interviews were conducted by telephone (82 landline and 19 cellphone). Online invitations were targeted to those who have self-identified as having a disability. Telephone interviewing was conducted using random-digit-dialing. Interviews were conducted both online and via phone to provide greater accessibility for respondents to help overall representativeness.

** Exact question text utilized: do you have any of the following long-lasting conditions, disabilities, functional limitations or health problems? Select all that apply.

*** Based on the US Census American Community Survey (ACS) which estimates 15.88% of the US adult population has a disability.



ACS Disability Estimates—Implications

In order to enable trending across the various ODO Market Studies, Open Doors Organization and The Harris Poll again used the US Census American Community Survey (ACS) to determine disability prevalence. The ACS, however, which uses a “core definition” of disability, provides a very conservative estimate of the overall size and thus economic impact of the disability community.

While the ACS estimates the prevalence of disability among American adults as 15.4% (38 million), estimates from other federal agencies are far higher:

- Centers for Disease Control (CDC) Behavioral Risk Factor Surveillance System (BRFSS) estimates that 28.7% (70+ million) of adults 18 and older have a disability (2022 data)*
- Social Security Administration (SSA) Supplement to the Survey of Income and Program Participation (SIPP) estimates that 30.3% (72.7 million) of adults 18 and older have a disability (2012 data).**

In its *Annual Report on Disability-Related Air Travel Complaints Received during Calendar Year 2022*, the US DOT cites the CDC estimate. At ODO, we, too, feel that the CDC provides a more accurate and realistic assessment of the numbers of American adults who experience significant limitations due not just to core disabilities (hearing, mobility, vision, cognitive, self-care, independent living) but also medical conditions, pain, anxiety, depression, etc.

Therefore, in reviewing the data in this report, readers should consider that our estimates of the numbers traveling and dollars expended are a baseline but do not represent the full economic impact of the disability travel market.

*CDC Disability and Health Data System, 2024, <https://dhds.cdc.gov>

**US Census Bureau, 2018, “Americans with Disabilities: 2014” (P70-152)



Limitations When Comparing Data Year-Over-Year

The Open Doors Market Study has been conducted in 2002, 2005, 2015, 2020, and 2024. With each year, slight variations have been made to the survey content, recruitment method, survey administration, and other aspects of methodology. Because of this, there are limitations when comparing results year-over-year. Such comparisons should be made directionally only.

A few specific considerations when reviewing the 2024 data:

- ✓The 2024 research was conducted primarily online with some telephone completions.
 - ✓In 2015 the research was conducted entirely online; in 2005 and 2002 unique mixes of online and phone completes were obtained.
 - ✓The blend of sample providers varied year-over-year.
- ✓The 2024, 2020, 2005, and 2002 research studies were conducted by The Harris Poll. The 2015 research was conducted by another research company but with data derived through a Harris Poll survey.
- ✓Many of the survey questions ask respondents to reflect on experiences in the past 2 years. Due to the COVID-19 pandemic, in 2020 respondents were asked to think about the past two years, defined as 2018-2019. In 2024, the question wording was changed back to reference the past 2 years and not specific years.
- ✓While many questions included in the survey were parallel to past years' research, adjustments were made to the question text and entirely new questions were included.

Key Findings and Implications

General Profile of Travelers with Disabilities

For the most part, adults with disabilities are active travelers, often traveling multiple nights for both business, pleasure, or some combination of both, alongside at least one other adult.

- In the past two years, the majority of adults with disabilities (63%) have taken at least one trip – and around a third (32%) have taken 3 or more. Among those who traveled during the 2-year period, 63% took at least 1 trip for pleasure (median 2 trips); 12%, for combined business/pleasure (median 2 trips); and 10%, for business (median 3 trips).
- When taking a trip, two-thirds of travelers with disabilities are generally accompanied by someone (68%), fewer travel alone (31%).
- Thinking again about their last trip, most travelers with disabilities (66%) were away from home for three or more nights, typically 3. Only 7% took a day trip on their last trip.

General Profile of Travelers with Disabilities

The most popular U.S. destinations are urban, entertainment meccas like Atlanta, Las Vegas, NYC and Chicago. Internationally the top regions visited are N. America, Europe and the Caribbean.

- In the past five years, travelers with disabilities have traveled to the South (62%, top spot Atlanta); West (41%, top spot Las Vegas); East (26%, top spot NYC); and Midwest (25%, top spot Chicago).
- Over the past five years, a third of travelers with disabilities (34%) have traveled outside of the United States (typically 2 times). This was a slight decrease from 2020 (37%, median of 3 trips). Note that this 5-year period includes 2020 when travel internationally was suspended for most of the year due to Covid-19, so the reduction in travel frequency is not surprising.
- These international trips have most commonly included:
 - North America (51%, top spot Mexico);
 - Europe (33%, top spot Italy);
 - Caribbean (31%, top spot Dominican Republic);
 - Central and South America (20%, top spot Costa Rica);
 - Asia (15%, top spot China);
 - Africa and the Middle East (8%, top spot Egypt).

Impact of Travelers with Disabilities

Compared to the 2020 ODO Market Study (which focused on travel in 2018-19), travel frequency and spending by American adults with disabilities have not fully rebounded to pre-Covid levels. One exception is the Cruise Industry (see next slide).

General Travel

In the past two years:

- ✓ **25.6 million travelers** with disabilities (27 million in 2020) have taken
- ✓ A total of **76.9 million trips** (81 million in 2020) and
- ✓ Spent almost **\$50.0 billion** (\$58.7 billion in 2020)

Travel by air

In the past two years:

- ✓ **31%** of adults with disabilities have taken a flight on a trip (38% in 2020), amounting to
- ✓ Nearly **13 million air travelers** taking **25.4 million air trips**, generating
- ✓ **\$10 billion in spending** (\$11 billion in 2020).

These population and spend projections are based on the US Census American Community Survey (ACS) which estimates 15.88% of the US adult population has a disability

Throughout this report, median values of estimated spending have been utilized for all calculations.



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Impact of Travelers with Disabilities

The percentage of adults who cruised over a five-year period remained at 13%. This indicates that demand has surged back strongly following the Covid-19 industry hiatus, with spending on fares jumping from \$10.4 billion to \$18.5 billion.

Stays in accommodations (hotels, motels, B&B, short-term rentals, etc.)

In the past two years:

- ✓ **50%** of adults with disabilities have taken a trip that includes a stay in an accommodation (59.7% in 2020), amounting to
- ✓ **20 million travelers** taking **40.5 million hotel-based trips** (68.7 million in 2020).
- ✓ Each traveler with disabilities typically spends **\$125 per night** when they stay in a hotel.

Travel by cruise

In the past five years:

- ✓ **13%** of adults with disabilities have taken a cruise, amounting to
- ✓ **5.1 million travelers** taking **10.3 million trips** and generating
- ✓ **\$18.5 billion in spending on fares** (up from 10.4 billion in 2020) and **\$3.1 billion in spending on excursions.**

These population and spend projections are based on the US Census American Community Survey (ACS) which estimates 15.88% of the US adult population has a disability

Throughout this report, median values of estimated spending have been utilized for all calculations.



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Obstacles Encountered During Travel in the Past Two Years

The percentage of travelers with disabilities who experienced obstacles with airlines, airports and overnight accommodations increased, often markedly, since the ODO 2020 Study. For cruise lines, those reporting barriers remained steady at 7 in 10.

- **Airlines**—More than 4 in 5 (84%) faced obstacles at the airport, a large increase from 70% in 2020. Most common barriers include: long distance to or between gates (53%); long lines (42%); difficulty finding my way (25%); lack of seating in some areas (23%); and long distance to/from rental car/transport/parking facility (23%).
- **Airports**—81% of travelers with disabilities faced obstacles when dealing with airlines, up from 76% in 2020. Most commonly, cramped seating areas (46%); long lines at ticket counters/check-in (34%); difficulty navigating the narrow aisles (30%); expensive tickets (30%); and difficulty hearing announcements (28%).
- **Accommodations**—Almost three-quarters of travelers with disabilities (74%) encountered obstacles when staying at a hotel/motel or short-term rental, a large increase from 2020 (53%). The top obstacles include doors that are heavy or hard to open (33%); lack of availability of convenient rooms such as on the first floor or near the elevator (27%); and lack of a built-in or portable shower bench (25%).
- **Cruise Lines**—Seven in ten (68%) encountered obstacles while taking a cruise, versus 71% in 2020. Top obstacles included long distances to dining/entertainment areas (24%); difficulty finding their way (22%); elevators that are too crowded/small (21%); and doors that are heavy or hard to open (19%).



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Resources Utilized When Planning a Trip

When planning a trip and evaluating accessibility, people with disabilities often depend on their own personal connections (like previous experience or friends and family) more than anything else. When booking a trip, travelers with disabilities most commonly book online.

- While 70% of travelers with disabilities use websites or apps (net) to plan their trip - in general, when travelers with disabilities are planning a trip, they rely most on: friends and family (57%), previous experience (56%), websites/apps for third party travel sites (38%), online customer reviews (38%), and travel companies (29%) as their best sources of information about which companies, services and products are most accessible for people with disabilities.
- Most travelers with disabilities have used websites or apps (69%) or travel companies, e.g., airlines, hotel chains, etc., (53%) to book trips in the past two years. More than a quarter (28%) have used attractions or tour companies for their bookings.
 - Travelers with disabilities more often use websites or apps of travel companies (44%) or websites or apps of third-party travel sites (37%) rather than websites of third-party booking companies that specialize in accessible travel (10%). As the latter are a relatively new option, this may change in future.

Using Devices and Technology for Planning and Travel

Adults with disabilities increasingly rely on the Internet to plan and support their travel needs. More than 7 in 10 now use websites and apps while traveling.

- Over the past two years, 4 in 5 travelers with disabilities (81%) have used the Internet to support their travel needs (up from 76% in 2020), primarily by finding and booking accessible hotels (48%), finding accessible activities once they reach their destination (39%), finding accessible destinations to visit (35%), and finding accessibility information about restaurants (34%).
- Seventy-two percent of travelers with disabilities use functions or apps when traveling (up from 65% in 2020), most commonly hotel apps (39%), mobile boarding passes (31%), ground transportation apps (30%), and airline apps (29%).

Implications of the 2024 ODO Market Study

While travel frequency and spending among travelers with disabilities have not returned fully to the pre-Covid-19 levels (2018-19) in the 2020 Market Study, the bounce back is still impressive. Price increases due to inflation, significantly higher airfares (as demand outran supply), and the psychological impact of the pandemic may each have had a restraining effect.

One bright spot has been the cruise industry. Following a 15-month shut down, the industry roared back in 2023 to meet or exceed pre-pandemic levels according to the Cruise Line Industry Association (CLIA). Travelers with disabilities clearly contributed to that surge, with 13% of adults with disabilities taking a cruise over the past five years, the same as in 2020. While the number of travelers and trips remained roughly the same, the amount spent on fares jumped from \$10.4 billion to \$18.5 billion in 2024.

Another positive finding is the continued rise in usage of the Internet and mobile devices, a trend unbroken since the first ODO/Harris Study in 2002. More than 80% of adult travelers with disabilities now use the Internet, while over 70% use apps and functions while traveling, making digital accessibility even more important to creating a seamless, equitable travel experience.



Implications of the 2024 ODO Market Study/2

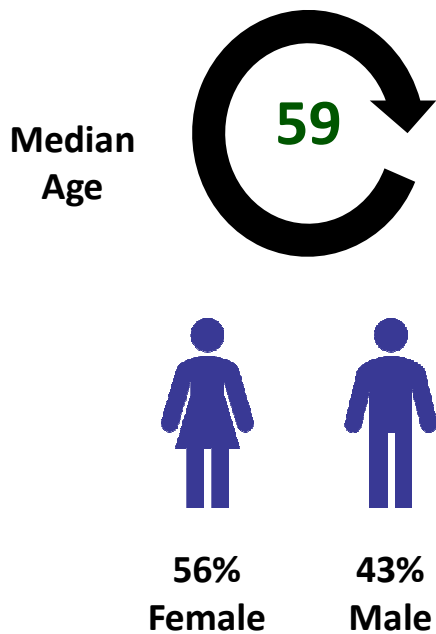
On the downside, the percentage of travelers who encounter major obstacles with airlines, airports and overnight accommodations increased from 2020. For airports, this reached an all-time high of 84%; for airlines, 81%; and hotels/bnb's, 74%. The percent reporting major obstacles with cruise lines decreased slightly, 68% compared to 71% in 2020.

To realize the full potential of this significant and growing part of the travel market, it is paramount that the industry begin to specifically measure and address their satisfaction levels as they do other customer segments.

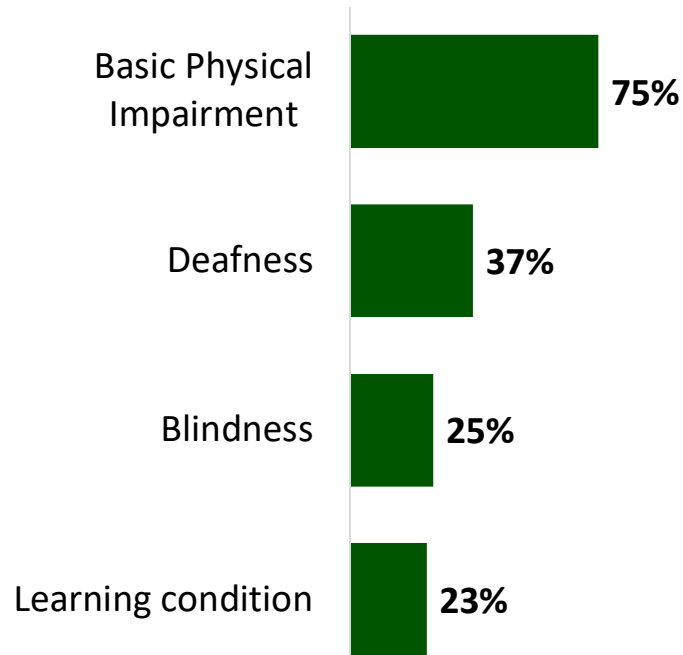
Respondent Profile

Profile of Adults with a Disability

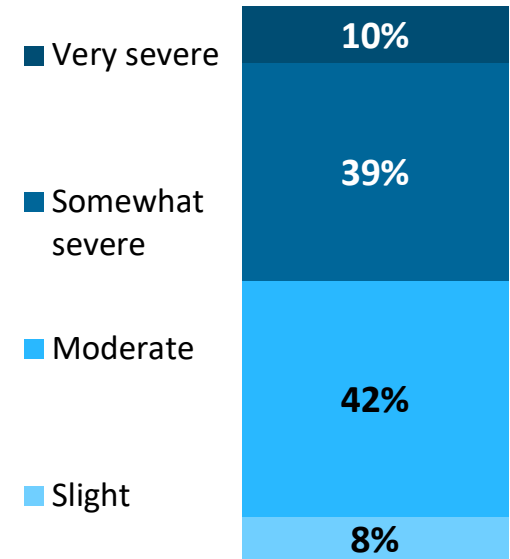
Age and Gender



Long-Lasting Conditions



Severity of Condition(s)



BASE: ALL QUALIFIED RESPONDENTS (n=1,108)

dmGen Are you...?; dmAge What is your age?; Q102 Do you have any of the following long-lasting conditions, disabilities, functional limitations or health problems? Select all that apply. Q103 Would you describe your long-lasting condition, disability, functional limitation or health problem as slight, moderate, somewhat severe, or very severe?

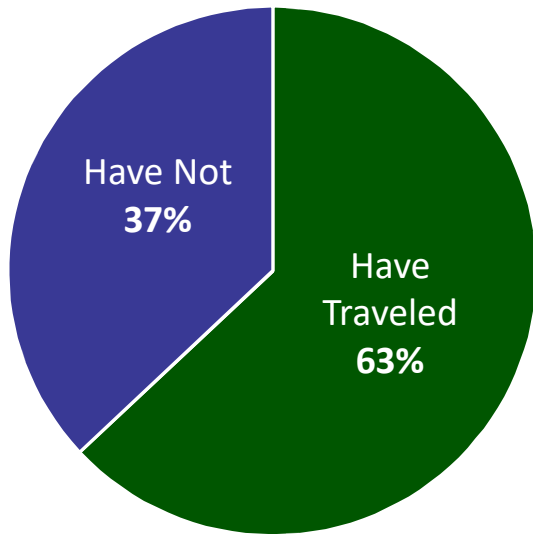


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Profile of Adults with a Disability

Trips in the Past Two Years



Service Animal

11%

Have a **service animal** to assist them at home or when traveling

Travel Companion

68%
Generally travel with someone

31%
Generally travel alone

BASE: ALL QUALIFIED RESPONDENTS (n=1,108)

Q201 How many trips have you taken in the for business, for pleasure, or for both? Your best estimate is fine.

BASE: TOOK 1 OR MORE TRIPS IN THE PAST TWO YEARS (n=738)

Q207 When traveling, do you generally travel on your own or accompanied by someone to assist with your disability?; **Q210** Do you have a service animal to assist you at home and/or when traveling?



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info@opendoorsnfp.org

