

# Days out and leisure

What disabled consumers choose  
to buy and why



June 2022

# Acknowledgements

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# Introduction



**We asked disabled consumers what they liked to do for fun and the factors that influenced their choice of where to go and what to do.**

The disabled consumers we spoke to wanted to go to the theatre, cinemas, and concerts. They liked to visit museums and have days out at theme parks and attractions with family and friends.

Some supported a football team and wanted to go to matches – home and away – and others wanted to participate in activities like dance. Everyone wanted to be able to enjoy the whole experience – the anticipation, the journey, and all the related activities such as eating and drinking and buying souvenirs to remember the experience.

Planning a leisure activity starts at home. Some of the biggest challenges related not to the experience itself but finding accessibility information in advance, and in some cases, making the booking itself.

Disabled people in the UK have an estimated spending power of £274 billion. Many want to spend on leisure activities, and they don't just go alone. A business that doesn't attract disabled consumers risks missing out on their family and friends as well.

We asked respondents to think about their experiences of planning and booking a day trip or outing, to a show, concert, museum or theme park in the last two years. They could also include leisure or interest activities such as trips to gyms, golf clubs, cooking classes or choirs.

## 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.

## The wider context: disabled consumers in Britain today

**There are 14.1 million people in the UK with a disability or condition.** This represents 22% of the total population and 19% of working age adults. **Disabled people have spending power, known as the “purple pound” worth around £274bn<sup>1</sup>** but research commissioned by Business Disability Forum reveals that, even in 2021, many report that their choice is limited and feelings of consumer empowerment are relatively low:

- **90% were** affected at the decision-making stage of purchases by either; limitations of design (products, services or venues not being inclusive or accessible), limitations in available information, and/or how information was presented (31% were impacted by all three aspects).
- **65% agreed that** “I feel like my choices of what to buy are limited on a daily basis due to barriers (a lack of accessibility or inclusion)”
- **27% did not feel able** to request adjustments or identify their preferences or needs when they tried to buy a products or services
- **74% agreed** that the businesses they buy from ‘have a long way to go to ensure products and services and accessible for all’.

There are signs of change however; almost two thirds (**65%**) agreed that businesses they used are starting to recognise the importance of accessible and inclusive products and services. Just over half (**54%**) agreed to have noticed a positive change in how they were treated as a disabled or older customer.

**Be part of the change.**

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<sup>1</sup> Recent research (2020) has found the annual spending power of disabled people and thier families to be £274 billion. It is important to remember that disabled people often have to spend more than non-disabled people on everyday living costs associated with having a disability.

## Methodology

Business Disability Forum (supported by Microsoft) commissioned Open Inclusion to gather business and consumer insights in the period from September 2021 to January 2022.

These insights were drawn from:

- **Ten depth interviews with businesses** undertaken by Business Disability Forum amongst their Members and Partners.
- **A quantitative survey of 1,001 people.** 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).
- **A qualitative and detailed online survey** (241 respondents all with disabilities answered a 25-minute questionnaire) among Open Inclusion's Panel.
- **Focus groups** of four separate 90-minute sessions facilitated by Open Inclusion.

### ▶ **View full research methodology.**

Our findings and recommendations are presented as a **report** and seven consumer sector reports.

Read other consumer sector reports in this series:

- ▶ **Banking and insurance**
- ▶ **Holiday accommodation**
- ▶ **Hospitality**
- ▶ **Retail**
- ▶ **Technology**
- ▶ **Utilities.**

# Key findings



We asked respondents to name the most important factors for them when deciding what to do.

The top five factors influencing disabled consumers' decisions were:

- Location and ease of travel (**79 per cent**)
- Details about the experience, event or attraction (**73 per cent**)
- Cost (**63 per cent**)
- The environment, including access inside (**58 per cent**)

Other factors mentioned as being important parts of the decision-making process for over four in ten respondents were:

- Access into and out of the venue or attraction
- Opening times
- Parking
- Ease of booking.

**Choice is limited for many – over half (56 per cent)** observed that choice of days out and leisure activities was limited to some extent given their disability or access needs.

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## Key highlighted stat:



**77% of respondents said**  
that relevant information is difficult to find.



Relevant information is difficult to find with **over three quarters (77 per cent)** saying that finding specific information they needed because of their disabilities or access needs was either a lot or a little more challenging to find.

**Just over two fifths (41 per cent)** felt confident that they were making the right choice.

## Getting it right

There are clear benefits to getting it right. **Just over a third (35 per cent)** said that their 'first instinct in this type of decision is to use a provider or business I have used before' – which means that nearly two thirds wanted to try new places and experiences.

Disabled consumers were also quick to praise when an organisation got things right.

“When booking the Globe theatre, their website had the best access information I have seen. Plus, it is great in reality and it’s ironic that a historic design building puts other more modern venues to shame. Similarly, the new RHS Garden in Manchester was very accessible both at the booking stage and the actual experience.”

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Disabled consumer

Disabled consumers liked to be asked what they needed because this recognised that not everyone with the same disability has the same needs. Asking the consumer about their requirements showed that staff were well trained in providing good customer service.

“Visiting Windsor Castle... I was identified in the queue by a member of staff who asked me to follow them, spoke to me about my requirements and what I would like to see. She showed me the route I should take on a map, radioed ahead to her colleagues to advise them I was enroute, and then they were waiting for me at specific accessible entrances. Well-managed and excellent customer service.”

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Disabled consumer

# Key recommendations



Five key themes emerged that, if applied consistently, would help businesses better attract and support the needs of disabled customers and potential customers.

In relation to days out and leisure these are:

- 1. Ensure that websites and apps are fully accessible** – for example, they can be used easily by people using screen readers.
- 2. Provide clear information** about all rides, exhibits, shows or experiences and seating inside a venue as well as how, and where and how tickets can be collected. Include information about quiet places, quieter times to visit and information about who to contact on arrival for questions relating to accessibility – including parking and public transport and the distance from parking or transport to the entrance.
- 3. Offer support** from customer service and salespeople in a range of formats – for example, telephone, email and webchat – for bookings and further questions about the accessibility of venues and arrival arrangements.
- 4. Be transparent** about costs and charges for carers and additional support.
- 5. Provide clear and easy to find information** about the accessibility of additional services such as cafes, bars (including menus in accessible formats), retail outlets and accessible toilets in these venues.



**“I like going to the theatre when it says an accessible audio described performance. I need to know that I can get in and out of the venue safely I need to know that I can get my tickets in advance or access to tickets. I need to know that I can bring a companion with me or if not that there is someone there to support me in my experience.”**

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Disabled theatre-goer

### Case study

Disabled theatre-goer who uses a wheelchair misses out on the full experience.

One disabled theatre-goer commented on how she was unable to get the full experience of a night out at the theatre and how the theatre and the artists were missing out on her business. She said:

“When I go to the theatre one of the things I like to do is get some memorabilia – but by the time you’ve queued for the loo during the interval they want to shepherd you back into the theatre before the other people. And even when you do get the chance afterwards the stalls aren’t accessible. You have to send your carer to relay back what there is and it just kind of spoils the experience of being able to get a souvenir. You spend half the time waiting for the loo and you don’t even get the chance to buy a drink even because they want you back in place before everyone else comes in.

It’s about fairness for disabled people. Surely, we could go in last if we are in the way? Or perhaps they could prioritise us for the shop so that we can get something to remember the experience by?”

# Detailed findings



## Factors influencing the decision

All respondents were asked about the factors that were most important in their choice of day out or venue to visit for leisure purposes.

Location and ease of travel (**79 per cent**) and details about the experience, event, or attraction, for instance, the performance, exhibition, or rides (**73 per cent**) were the most important factors.

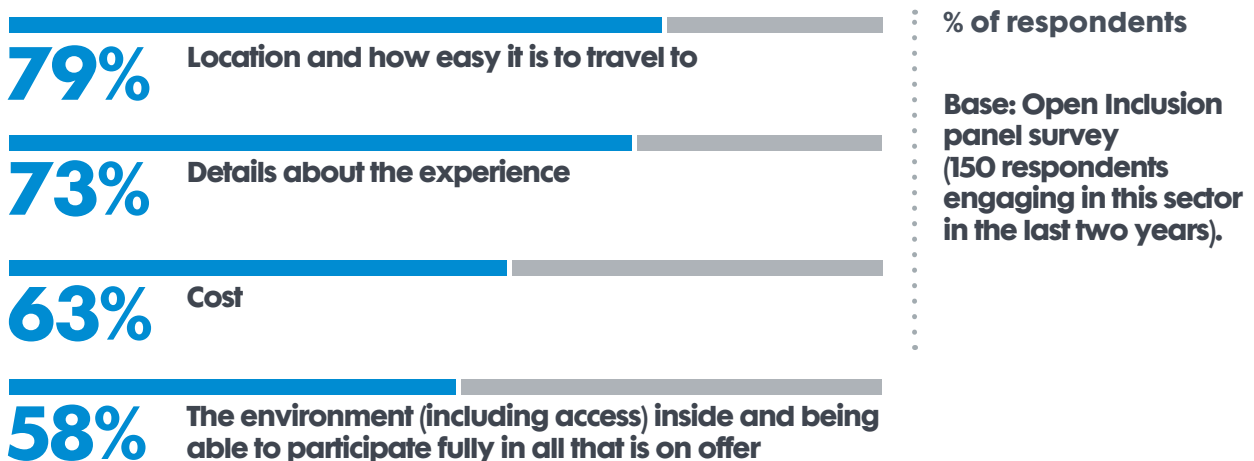
These were followed by cost (**63 per cent**) and the environment (including access inside) and being able to participate fully with what is on offer (**58 per cent**).

Between four and five in ten mentioned: :

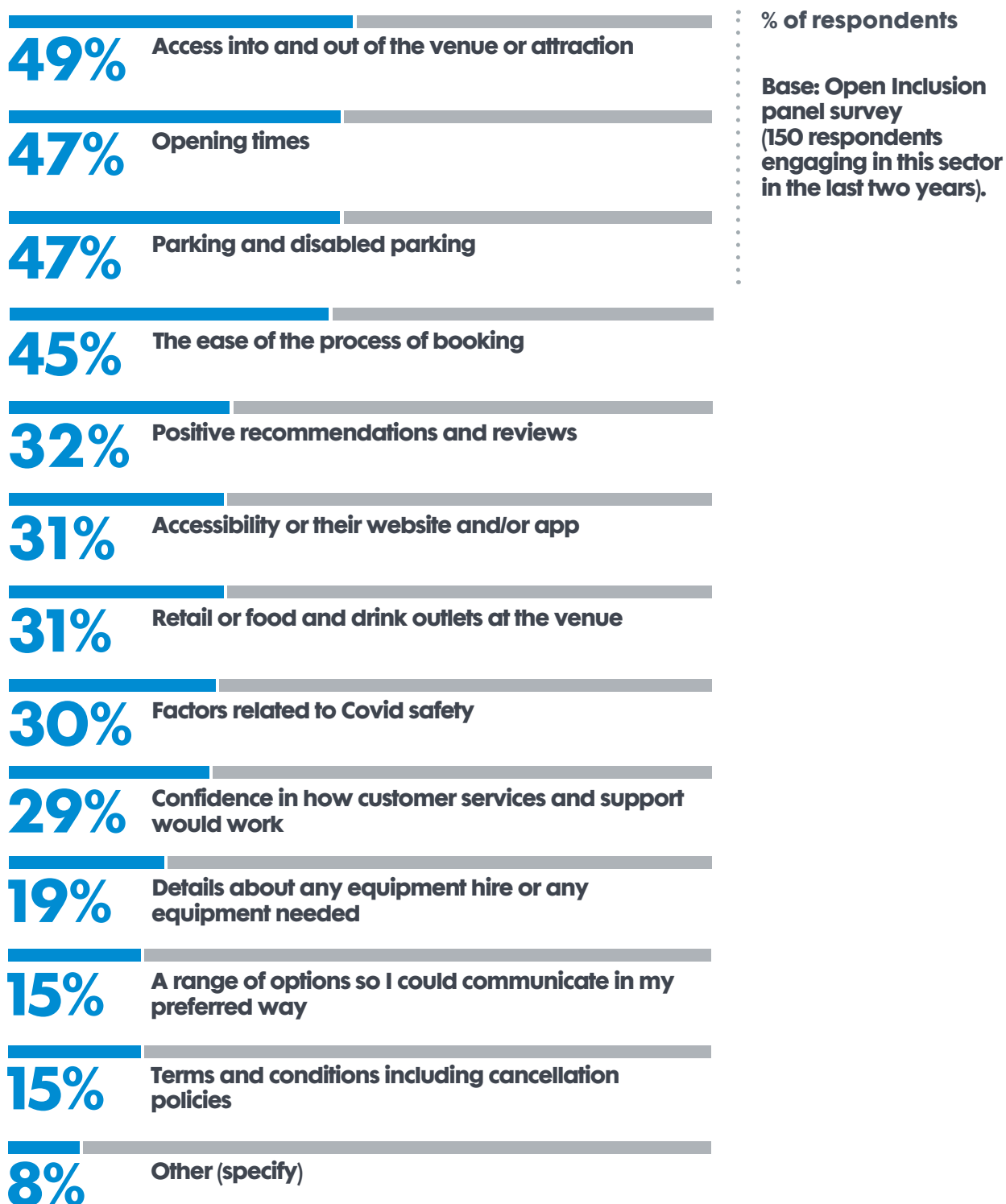
- Access into and out of the venue or attraction (**49 per cent**)
- Opening times (**47 per cent**)
- Parking and disabled parking (**47 per cent**)
- Ease of process of booking (**45 per cent**).

See Chart 1 for the full breakdown

**Chart 1: Most important factors influencing decisions to book a day out or leisure experience**



## Chart 1 continued



## Easy to find information before booking

Disabled consumers wanted easy to find information in advance – not just about the main attraction, whether an experience, performance, or ride but about the venue and all the facilities from accessible toilets and parking to bars and cafes.

One disabled consumer said that what made for a good experience was:

**“Being able to access not only the main event at the venue but being able to see the exhibits, being able to access coffee shop and disabled amenities without feeling my experience was far more negative than other people’s.”**

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Disabled consumer

Disabled consumers’ complaints often centred on just not having enough information about accessibility. This led to anxiety that they might be wasting their money or would have a negative experience rather than an enjoyable one.

One consumer with a mobility related disability said that they looked for the:

**“Location of disabled parking relative to the entrance and exit. Services like shuttles from places around large attractions such as stately homes.”**

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Disabled visitor at a stately home

Another commented that:

**“[They] never seem to be able to say if their disabled toileting facilities are adequate to fit a power chair in. I’ve had many times where they do provide disabled toilets only for them to be out of use, too small or worse still, obstructed.”**

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Wheelchair user

It isn't just consumers with mobility related disabilities who had concerns. These consumers with sight loss wanted to know if the experience would allow them to touch exhibits:

**“I consider whether there are hands on things and not just walking around looking at things. [I] consider whether there are physical things I can get involved in.”**

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Consumer with sight loss

**“Accessing information is tricky. Accessing museums can be particularly awkward as turning up to find everything in a glass case, so it can't be touched, is not ideal.”**

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Consumer with sight loss

Another with hearing loss wanted to know about interpreters.

**“For gigs I was not sure if they would provide an interpreter; it is not included in the website. You need to contact them to find out.”**

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Consumer with hearing loss

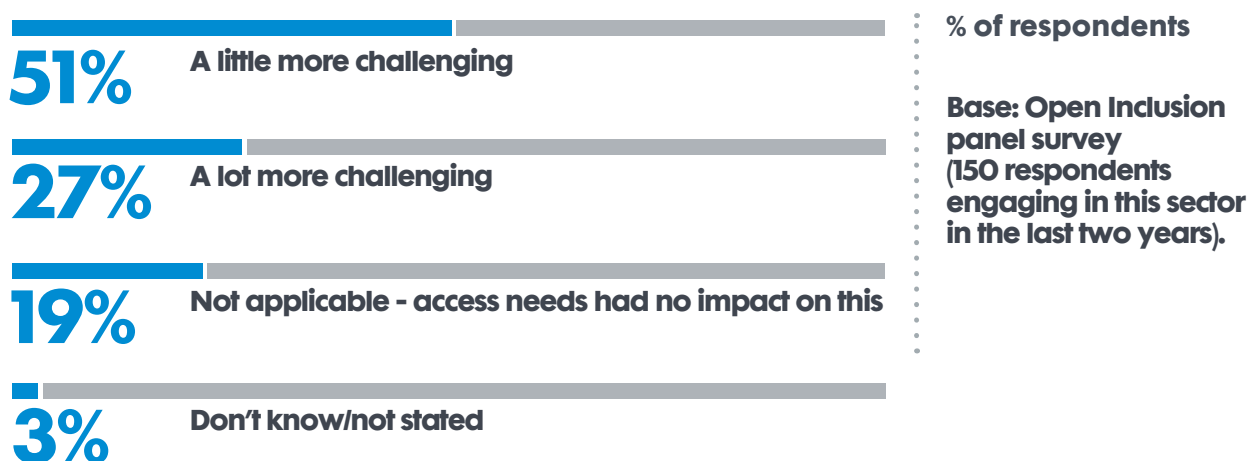
Disabled consumers knew that businesses were often accessible or willing to make adjustments but noted that many businesses just didn't advertise the information well enough. People with different disabilities had different access needs but they all wanted easy to find and access information that would make their experience enjoyable and inclusive before making their decision to buy tickets for that experience or performance or choose to visit that attraction.

“Many sites either do not have a specific accessibility policy or if they do, it is so hidden that I quite often give up.”

Disabled consumer

Just over three quarters of respondents (77 per cent) observed that finding specific information that they needed was more challenging to some extent because of their disability or access needs. Just over a quarter (27 per cent) said it was a lot more challenging.

**Chart 2: To what extent, if at all, do you feel that finding specific information about these types of services was more challenging for you given your disability or access needs?**



Almost two thirds of respondents (96 in total) noted that information was difficult to find in some way. The data indicates that the main challenges were in relation to:

- Easy access and assistance (parking spaces, blue badge, other passes)
- Information being hard to find in general or, more specifically, details about the layout of the venue (images, accessibility on-site, outdoor space)
- Details about costs & pricing (concessions).



## Staff and customer service

Good customer service and disability awareness training was a theme throughout. One disabled consumer just wanted to know:

**“Will staff be kind to me or make me feel like a burden? [You] get a feel for this via calls, emails or when you arrive. Flexibility and interest in listening to me and responding is very important so I still feel good about myself and not a burden.”**

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Disabled consumer

Others recounted more positive experiences:

**“Staff were extremely helpful and did not rush me or make me feel embarrassed about needing to hire a mobility aid.”**

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Consumer with a mobility disability

**“[I] visited a theatre to watch a play...As soon as I went to the entrance, workers were ready to meet us and escorted us easily through to our area and we were able to avoid busy crowds. I called before going and the event management had specific people to organise disability access who were very friendly and easy to contact and supported me on everything.”**

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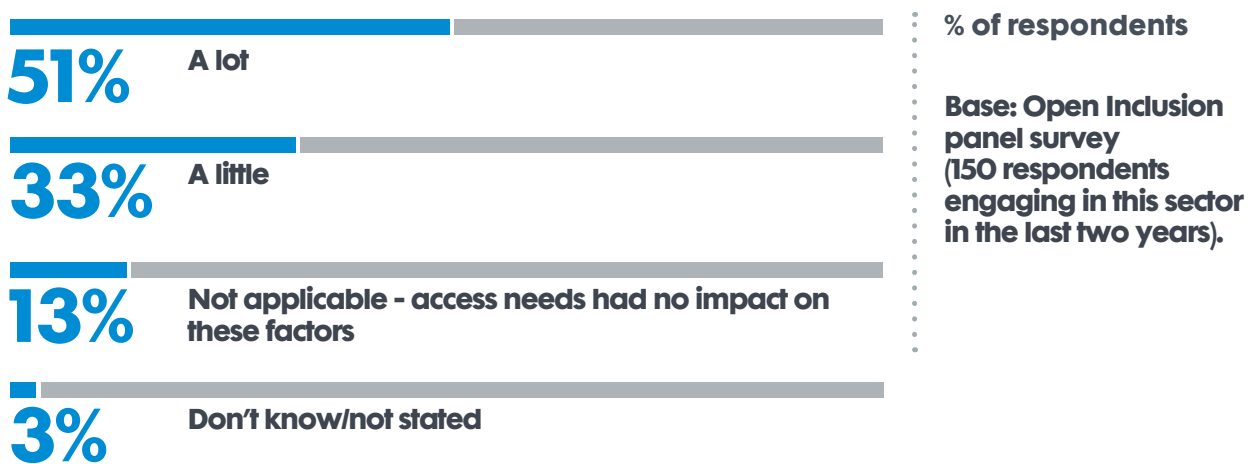
Disabled theatre-goer

## Accessibility

**Just over half (51 per cent) of respondents said** that in the last two years their disability and access needs influenced their decision to buy a lot. **A further 33 per cent said** it influenced factors a little.

**Just over one in ten (13 per cent) said** that access needs had no impact at all on their decisions.

**Chart 3: To what extent, if at all, do you feel that your disability or access needs impacted the factors influencing choice, or played a role when deciding?**



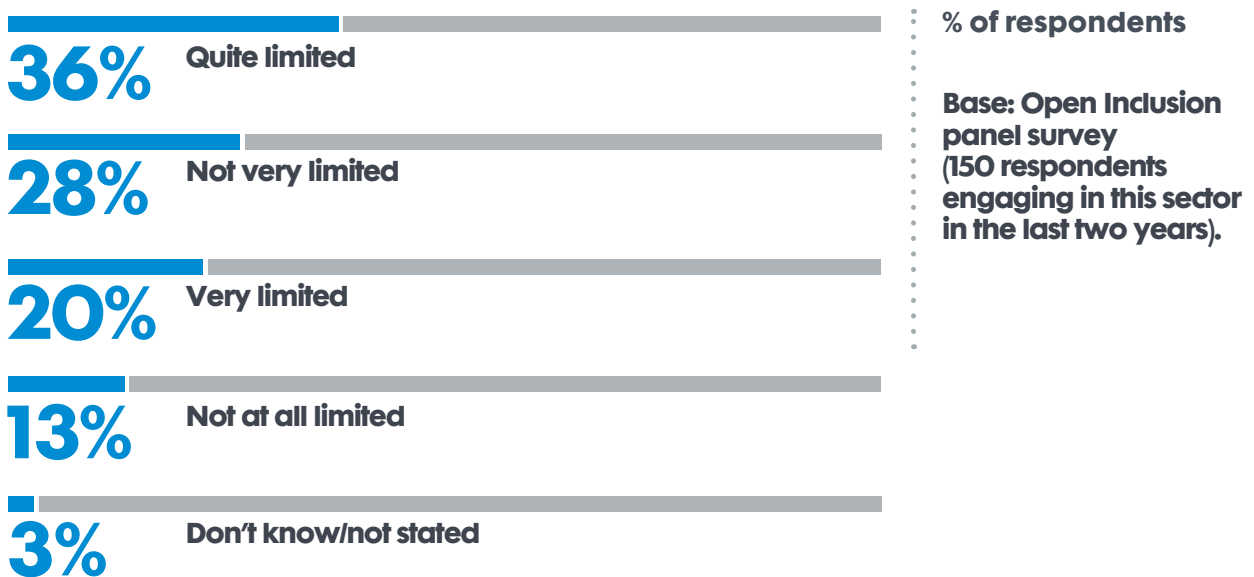
## Limited choices and planning ahead

Over half (56 per cent) of respondents said that their choice of a day out or leisure experience had been limited to some extent because of their disability or access needs. 20 per cent said that choice had been very limited.

“In certain venues I need to book early or else the few wheelchair spaces they have are booked already.”

Wheelchair user.

Chart 4: To what extent, if at all, do you feel that your choice of day out or leisure experience was limited given your disability or access needs?



Disabled consumers also commented on how they had to plan meticulously to get the best out of the experience.

**“We have to think carefully about what each of us can cope with on a day out and plan it in detail and make sure everyone is prepared for what we are going to do and see – planning ahead makes days out easier.”**

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Disabled consumer

Not being able to find the right information made anticipation of the day out or experience a worry rather than a pleasure.

**“I find the whole process overwhelming and with too many unknown, unpredictable variables I end up worrying about.”**

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Disabled consumer

Booking the day out or leisure activity was often a frustrating experience not just because of the lack of information about accessibility but also because the process of booking was itself ill thought through or inaccessible – often at the final stage when the disabled consumer wanted to buy and pay.

**“Providers have to consider the whole user journey. It’s not good if you get to the end of the booking process and you can’t select the preferred date or click the check-out button because the site is inaccessible.”**

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Disabled consumer

But some businesses were getting it right:

**“Booking access seating at a concert. I was easily able to contact the access team, the service was streamlined. I was met at the door, shown to my seat and the staff ensured we had everything we needed. The company website had information about what proof was needed and it was easy to show them.”**

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Disabled theatre-goer

Or were on the way to getting it right:

**“I thought that buying tickets from the theatre was a great experience – you can get access tickets online, and when I emailed about which seats had the best view of captions, they replied really quickly with clear and concise information. Ideally, that information should have been on the page so that I wouldn’t have had to email, but it was still a positive experience overall.”**

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Disabled theatre-goer

## Format of information and communication

Approximately a third of respondents (52 in total) noted difficulties in the format of information and communication. The following themes were most prominent:

- Lack of detail and consistency of information
- Lack of transparency and openness
- A range of accessibility issues such as website being hard to navigate and the booking process online being inaccessible.

**“Some info on websites not up to date. Sometimes phones not answered. [It’s] understandable in a pandemic but makes planning more difficult.”**

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Disabled consumer

Making promises that were not then fulfilled when the disabled person arrived at the venue was also mentioned

**“Access is not always discussed. Also, companies often make empty promises...”**

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Disabled consumer

Disabled consumers wanted transparency, particularly about costs when they arrived with a carer or support worker.

**“Websites don’t always list what concessions are available, and if a carer is free, or it’s not always easy to find under ticket prices if it is online.”**

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Disabled consumer with a carer

Businesses that get it right offer consumers a range of ways in which to communicate with them, as this theatre-goer with anxiety and a disability related to speech recounts:

“I remember booking theatre tickets and I could book them via email. It was great because I don’t like talking on the phone both because of anxiety and because I struggle to physically use a phone and people can’t always understand my speech so to be able to do it by email was so useful... I wish all venues had an option to book tickets for access spaces via email or online booking.”

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Disabled theatre-goer

## Deciding to buy

**Only two fifths (41 per cent) of disabled consumers said** that they felt confident that they had made the right choice.

**62 per cent of respondents said** that they considered all features carefully before they made a choice, which highlights the importance of accessing detailed and accessible information

Reviews and comparison sites are important: **31 per cent agreed** ‘I read general reviews in the media, websites or comparison websites, such as TripAdvisor’ and **31 per cent agreed** that ‘When possible, I will filter or look for reviews and recommendations from people like me.’

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### Key highlighted stat:



**Only 41% said**

**that they felt confident that they had chosen the right leisure activity or day out.**

## Getting it right

The benefits of getting it right for a business was shown in the **just over a third (35 per cent) of disabled consumers who said** that their 'first instinct in this type of decision is to use a provider or business I have used before.'

This does, however, mean that nearly two thirds of disabled consumers are willing to try a new experience. They just need to know that it will be accessible and inclusive and that they will enjoy themselves.

Respondents gave examples of when experiences had felt inclusive, and they ranged from small classes to big experiences.

**“Best inclusive service was booking an outdoor dance course where the teacher went through every detail of the landscape and environment and my needs and altered the course to match so I could take part in everything. Excellent approach to inclusion.”**

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Disabled consumer



## Case study – The Harry Potter Studios

A consumer with anxiety praised the Harry Potter Studios for providing an inclusive and accessible experience.

“Day trips to new places are a very big deal to me because they cause a lot of anxiety because everything is new and different. The place I went to (Harry Potter Studios) had many different reasons why I chose them (and that I wish other places offered).

The studios provided:

- An autism guide of what to expect from every part of the trip, including the process of arriving, the order of the tour, where it will be busy, what the sounds and lighting will be like in each area, where I can stop for the toilet etc
- Menus of every eatery available online
- It very clearly stated on their website that they are trained in hidden disabilities and who I could ask for help while I was there
- Free tickets for carers
- Were very helpful and understanding when I struggled with their booking system and said that they would book it all for me (which they then did when I decided to go).”

# Conclusion



Disabled consumers have money to spend (£274 billion in the UK) and they are willing to spend it on days out and leisure activities.

Some businesses fail to attract disabled consumers not because they aren't accessible or inclusive or don't want to welcome disabled consumers. It is quite simply because disabled consumers can't find the information about accessibility and inclusion that they need to book with confidence.

In many cases, all that's needed is information that's easy to find and access about the facilities and services and well-trained customer service staff who are willing to communicate with consumers in a range of formats.

If an attraction, experience, or venue is accessible and inclusive, it needs to advertise this to disabled consumers deciding where to go and what to buy. If it isn't advertising this, then the business is at risk of losing a significant amount of custom from not just disabled consumers but also their family and friends – because disabled consumers don't go out alone or just with other disabled people.

## 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](https://businessdisabilityforum.org.uk/membership).

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