Digital Accessibility
The necessity of inclusion
15% of the world has a disability

**Visual**
- 285 million people of all ages are visually impaired
- 39 million are blind; 82% of all blind people are age 50+

**Hearing**
- 466 million people have disabling hearing loss
- By 2050, over 900 million people will have disabling hearing loss

**Cognitive**
- 1-3% has an intellectual disability, as many as 200 million people
- Intellectual disability is significantly more common in low-income countries – 16.41 in every 1,000 people

**Speech**
- Approximately 18.5 million people have a speech, voice or language disorder
People with disabilities are regularly consuming all forms of content

View, read, or listen to content weekly or more often | % Selected

Includes people with visual, hearing, speech and cognitive disabilities

**Visual content**
- Social Media: 89%
- TV Shows: 86%
- Short Video Clips: 80%
- Movies: 75%
- Photographs: 67%
- Music Videos: 65%

**Non-visual content**
- Radio: 74%
- Online Articles: 70%
- Informational and Educational Content: 65%
- Books: 58%
- Newspapers: 52%
- Podcasts: 48%

U.S. & U.K. n=807
Q: How often do you view, read, or listen to the following?
But can they fully access this content?
Methodology

Recruited Participants

Recruited participants with visual, hearing, cognitive, or speech disabilities

United Kingdom: A16+ n=206
United States: A16+ n=601

Online Interviews

We ran a survey to uncover...

- Media consumption habits
- POV on communication from companies today
Visual media for all
Despite having a disability, people are actively seeking out visual forms of content

Consume visual content weekly or more often | % Selected
Includes people with visual, hearing, speech and cognitive disabilities

98% US
98% UK
In fact, even those with visual disabilities consume a lot of visual content

**Consume visual content weekly or more often | % Selected**
Only includes people with visual disabilities

- **Non-visual**: 96%
- **Visual**: 98%

Especially social media, TV shows, and short video clips

**Visual content broken down**
- Social Media: 89%
- TV Shows: 86%
- Short Video Clips: 82%
- Movies: 75%
- Music Videos: 74%
- Photographs: 68%

U.S. & U.K. n=480
Q: How often do you view, read, or listen to the following?
Social Media platforms are a challenge
Social Media platforms are comparatively the most difficult to use

Platform is somewhat difficult, or very difficult to use | % Selected
Includes people with visual, hearing, speech and cognitive disabilities

Social Media, 20%
 Particularly non-visual platforms...
 Reddit, LinkedIn, and Twitter

Web Browsers, 12%

Audio Streaming, 11%

Video Streaming, 9%
No matter the type of disability, people struggle with social media

Platform is somewhat difficult, or very difficult to use - % Selected
Includes people with visual, hearing, speech and cognitive disabilities

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Q: Thinking about the ways you consume your favorite content, what best describes your experience with using the following platforms and services?
Social media platforms simply lack accessibility

Reasons why Social Media platforms are difficulty to use | Open-ended responses
Includes people with visual, hearing, speech and cognitive disabilities | Those who use Social Media platforms

“A lot of small text and misleading buttons”

“Ads interfere with actual posts”

“Far too many options and menus”

“Hard to navigate, confusing”

“Instagram especially is difficult to understand I don't see what I post and I rarely see what I am looking for”

“Complicated with lots of links and words. Very busy everywhere and tabs not labeled well”
Assistive tools, a flawed experience
Over half use some type of assistive tool to consume media

Assistive tool usage | % Selected
Includes people with visual, hearing, speech and cognitive disabilities

54%
Use an assistive tool to help read, view, or listen to content

46%
Either don’t or are not sure if they use an assistive tool

Q: Do you use any assistive tools to help you read, view, or listen to content?
There is a vast variety of assistive tools used.

Types of assistive tools used:

- Word cloud of open-ended responses
- Includes people with visual, hearing, speech and cognitive disabilities
- Those who use assistive tool

Assistive tools are designed to help someone watch, read, or listen to various types of content. Some examples are screen readers, assistive listening devices like TV streamers, and remote microphones.
The need for assistive tools isn’t restricted to a certain disability

Assistive tool usage by disability | % Selected
Includes people with visual, hearing, speech and cognitive disabilities

- Visual: 57%
- Hearing: 56%
- Speech: 79%
- Cognitive: 64%

Of those who have a speech disability, 79% use assistive tool(s)
People have problems consuming content even with an assistive tool

Content consumption with an assistive tool | % Selected
Includes people with visual, hearing, speech and cognitive disabilities | Those who use an assistive tool

64% of those that use an assistive tool reported having problems consuming content even with an assistive tool

34% of those that use an assistive tool have problems consuming content because of the tool

Brands have an opportunity to directly help
Basic challenges with assistive tools affect basic functioning

Reasons why people have issues consuming content even with an assistive tool | Open-ended responses
Includes people with visual, hearing, speech and cognitive disabilities | Those who had issues consuming content even with an assistive tool

“Had readability issues with the tool”
“My glasses are too old”
“Trouble understanding how the tool works”
“Words were still blurry”
“Could not understand what was being said because closed captions would not keep up”
And many don’t even have access to assistive tools

Reasons why people need, yet don’t use assistive tools | % Selected
Includes people with visual, hearing, speech and cognitive disabilities | Those who need an assistive tool

56% of all overall audience needs assistive tools, but they don’t have access to them

- 37% say they are too expensive
- 35% say they don’t find assistive tools useful
- 22% say assistive tools are inconvenient to setup
- 6% have other reasons
Why is accessible communication important for brands?
Lack of accessibility has become a normalized experience

On the surface, people think brands are doing a good job

Brand scorecard on accessibility - % Selected
Includes people with visual, hearing, speech and cognitive disabilities

- 37% Excellent
- 40% Good
- 20% Fair
- 2% Not Good
- 1% Terrible

Q: In general, how well do you think companies are doing with communicating in a way that is accessible for all?
Standards are low to begin with

Changes companies should make
- Open-ended responses
Includes people with visual, hearing, speech and cognitive disabilities

- “I don’t know”
- “I don’t think I would change anything”
- “I don’t really know to be honest”
- “I dunno”
- “I really don’t know I wish I had an idea”
Looking deeper, inaccessible communications specifically lead to a range of negative emotions

People’s feeling when communication from brands is not accessible - % Selected
Includes people with visual, hearing, speech and cognitive disabilities

I feel **frustrated** 38%
I feel **disappointed** 31%
I feel **ignored** 27%
I feel **unhappy** 21%
I feel **isolated** 17%
It also has serious repercussions for brands

People’s feeling about brands when communication is not accessible | % Net Score
Includes people with visual, hearing, speech and cognitive disabilities

- Negative actions towards the brands
  - Wouldn’t purchase from the brand (40%)
  - Wouldn’t recommend the brand to others

- Negative emotional response
  - Feel disconnected from the brand (81%)
  - Feel less excited about the brand
  - Feel like the brand lacks positive qualities
  - Feel like the brand is unreliable

Q: How would you feel about companies that do not communicate in a thoughtful manner that is accessible for everyone?
When brands are accessible, they reap a host of benefits

People’s feeling about brands when communication is accessible | % Net Score
Includes people with visual, hearing, speech and cognitive disabilities

Positive actions towards the brands

- Would choose them over other brands: 60%
- Would recommend them to others

Positive emotional response

- Feel connected to the brand: 81%
- Feel like the brand cares about my needs
- Feel excited about the brand
- Feel like the brand is reliable

Q: How would you feel about companies that do not communicate in a thoughtful manner that is accessible for everyone?
...and spark positive emotions

People’s feeling when communication is accessible | % Selected
Includes people with visual, hearing, speech and cognitive disabilities

- I feel satisfied: 49%
- I feel supported: 45%
- I feel happy: 41%
- I feel included: 36%
- I feel relieved: 28%
To connect with people, brands need to put in the work to make communications accessible.
Implications

1. Brands should not overlook accessibility when it comes to communications. People with all types of disabilities consume a lot of media and the majority have trouble.

2. Assistive tools are only part of the solution. Hearing the lived experiences of people with disabilities clearly shows assistive tools don’t always work, with the content itself being half the problem.

3. Accessibility in communication planning is not simply a “nice to have”, it’s a must. It has a direct impact on how people feel in general and about your brand.
Thank You