

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

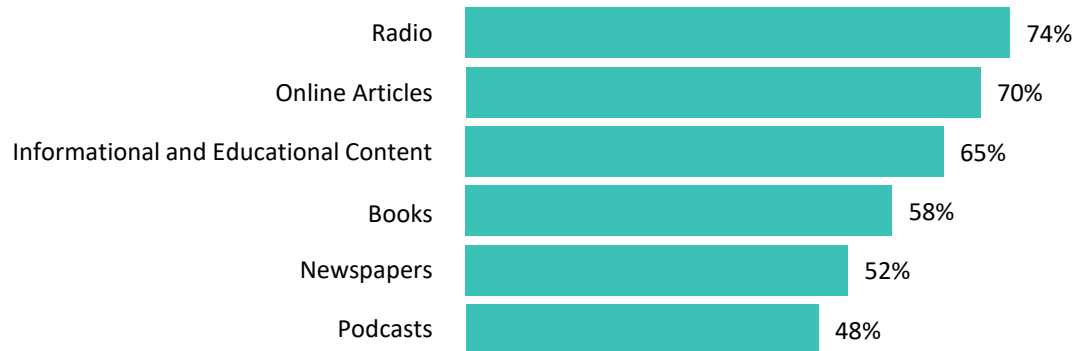
Approximately 18.5 million people have a speech, voice or language disorder

People with disabilities are regularly consuming all forms of content

Visual content



Non-visual content



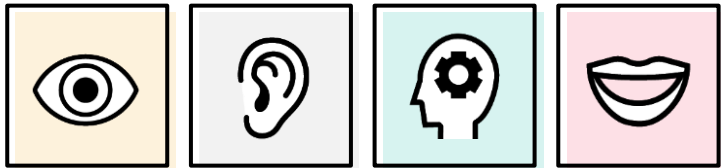
But can they
actually **access**
this content?



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...

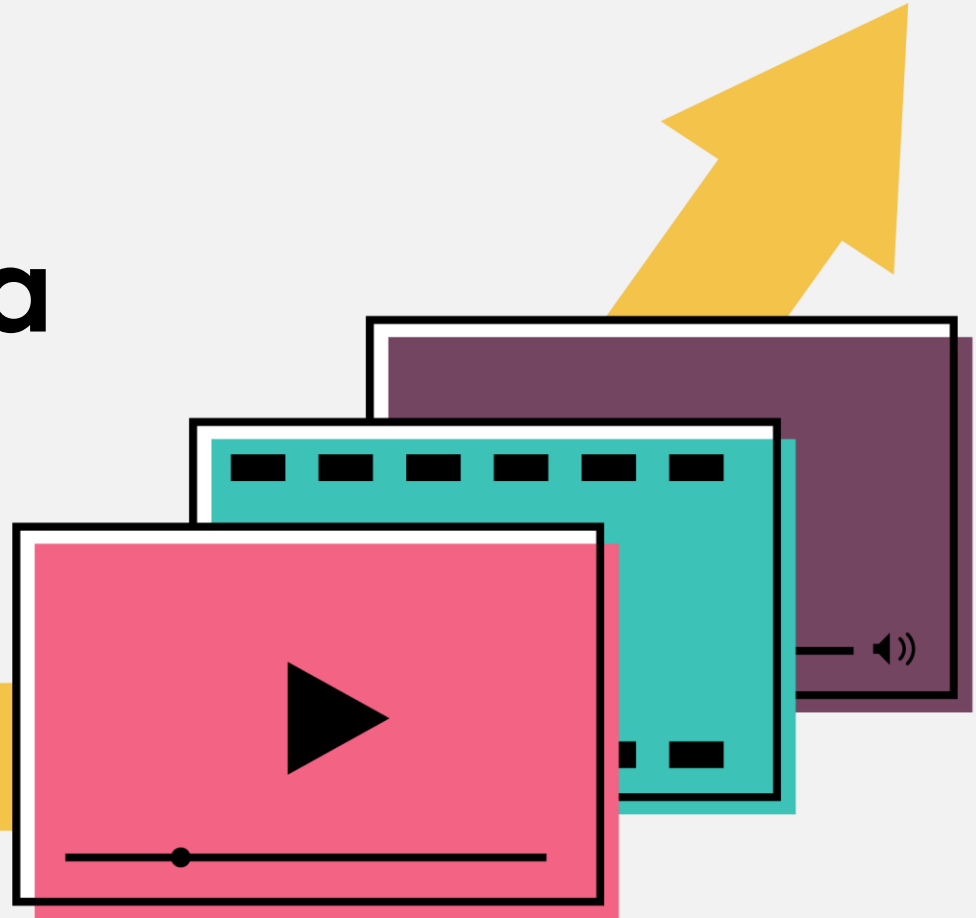


Media consumption habits



POV on communication from companies today

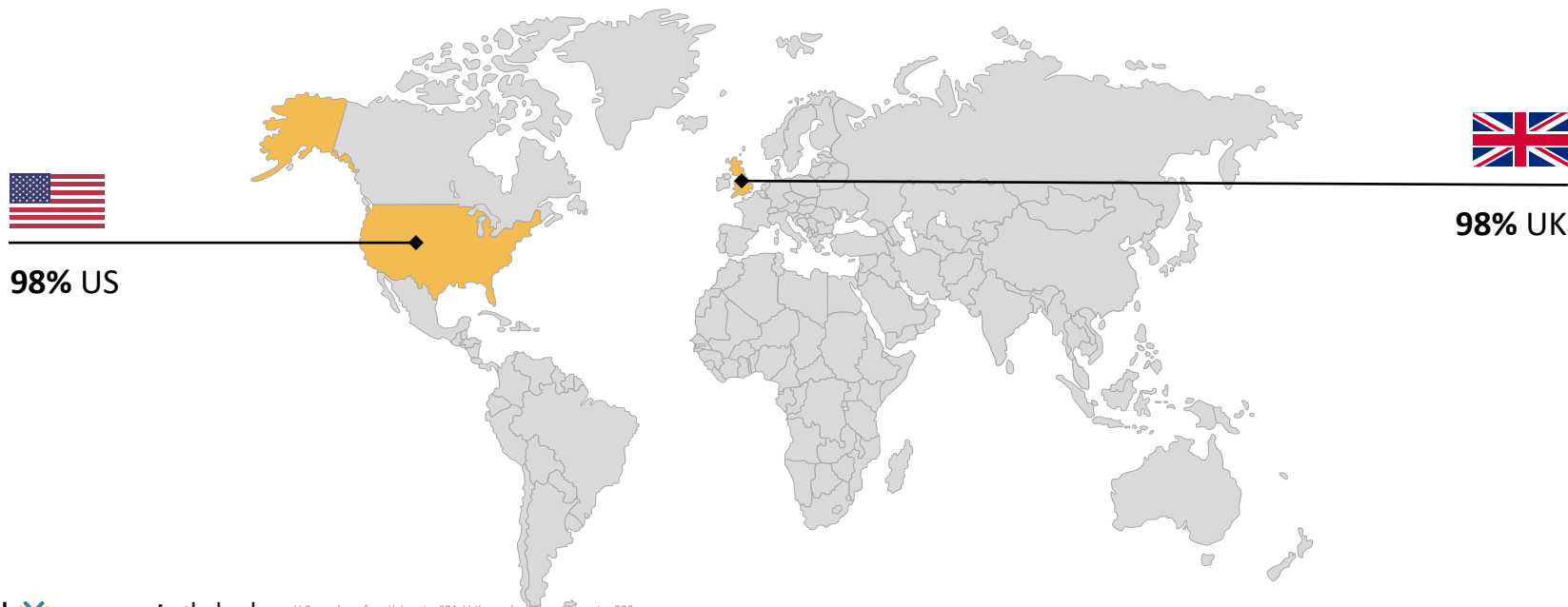
Visual media for all



Despite having a disability, people are actively seeking out visual forms of content

View visual content weekly or more often | % Selected

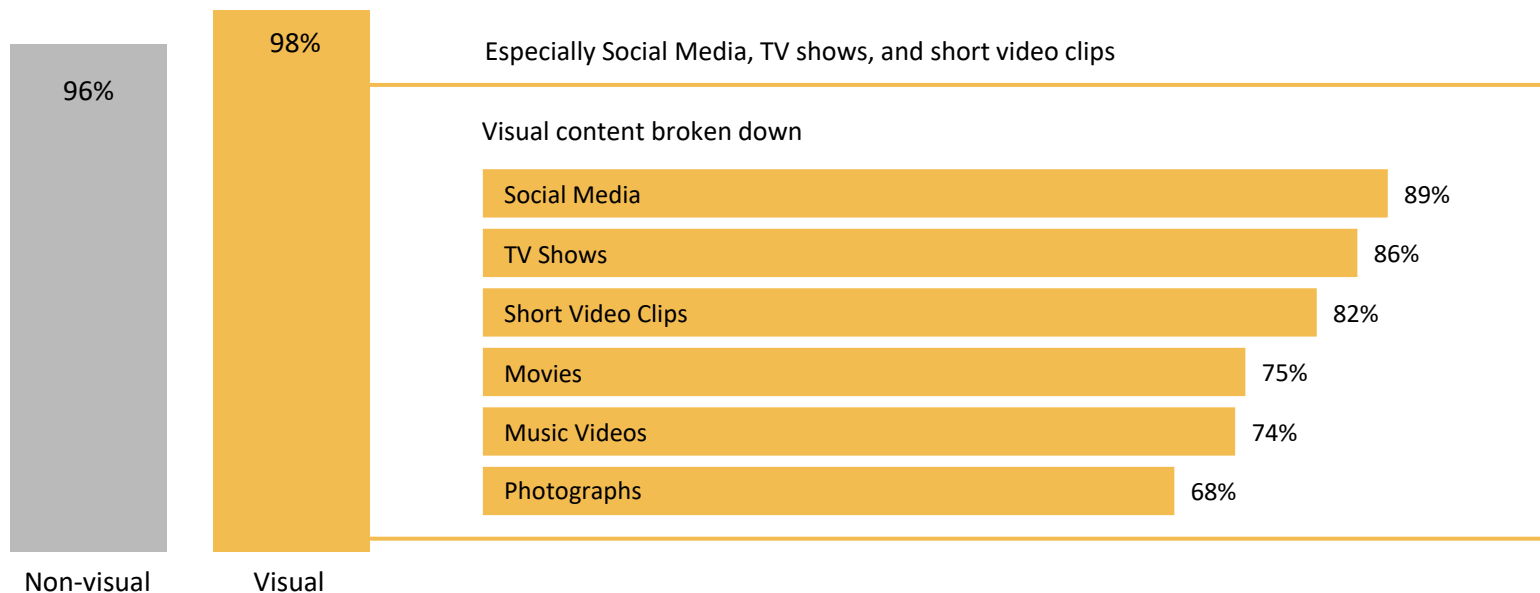
Includes people with visual, hearing, speech and cognitive disabilities



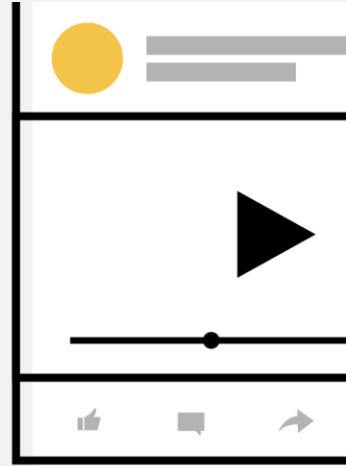
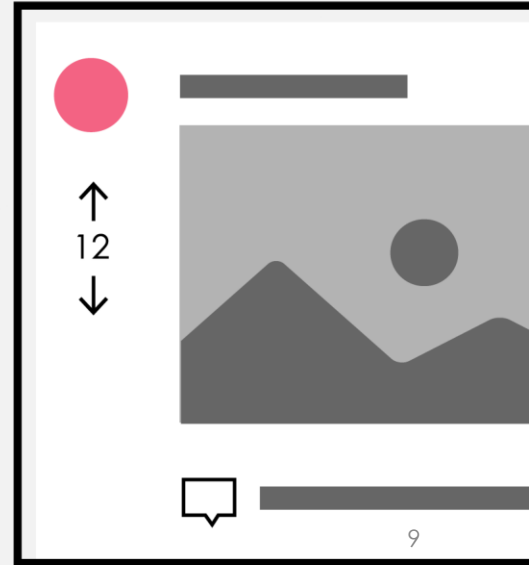
In fact, even those with visual disabilities view a lot of visual content

View visual content weekly or more often | % Selected

Only includes people with visual disabilities



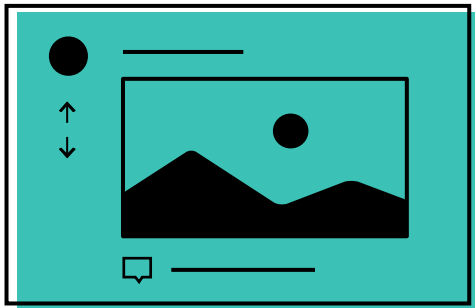
Social Media platforms are a challenge



Social Media platforms are comparatively the most difficult to use

Platform is somewhat difficult, or very difficult to use | % Selected

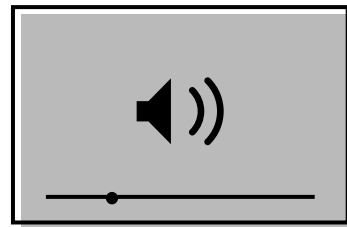
Includes people with visual, hearing, speech and cognitive disabilities



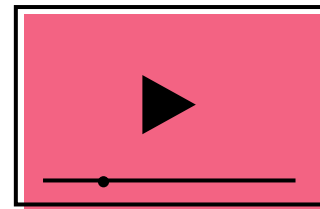
Social Media, **20%**



Web Browsers, **12%**



Audio Streaming, **11%**



Video Streaming, **9%**

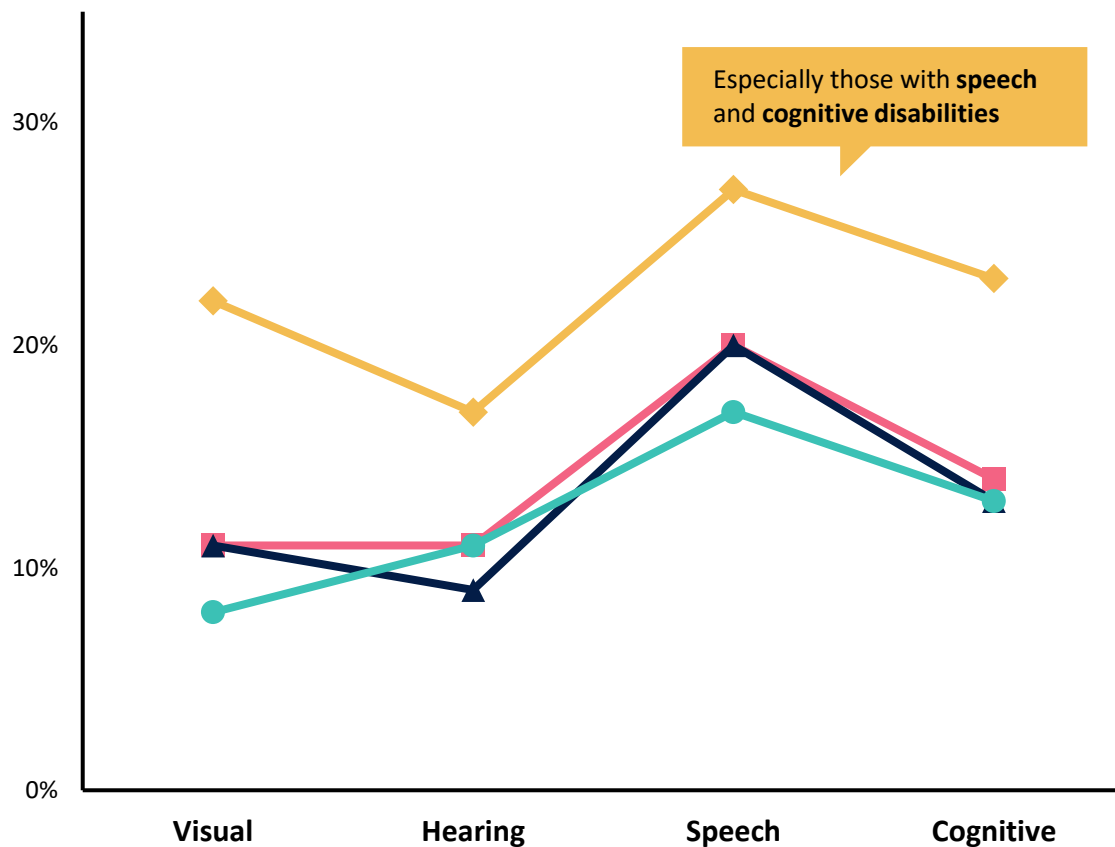
Particularly non-visual
platforms...
Reddit , LinkedIn, and Twitter

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

- ◇— Social Media
- Web Browsers
- ▲— Audio Streaming
- Video Streaming



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"

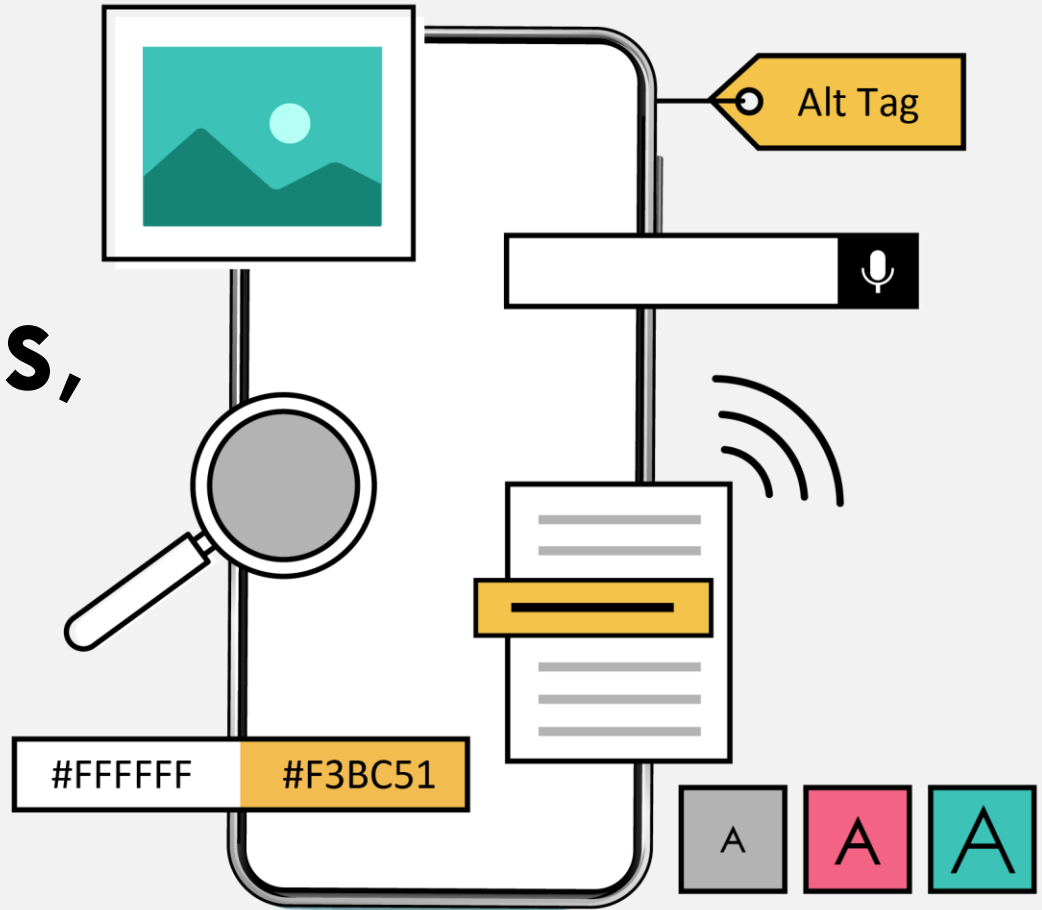


"Instagram especially is difficult to understand I don't see what I post and I **rarely see what I am looking for**"



"**Complicated with lots of links** and words. Very busy everywhere and tabs not labeled well"

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

46%

Either don't or are not sure if they use an assistive tool



54%

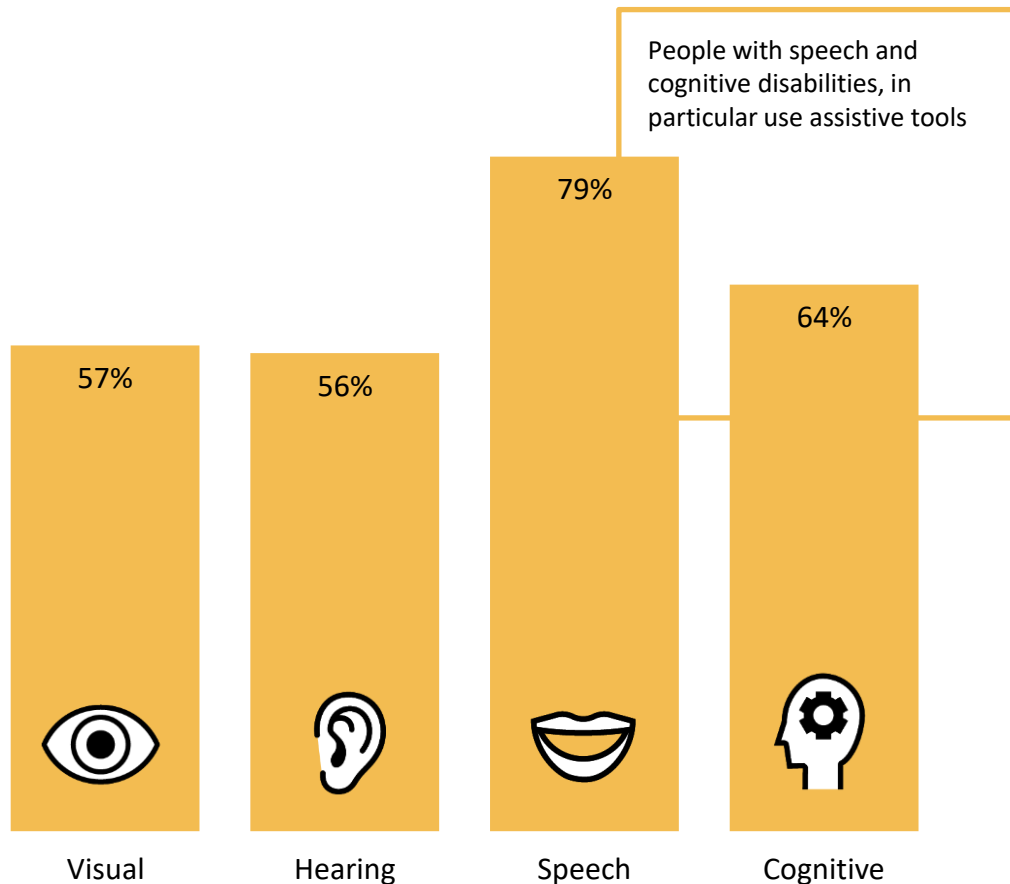
Use an assistive tool to help read, view, or listen to content

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

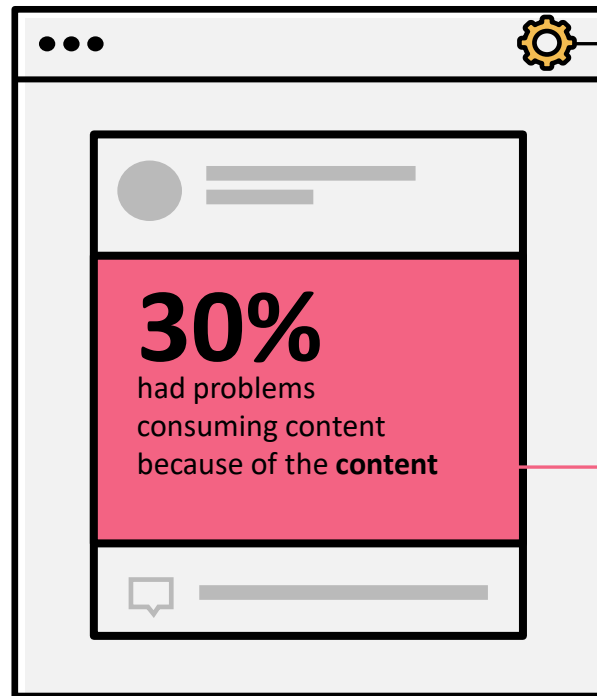


People have problems consuming content even with an assistive tool

Content consumption with an assistive tool | % Selected

Includes people with visual, hearing, speech and cognitive disabilities

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



34% had 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

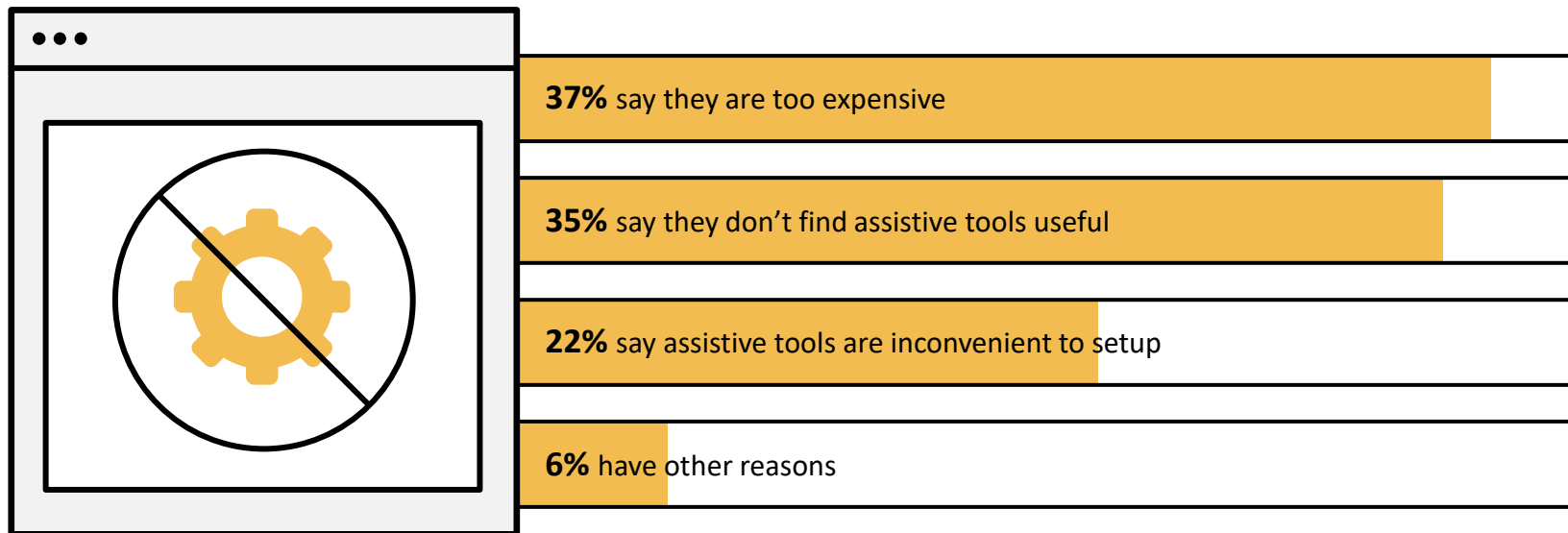
Includes people with visual, hearing, speech and cognitive disabilities

- ✗ “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”

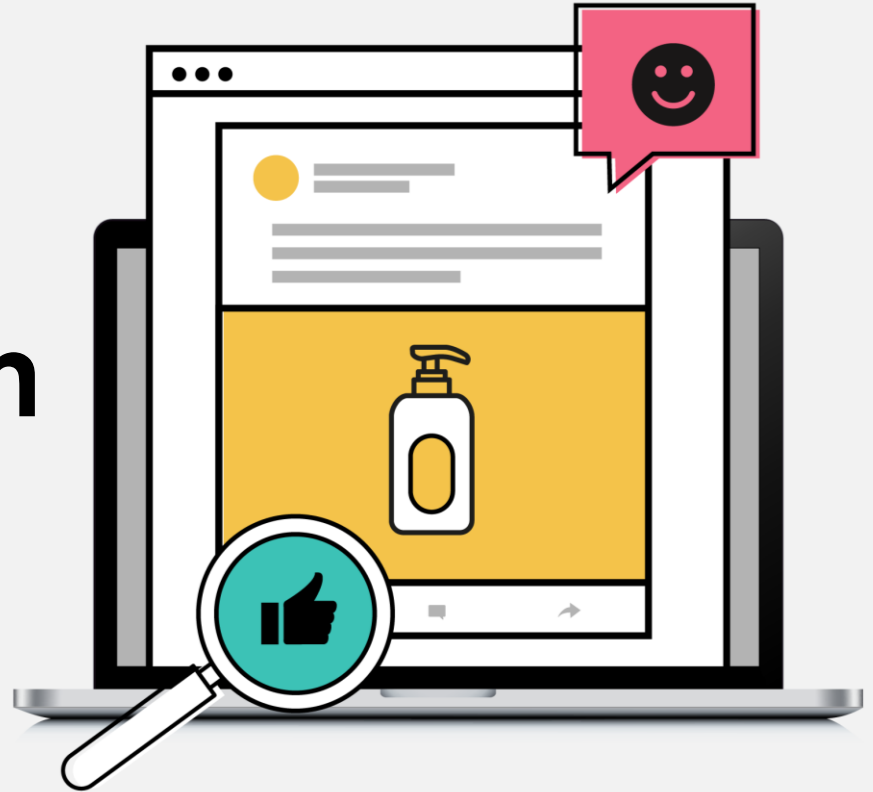
And many don't even have access to assistive tools

Reasons why people need, yet don't use assistive tools | % Selected

Includes people with visual, hearing, speech and cognitive disabilities



Why is accessible communication important for brands?

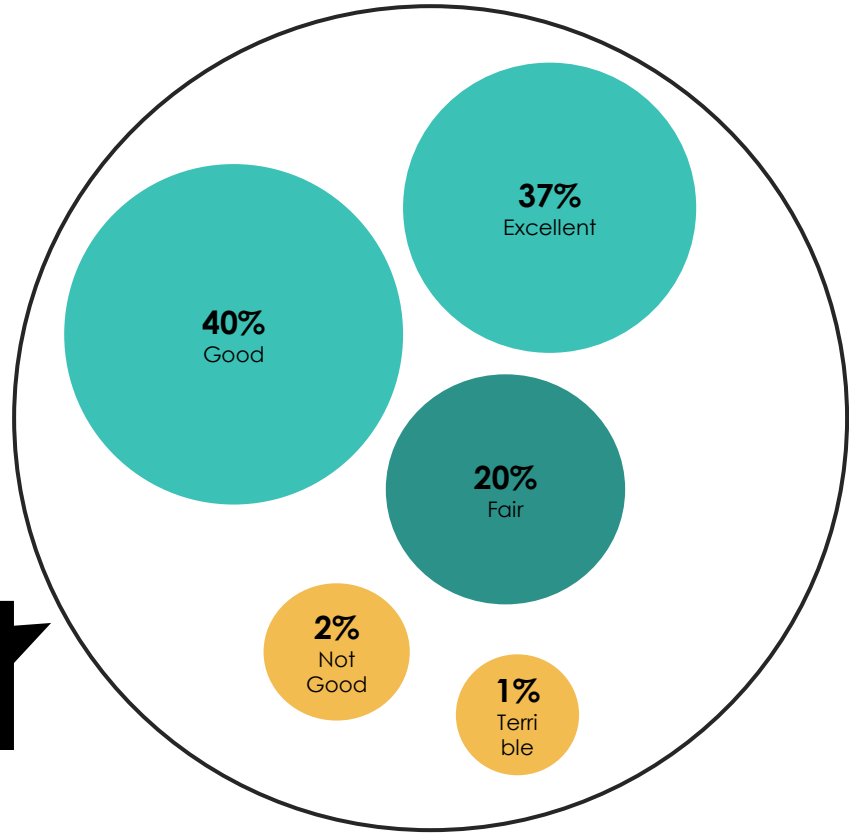


Brands are doing a good job, but expectations might be low

Brand scorecard on accessibility | % Selected

Includes people with visual, hearing, speech and cognitive disabilities

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

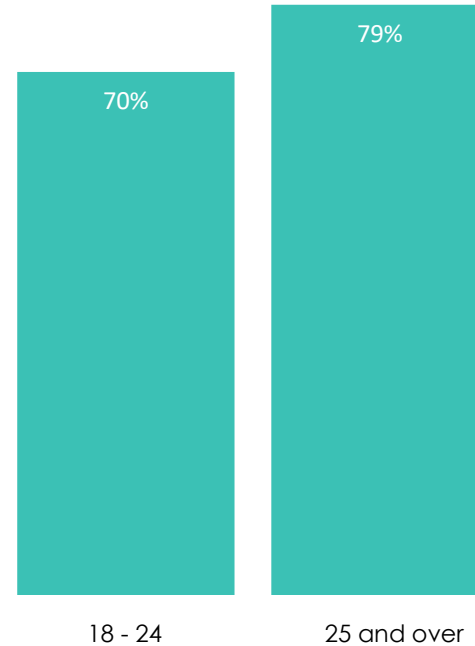
Includes people with visual, hearing, speech and cognitive disabilities

- ✗ "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**"

Younger folks expect more from brands

Brand scorecard on accessibility– Excellent or good job | % Selected

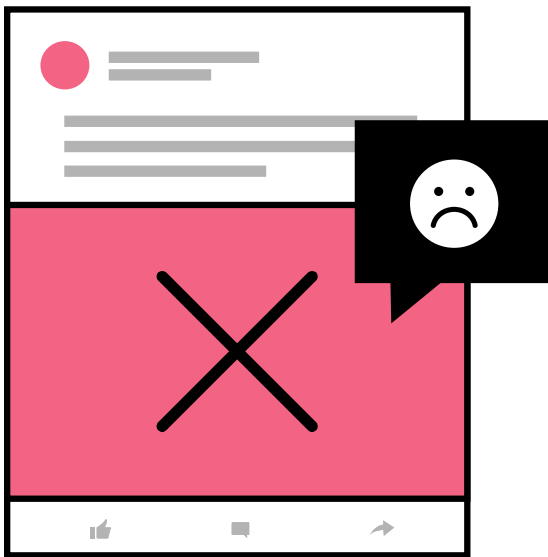
Includes people with visual, hearing, speech and cognitive disabilities



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**



I feel **disappointed**



I feel **ignored**



I feel **unhappy**



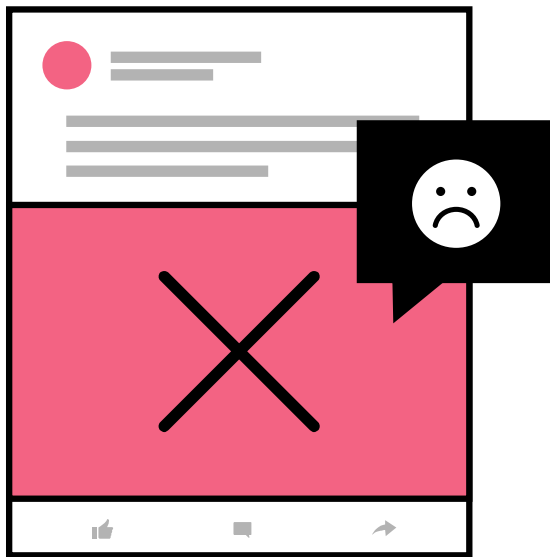
I feel **isolated**



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



Negative emotional response



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**



I feel **supported**



I feel **happy**



I feel **included**



I feel **relieved**



**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

