

# Retail

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**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



The way we shop has changed and as a result, so has the high street. The COVID-19 pandemic accelerated a move that had already started to people shopping online rather than in-person.

Many people, however, still want the experience of going shopping and many retailers are responding by making it a great experience for shoppers that goes beyond a simple transaction – but are they making it an inclusive and accessible experience for everyone? Disabled and non-disabled consumers alike want the choice of being able to click to purchase from their own homes or phones and the option of being able to go in-store to browse.

Our research found that disabled consumers were often disappointed by being unable to find the information they needed before they could decide to buy.

## 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)”
- **26% did not feel able** to request adjustments or identify their preferences or needs when they tried to buy a products or services
- **27% 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**
- ▶ **Days out and leisure**
- ▶ **Holiday accommodation**
- ▶ **Hospitality**
- ▶ **Technology**
- ▶ **Utilities.**

# Key findings



We asked disabled consumers what influenced their choice of where to shop and why.

The items they were looking to purchase ranged from clothes, shoes and beauty items and toiletries to large electrical appliances such as fridges or televisions as well as groceries. We asked them to tell us about their experiences of finding what they wanted to buy and the information they needed to make an informed choice both in-store and online in the last five years.

When this was explored further through the online survey among the Open Inclusion panel, of those who had shopped online or in-store in the last two years:

- **45 per cent said** that choice of products when shopping in person was very or quite limited, 38 per cent said the same in relation to online shopping
- **43 per cent** had abandoned their shop very or quite recently when shopping in-store due to barriers experienced – the same proportion was highlighted for the online experience (**43 per cent**)

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## Key highlighted stat:



**43% of respondents said**

**that they abandoned their shop frequently because of the barriers they encountered when shopping – both online and in-person.**



- Multiple barriers were cited for shopping in-store:
  - **Customer service** – availability of staff, knowledge of products and services and how to answer queries
  - **Physical and sensory barriers** – such as the space inside the store, accessibility getting in and out, the level of brightness and the environment being too loud
  - **Other customers** – the store being too busy or other shoppers contributing to a negative experience
  - **Accessibility of products and services themselves**
- Barriers related to customer services were mirrored by respondents discussing online shopping
- Other barriers related to online shopping were:
  - **Confusing routes** through the website or app
  - **Accessibility issues** with the website or app
- The process of setting up accounts, arranging delivery and understanding terms and conditions.

# Key recommendations



Retailers who want to welcome disabled customers should focus on:

- Customer service – our respondents highlighted support from customer service staff was key to either making them feel welcomed, or putting them off from making a purchase at with retailer.
- Ensuring customer service staff are knowledgeable about the accessibility of the premises and the products or services on sale.
- Carrying out barrier analyses of the whole shopping experience. Look at the physical premises, any websites or apps, and access routes to and from the premises. Include aspects such as noise and light levels, as well as physical barriers to access such as narrow or blocked pathways. Check that websites and apps can be used by disabled consumers, for example those who use a screen reader.
- Checking the accessibility and design of the products and services on sale. Disabled shoppers' choices are often limited by a poor selection of goods and services that they can actually use themselves.
- Providing accessible and informed customer support – for example, if someone is having trouble setting up an account or arranging delivery, is it clear who they should contact? Will the person they speak to know how to help a disabled customer with customer support needs specific to their disability? Provide multiple options for contacting customer support – for example, email, telephone and webchat.

# Detailed findings

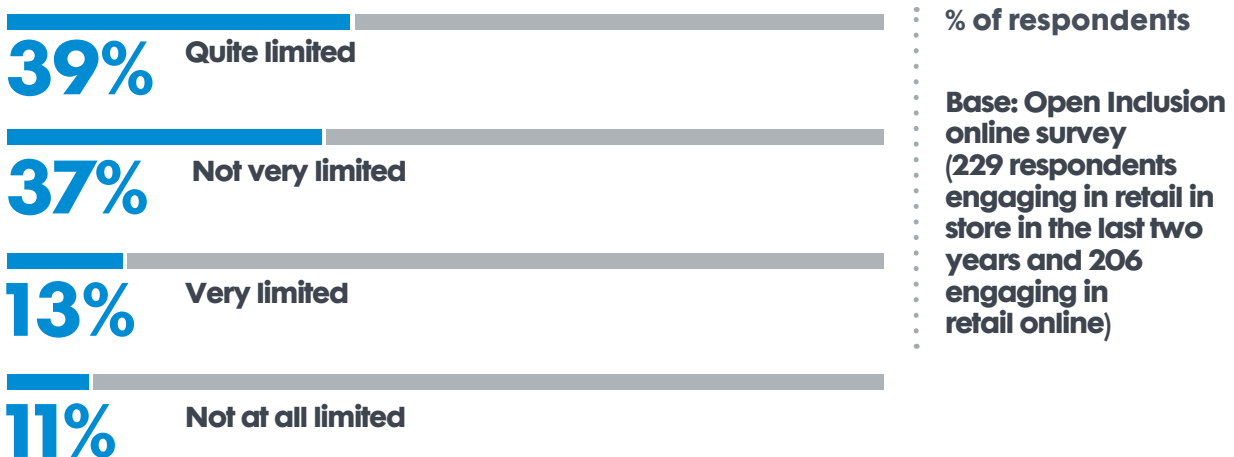


## Experience of choice

Approximately two fifths of respondents in the Open Inclusion online survey felt that there was limited choice when shopping, both in person and online:

- **45 per cent said** that choice of products when shopping online was very or quite limited
- **38 per cent said** that choice of products when shopping in-person was very or quite limited.

**Chart 1: To what extent, if at all, do you feel that the choice of products you want to buy is limited given your disability or access needs – for example, you had fewer options to choose from than you would have liked?**

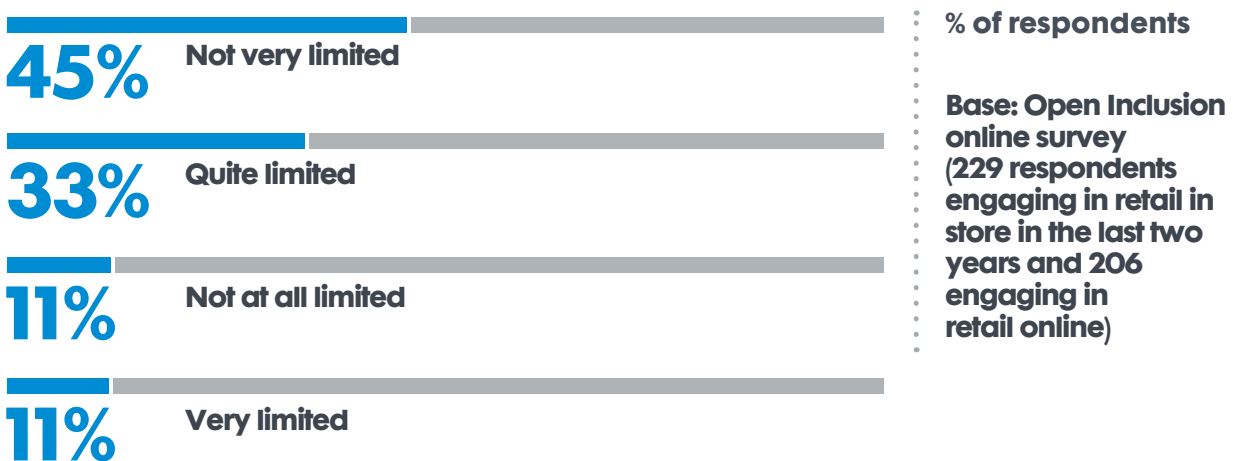


## Barriers when shopping

A separate question explored how often respondents had had to abandon their task or leave early when shopping due to barriers that they had experienced related to their access needs. This was explored separately for in-store shopping and online. Data indicates that this is happening frequently:

- **In-person shopping – 33 per cent agreed** that they abandoned their shop or left early quite frequently and 10 per cent very frequently
- **Online shopping – 36 per cent agreed** that they abandoned their shop or left early quite frequently and 7 per cent very frequently

**Chart 2: Thinking about your disability or access needs, how frequently would you say you experience barriers that cause you to leave the task early or abandon your online shop without buying?**



## Shopping in-store

Respondents were asked which barriers, if any, they had experienced in-store when shopping. Main points to note were:

- Aspects related to customer services or sales staff were common reasons for having to abandon a shop in person which highlights the importance of getting this aspect right. These included:
  - Having customer or sales staff available to help (**54 per cent**)
  - Staff not being able to give them the answer to queries (**36 per cent**)
  - Having a negative experience with customer or sales staff (**34 per cent**).
- Some barriers were more physical, these included:
  - Space to move around the shop (**52 per cent**)
  - Placement of items to look at (**47 per cent**)
  - Access into the shop itself (**40 per cent**)
  - Parking or getting to the shop from public transport (**30 per cent**).
- Design of products and environments were a factor with **33 per cent mentioning** that products being offered were unsuitable or inaccessible and **27 per cent reported** struggling to read labels or signs.
- Sensory factors were also mentioned as barriers causing the experience to be abandoned or ended early; the store being too loud (**24 per cent**) or too bright/not bright enough (**14 per cent**).

Other customers were also a challenge for some respondents with **37 per cent saying** that the shop was too busy and 11 per cent had a bad experience with other shoppers.

**Chart 3: Have any of the following aspects been a barrier to purchase for you? Barriers can include anything that meant you had to leave early or abandon your visit without buying**



### Chart 3 continued



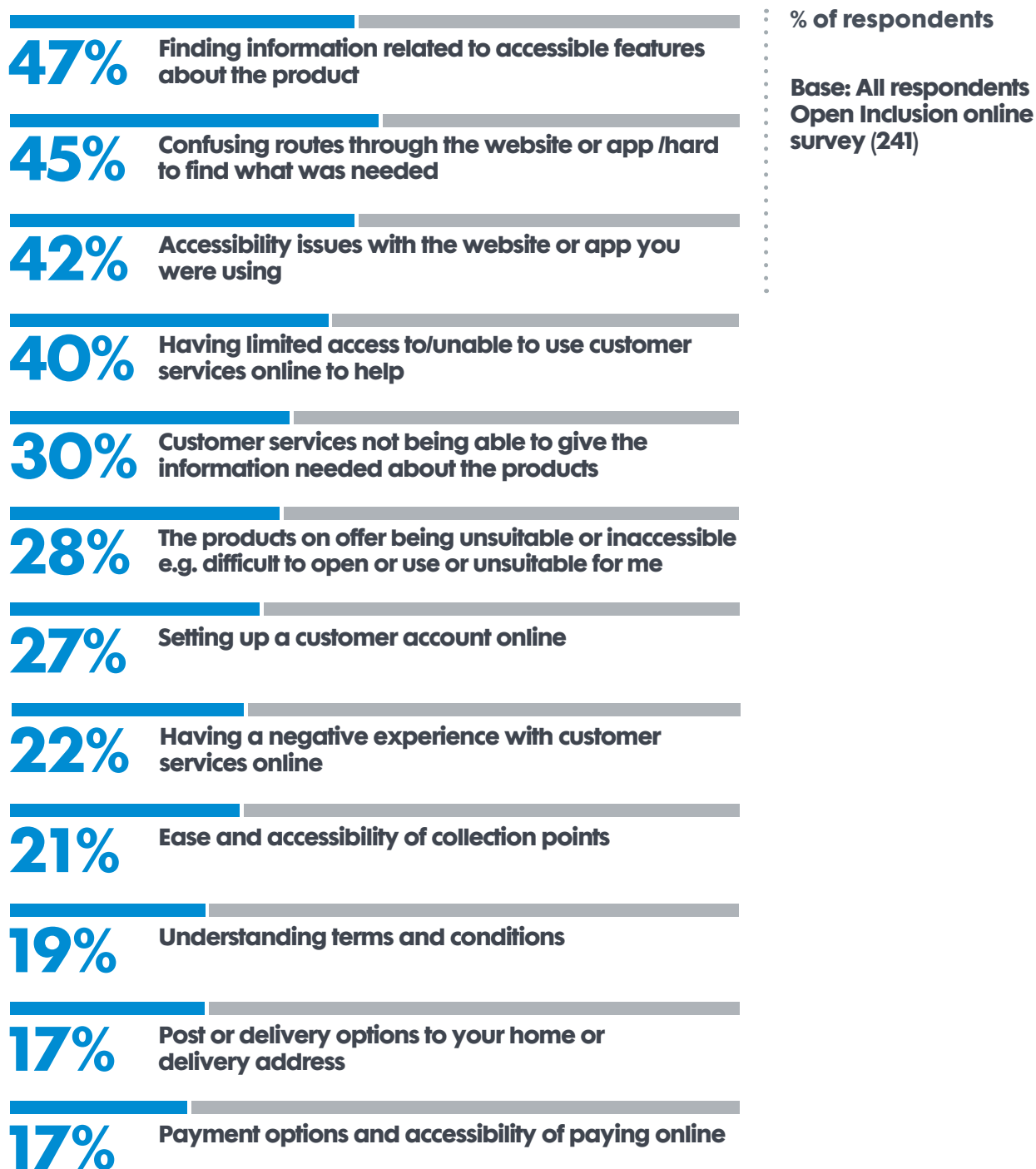
## Shopping online

In terms of barriers when shopping online, some of the broad themes mirrored in-store experiences. Main points to note were:

- Finding information relating to accessible features of products (**47 per cent**)
- Reasons directly related to customer services or sales staff were once again highly influential:
  - Having limited access to/unable to use customer services to help (**40 per cent**)
  - Customer services not being able to give information needed about products (**30 per cent**)
  - Having a negative experience with customer services online (**22 per cent**).
- Inaccessible digital experiences were mentioned including confusing routes through the website or app (**45 per cent**) and accessibility issues with the website or app (**42 per cent**)
- Barriers related to process of purchasing products were also raised, including:
  - Setting up a customer account online (**27 per cent**)
  - Ease and accessibility of collection points (**21 per cent**)
  - Understanding terms and conditions (**19 per cent**)
  - Post or delivery options to home address (**17 per cent**)
  - Payment options (**17 per cent**).



**Chart 4: Have any of the following aspects been a barrier to purchase for you? Barriers can include anything that meant you had to leave early or abandon your visit without buying**



## Chart 4 continued



## When the experience 'works'

Respondents gave examples of when experiences had felt inclusive in this sector.

**"I needed a new washing machine. I went to a local independent store, they allowed me to fiddle with dials and twist and press buttons to see whether it was accessible for me, they really listened to what I needed, and even said that they would give me a seven-day trial period. If it did not meet my needs, they would give me a full refund or exchange, which they did."**

**"...Apple has the best customer service team available. Whether this be online or in-store, each employee has an understanding or knowledge of accessibility settings. This makes the customer experience more enjoyable and accessible."**

**"Buying new football boots for my teenage son. After finding a member of staff thanks to my guide dog, I told them I needed firm ground football boots that had to be a certain brand. I showed them the ones I was returning as they were the right size but tight across the front. They explained that there were a few different shapes on the front and showed me these, allowing me to feel them. They described in very fine detail how every boot looked and allowed me to feel them along with the shin pads. They assisted me to the tills where I purchased these and even helped me to the lift and out the store – although I was OK with this myself, it was much appreciated."**

**“Shopping for clothes an assistant brought the items to me and was very knowledgeable. I was able to choose from a large selection.”**

**“Buying a new slow cooker. I went to the store Lakeland and the sales lady showed me every model and was interested to hear and meet my needs.”**

**“I called Vodafone to order an Apple watch. They ran me through the features and I bought it. It was very simple and quick.”**

**“A clothes shop [which was] well-spaced, helpful staff who weren’t in your face, changing rooms wheelchair accessible and the till accessible.”**

**“I was researching new sofas and as I am very likely to spill food/liquids I wanted fabric that would cope with this. Also, my disability makes getting up from a chair difficult. I visited Sofology and the salesman couldn’t have been more attentive and really listened to my concerns. He gave me all the information I needed.”**

**“I always love going to choose my motability car. All the dealers I’ve worked with have always understood the need to get the right vehicle and I’ve never felt undervalued.”**

**“I found Amazon Prime really easy to use and set up. There were lots of options for different things included and was easy.”**

**“It was my LUSH experience when a member of staff helped me from the moment I got in to [the store] ...she understood why I was there and the types of things I was looking for, for my skin.”**

**“The most amazing service was Primark – they offered help to find items as soon as I went in, asked if I needed help finding anything, left me to shop after pointing out where the lifts etc were and opened the lower counter for me as soon as I was ready to pay.”**

# Conclusion



Retailers can reap big benefits by doing more to welcome disabled consumers.

Almost half of disabled consumers we asked said they had abandoned an in-person or online shop because of barriers they faced trying to complete their purchase. Clearly, disabled people are ready to shop around for an experience that will give them what they need.

Key areas identified by respondents as areas where retailers can improve are:

- **Finding the information they need**
- **Customer service support**
- **Inaccessible shops, websites or apps**
- **Inaccessible products or services.**

Our respondents were full of praise for retailers with whom they had had good experiences. Retailers who create inclusive shopping experiences can capitalise on the £274 billion market of disabled consumers.

## 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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