ACCESSIBLE TECHNOLOGY – UK – 2024

Technology can empower individuals with disabilities. Brands can leverage the language of autonomy, rights, and self-expression to shift perceptions around disability.

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This report looks at the following areas:

- Places where consumers have experienced accessibility issues.
- Technology devices that consumers have experienced accessibility issues with.
- Accessibility features most commonly used.
- Interest in accessible innovations.
- Behaviours and attitudes towards technology and accessibility.

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Technology can empower individuals with disabilities. Brands can leverage the language of autonomy, rights, and self-expression to shift perceptions around disability.

Overview

Greater awareness of neurodiversity including autism and dyslexia is shedding light on **new ways brands can design more inclusive technology and accessibility features**. Neurodivergent consumers face a range of accessibility barriers when out of the home and when using technology. Brands can **design technology with neurodiverse users in mind,** for example having the option of a simplified viewing mode on websites, and gaming and social media can remove distracting and overloading sensory information.

Consumers with a physical/cognitive issue do not think there is enough disability representation in the media. Disability representation in marketing is key to demonstrating value and showing how brands have their consumers' best interest at heart. Brands can **leverage the language of empowerment, rights and self-expression,** to shift perceptions around disability, raise awareness and generate confidence among disabled people regarding their intentions.

Voice command/voice access is the most used accessibility feature. However, usage among older generations and those with mobility issues is low, even though these groups may particularly benefit from them. Concerns about privacy may be a barrier to use, which brands should address in marketing messages.

Report Content

EXECUTIVE SUMMARY

Opportunities for the accessible technology market

- Map 'quiet routes' in travel apps
- Support content creation with AI guidance
- Personalise TV viewing experience with an interactive AI that can support engagement and programme appreciation

What consumers want and why

- VR in the travel industry can build confidence for public transport
  - Graph 1: places in which you have experienced accessibility issues in the last two years, 2024
- Tackle the lack of audio descriptions on social media
  - Graph 2: circumstances in which you have experienced accessibility issues in the last two years, 2024
- Emoji vs Accessibility
- Representation is key in marketing strategies
  - Graph 3: attitudes towards accessibility, 2024

Innovation and marketing

- Earbuds for everything
- Technology empowers people to keep their own voice

MARKET DYNAMICS

Macro-economic factors

- People feel more confident about their financial prospects
  - Graph 4: the financial confidence index, 2016-23

Social, environmental and legal factors

- UK government support ATech
- New research sheds light on social media inclusivity
- Serving the underserved
- Rising rates of long term health conditions
- Number of disabled people in employment continues to rise

WHAT CONSUMERS WANT AND WHY

Consumer accessibility needs

- Accessibility benefits everyone

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- Vision issues are most common
    - Graph 5: accessibility needs, 2024
- Younger people are more likely to identify as having communication issues
- Younger people more likely to report accessibility needs
    - Graph 6: communication issues by age, 2024
- Technology can support accessibility at work
- Improve ethical image and tackle technology illiteracy
    - Graph 7: household income of people with a cognitive/physical issue by gender, 2024
- Increase smartphone ownership...
    - Graph 8: ownership of smartphone device by cognitive/physical issue, 2024
- ...by addressing the accessible smartphone knowledge gap
- Improvements in technology enable visually impaired to enjoy TV...
    - Graph 9: ownership of HD TV by cognitive/physical issue, 2024
- .... however inaudible dialogue is still an issue
- Marketing messaging should include the language of rights and empowerment

Barriers to accessibility

- Accessibility on public transport is the biggest challenge
    - Graph 10: places in which you have experienced accessibility issues in the last two years, 2024
- The unpredictable nature of public spaces can be a challenge for people with communication issues
- Develop adjustable noise cancelling devices
- Make space for quiet areas in event venues
    - Graph 11: experienced accessibility issues at ticketed events in the last two years, by physical/cognitive issue, 2024
- Make charging points accessible
- Older generations express greater negativity towards technology and disability
- Support pre-trip planning with virtual reality
- Fitness trackers show the fewest barrier to accessibility, but they are also the least owned device
    - Graph 12: circumstances in which you have experienced accessibility issues in the last two years, 2024
- Support people to get active
- Boost disability representation in gaming
- Minimise misunderstandings on social media
- Offer more information about the meaning behind emojis and memes
- Improve punctuation in captions to boost inclusion
- Make audio descriptions widely available on social media...
- ...using AI technology
- Focus and memory barriers make TV storylines hard to follow...
    - Graph 13: accessibility issues when watching TV by cognitive/physical issue, 2024
- ...but an interactive AI that can summarise will help consumers follow the plot

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Accessible features

- Voice commands are most popular for people with dexterity and hearing issues

  – Graph 14: usage of accessibility features on any device, 2024

- Subtitles are a popular aid to follow the storyline

- Older generations are least likely to use accessibility features

  – Graph 15: usage of accessibility features by age 2024

- Boost awareness of accessibility features

  – Graph 16: usage of accessibility features on any device, by any physical/cognitive issue, 2024

- Provide alternatives to touchscreens...

- ...by integrating voice commands

- Address privacy concerns to increase usage of voice controlled features

- Emoji vs Accessibility

- Make emojis accessible for image to text users

Interest in accessible innovations

- Accessible innovations can benefit all consumers

  – Graph 17: interest in accessibility innovations by physical/cognitive issues (net), 2024

- Technology that helps with tasks around the home is most popular

  – Graph 18: interest in accessibility innovations by physical/cognitive issues, 2024

- A digital voice can improve self-identity, communication and quality of life

  – Graph 19: interest in using a digital copy of my voice (eg for sending text-to-voice messages in your own voice) by physical/cognitive issue, 2024

- Design 'quiet routes' for people with sensory hypersensitivity

  – Graph 20: interest in barrier-free route/map app (ie showing accessible routes) by physical/cognitive issue, 2024

- Accuracy will boost interest in AI generated text summaries

Accessibility behaviours

- Video calling has supported people's accessibility needs

  – Graph 21: behaviours towards accessibility, 2024

- Make websites/apps accessible for people with reading issues

- Help manage cognitive overload with simplified modes

- Create simplified gaming modes for hyper sensory users

- Technology has improved peoples lives

  – Graph 22: agreement with 'developments in technology have made it easier to do things I previously struggled with (eg work, communicate with people)', by physical/cognitive issue, 2024

- Consumers have been let down by technology...

- ...and need reassurance of commitment to accessibility

- Disability representation is missing

- Key consumers are neglected in marketing representation
  - Graph 23: smart home technology ownership by physical/cognitive issue, 2024

Accessibility attitudes

- Technology dismantles accessibility barriers
  - Graph 24: attitudes towards accessibility (agree with statement), 2024
- Accessibility counters the negative narrative around technology devices...
  - Graph 25: think technology makes modern life more inclusive by physical/cognitive issue, 2024
- ...however older generations feel sidelined by technology
  - Graph 26: think technology makes modern life more inclusive, by age, 2024
- Show consumers you are taking accessibility seriously
- Apple promotes accessibility features in The Greatest campaign
- Disability representation can boost VR ownership
- Dispel fears that AI will marginalise people further
  - Graph 27: think artificial intelligence (AI) will marginalise disabled people further (eg will not account for accessibility needs, lack of representation for disabilities), by physical/cognitive issue, 2024

INNOVATION AND MARKETING TRENDS

Launch activity and innovation

- The earbud that controls everything
- Samsung's personalised TV picture quality supports inclusivity
- L'Oréal announce handheld computerised makeup applicator
- Experience live game play through touch
- Apple launch new accessibility feature Personal Voice
- Your voice is never lost in the Lost Voice campaign by Apple
- Access Controller supports people with limited mobility to play video games
- GIPHY content becomes readable
- Seeing AI app launches on Android
- Live captioning glasses
- Hand glove reduces tremors

APPENDIX

Report scope and definitions

- Market definition
- Abbreviations and terms

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Methodology

- Consumer research methodology

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