

What disabled consumers choose to buy and why – Research objectives and methodology



Who is this for?

'What disabled consumers choose to buy and why' is for everyone involved in improving the experience of disabled consumers whether online, by phone or in-person. The findings will be useful for customer experience managers, customer service personnel, facilities and property managers and also for D&I and HR professionals responsible for attracting and hiring customer-service staff.

Research objectives

The objectives of this research are as follows:

Explore consumer confidence and empowerment

- Are there particular factors that impact on confidence and feelings of empowerment? If so, what are the components that can help, or hinder, these feelings and relationships?
- How happy are consumers to discuss their needs and ask for help or adjustments before they buy?
- If there are barriers at the pre-purchase stage, what are they and how could they be overcome?

Understand information and communication needs

- How do consumers find information about a product or service prior to purchase (research, trusted sources, looking for specific product or service attributes)?
- How confident are consumers about applying this information when deciding to purchase a product or service?
- How well do consumers feel that businesses communicate with disabled consumers?
- If information about inclusivity or accessibility is hard to find, how can it be better communicated to both current and potential consumers?
- If the information supplied about inclusivity and accessibility is not effective, or fit for purpose, how can it be improved?

Review the influence and impact of inclusive strategies

- Different factors will influence different consumers' decision to buy – for example, type of product, price, convenience, brand loyalty, geographical location etc. To what extent are disabled consumers influenced by accessibility features and/or adjustments the provider makes?

Sector insights

In addition to general insights from disabled consumers into behaviours and attitudes, we have focussed on a few key sectors for deeper investigation. In each of these sectors, consumers expect brand choice.

The sector focus areas selected include:

- **Retail** – purchasing goods online and in store
- **Banking and insurance** – opening and changing a personal bank account or renewing or changing insurance provider
- **Utilities** – finding a new provider or account for utilities (for example, electricity or gas or broadband)
- **Hospitality** – booking and / or going to a restaurant, café, or pub

- **Days out and leisure** – outings or leisure interest activities such as going to the theatre, cinema, concerts or a trip to a museum, gallery, theme park or sporting event.
- **Holidays** – booking holiday accommodation
- **Technology** – buying new technology or entertainment services (hardware and software including games or streaming services).

Methodology

We gathered both business and consumer insights in the period from September 2021 to January 2022 and applied a mixed methodology, incorporating a range of sequential, different research approaches.

The methodology was designed to ensure sufficient depth and breadth of insights and to enable the research team to build on learnings from one stage and further explore and more deeply understand them in the next.

Business insights

Interviews were conducted with businesses in the focus sectors, to explore current consumer inclusion strategies, experiences, and future plans.

- **Ten depth interviews with businesses** were undertaken by Business Disability Forum amongst their Members and Partners.

Consumer insights

Quantitative and qualitative fieldwork was conducted with consumers both with and without disabilities or specific access needs.

- **Quantitative nationally representative omnibus questions.** A quantitative survey carried out by Ipsos on behalf of the Business Disability Forum, interviewing 1,001 adults aged 18+ in Great Britain between 26 November and 5 December 2021. The survey was carried out to explore the differences in attitudes to decision making between disabled and non-disabled consumers. Disabled respondents self-selected their disability and included people with sensory, physical, neurodiverse, mental health, cognitive and long-term conditions and access needs related to aging. In total 457 respondents opted in to one or more of these. The data has been weighted to the known offline population proportions for age within gender, government office region, working status, social grade (and ethnicity in the UK).

- **More qualitative and detailed online survey** (241 respondents all with disabilities answered a 25-minute questionnaire). Open Inclusion designed and conducted a survey with their dedicated panel of individuals with disabilities to further explore challenges and issues.
- **Focus groups** were held with disabled consumers (four separate 90-minute focus groups) facilitated by Open Inclusion. These delved deeper into consumer needs and preferences when making purchase decisions, limitations and impacts of a disability on consumer choice, and potential solutions for businesses going forward that would be appreciated by disabled consumers.

Defining disability

In this report we talk about consumers with disabilities. We have defined this for the purposes of this research as:

Those who have lived experiences of disability stemming from differences in how they see, hear, move, communicate, think, or feel.

These differences may have been from birth, incurred through illness, injury, or change, and can be stable, sporadic, or gradually changing. Many people involved in the research have more than one co-occurring access need.

People with the same need can have many different adaptive approaches that impact their experiences differently. We specifically included people with neurodiverse, chronic and mental health conditions. We are conscious that not all people identify as “disabled” personally, or if asked by a brand – even though they might be protected from discrimination as a disabled person by the Equality Act 2010 in Great Britain or other legislation elsewhere.

About Business Disability Forum

Business Disability Forum is the leading business membership organisation in disability inclusion. We are trusted partners, working with business, Government and disabled people to improve the life experiences of disabled employees and consumers, by removing barriers to inclusion.

Find out more about the benefits of joining us at businessdisabilityforum.org.uk/membership.

Contact us

**Business Disability Forum
Nutmeg House
60 Gainsford Street
London
SE1 2NY**

Tel: +44-(0)20-7403-3020

Fax: +44-(0)20-7403-0404

Email: enquiries@businessdisabilityforum.org.uk

Web: businessdisabilityforum.org.uk

Business Disability Forum is committed to ensuring that all its products and services are as accessible as possible to everyone, including disabled people. If you wish to discuss anything with regard to accessibility, please contact us.

Company limited by guarantee with charitable objects. Registered Charity No: 1018463.

Registered in England No: 2603700.