

# Open Doors Organization 2024 Market Study

Research Among Adults with Disabilities: Travel and Hospitality

## UAIA 2024

# Background and Objectives

The Open Doors Organization once again commissioned The Harris Poll to conduct a quantitative study among U.S. adults with disabilities (aged 18 and older) to identify their general travel habits, patterns and spending. This is our fifth such study and is still the only statistically reliable, nationwide survey on this large and growing travel market.

## 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 disability or a condition that substantially limits one or more basic physical activities such as walking, climbing stairs, reaching, lifting or carrying.

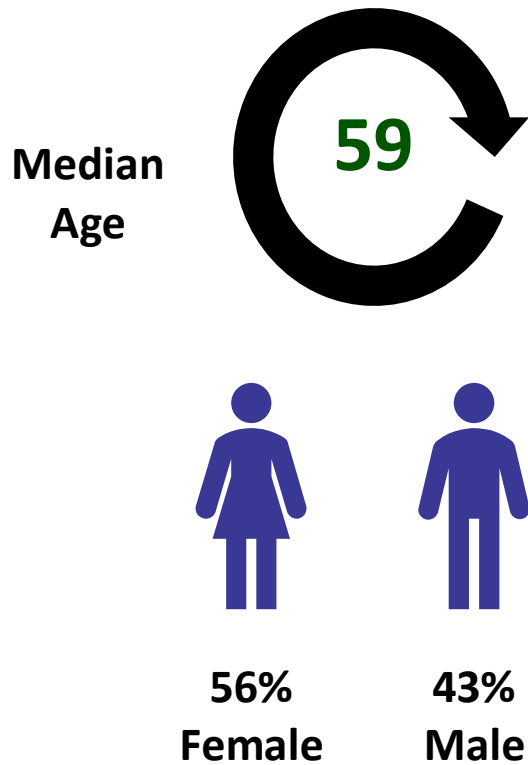
**According to the most current US Census Bureau American Community Survey (2022) estimate, there are 256,066,836 American adults. Sixteen percent of American adults have some form of disability, amounting to more than 40 million people.\*\*\***

This is a very conservative estimate since those from other federal agencies are far higher:

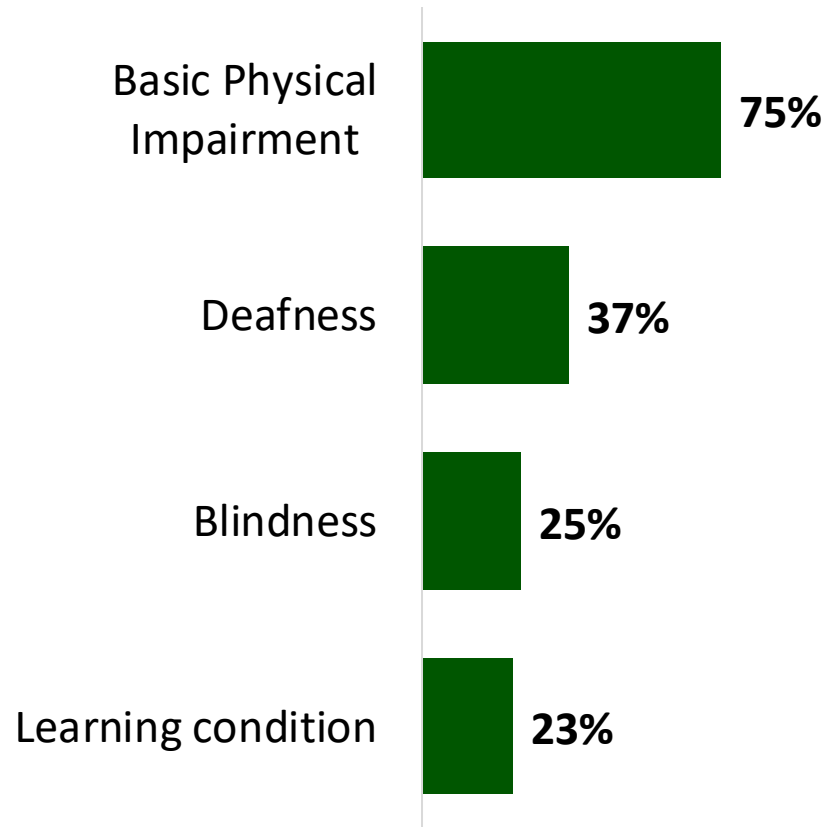
- **Centers for Disease Control (CDC) Behavioral Risk Factor Surveillance System (BRFSS) estimates that 28.7% (70+ million) of adults 18 and older had a disability (2022 data)\***
- **Social Security Administration (SSA) Supplement to the Survey of Income and Program Participation (SIPP) estimates that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

# Profile of Adults with a Disability

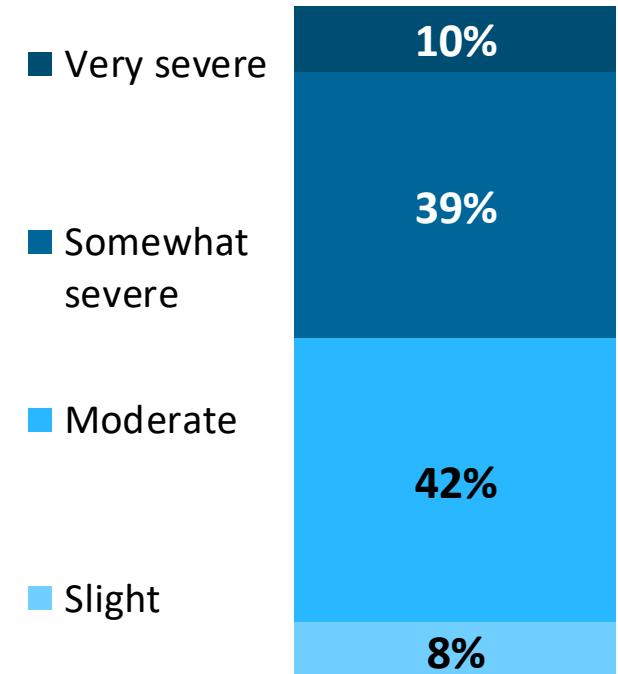
## Age and Gender



## 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?

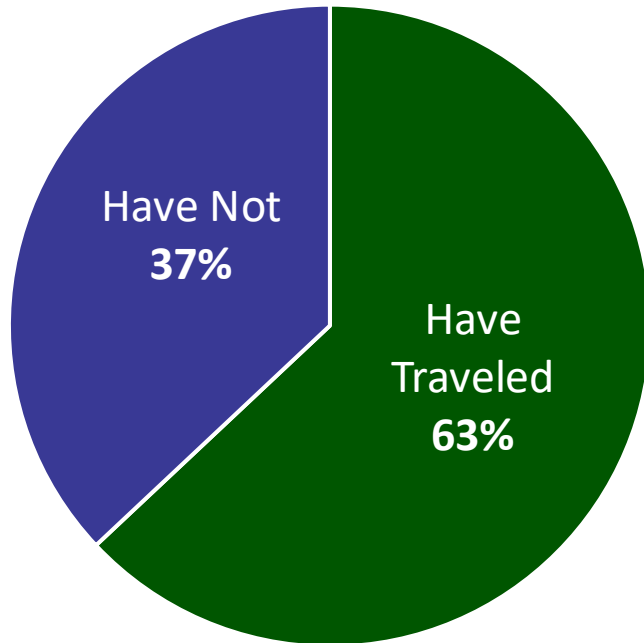


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# Profile of Adults with a Disability

## Trips in the Past Two Years

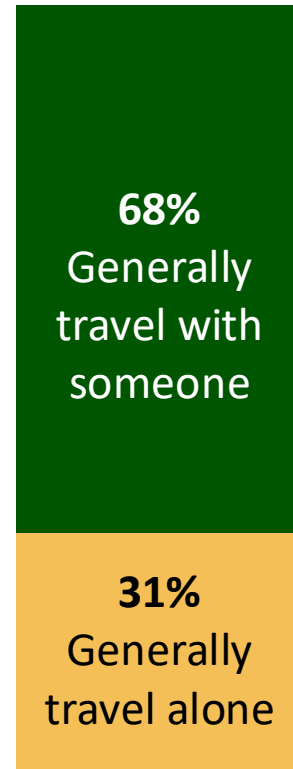


## Service Animal

**11%**

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

## Travel Companion



**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?



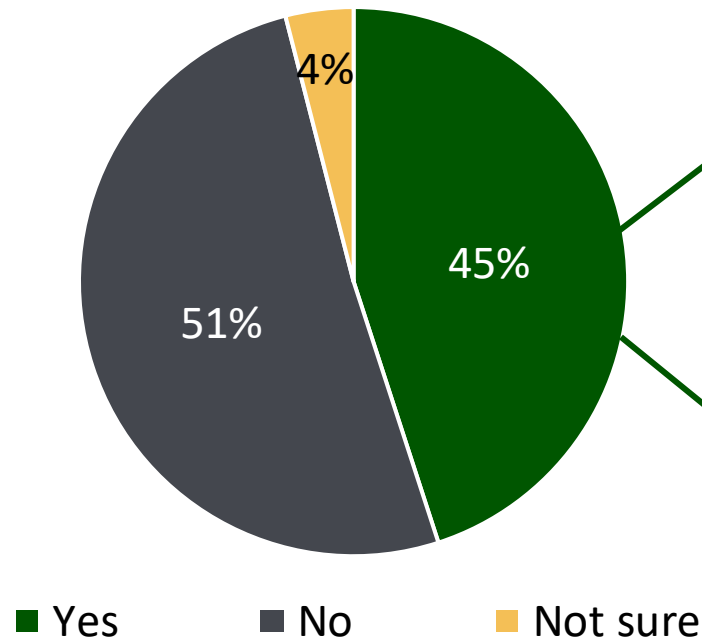
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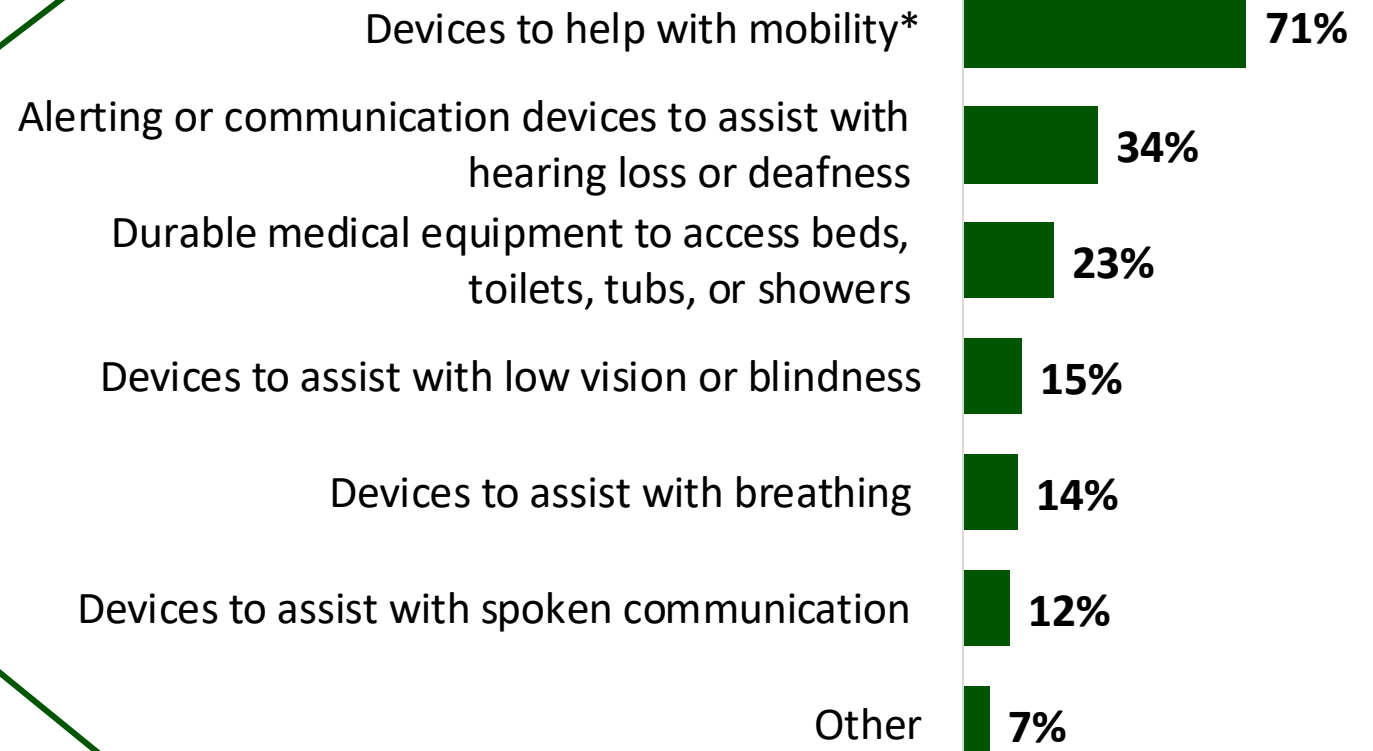
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# Assistive Device Usage – At Home or When Traveling

## Use an Assistive Device at Home or When Traveling



## Types of Assistive Devices Used *(among those who use an assistive device)*



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

**Q208** At home or when traveling, do you use any kind of assistive device(s)?

**BASE: USE AN ASSISTIVE DEVICE (n=331)**

**Q209** Which type(s) of assistive device(s) do you use either at home or when traveling?

*\*Response option was broken out into two separate items in 2024 ("Wheelchair (power or manual) (16%)" and "Other devices to help with mobility (67%)", data here represents the net of both options*



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# Impact of Travelers with Disabilities

*Compared to the 2020 ODO Market Study (which focused on the travel period 2018-19), travel frequency and spending by American adults with disabilities has not fully bounced back to peak, pre-Covid levels. One exception is the Cruise Industry (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** (down from \$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** (down from \$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

## 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 (same as in 2020), 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.**

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## 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%).



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## Barriers in Air Travel

***In the post-Covid era, the percentage of travelers with disabilities reporting major obstacles in airports and in their dealing with airlines has increased.***

- More than 4 in 5 (84%) have 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/transportation/parking facility (23%).
- 81% of travelers with disabilities faced major 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%).



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## In Summary...

While travel frequency and spending among travelers with disabilities have not returned fully to the pre-Covid-19 levels, the bounce back is still impressive.

Possible restraining factors:

- Price increases due to inflation
- Significantly higher airfares (as demand outran supply)
- Psychological impact of the epidemic.

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 ever, digital accessibility is important in creating a seamless, equitable travel experience.

On the downside, the number of travelers who encounter major obstacles with airports and airlines increased significantly from 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.

# Attribution

Any citation of this material should credit  
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