

Hospitality

**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.

Contents

<hr/> Acknowledgements	2
<hr/> Introduction	5
Who is this for?	5
Methodology	7
<hr/> Key findings	8
<hr/> Key recommendations	9
<hr/> Detailed findings	10
Choosing where to go	12
Food and the menu	14
Getting in and around the space	15
Ambience and atmosphere	16
What people choosing a restaurant or café said was important	17
Getting it right	17

Challenges in the format of information and communication	19
What consumers said about accessing information	20
Reviews and recommendations	21
<hr/>	
Conclusion	23
About Business Disability Forum	23
<hr/>	
Contact us	24

© 2022 This publication and the information contained therein, are subject to copyright and remain the property of Business Disability Forum. They are for reference only and must not be reproduced, copied or distributed as a whole or in part without permission

Introduction



Dining out and choosing where to go, whether for a quick coffee with a friend, a session in the pub or a relaxed meal with friends is one of life's pleasures, that was denied to us all during the lockdowns of 2020 and 2021.

However, when asked about their experiences of choosing where to eat out, disabled people revealed that they have long been (and often still are) denied some of the pleasures of eating and drinking out because of inaccessible or difficult to navigate websites and venues and poor customer service.

Disabled consumers wanted to go out to eat and drink but many were simply unable to spend their money because of a lack of (accessible) information or an inability to get in and around hospitality spaces..

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'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**
- ▶ **Days out and leisure**
- ▶ **Holiday accommodation**
- ▶ **Retail**
- ▶ **Technology**
- ▶ **Utilities.**

Key findings



- **A high percentage of disabled consumers (85 per cent) said** that disability or access needs influenced their choice of restaurant, café or pub.
- However, choice is limited for many. **Almost half (45 per cent) observed that** choice of hospitality venues was limited because of their disability or access needs.

Disabled consumers chose to spend their money on places that had either provided them with good information and service before or had been positively reviewed by people like them.

- **48 per cent said** they relied on positive reviews and recommendations
- **32 per cent of those surveyed said** 'I read general reviews in the media, websites or comparison websites, such as TripAdvisor'
- **21 per cent agreed that** 'When possible, I will filter or look for reviews and recommendations from people like me'.

Key highlighted stat:



45% of respondents said

that their choice of hospitality venue was limited by their disability or access needs.

Key recommendations



Knowing what was on the menu, ease of travel to the venue and cost were the three main factors driving choice of new restaurant, café or place to eat.

Simple steps that all businesses could take to be more welcoming not just to disabled consumers but all of us are:

- Ensuring that websites and apps are fully accessible and easy to navigate
- Always having details about the ingredients of dishes
- Showing pictures of the venue (with descriptions) which allow consumers to see or read about the environment and make their own judgements about accessibility. Disabled consumers want to know about entrances, the space between tables and any steps or stairs inside the venue.
- Indicating where the toilets are situated and whether they are accessible
- Clearly indicating aspects relating to access into the venue such as steps
- Providing quieter or less bright / dark areas in the venue if possible and tell people how to book these tables in advance
- Giving details of how to get to the venue from transport locations and details about parking including distance from the door

Detailed findings



All the disabled consumers who took part were asked what was most important to them when choosing a new restaurant, café, or place to eat.

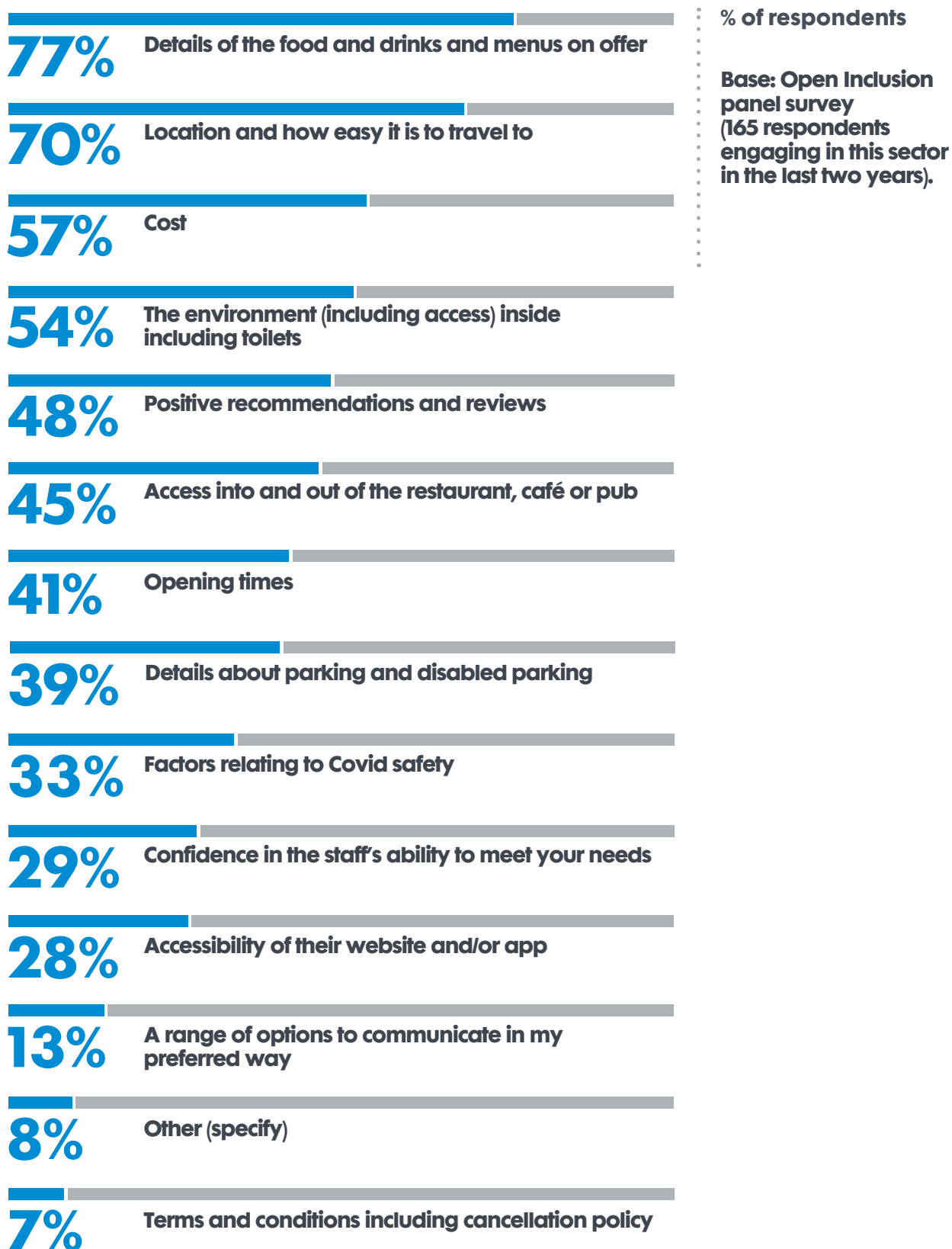
Aspects about the food and the menu were the most influential factors (**77 per cent**). However, for many, the barrier was finding or being able to access the information about the food and menu that they wanted before booking.

Location and ease of travel to the venue were also important (**70 per cent**). Over half mentioned cost (**57 per cent**) and the environment and access inside the venue, including toilets (**54 per cent**). Other key factors for approximately two fifths of respondents or more were:

- Reviews and recommendations being positive (**48 per cent**)
- Access into and exiting the venue (**45 per cent**)
- Opening times (**41 per cent**)
- Details about parking (**39 per cent**).

Chart 1 has the full breakdown.

Chart 1: Most important factors influencing decisions to book a new restaurant, café, or place to eat



Choosing where to go

One of the biggest barriers disabled consumers reported was finding the information they wanted and needed about the venue and what they had on offer.

Three quarters (75 per cent) of those who had planned or booked a new restaurant or cafe in the last two years felt that finding specific information was either a lot or a little more challenging because of their disability or access needs. **Only around two fifths (39 per cent)** felt confident that they were making the right choice when deciding to go to a particular venue.

“I like to ‘virtually attend’ before actually going so I know how it will be and what to expect. It is often hard to find pictures of everywhere, such as where the doors and toilets will be.”

Disabled consumer

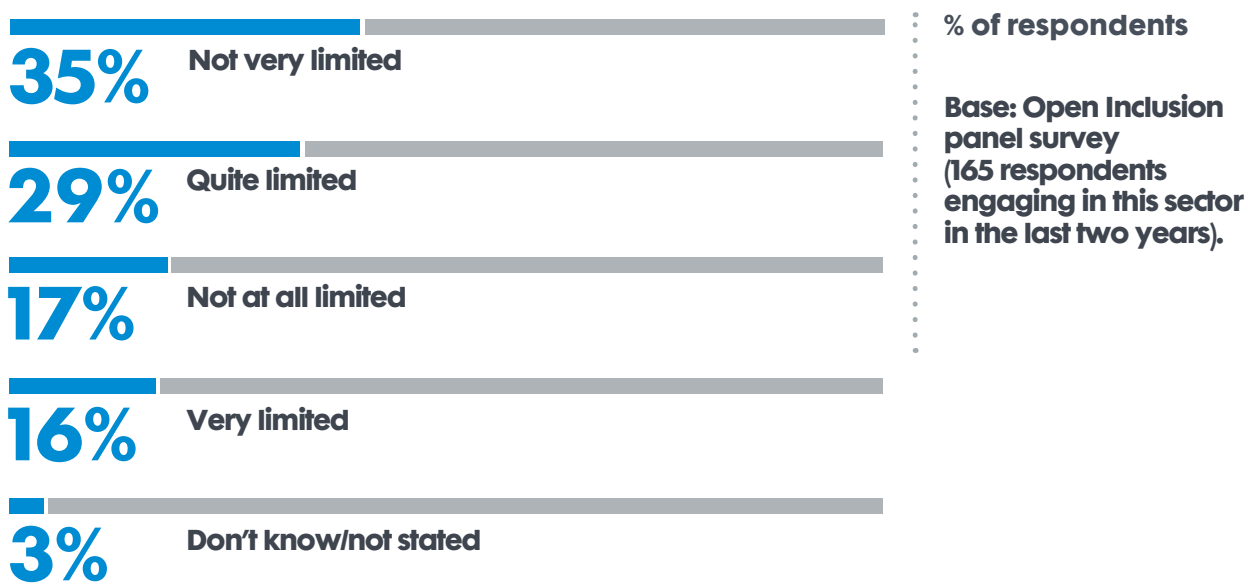
Chart 2: To what extent, if at all, do you feel that your disability or access needs impacted the factors influencing choice, or played a role when deciding?



“A [member of] staff’s perception of disabled access is different to a disabled persons reality.”

Disabled consumer

Chart 3: To what extent, if at all, do you feel that your choice of new restaurant, café or place to eat was limited given your disability or access needs?



“People don’t always understand what is and isn’t wheelchair accessible. They say the place is wheelchair accessible, but I can go there and the doorway is too narrow or there is a threshold. I have to question them about the accessibility to try to get a clear picture...”

Consumer who uses a wheelchair

Three quarters of respondents (75 per cent) observed that finding specific information about these types of services was more challenging to some extent because of their disability or access needs. **A quarter (25 per cent)** said it was a lot more challenging.

Food and the menu

Wanting to know what's on the menu and anticipating what we are going to eat is one of the many pleasures of eating out.

“Sighted people can go to Instagram and see a picture of the menu before deciding to go or when selecting what they want to eat. I can only do that if the menu is on an app like Just Eat or Uber Eats because most restaurants don't put an easy read version of their menu online. It takes too long to go inside and ask someone to read the menu, often staff aren't free to do that anyway.”

Consumer with sight loss

For some information about the food on offer is essential because of allergies but finding this was difficult.

“When restaurants do not know the allergens they include in their food, it means I cannot eat in that venue.”

Disabled consumer

“The main difficulty is finding accessible information online. Sometimes menus are not available at all and at other times the menu is available as a picture that conveys no useful information to me as a blind person.”

Disabled consumer

“I have allergies... the menus again were in a PDF format which are not screen reader friendly. If they were uploaded to the website, they were very hard to navigate as they were screen images.”

Consumer who uses a screen reader

Getting in and around the space

Predictably ease of access into buildings and navigating the space inside was a big issue but not just for wheelchair users. People with disabilities ranging from sight and hearing loss to neurodiverse conditions like autism complained that they didn't know if they would be able to get in and around the space before they booked.

“...Physical access, it's amazing how many pictures of places do not show how accessible the main entrance is.”

Disabled consumer

“The layout of the restaurant. Some places are very compact and small. This makes it difficult to manoeuvre, especially when using a cane.”

Disabled consumer

“I don’t want the one table by the door, in the draught, that no one else wants, thank you!”

Disabled consumer

Access needs were a strong influence on factors that were key drivers for engagement in this sector. **Just over two fifths (44 per cent) of respondents** who had planned or booked to eat out in the last two years said that their disability and access needs influenced the decision a lot and a further **41 per cent said** it influenced factors a little. **Only just over one in ten (12 per cent) said** that access needs had no impact at all on their decisions.

“Often difficult to find if they are step free and if they have step free toilets.”

Disabled consumer

Ambience and atmosphere

People with a variety of disabilities commented adversely on noise and lighting levels in restaurants and cafes. This is information that is hard to find before visiting the venue but was a big factor for many when deciding whether to return.

People with hearing loss who use hearing aids found that background noise made it difficult for them to tune into conversation at their table. Lip reading was hard if lighting levels were very low. Very low lighting was also an issue for people with sight loss and for some older people who struggled to read menus.

Noise levels and harsh lighting were also off-putting to people with some neurodiverse conditions.

What people choosing a restaurant or café said was important

- “Lighting in the venue...amount of background noise.”
- “As VI [vision impaired] I person I don’t want to go somewhere it is loud – I can’t lip read, [the] sensory overload just ruins the whole ambience.”
- “The accessibility of venue, being able to select a certain table preference (e.g. away from loud music) needing a longer seating time due to difficulties eating.”

Getting it right

The benefits of getting it right were clear as disabled consumers were loyal to places that provided good information and service. **Just over two fifths (41 per cent) said** that their ‘first instinct in this type of decision is to use a provider or business I have used before’ which highlights the importance of getting it right for customer loyalty.

Disabled consumers asked for good experiences could remember the occasions clearly and some establishments stood out for being named more than once

“It was a trip to Nando’s. I didn’t have a cane, so I don’t know how they figured out I was blind, as it’s not obvious. When it came to making payment, the staff member knew I was blind and so took the card from my hand softly, touched the contactless area for me and handed the card back to me. This was great because I didn’t need to explain my needs, rather than the fumbling moment of me asking where it was. [I was] blown away by that.”

Consumer with sight loss

“In Nando’s I was queuing with a friend. They guided us to the table which also had a QR code that gave access to the menu. They made sure I could use my phone – it was the only time I can recall that I could browse items, customise my meal and make sure it turned up... and it did.”

Disabled consumer

“It was booking a restaurant and stating I would be using a mobility scooter. The person there gave me an option of either taking the vehicle to the table or parking outside in a vestibule. I felt she went out of her way to accommodate me and make me feel as normal as possible.”

Consumer with limited mobility

“Five blind people went out independently and rang in advance. [They discussed] help guiding to table, to the loos, even serving. [The venue] were not condescending at all – they explained where something was on the plate. Just to have that awareness was brilliant.”

Consumer with sight loss

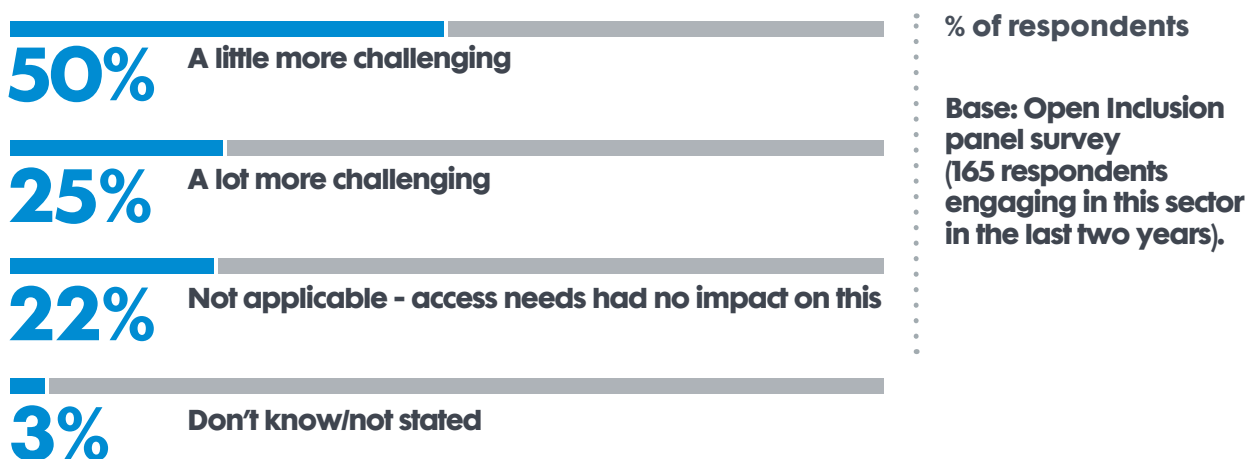
Challenges in the format of information and communication

Even when the information disabled consumers wanted was available on websites and apps some struggled to access it because it was presented in an inaccessible format.

Just under two fifths of respondents (62 in total) noted difficulties in the format of information and communication. Across the feedback, the following themes were most prominent:

- Lack of detail and consistency of information
- Font size and colour hard to read in communications
- Screen reader issues – the information could not be read or was not easy to read using a screen reader
- A lack of accessible formats such as large print, easy read or braille
- Websites being difficult to navigate.

Chart 4: To what extent, if at all, do you feel that your choice of new restaurant, café or place to eat was limited given your disability or access needs?



Two thirds of respondents (108 in total) noted that information was difficult to find. Disabled consumers were looking for:

- **Accessible menus that were easy to read.** Those with QR codes so that the menu could be read online were mentioned specifically
- **Information about ingredients** – allergens in particular, as many consumers have dietary requirements
- **Details about the layout of the venue** (images and written descriptions and the accessibility of indoor and outdoor space)
- **Ambient details about the venue** – is it busy or quiet, how loud is the space and what are the lighting levels?
- **Accessible toilets**
- **Easy access and assistance** (parking spaces, blue badge, other passes) and directions to venue.

“**A larger table and room for my assistance dog and power chair, a lot of staff don’t understand what’s needed.**”

Consumer with sight loss and a guide dog

What consumers said about accessing information

- **“...Sometimes though it’s all poorly thought out, it’s about looking pretty and it’s not about informing people.”**
- **“As a blind user of screen reading software, I found limitations in the usability of websites for information.”**
- **“Difficult to navigate restaurant’s app or website.”**

Reviews and recommendations

No one wants a bad experience when eating out, so it was unsurprising that many disabled consumers returned to places they had been to before and had where they had had a good experience. Disabled consumers did, however, want to try new places – but were often put off by a lack of information.

Many respondents said that finding information they needed about a new restaurant, café, or place to eat was difficult. **Just under two fifths (39 per cent) agreed** that they felt confident making the right choice on this type of product or service. **42 per cent of respondents said** that they considered all features very carefully before they made a choice. This highlights the importance of accessing detailed and accessible information.

The best information, however, was often not found on the restaurant or café's own website but on review or comparison sites. Word of mouth recommendations and reviews by other disabled people were important in the decision-making process.

32 per cent of those surveyed said 'I read general reviews in the media, websites or comparison websites, such as TripAdvisor.' **21 per cent agreed** that 'When possible, I will filter or look for reviews and recommendations from people like me'.

“**[I] speak to friends about new places. If there is something new, I look on TripAdvisor or Google reviews. I sometimes [look at their] attitude to children – you can pick up clues and pointers from other reviews even if they are not particularly about disabilities.**”

Disabled consumer

Almost half (47 per cent) stated that they liked to discuss this type of decision with partners, friends or family:

“I think I rely a lot on previous experience and social network – i.e. my deaf friends and family. Though I do have less access to verbal information via the wider community. A key part also is how easy, available and responsive the service is to contact via online chat or email.”

Deaf consumer

“I am generally slower to use internet. However, I tend to talk to friends or family about new restaurants.”

Disabled consumer

Conclusion



Disabled consumers enjoy going out for a meal or drinks and are willing to try new places, but no one wants a disappointing experience.

For many disabled people, disappointment can start at the front door, when they find they cannot get into the establishment at all, or once inside, when they realise there is nothing on the menu that they can eat. That is why so many want information about the premises and the menu before they book or turn up at the door, but this is often difficult to find. Eating establishments either do not publish this information on their websites or do so in inaccessible ways.

Service from staff can of course make or break a dining out experience no matter the quality of the food. Disabled consumers were delighted when staff got it right and these establishments stood out from the competition in a busy sector which has struggled so much in recent months.

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.