Digital Inclusion

The necessity of accessibility
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

<table>
<thead>
<tr>
<th>Visual content</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Media</td>
<td>89%</td>
</tr>
<tr>
<td>TV Shows</td>
<td>86%</td>
</tr>
<tr>
<td>Short Video Clips</td>
<td>80%</td>
</tr>
<tr>
<td>Movies</td>
<td>75%</td>
</tr>
<tr>
<td>Photographs</td>
<td>67%</td>
</tr>
<tr>
<td>Music Videos</td>
<td>65%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Non-visual content</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Radio</td>
<td>74%</td>
</tr>
<tr>
<td>Online Articles</td>
<td>70%</td>
</tr>
<tr>
<td>Informational and Educational Content</td>
<td>65%</td>
</tr>
<tr>
<td>Books</td>
<td>58%</td>
</tr>
<tr>
<td>Newspapers</td>
<td>52%</td>
</tr>
<tr>
<td>Podcasts</td>
<td>48%</td>
</tr>
</tbody>
</table>

U.S. & U.K. number of participants = 807
Q: How often do you view, read, or listen to the following?
But can they actually 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

View 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 view a lot of visual content

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

<table>
<thead>
<tr>
<th>Non-visual</th>
<th>Visual</th>
</tr>
</thead>
<tbody>
<tr>
<td>96%</td>
<td>98%</td>
</tr>
</tbody>
</table>

Especially Social Media, TV shows, and short video clips

<table>
<thead>
<tr>
<th>Visual content broken down</th>
<th>% Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Media</td>
<td>89%</td>
</tr>
<tr>
<td>TV Shows</td>
<td>86%</td>
</tr>
<tr>
<td>Short Video Clips</td>
<td>82%</td>
</tr>
<tr>
<td>Movies</td>
<td>75%</td>
</tr>
<tr>
<td>Music Videos</td>
<td>74%</td>
</tr>
<tr>
<td>Photographs</td>
<td>68%</td>
</tr>
</tbody>
</table>
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

Especially those with speech and cognitive disabilities

U.S. & U.K. number of participants=807
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 difficult to use | Open-ended responses
Includes people with visual, hearing, speech and cognitive disabilities

“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”

U.S. & U.K. number of participants=638
Q: You indicated you have difficulty with the following categories. Can you tell us about some issues you have?
Assistive tools, a flawed necessity
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?
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%

People with speech and cognitive disabilities, in particular use assistive tools

Q: Do you use any assistive tools to help you read, view, or listen to content?
People have problems consuming content even with an assistive tool

<table>
<thead>
<tr>
<th>Content consumption with an assistive tool</th>
<th>% Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Includes people with visual, hearing, speech and cognitive disabilities</td>
<td></td>
</tr>
</tbody>
</table>

- 30% had problems consuming content because of the **content**
- 34% had problems consuming content because of the **tool**

64% Reported having problems consuming content even with an assistive tool

Q: Have you ever had problems viewing, reading, or listening to content online even with an assistive tool(s)?
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

| “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

- 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?
Brands are doing a good job, but expectations might be low

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

No differences by type of disability
In the minds of consumers, standards for brand accessibility 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”

U.S. & U.K. number of participants=807
Q: If you could make any change to the way companies are currently communicating with you, what would it be?
Younger folks expect more from brands

Brand scorecard on accessibility—Excellent or good job | % Selected
Includes people with visual, hearing, speech and cognitive disabilities

- 18 - 24: 70%
- 25 and over: 79%

U.S. & U.K. Those who said brands are doing an excellent or good job number of participants=622
Q: In general, how well do you think companies are doing with communicating in a way that is accessible for all?
Lack of brand accessibility leads to feelings of frustration

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%

U.S. & U.K. number of participants=807
Q: How does it make you feel when companies don’t communicate in a thoughtful manner that is accessible for everyone?
Inaccessible communications can have 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

U.S. & U.K. number of participants=807
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
Would recommend them to others

Positive emotional response
Feel connected to the brand
Feel like the brand cares about my needs
Feel excited about the brand
Feel like the brand is reliable
...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%

U.S. & U.K. number of participants=807
Q: How does it make you feel when companies do communicate in a thoughtful manner that is accessible for everyone?
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