

# Executive summary on disabled customers research

## Objective:

HM Revenue & Customs (HMRC) would like to make the help and support it provides to all its customers as accessible and useful as possible. In particular HMRC wish to understand more about the experiences of disabled customers when using its services

HMRC have commissioned this research to help identify service gaps and to explore further ways of reaching out to customers The primary objectives for this research were as follows:

- to optimise the effectiveness of the help and support services
- to explore and prioritise all routes for access to, and delivery of, these services
- to understand the experience of individual customers with disabilities who face particular barriers or difficulties
- Overall HMRC wants to explore how it can best support disabled customers and in particular, to determine how it can help to make its services accessible, useful and desirable to use

## Findings:

- The largest group of customers with disabilities are pensioners, although customers with disabilities can be found across all HMRC products.
- Disabled customers are more likely to need support. In short, customers with disabilities face similar difficulties with HMRC and tax as customers without disabilities. However, their opportunities to address these difficulties are sometimes affected by their disabilities.
- Customers with mental health problems and sensory impairments face the most difficulties when trying to interact with HMRC. For customers with sensory impairments, channel

options become more limited. Mental health problems may affect customers' overall willingness to engage with HMRC.

- Overall customers with disabilities expected to receive a service tailored to their needs. As 'customers', HMRC needs to offer a choice of customer service channels and demonstrate flexibility when responding to their needs.
- Disabled customers felt that they needed to be informed about the range of different ways in which one can contact HMRC. They also felt they needed to be treated as individuals rather than the 'one size fits all' approach. Frontline staff wanted to be able to provide a flexible service focussed on individuals' needs, supported by leadership about equality and diversity issues and information about HMRC's services for people with disabilities. Customers with disabilities also felt that customer service would be improved if staff were encouraged to understand the needs of disabled customers, always provide either a solution or a signpost to the solution and maintain a consistent response.
- Although telephone helplines were popular, they did not fulfil everyone's needs. Face-to-face services were considered an important channel (particularly for older disabled customers and those facing financial hardship).
- For the most hard-to-reach disabled customers there is a liaison role for the voluntary sector who will also need to be educated about HMRC customers' obligations and entitlements.

### **Outcome:**

- Overall, views of HMRC were positive. HMRC was perceived to be 'doing well' in trying to meet its customers' needs. The attempt to cater for disabled customers was very much appreciated, given the scale of the task: "There are so many different people out there – that's a lot of catering."