

Holiday and accommodation

What disabled consumers choose
to buy and why



June 2022

Acknowledgements

We are incredibly grateful to our longstanding friend and Partner, Microsoft, for making this report possible.

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Introduction



Choosing where to go on holiday should be a pleasurable experience – but for many disabled consumers it can be unnecessarily stressful. We all want to know what our accommodation will be like and the facilities on offer that will make our stay comfortable and enjoyable.

We all want to know what our accommodation will be like and the facilities on offer that will make our stay comfortable and enjoyable.

Many disabled people, however, cannot find the information they need to book with confidence. If accommodation isn't accessible, or information about accessibility isn't available, then the opportunity may not become a reality and the holiday provider loses a valuable booking.

Disabled people, of course, don't travel alone. Although we only asked disabled consumers about their experiences for this research, if they can't find the information they need about accessibility, the whole party is unlikely to book.

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 £274bn¹** 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.

¹ 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 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**
- ▶ **Days out and leisure**
- ▶ **Hospitality**
- ▶ **Retail**
- ▶ **Technology**
- ▶ **Utilities.**

Key findings



This is what they disabled people who had considered or purchased holiday accommodation in the last two years told us:

- Location was the most important factor (**82 per cent**)
- Almost as many people (**75 per cent**) said that details about the accommodation such as beds, bathrooms and features in the kitchen were almost as important
- Other factors influencing decisions were cost (**72 per cent**) and ease of travel to location (**70 per cent**)
- Over eight in ten respondents (**81 per cent**) said that disability or access needs influenced their choice to some extent
- Almost six in ten (**59 per cent**) observed that choice of holiday accommodation was limited to some extent because of their disability or access needs
- Relevant information is difficult to find and access. Almost three quarters (**73 per cent**) felt that finding the specific information they needed was either a lot or a little more challenging because of their disability or access needs
- Just under two fifths (**39 per cent**) felt confident that they had made the right choice of holiday accommodation.

Key highlighted stat:



73% of respondents said

that finding the information they needed was more challenging because of their disability or access needs.

Getting it right

There are clear business benefits to getting it right. **While almost third (32 per cent) said** that their first instinct in this type of decision is to use 'a provider or business I have used before', this leaves two thirds who are prepared to look for something new.

Disabled consumers were quick to praise when the process worked.

“Purchasing a hotel room stay. Having emailed customer services, within 24 hours I had very detailed pictures of the entire room and a separate number to phone if I had any other questions.”

Hotel consumer

“Disney cruise ships were incredible at always getting it right, nothing was too difficult, didn't make me feel different.”

Cruise consumer

“We bought a cruise holiday via an agency. We called the agency, the agent was brilliant, explained everything in great detail, reassured us and helped us along the way, she made a booking for us, provided info about excursions etc, she was brilliant.”

Travel agency customer

Key recommendations



Five key themes emerged throughout our research that, if applied consistently, would help businesses better attract and support the needs of disabled consumers and potential consumers. In relation to holiday accommodation these are:

1. Disabled consumers with access needs need to know up front if the experience will work for them.
2. Clear and easy to find information about accessible features in the property and detailed descriptions are critical. For instance, disabled consumers may need to know the size of the room and if rooms with walk in showers (wet rooms) or baths are available. The accessibility of additional facilities in accommodation such as bars, restaurants and swimming pools are equally important for disabled consumers choosing where to book.
3. Details about how to get to the location should include information about the accessibility of nearby public transport (such as railway stations and buses) and how far transport facilities are from the accommodation. Information about parking is also crucial, including how far visitors will have to travel from their car to the entrance of the accommodation and on what sort of surface. For example, is the surface smooth? Is there an incline?
4. Websites need to be easy to navigate and accessible and all other communication needs to be available in inclusive formats. This includes downloadable PDF or Word documents that can be read using a screen reader.
5. There needs to be better support for booking and filling in forms. Disabled consumers want to be able to access to ask questions of customer or sales staff in the most accessible format for them – for example, by telephone, email or web chat – depending on their disability and preferences.

“Is there a wet room? Is there a shower chair? Is the accommodation all on one floor? Is there allergy information on the food provided in the welcome pack?”

Disabled consumer

Detailed findings



Factors influencing the decision

“Holiday accommodation needs are varied. Pictures provide the best information for me to decide if the place might be accessible. [However], marketing photos are often of pretty scenery or ‘arty’ photos of a fresh pot of coffee or something similar. I am more interested in what the bathroom looks like, the front door and parking.”

Disabled consumer

All respondents were asked about the factors that were most important in their choice of holiday accommodation.

Location was the most influential factor (**82 per cent**) but this was closely followed by details about the accommodation such as beds, bathrooms and features in the kitchen (**75 per cent**). Cost and ease of travel to the location were mentioned by approximately seven in ten respondents.

Other key factors for approximately two fifths of respondents or more were:

- Meeting my requirements as a disabled customer (**54 per cent**)
- The environment in/outside the accommodation being able to use facilities on site (**53 per cent**)
- Access into and out of the accommodation (**52 per cent**)
- Parking and disabled parking (**40 per cent**).

Chart 1 has the full breakdown.

Chart 1: Most important factors influencing decisions for booking holiday accommodation

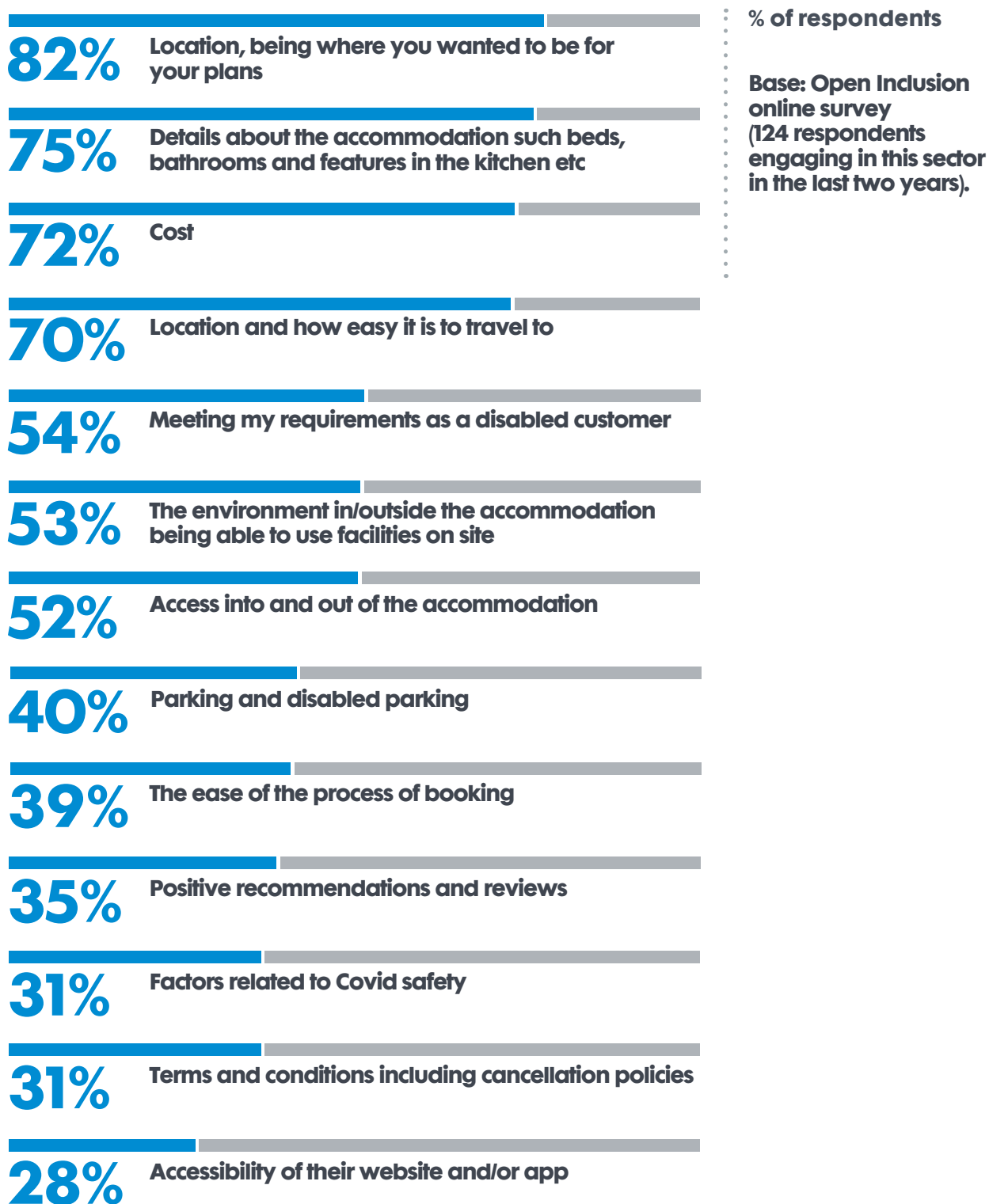
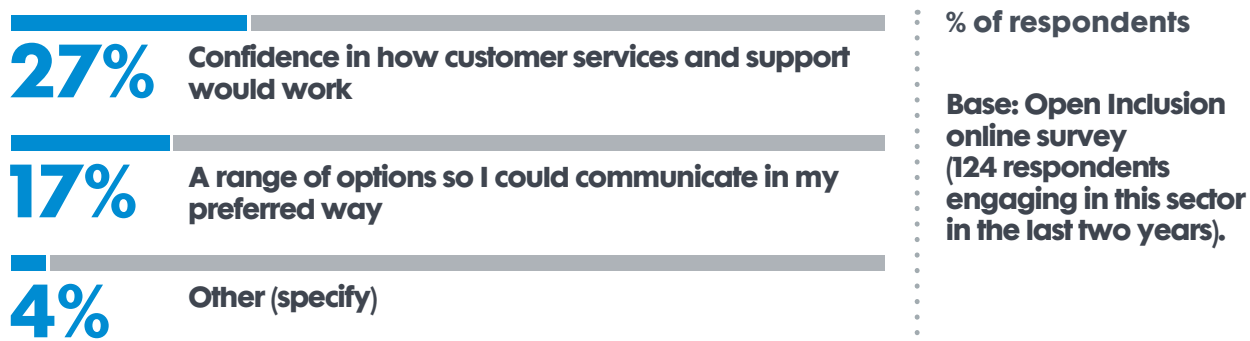


Chart 1 continued



Accessibility needs drive decisions for a majority of consumers

“Simple access needs such as subtitles on TV, light alarms for doorbells etc.”

Consumer with hearing loss

Access needs were key drivers for engagement in this sector. **Almost half (49 per cent) said** that their disability and access needs influenced the decision a lot and a further 31 per cent said it influenced factors a little. Just 16 per cent said that access needs had no impact at all on their decisions.

“At the time, I was new to booking accessible accommodation and didn’t go into enough detail of what an accessible room was and what my own requirements where. I ended with a double bed for me and my carer and a shower over a bath, neither of which were suitable. It was a learning curve and I now have a checklist.”

Disabled consumer

The environment inside and outside

This is by no means an exhaustive list, but some details required about the inside of the property includes:

- **Configuration** – whether all accommodation was on one floor and if not, what was upstairs
- **Bathroom** – whether there was a wet room, shower over the bath or availability of a shower chair
- **Beds** – double or twin, in which rooms?
- **Other technical details** – subtitles on TV, light alarms for doorbells and/or smoke alarms.

“I was travelling with my mum who has reduced mobility but does not use a wheelchair. It was much more difficult to get information on walking distances, terrain, rest areas and in-room accessibility.”

Consumer with reduced mobility

Like everyone else, disabled people don't just want to stay in their rooms. Information about the surrounding area and how accessible it is can be a key selling point.

Disabled consumers said that they looked for information about distances and whether they would be able to use all the facilities, ranging from spa areas and pools to restaurants and bars and the natural environment.

Chart 2: 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?



Choice

Just under six in ten (59 per cent) disabled consumers said that booking holiday accommodation had been limited to some extent specifically due to their disability or access needs (27 per cent said that choice had been very limited).

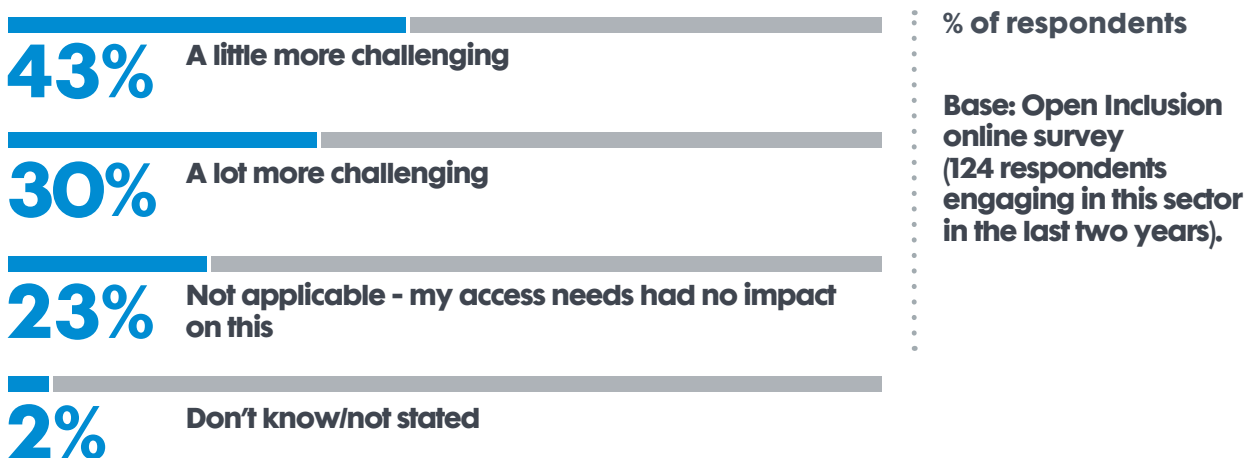
Finding information and booking with confidence

“Some websites gave vague info or wanted me to call to ask further questions. For example, I wanted to know if they accepted hearing dogs.”

Consumer with hearing loss

Almost three quarters (73 per cent) of disabled consumers asked said that finding specific information about holiday accommodation was more challenging because of their disability or access needs. Three in ten (30 per cent) said it was a lot more challenging.

Chart 3: 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?



Providers are not giving enough information. Almost six in ten respondents noted that information was difficult to find. The data indicates that the main challenges were in relation to:

- Finding out about the accessibility of rooms and other facilities in the area or on site (for example, swimming pool or parking)
- Lack of details about accessible equipment in the accommodation
- Information being hard to find generally
- Details about the area, for instance directions and distances to the hotel or other venues, attractions, restaurants, and transport
- Information being hard to understand and process
- Ambient details about the accommodation such as lighting and noise
- Inconsistent and conflicting advice.

“Again, researching accessibility of places and accommodation is always important and sometimes information isn’t so easy to find whether it is stairs into the building or any lifts.”

Disabled consumer

Challenges in the format of information and communication

“I get confused with too much information that I’m not wanting and finding what I do. Any pop ups or flicking on the screen is so distracting I will leave the site if it cannot be removed. Often you can put in a booking request, go through all the pages only to be told not available or try again. Certain considerations of disabilities do not exist, and I’ve found that unless your disability is extremely obvious people have little patience or understanding.”

Neurodiverse consumer

Just over a third of disabled consumers found the formats of information provided and communication methods difficult to access, noting:

- A lack of detail and consistency across information which was interpreted as a lack of transparency and openness
- Information was difficult to find
- Different options in how to communicate with the provider to ask questions and make bookings (webchat, phone, BSL) was not readily available
- A lack of accessible formats – for example, documents that can be read using a screen reader
- Websites that are difficult to navigate.

Most people looked for the information they needed on websites, but some disabled consumers found that they needed to speak to a travel agent to find the information they needed to choose the right place to stay.

“Because I cannot see to look through holiday brochures and get an instance picture of a resort, I need to speak to staff at a travel agent, and this is often not available.”

Consumer with sight loss

But not everyone wanted to speak to someone – they just wanted to find the information they needed quickly and easily by themselves.

“I always find ringing dedicated teams useful but a bit of a hassle.”

Disabled consumer

Deciding to buy

Only two fifths (39 per cent) of disabled consumers said that they felt confident they were making the right choice when they decided to book. **70 per cent said** that they considered all features very carefully before they made a choice.

Reviews and comparison sites are important factors in deciding where to book: **34 per cent agreed** with the statement ‘I read general reviews in the media, websites or comparison websites, such as TripAdvisor’.

Almost as many, 31 per cent agreed that ‘When possible, I will filter or look for reviews and recommendations from people like me’. **Over half (56 per cent) stated** that they liked to discuss this type of decision with partners, friends or family.

Conclusion



Disabled consumers want to go on holiday, and they have money to spend on enjoyable and accessible experiences.

Holiday accommodation providers sometimes don't make it easy for them to spend their money.

Aside from ensuring that all facilities and accommodation is accessible, a few simple steps at the decision-making stage would help attract disabled consumers and their families and friends. These include:

- Taking time to understand the types of questions disabled consumers are likely to have about your venue
- Providing clear information about accessibility on easy-to-use websites
- Providing customer sales services for questions and follow up in a range of formats.

The benefits to businesses of getting it right are clear. **Almost third (32 per cent) said** that their first instinct in this type of decision is to use a 'provider or business I have used before' which had provided a positive experience.

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.

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