

2012 LEGACY FOR DISABLED PEOPLE: INCLUSIVE AND ACCESSIBLE BUSINESS

**Improving messages to SMEs: The case for the
disabled customer**

August 2010

ODI

2012 Legacy for Disabled People: Inclusive and Accessible Business

Improving Messages to SMEs. The Case for the Disabled Customer.

Final Report

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Executive Summary

The 2012 Legacy Promise for Disabled People has amongst its main objectives a radical shift in societal perceptions of disability and the removal of barriers to inclusion.

Atkins Management Consultants were commissioned to provide support in this work encompassing: a critical review of messages targeted at small and medium size enterprises (SMEs), development of a compelling case for SMEs to focus on disabled people as customers, recommendations for improvements in the way messages on accessibility and inclusiveness are promoted and a Communications Action Plan for key stakeholders.

The case we developed highlights the business opportunity disabled customers entail. Disabled consumers are a sizeable yet poorly addressed segment of the consumer market worth £80 billion p.a.¹ For an average business disabled customers may account for up to 20% of the customer base. The risk of losing custom to a more accessible competitor is high as consumer experiences of disabled people affect the choices of families and friends².

The case provides examples of small businesses that have successfully addressed disabled customer requirements and elucidates the business benefits associated with improved accessibility. Businesses with a better focus on the disabled customer have seen a rapidly expanding customer base, increases in sales and profitability, have gained a substantial 'foothold' in their market and a distinct advantage to their competitors.

The main barriers to SMEs becoming more focused on disabled customers relate to low awareness of the opportunity to boost sales and profits by being more accessible. This is compounded by fear and discomfort with disability, a narrow understanding of 'access' and confusion around the concept of 'reasonable adjustments'.

Our review found that government departments and agencies wanting to promote accessibility and inclusiveness either in the context of the 2012 Games or generally experience a lack of material in respect of the business opportunity disabled customers entail. Some information exists but it is often difficult to find and is dispersed across a variety of channels many of which are not used by SMEs.

¹ DWP: Press release, 3 December 2004

² EFD and RADAR, 2006: The Walk Away £

Our report recommends that government develops and promotes a case for focusing on the disabled customer in the lead up to the 2012 Games. To be effective with SMEs, messages need to focus on the disabled consumer market as a business opportunity still to be exploited and present the economic and business case for targeting this market. The communication process needs to change to a more proactive approach and include face-to-face engagement with businesses in order to be effective in raising the general level of awareness. Finally, the channels to promote the message need to have credibility with small and medium sized businesses.

The 2012 Olympic and Paralympic Games represent an opportunity to give a focus to the recommendations of this report. We recommend improvements in the knowledge, data and information sharing between business delivery agencies and improvements in training for business advisers.

The report concludes with recommendations to improve the availability of information on channels used by SMEs; to incorporate access and inclusion into mainstream business activities via the business planning process and in the advisory support provided to business start-ups. To achieve a radical shift in the attitude of businesses over the longer term we recommend that new compelling material, case studies and evidence is commissioned.

The Communications Action Plan was developed at a Workshop with main stakeholders which focussed on specific activities to be completed by the end of the year. The actions target specific improvements on: information availability on the Business Link website, proactive communications of the business case material, regional SME events and sharing existing 'best practice' amongst RDAs, Business Links and equivalents in the Devolved Administrations.

1. Introduction

Background

- 1.2 In December 2009 the Government announced an additional legacy promise for the London 2012 Olympic and Paralympic Games: The Legacy Promise for Disabled People. It has amongst its main objectives a radical shift in the societal perceptions of disability and the removal of barriers to inclusion in areas such as business and sports, so that disabled people enjoy full and equitable access to goods, services and leisure activities
- 1.3 ODI and BIS lead an initiative focused on improving the way businesses engage with disability issues. One aspect of this work is to promote perceptions of disabled people as an attractive customer base for businesses and, in particular, for small and medium-sized enterprises (SMEs).
- 1.4 Atkins Management Consultants were commissioned to undertake a rapid assignment in support of this initiative, by reviewing in a critical manner existing messages and communications to SMEs, developing more compelling messages and a case for focusing on the disabled people as customers. The study also looked at developing an Action Plan for key stakeholders for promoting the messages for accessible and inclusive business.

Scope and Approach

Scope

- 1.5 The work focused on the following areas:
- Critical review and understanding of what needs to change to make messages to SMEs more compelling
 - Development of a compelling case for focusing on disabled people as customers, targeted at SMEs and based on collation and analysis of existing data and case studies
 - Development of recommendations and an Action Plan for promoting messages to SMEs in the run up to the 2012 Games

Approach

- 1.6 The work was based on a combination of secondary research and interviews with key stakeholder groups. An extensive review was undertaken of the main information sources, existing guidance, case studies, information and ‘messages’ on disabled people as customers. 25 interviews: face-to-face, telephone and e-mail-based exchanges were conducted with representatives from the following stakeholder groups:
- Central Government Departments – policy development
 - RDAs, Business Links, DA equivalents – policy implementation; interface with SMEs
 - Disabled Persons Organisations – represent the interests of disabled people
 - SME membership organisations³ - represent business members’ interests; interface with SMEs
 - Non-profit organisations / tourism organisations working with SMEs on accessibility – interface with SMEs
- 1.7 The interviews highlighted the barriers small businesses face to becoming more inclusive of disabled customers and the changes needed in the arguments and information presented to SMEs.
- 1.8 Respondents gave their views on the kind of information and advice on disability issues small businesses seek; the information, support and guidance provided to them; and perceived ‘gaps’ between needs and provision. The interviews also explored views on the most effective messages, communication channels and processes to persuade more SMEs to become inclusive.
- 1.9 A Workshop with representatives of these stakeholder groups was also conducted. Its aims were to debate views on existing messages, assess gaps, recommend improvements and arrive at a common view of the most compelling messages to promote to SMEs and the best ways of reaching the SME audience. The workshop culminated in the development of a Communications Action Plan.

³ SME membership organisations include the Federation of Small Businesses (FSB), the Forum of Private Business (FPB), The British Chambers of Commerce and others.

Report Structure

- 1.10 This report presents the outcomes of the Consultants' research and analysis. Section 2 presents the Case for Focusing on the Disabled Customer. Section 3 presents a critical review of the existing messages about disabled customers, stakeholder views on the communication process to SMEs and an analysis of the main 'barriers' to SMEs becoming more inclusive of disabled customers. Section 4 presents our recommendations in respect of improving communications to SMEs and promoting the messages developed in the course of our work.

Acknowledgements

- 1.11 The Consultants would like to thank the following organisations that agreed to take part in the research for their invaluable contribution to this report:

- British Chambers of Commerce
- BT
- Department for Business, Innovation and Skills
- Business Link Kent
- Business Link London
- DCMS
- EFD
- EHRC
- East Midlands Development Agency
- Forum of Private Business
- Federation of Small Businesses
- Government Olympic Executive
- Inclusion London
- London Development Agency
- Office for Disability Issues
- One North East
- RADAR
- RNIB
- RNID
- Scope
- South West of England RDA
- Tourism for All
- VisitEngland
- Welsh Assembly Government

2. The Case for the Disabled Customer

2.1 This section sets out the economic and business arguments for focusing on the disabled customer. It highlights the size of the market opportunity and presents the business benefits associated with better accessibility.

Summary

- Disabled consumers are a significant but poorly addressed market worth £80 billion p.a.⁴
- For an average business disabled customers may account for up to 20% of the customer base⁵
- The risk of losing business to a more accessible competitor is high as consumer experiences of disabled people affect the choices of family and friends⁶
- Business benefits associated with better accessibility include a rapidly expanding customer base, increases in revenues and profits and a distinct competitive advantage⁷

The market potential

2.2 Disabled consumers are a sizeable yet poorly addressed segment of the consumer market. A survey of disabled consumers' buying patterns⁸ revealed that a staggering proportion, 83%, had to take their custom elsewhere, to a more accessible competitor. Up to 1 in 5 customers are currently likely to be a disabled person⁹. There is a strong link between age and the prevalence of disability and, as the population grows older, there is likely to be an even greater prevalence of disability in the future. If the impact of the ageing population is considered, businesses may be losing over a quarter of their potential customers by failing to respond to disabled customers requirements. Businesses with a better focus on disabled customers

⁴ DWP: Press Release, 3 December 2004

⁵ Atkins estimate based on the following figures: 10.6m disabled people for 2007/08 (ODI: Disability prevalence estimates, ODI website) and 61.4 million UK overall population as of mid-2008 (ONS: Population estimates. Statistical bulletin, August 2009); makes allowance for the figure of 10.6 million under-representing the total number of disabled people

⁶ EFD and RADAR, 2006: The Walk Away £

⁷ Atkins analysis of existing case studies, examples presented later in the section.

⁸ EFD and RADAR, 2006: The Walk Away £

⁹ See Note 5.

have seen a rapidly expanding customer base, increases in sales and profitability, have gained a substantial ‘foothold’ in their market and a distinct advantage to their competitors¹⁰.

Market size and growth

- 2.3 The UK disabled consumer market comprises 10.6 million disabled people¹¹ with combined annual spending on goods and services estimated in excess of £80 billion¹². (The figure of £80 billion reflects the estimated annual market size in 2002-2003). For an average business disabled people may account for up to 20% of all customers¹³.
- 2.4 The market is set for growth: as the population ages, the prevalence of disability increases. 33% of 50 to 65 year olds and 42% of people over 65 have a disability¹⁴. There are now 11.8 million people above state pensionable age¹⁵. 23% of the population will be aged 65 and over and 5% will be 85 years and older by 2033¹⁶.

Spending power

- 2.5 The market is growing in terms of customer numbers and so does its spending power. Whilst the annual market is estimated in excess of £80 billion, older people’s spending is set to reach £100 billion p.a.¹⁷ In 2008 older people’s spend reached £97 billion, some 15% of total household spend in the UK.¹⁸ People aged 65 years and over hold un-mortgaged equity estimated at £460 billion and nearly half expect to access this wealth¹⁹. Average pensioner incomes tend to increase faster than average earnings. In the period between 1995 and 2008 the increase in average pensioner incomes was 42% in real terms²⁰.

¹⁰ See Note 7.

¹¹ ODI: Disability Prevalence Estimates, ODI website

¹² DWP: Press release, 3 December 2004

¹³ See note 5

¹⁴ Labour Force Survey, ONS, Autumn 2005 (as reported by EFD)

¹⁵ ONS: Population Estimates. Statistical Bulletin. August 2009

¹⁶ ONS: Mid-year population estimates, 27 August 2009

¹⁷ Age Concern and Help the Aged: “The “grey pound” set to hit £100bn mark”, press release, 20 January 2010

¹⁸ ONS: Family Spending. 2009 edition.

¹⁹ J. Smith, Exploring attitudes to housing wealth and retirement, Housing Finance, 63, pp 34-44, 2004 as reported in Age Concern: Older People in the UK: Key facts and statistics, 2008

²⁰ ONS, Statistical bulletin: Older People’s Day 2009, 30th September 2009

- 2.6 Given the strong link between an ageing population and the prevalence of disability, businesses that fail to respond to disabled customer requirements risk losing their share of a potentially much larger market.

Common misconceptions

- 2.7 Many businesses fail to recognise the business opportunity that improved access presents primarily because of lack of understanding of how diverse the potential customer base is and a narrow definition of access. For many businesses disabilities are always “visible” and the understanding of access relates primarily to alterations to the physical environment: taking down walls, having lifts installed and widening entrances for wheelchair users.
- 2.8 Yet the 10.6 million disabled people in the UK are not a homogenous group and wheelchair users account for less than 8% of the total²¹. Disabled people include blind people and partially sighted people, deaf people and hard of hearing people, people with arthritis, asthma, diabetes, people with learning disabilities. Disabled consumers are a significant proportion of the UK consumer market and businesses of any size would benefit from understanding how to attract and retain disabled customers.

Disabled customers and their buying patterns

How disabled people choose where to buy

- 2.9 Disabled customers spend a lot longer choosing where to buy than the average consumer and tend to make more ‘informed choices’. The main decision factors underpinning customer choice are ‘past experience of good service’ and ‘reputation for good service’²².
- 2.10 The main reasons for disabled customers’ switching to a more accessible competitor include²³:
- Inaccessible premises
 - Inaccessible websites

²¹ DRC: Media briefing on disability in the workplace, 2005

²² EFD, RADAR: The Walk Away £, 2006

²³ Ibid.

- Poor customer service: lack of awareness, poor communications, lack of flexibility
- Inaccessible telephone systems
- Inaccessible printed information

2.11 A survey of disabled consumers' buying behaviour revealed that 66% choose businesses where they have received good service. 2/3 seek businesses with good reputation for customer service. For over 37% good, 'disability aware' service is the primary reason for choosing a business. Over 1/3 of disabled customers do not complain about the poor service they have received – the business therefore may never know why they have lost that customer²⁴.

Purchasing transactions

- 2.12 The majority of disabled people (63%) make most of their purchases in store²⁵. In 2005 some 21% primarily shopped on-line²⁶. 71% of disabled people in the UK use the Internet to find information on goods and services²⁷. As the penetration of home Internet access amongst disabled people continues to increase on-line transactions are likely to account for an increasing proportion of overall transactions (About 51% of disabled people had internet access at home in mid-2009 compared to 35-39% in 2005)²⁸.
- 2.13 For businesses these statistics highlight the importance of accessible websites both in terms of information provision and on-line transactions.

Evidence from an Insurance Business: Following the upgrade of the website to make it fully accessible the business saw a 90% increase in on-line sales of insurance products²⁹.

²⁴ Ibid.

²⁵ Ibid.

²⁶ Ibid.

²⁷ Ibid.

²⁸ Ofcom: The Consumer Experience, 2009, Research Report

²⁹ EFD, website

www.directenquiries.com, the nationwide disabled access register receives 250,000 hits per week from people looking for accessible local businesses³⁰

Impact of disabled people's buying experiences

- 2.14 Disabled people's consumer experiences and buying decisions have a big impact on consumer choices of carers, family members and friends. For businesses the implications are twofold: the market 'upside' is even larger but so is the risk of losing custom.
- 2.15 Disabled people are often accompanied by carers or family members. There are an estimated 6 million carers in the UK³¹, or just under 10% of the population. 58% of disabled people state that how a business treats them affects the buying decisions of their families and friends³². However 70% of all consumers would feel more positive about a company if its product and marketing information showed greater focus on disabled people's needs³³.

Perspective on costs

Incorporating accessibility 'up-front'

- 2.16 The majority of successful inclusive businesses have a holistic approach to accessibility whereby business plans and marketing plans explicitly take account of disabled customers and their requirements.
- 2.17 Costs are minimised when accessibility is incorporated 'up-front', at the design and planning stage of new build and facility upgrades; when choosing where to locate the business and when designing the product or service.

Changes with far reaching impact

- 2.18 There are many changes that a business can make which would have a significant impact as they would benefit a wide range of customers.

³⁰ Ibid.

³¹ NAO: Department for Work and Pensions. Supporting Carers to Care, 2009

³² EFD, RADAR: The Walk Away £, 2006

³³ EFD, website

- Clear lighting benefits both customers with visual and hearing impairments
- Accessible websites attract the widest spectrum of potential customers
- Large print material, e.g. signs, labels, menus, marketing information caters to the needs of a large majority of partially sighted people
- Different ways of delivering the product or service: home visits / home deliveries / moving meeting rooms to the ground floor benefit disabled customers but also provide more choice to others
- Flexible rather than fixed seating – e.g. in a café, would benefit disabled people as well as customers with pushchairs

2.19 Most adjustments are simple but crucial aspects of customer care. They are all about finding out what the customer needs and expects from you and how you can best respond. For example:

- Asking how you can help
- Asking disabled customers what you can do better
- Using plain language
- Speaking directly to the person
- Coming round to their side of a table or counter if it is acting as a barrier
- Being ready to give priority to those less able to stand

Marketing accessible businesses to disabled people

2.20 Marketing to disabled people entails no greater cost or effort than for any other customer market. The most effective marketing tool is word of mouth. For businesses it combines the advantages of 'zero' budgetary cost and a wide reach to both disabled people and their families and friends. However it may also be the fastest route to losing custom and reputation if the business fails to meet customer service expectations.

2.21 Just like any other consumer group, disabled people use a variety of sources to look for information on providers of goods and services. However, on-line directories of accessible businesses are gathering momentum amongst disabled consumers. Some sectors – such as the tourism industry - are capitalising on this by creating online guides

to accessible businesses for disabled people in the run up to the 2012 Games. For any business, an accessible web-presence offers a low-cost, wide-reach route to market. In addition, some local communities and local disabled people's organisations have routes available to businesses to promote their accessibility.

Business benefits

2.22 The main benefits realised by accessible and inclusive businesses can be summarised as follows³⁴:

- Expanding and diversifying the customer base
- Financial benefits: increased sales and improved profitability
- Loyal customer base and repeat business
- Overall increase in business volumes
- Business plan targets achieved earlier
- Faster business expansion
- Improved reputation and 'free' word of mouth advertising
- Competitive advantage: differentiation from competitors

2.23 Below are some examples of businesses which have become more successful because of their focus on the needs and requirements of disabled customers. They have benefited from a larger, more diversified customer base and overall increases in the volume of business as improvements in customer service extend to **all** customers. Their customer base has expanded beyond the disabled customer to include carers, family members, older customers, families with pushchairs, children. In disabled customers they have gained a loyal customer base and the ability to generate repeat business and lower their customer acquisition costs. For some, the additional revenues have financed future growth and sped up the expansion of the business.

³⁴ Based on Atkins review of existing case studies in the public domain; examples provided later in the section.

The Hytte is a provider of self-catering accommodation. After incorporating accessibility at the design and planning stage the benefits received include:

- *Occupancy levels at 97% compared to average for the county of 55%*
- *70% of customers are families and groups that include a disabled person*
- *Increasing proportion of elderly customers*
- *High proportion of repeat business*
- *Differentiator from other providers in the region*

Cheshire Farm Ice Cream parlour. Changes include large print menus and labels, straws provided with drinks, low windows fitted. Benefits include:

- *High proportion of repeat business from disabled customers*
- *Growth in business from school groups*
- *Differentiator from other providers in the region*

Small Insurance Business. Changes include large print material, meeting room for customers on the ground floor. 'Virtuous circle' of benefits:

- *Increase in the number of disabled customers...*
- *...Drives development of new products aimed at disabled customers...*
- *...Drives further customer growth*

Small video rentals business. Changes around customer service: returns policy change, different arrangement of display cabinets; staff help visually impaired. Benefits:

- *Repeat business from disabled customers*

Petasfield Cottages, accommodation provider. Changes include 2 cottages for wheelchair users, website for partially sighted, hearing loop, walking frame, shopping delivery service. Benefits include:

- *Within 16 months demand outstrips supply*
- *Revenue growth Increase in the number of disabled customers...*
- *Expansion plans brought forward*

Sources: DWP, Tourism for All, Tourism North East

Useful information sources

2.24 There is a wide range of material available to business about disability equality. In some cases registration with the website or organisation is required for access to more than basic information.

- Business Link has a wide range of information available on their website that mostly deals with employment and service provider issues – www.businesslink.gov.uk.
- The Equality and Human Rights Commission (EHRC) has a range of products available including Codes of Practice, business advice and guidance on accessible websites - www.equalityhumanrights.com
- Some disability organisations include advice and guidance on improving accessibility for disabled people. These include information about visually impaired people provided by RNIB – www.rnib.org.uk, information about people who are deaf or hard of hearing by RNID – www.rnid.org.uk.
- Information is also available from professional organisations, for example, the Employers' Forum on Disability (EFD) provide information for members and non-members – www.efd.org.uk
- Other professional bodies that provide information on disability issues, are the National Register of Access Consultants - www.nrac.org.uk and the Centre for Accessible Environments www.cae.org.uk and their sub-site Access Group Resources – www.accessgroupresources.co.uk

- Information and guidance on accessible websites and the internationally accepted Web Content Accessibility Guidelines (WCAG) is available from– www.w3.org/WAI
- Other sites like Equal Works provide information from development partnerships in each region of Great Britain – www.equal-works.com.
- Many local authorities have an access officer who would be able to provide advice on access issues. Many communities have local ‘access groups’ or ‘equalities groups’, often led by voluntary and disabled person’s organisations – they can provide access consultancy and support to businesses.
- There are also websites that offer disabled people information about accessibility, and the services, business provide. These can be sector specific, for example Open Britain www.openbritain.net/openbritain or more generalist like Direct enquiries <http://directenquiries.com>. These websites can give businesses some ideas about the information disabled people need before deciding where to make a purchase.

3. Messages and communication channels: critical review

3.1 This Section summarises the outcomes of our review of messages to SMEs and communication channels and stakeholder's views of the barriers preventing SMEs from taking positive steps towards inclusion. It concludes with practical ideas to use the 2012 Games to inspire change.

Summary

- The main barriers for SMEs are a low level of awareness and misconceptions about disability and access.
- Material for business policy or advice delivery leads to promote the business case could be improved by developing more case studies relevant to SMEs that highlight the business benefits in economic terms.
- The case for focusing on the disabled customer outlined in section 2 – referred to in this section as “the opportunity” - should be proactively marketed to SMEs, as most SMEs are not aware that they need the information.
- There is a mismatch between the channels used by SMEs and the main sources of information on accessibility and inclusiveness. Government should encourage collaboration and partnering between channels in order to maximise the effectiveness of the communication process.

Barriers to SMEs

3.2 The main factors or ‘barriers’ precluding SMEs from becoming more inclusive of disabled customers can be summarised as follows:

- Lack of awareness of the business opportunity disabled consumers entail
- Attitudinal barriers: misconceptions and discomfort with disability
- Misconceptions of the notions of ‘accessibility’ and ‘reasonable adjustments’
- Fear of ‘getting it wrong’
- Dominant legal compliance messages and little emphasis on the business opportunity
- A perception of “low enforcement” of the DDA

- Little active promotion and ‘complacency’ in engaging businesses

Low awareness

- 3.3 Our research with Regional Development Agencies, Devolved Administrations, Business Link representatives and SME membership organisations revealed a low level of SME interest and low awareness of disabled people as customers. Business advisers are rarely asked about information, support or advice in respect of disabled customers. This makes it difficult for business advisers to assess ‘gaps’ between information needs of businesses and their capacity to deliver. It also highlights the need for proactively improving the awareness of business advisers of the main messages, themes, arguments to be communicated and the timely questions to ask SMEs about disability.
- 3.4 Both SME advisers and Disabled Persons’ Organisations highlighted the misconceptions about disability and the confusion around the concept of ‘reasonable adjustments’ as main impediments. Many SMEs associate ‘disability’ with wheelchair use and ‘accessibility’ with changes in the physical environment which reinforces another misconception: that disability is costly to address. Unable to identify any ‘visible’ disabled customers, businesses would often lose interest. The lack of understanding of the range of changes or adjustments that address the diverse access requirements of disabled customers intensifies the fear of ‘getting it wrong’ – businesses would often choose to ‘hide’ behind the concept of ‘reasonable adjustments’.
- 3.5 Several respondents across stakeholder groups expressed a view that the DDA is not being enforced effectively and that there is little “policing” of its implementation across businesses. As cases are settled out of court there is little opportunity for businesses to draw ‘lessons’ from the experience of others.
- 3.6 Organisations working at the interface with businesses also acknowledged that the dominant emphasis on legal compliance in messages has to some extent acted to reinforce misconceptions and attitudinal barriers to inclusiveness.

Current communication activities identified across regions

- 3.7 Up until recently there has been relatively little activity in engaging SMEs to become more focused on disabled people as customers.

The main focus has been on engaging businesses on disability issues related to employment and diversity in the workplace.

- 3.8 A comprehensive review of activities across regions was not a main objective of this study, however respondents noted that in several regions there is now active effort by RDAs and tourism organisations to promote access and inclusion to businesses. There are a number of on-going initiatives to improve accessibility in the hospitality industry and in many regions including London, South East, North East, South West, East of England, East Midlands. For example, East Midlands have done a lot of work on understanding the business support needs of disabled entrepreneurs and are in the early stages of developing a business case for diversity targeted at SMEs. Wales have a major programme of providing support to small businesses on the whole range of equality issues, via one-to-one engagement with equality advisers. The programme is financed with EU funds.
- 3.9 The Federation of Small Businesses (FSB) has held a small number of regional presentations to members highlighting the market opportunity that disabled customers entail.
- 3.10 Early views of those who engage with businesses indicate that proactive, face-to-face communications would be the most effective. Incorporating disability messages in regular SME events and regular newsletters would be more effective in raising awareness than events with a single focus on disability.

Communication 'Gaps'

Messages

- 3.11 The main 'gaps' in the existing messages to SMEs can be summarised as follows:
- Little material available that is specifically targeted at SMEs and that focuses on disabled people as customers
 - Little data available on the needs and requirements of disabled people as consumers of goods and services
 - Few case studies of small businesses that demonstrate the benefits associated with improved accessibility expressed in economic and business terms

- Not enough material that is easily available on the range of adjustments including customer service for disabled consumers.
- 3.12 Up until recently there has been no material available to small businesses that present a well-argued case for focusing on the disabled consumer. The emphasis has been mainly on the relationships between businesses and disabled employees and on the obligations of businesses as employers. In February 2010 the DCMS Accessible Tourism Stakeholder Forum published “Accessible Tourism: Making it Work for Your Business”, a case targeted at businesses in the hospitality industry. It is too early to assess its impact on businesses in raising awareness and improving accessibility.
- 3.13 There are a limited number of case studies of small businesses exemplifying ‘best practice’ and highlighting business success in capitalising on the opportunity disabled customers entail. Many of these focus on the adjustments made but do not highlight the benefits to the business. Even less is available in terms of quantified financial ‘gains’ or cost information: revenues, profitability, increases in market share, customer numbers or business volume, or returns on the initial investment.
- 3.14 There is relatively little data available on the needs and requirements of disabled people as consumers of goods and services.
- 3.15 The EFD has ample information available on the disabled consumer market including the only survey identified on disabled consumer buying habits – ‘The Walk Away £’ (commissioned by EFD and RADAR in 2006).
- 3.16 The EFD has also developed communications and customer service guides which can be purchased. The availability of this information and material however is not widely known outside the organisation’s membership base which comprises mainly large businesses and public sector organisations.
- 3.17 There is also a lack of data on the extent to which small businesses have improved their accessibility and inclusivity. Organisations working with small businesses felt that the collection of such data is important in two ways – in communications with SMEs to highlight

‘best practice’ and by way of assessing the effectiveness of communications and indentifying future areas for improvement.

Improving messages to SMEs

- 3.18 The overwhelming view from respondents interviewed in the course of our work is that communication to SMEs needs to fundamentally change - from a reliance on obligation and regulation to more efforts to develop and promote the opportunities and benefits. Communication channels used by business need to challenge the current perceptions and misconceptions about disabled people to raise awareness that disabled consumers are an attractive market.
- 3.19 The main improvements needed can be summarised as follows:
- Do not rely on messages about obligations
 - Develop and communicate ‘positive’ messages about the ‘business opportunity’ in a business ‘language’ that SMEs can relate to
 - Explain the diversity of the disabled customer base
 - Demonstrate the impact on the business through ‘best practice’ examples – SME-focused case studies
 - Emphasize the benefits to the business and the financial benefits in particular
 - Change the tone and presentation of messages from ‘lecturing to ‘informing’

Developing compelling messages for SMEs

- 3.20 Respondents interviewed in the course of this project were of the view that there is no ‘single’ compelling message or set of ‘headline’ statements that would be effective in changing awareness of SMEs. The view was that what is needed is a set of facts and business arguments that present ‘the case for focusing on the disabled consumer’. It was felt SMEs would respond to ‘economic arguments’ and in particular business benefits expressed in monetary terms such as increases in revenues, profits, business volumes. Moral or social equality arguments would be less effective or even result in businesses losing interest.
- 3.21 A ‘generic’ case presenting the opportunity was regarded as essential in raising the general level of awareness amongst a wide spectrum of

SMEs and for bridging a major 'gap' in the communications to SMEs. However there was also the view that the work needs to target particular SME-intensive sectors – e.g. retail or specific service sectors.

3.22 The main 'selling points' for an SME – or compelling messages that the business case should be able to convey, can be summarised as follows:

- 'Disabled people represent a large untapped market with considerable spending power'
- 'A successful business is an inclusive business'
- 'Businesses with a better focus on the disabled customer have gained a new market and expanded their overall customer base to include family, friends, older people and parents with pushchairs'
- 'Businesses with better focus on the disabled customer have grown their revenues and profits'
- 'Businesses with better focus on the disabled customer have gained a competitive advantage, a loyal customer base and enhanced reputation'

3.23 The case for focusing on the disabled customer developed in the course of our work was presented earlier, in Section 2 of this report. The aim is to use the messages developed as part of this study to start addressing some of the communication issues.

Channels to promote the opportunity

3.24 The main problems associated with the sources of information can be summarised as follows:

- Information is dispersed and often difficult to find
- Main sources include channels which are not used by SMEs
- Sources are seldom linked and many links are defunct

3.25 The main channels for information and advice used by SMEs are as follows:

- Private advisers: accountants, banks, lawyers
- Business Support Organisations (Business Link in England)
- Small business membership organisations

- Industry associations

3.26 Business Link is the main government channel for provision of information, support and advice to businesses in England³⁵. Small business membership organisations such as the Federation of Small Businesses (FSB) or the Federation of Private Business (FPB) are active in providing support and advice to their members on legislative and regulatory changes or opportunities that are likely to have impact on businesses. SMEs would tend to turn to their private advisers – accountants, financial and legal advisers on specific business problems.

3.27 The main sources of information on disability issues are available via rather different channels:

- DWP
- EHRC
- Business Link
- Regional tourism organisations
- VisitEngland
- Disabled people's organisations
- Employers' Forum on Disability

3.28 The national Business Link website contains information related to the DDA and the adjustments to physical facilities businesses are required to make but does not carry messages of the business benefits of change.

3.29 The Department for Work and Pensions website provides case studies of small businesses that have undertaken changes to the overall benefit of the business. The comprehensive site also provides a business 'checklist' of a wide range of changes related to improving accessibility. However, SMEs associate the department with employment advice rather than general business advice. At present the businesslink.gov and dwp.gov websites are not linked and do not reference each other.

³⁵ Some 929,000 SMEs used Business Link over the past 12 months. The website attracted over 12 million visits in the year to June 2009 and over 180,000 calls were made to the telephone helpline (Source: BIS)

- 3.30 EHRC, EFD or Disabled People's Organisations' websites are not information channels that SMEs tend to use. VisitEngland and regional tourism organisations would not be known to businesses outside the hospitality industry.

Engaging the SME audience

- 3.31 Most individuals and organisations working at the interface with small businesses underscore the difficulties in engaging the SME audience in a communication process. The feedback we received highlighted the resource constraints of SMEs – in terms of time, financial and human resources as a barrier. In contrast to larger businesses which can have dedicated resources to research specific social, regulatory or legislative requirements, small businesses often find it difficult to allocate resources to research information which does not directly relate to their day-to-day activities or specific business plans.
- 3.32 Our respondents' experiences are that small businesses tend to look actively for information if they have encountered a particular business problem. They also respond to communications related to procurement or new market opportunities.
- 3.33 The difficulties in engaging the SME audience in a communication process on the one hand, and the low level of awareness of disability and of disabled customers, on the other, have the following implications for the communication process:
- Pertinent information needs to be made more easily available on channels used by SMEs
 - Given the low level of awareness of disability, a shift will be required from reliance on SMEs looking for information towards proactively promoting messages
 - Accessibility and inclusivity need to be integrated in day-to-day business activities of SMEs
- 3.34 We propose that on business facing web-sites messages about the business opportunity disabled customers entail and are linked into promoting the links to the main sources of information on disability.
- 3.35 A shift towards a more proactive approach seeking to engage businesses means a greater emphasis on targeted, 'face-to-face' communications. The experiences of organisations working with small

businesses elicited in the course of this study provide valuable insights: they cited accessibility-focused events as “less effective” and that communications on disability issues would work better if integrated in tender opportunity events or other, regular SME events.

- 3.36 Integrating accessibility and inclusiveness in mainstream business activities requires that the disabled customer market be addressed in the business planning and marketing planning process. This in turn highlights the role of business advisers in integrating accessibility and inclusiveness of the disabled customer in their advisory work with small businesses and business start-ups, as well as the need to strengthen advisory capacity.

Improving channel capacity and strengthening collaboration

- 3.37 The main challenges in using existing channels to promote the business opportunity to SMEs can thus be summarised as follows:

- A single “ideal” channel does not currently exist
- The “ideal” channel would dispel current misconceptions about disabled customers and access and raise overall capability of SMEs to capitalise on the opportunity
- The “ideal” channel should ultimately work to integrate accessibility and inclusiveness into the mainstream business activities of SMEs
- The capacity of the “best fit” channels needs to increase through partnerships, training and knowledge sharing in order to maximise the effectiveness of communications with SMEs
- Whilst currently there are few examples of partnerships between channels, our study revealed the willingness of stakeholders to collaborate and partner in their efforts to raise awareness of businesses and promote the case for the disabled customer

- 3.38 At present the knowledge of disability issues resides primarily with disabled people’s organisations rather than business-facing organisations. A key recommendation of this report is that there is a greater attempt to build relationships between these two groups.

4. Recommendations

- The 2012 Olympic and Paralympic Games offer an unparalleled opportunity to raise the profile of disabled people’s positive

economic contribution to society. As this study shows, no-one yet has all the answers to removing the barriers preventing government from realising the full potential of this opportunity.

Medium to longer term recommendations to tackle barriers

- Consider commissioning research on disabled consumers' buying behaviour, criteria for choosing providers of goods and services and perceptions of customer service
- Consider a capacity building programme for business-facing /influencing staff to raise knowledge levels on disability and improve the capability to deliver advice to businesses
- Share the outcomes of the tourism industries accessible business campaign in the lead up to 2012 with other sectors and influence them to develop industry-specific material and advice for their industry.

Short and medium term recommendations

- Launch the key messages to businesses on becoming more accessible and inclusive of disabled customers in a high profile way.
- Encourage ministers to include these messages in key speeches and press releases
- Explore options for promoting the case for focusing on the disabled customer via other channels used by SMEs, in particular SME membership organisations and industry associations – e.g. including material in newsletters, or providing links on websites.
- Start to link existing guides/practical tips for businesses on changes to customer service, accessibility of information and websites, or physical adaptations – e.g. link the Better Business Checklist currently on the DWP website to business facing web-sites.
- Engage Olympic and Paralympic Games sponsors so they can get the message out to their supply base on the importance of the disabled consumer market.
- Investigate options with Sector Skills Councils for integrating disability awareness training in their training courses.
- Work with those advising companies to improve the messaging that companies receive.

- Establish regular ‘disability themed’ workshops between those who lead on disability issues and those who advise business.
- Continue to develop case studies of SME ‘best practice’ that capture the costs associated with improving accessibility and quantify business success in indicators such as: increases in revenues and profit, return on initial investment, increases in the volume of transactions
- Make available to SMEs existing disability communication guides and disabled customer service guides.

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URN 10/1126

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