level access
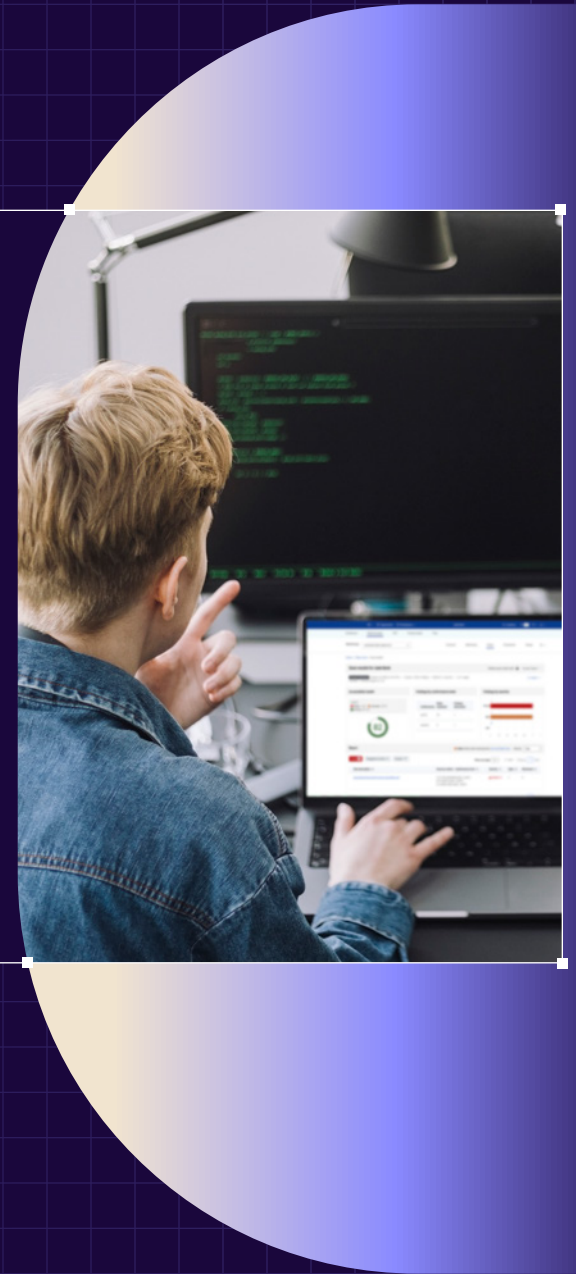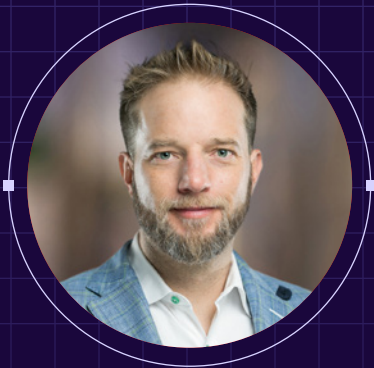
Fifth Annual

State of Digital Accessibility Report

2023-2024

By Tim Springer,
Founder and CEO,
Level Access

Foreword from Level Access

The evolution of digital accessibility:

From awareness to integration

As we forge ahead in the digital era, the narrative surrounding digital accessibility has profoundly shifted. Gone are the days when merely recognizing the need for accessible technology was sufficient. Organizations now understand that digital accessibility is about more than compliance, and they are embracing it as a cornerstone of inclusive business.

We've documented this evolution in our annual State of Digital Accessibility Report since 2019. This survey-based research publication has served as a benchmark for the industry, providing insight into how teams are thinking about and implementing digital accessibility at the current moment. But this year, we've broadened our approach to gain the most comprehensive perspective since our surveying began. By interviewing over 500 senior managers and executives at enterprise organizations, we've put together an expansive overview of digital accessibility within the general market.

This year's findings illuminate myriad key trends and developments in organizations' progress toward building a more equitable digital world, including the following:

From awareness to action

Today, the technology sector isn't grappling with building awareness around digital accessibility. The challenge now lies in resource allocation and methodology. The consensus is clear: organizations need the right tools, talent, and resources to integrate accessibility into their ongoing business operations.

Beyond compliance

The foundation for implementing digital accessibility might be legal and regulatory mandates, but industry leaders understand that these are just the starting line. Their true ambition? Delivering exemplary user experiences for everyone.

Incorporating accessibility from the ground up

There's a resounding agreement among professionals that the best way to create a lasting digital accessibility program is by embedding accessibility within the software or product development life cycle. While retrofit solutions have their place, they aren't the first line of defense. To be effective and sustainable, accessibility must be woven into the fabric of software or content creation.

Centralized programs for cohesive implementation

The most impactful accessibility outcomes emerge when there's a defined, central program steering the ship. This doesn't imply centralization of all services but signifies a unified approach. Such programs synchronize processes, training, and tools to ensure that every team integrates accessibility at the very heart of their projects, and they see improved results because of it.

In this report, we delve deeper into the nuances of these points, offering insights and guidance on the dynamic landscape of digital accessibility. Join us as we explore the ways to truly make technology a realm where everyone belongs.

Embracing digital inclusion as a competitive advantage

By Axel Leblois,
CEO and President,
G3ict

Christopher M. Lee, PHD,
VP and Managing Director,
G3ict and IAAP

In an era where innovative technology is increasingly shaping our lives, the importance of digital accessibility cannot be overstated. As we navigate the digital landscape, we must continue to advance the rights of persons with disabilities to ensure no one is left behind.

This fifth edition of the State of Digital Accessibility Report reflects the progress achieved over the past five years. There seems to be an organic shift from awareness toward action, with organizations widely committing to building a more equitable digital world. This commitment encompasses:

- Resource allocation and methodology

- Delivering improved user experiences for all

- Embedding accessibility within the life cycle of software and product development

- Accessibility centralization for organization-wide navigation and leadership

As you review the report's findings, two facts to note are: (1) a vast majority (72%) of survey respondents indicate that their organization has a digital accessibility policy, and (2) 85% consider digital accessibility a competitive advantage. These findings shed light on the transformation of digital accessibility maturity since 2019 when the first edition of this report launched.

Along with our network of volunteer subject matter experts and strategic partners, the G3ict / IAAP team has invested in tools and resources to help organizations leverage digital accessibility as a foundational part of an inclusive workplace and a powerful competitive advantage.

G3ict wishes to extend our sincere appreciation to all respondents and individuals who have contributed to the production and dissemination of this report. This research continues to serve as a compass for the industry, enabling organizations to navigate their position on the journey toward a more accessible world.

Together, we can shape a digital landscape that is inclusive and transformative as we remain united in accessibility.

Table of contents

Glossary

Here are some clarifying definitions for terms that appear frequently in the discussion of our findings.

Digital accessibility:

The practice of ensuring a digital experience, like a website, mobile app, software product, or platform, is accessible for people with disabilities and works with assistive technologies (like screen readers)

Digital accessibility policy:

A documented commitment to digital accessibility, disseminated within an organization, which may include budget allocation, dedicated team resources, training procedures, and a system of measurement

Senior leaders:

Survey respondents in senior leadership positions at their organizations. This category includes respondents with a reported job level of Director or above (e.g., Senior Director, Vice President (VP), C-level, Board Member, or equivalent).

Practitioners:

Survey respondents who report being in individual contributor roles or in management roles below Director level (including senior, mid-level, or junior management and technical / analyst roles)

User experience:

The overall experience of a person using a product such as a website or computer application, especially in terms of how easy or enjoyable it is to use

Introduction

Digital accessibility is now a mainstream priority for organizations. As more and more of day-to-day life takes place through digital channels, organizations across sectors and industries are committing to ensuring that all people can access and benefit from digital information, products, and services. And the legal landscape reflects this moral imperative: the velocity of web accessibility lawsuits in the U.S. has remained high in recent years.

Adding to this velocity, global developments, including the U.S. Department of Justice's recommitment to enforcing Section 508 of the Rehabilitation Act of 1973 and the upcoming release of new requirements under the European Accessibility Act (EAA), indicate that organizations will need to double down on meeting compliance obligations in years to come. Beyond compliance, numerous factors— including the widespread adoption of corporate diversity, equity, and inclusion (DEI) initiatives, and the increased importance of user experience as a competitive differentiator—make digital accessibility a best practice for modern businesses.

To better understand how the digital accessibility space is shifting, Level Access has conducted an annual survey, in partnership with the International Association of Accessibility Professionals (IAAP) and the Global Initiative for Inclusive Information and Communication Technologies (G3ict), since 2019. While our survey has historically been aimed at practitioners actively invested in their organizations' accessibility efforts, this year, we expanded our audience of more than 1,000 respondents to include over 500 senior managers and executives at enterprise organizations—providing broader insight on how the general U.S. market is approaching digital accessibility. Given forthcoming changes to EAA, which more closely align with U.S. accessibility requirements, we anticipate that our research will provide valuable perspective for organizations in the European Union (EU) as well.

This report outlines our survey's main findings, covering topics including:

- The adoption of digital accessibility across organizations, and key benefits

- Confidence in digital accessibility versus reality

- How organizations are managing digital accessibility today, and the actions that are moving programs forward

- Common barriers to progress for organizations

- Markers of successful digital accessibility programs

Section 01

Key findings

Key findings

- **Digital accessibility is a widespread organizational priority, and respondents understand its value.**
  The vast majority (72%) of respondents say their organizations have a digital accessibility policy, and 85% consider digital accessibility a competitive advantage for their organizations. The most widely reported benefits of digital accessibility are improved user experience, improved customer satisfaction, and improved brand reputation.

- **Confidence in digital accessibility doesn't reflect the reality of legal action.**
  While 83% of respondents are at least "somewhat" confident in the accessibility of their organizations' primary digital experiences, 40% say their organizations have been involved in legal action related to digital accessibility in the past 12 months. Additionally, 53% of all respondents, and 80% of general counsel and legal decision-makers, think that their organization is at risk of accessibility-related legal action in the next 12 months.

- **Senior leaders and practitioners aren't on the same page about accessibility performance and resourcing.**
  Respondents in senior leadership roles tend to be notably more confident than practitioners about the accessibility of their organizations' digital experiences and report less severe gaps in resourcing.

- **Competing demands and inadequate time are barriers to progress for organizations.**
  Three-quarters (75%) of respondents report that their organizations want to improve digital accessibility but have too many competing demands—and 69% say they lack adequate time to address accessibility issues.

- **Central accountability and proactivity set successful digital accessibility programs apart.**
  Respondents are more likely to rate their digital accessibility programs as "developed" or "highly developed" when they begin addressing accessibility in the planning or design of new digital experiences, and / or have a role or department centrally accountable for accessibility.

Section 02

Methodology

Methodology

Level Access commissioned independent market research specialist Vanson Bourne to undertake the quantitative research upon which this report is based. A total of 1,033 business decision-makers and technical / product specialists in the U.S. were surveyed during July and August 2023.

Respondents are employed by organizations of varied sizes and across industries. All professionals surveyed have some involvement in digital experience creation at their organizations, whether in a tactical or purely strategic capacity.

Vanson Bourne conducted surveys online using a rigorous multi-level screening process to ensure that only suitable candidates were given the opportunity to participate.

Unless otherwise indicated, the results discussed are based on the total sample.

VansonBourne

About our respondents

Respondent position

Position	Number
Board member, C-level	192*
Senior leadership; VP, Senior Director, Director or equivalent	244
Senior management, senior manager of team or department	210
Mid-level management	86
Junior management; supervisory and frontline managers	33
Technical; development, programming, technician, analyst	224
Other	44
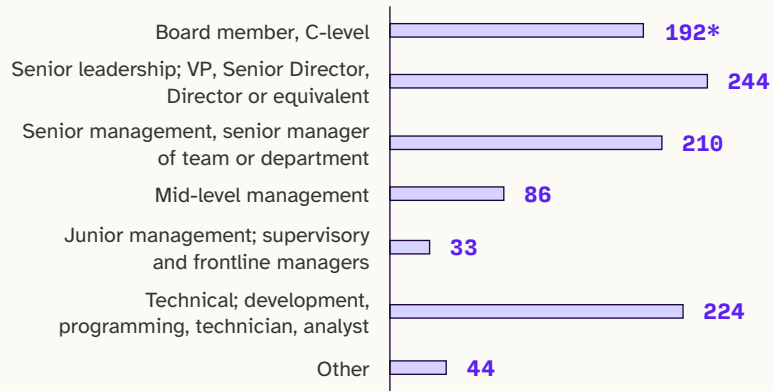
*Number of respondents

Respondent department

Department	Number
Product (including UX / UI design)	215*
Information technology	170
E-Commerce	99
Engineering (including development)	91
Operations	84
Risk / Fraud / Compliance / Governance	80
Legal	73
Marketing and communications	72
Business direction and strategy	37
Other	112
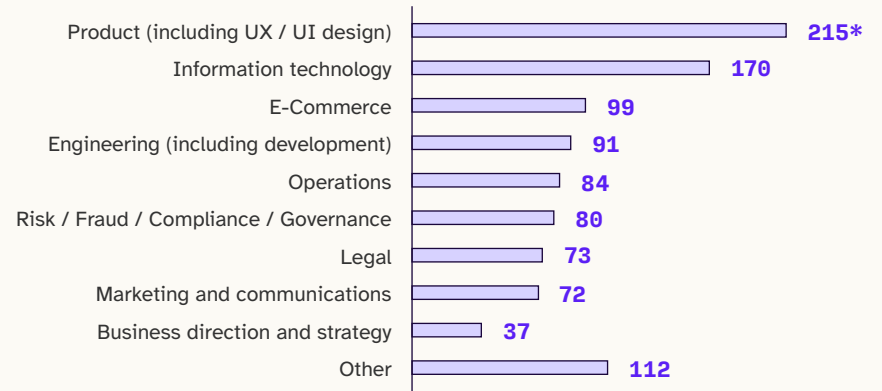
*Number of respondents

About respondents' organizations

Organization size

	Number of respondents
Less than 100 employees	122*
100-999 employees	131
1,000-2,999 employees	229
3,000-4,999 employees	198
5,000 or more employees	340
Don't know	13
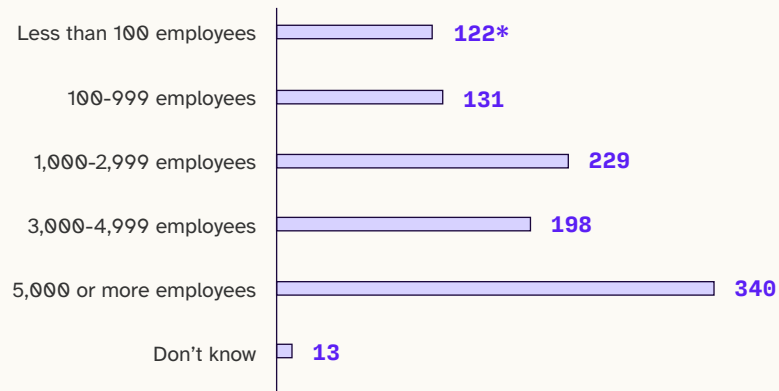
*Number of respondents

Organization industry

	Number of respondents
IT, technology, and telecoms	185*
Public sector	122
Business and professional services	111
Retail, distribution, and transport	111
Energy, oil / gas, and utilities	98
Manufacturing and production	93
Financial services	77
Charity / Not-for-profit	52
Media and entertainment	42
Travel and hospitality	38
Other	104
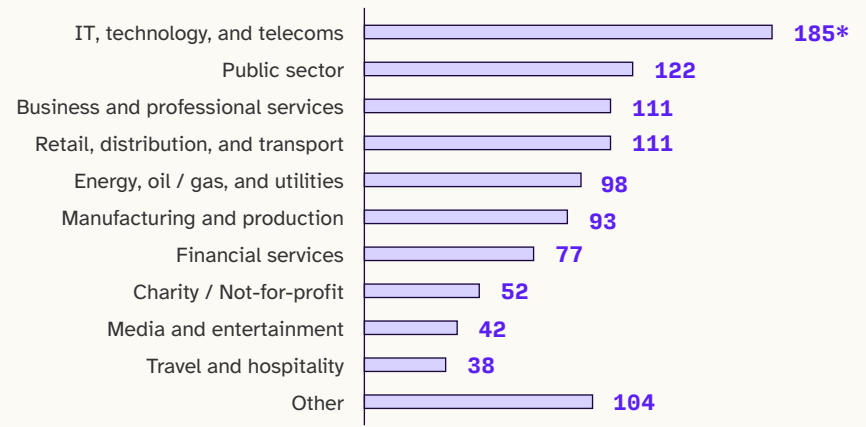
*Number of respondents

About respondents' organizations (continued)

Organization operating model

Business-to-business (B2B) 262*

Business-to-consumer (B2C) 166

Both B2B and B2C 597

Don't know 8
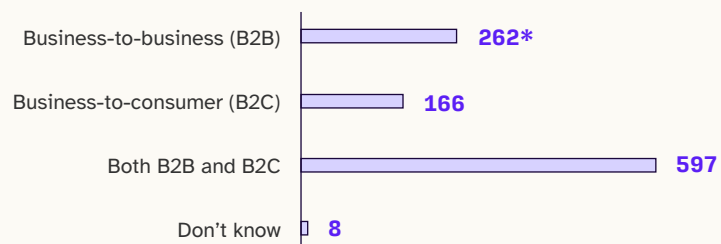
*Number of respondents

Reported development of organizations' digital accessibility practices

Highly developed 334*

Somewhat developed 345

Some improvement needed 194

Significant improvement needed 151

Don't know 9
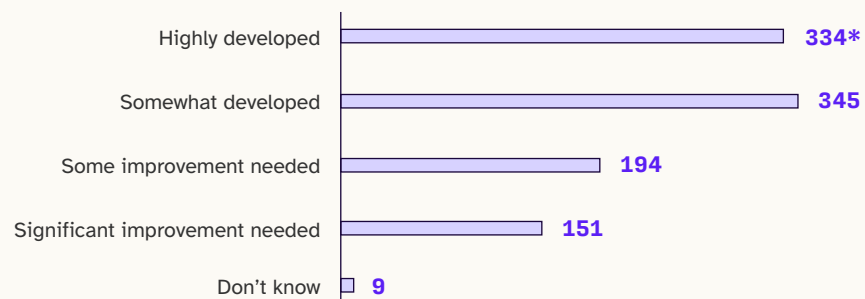
*Number of respondents

Section 03

Exploring our findings

In the following sections, we will unpack key trends surfaced in our research, adding observations on what they may reveal about the state of digital accessibility today.

Organizations are committed to digital accessibility—and it's paying off.

When drawn together, the following trends in the survey data indicate that digital accessibility is no longer an emerging movement: it's a requirement for many organizations today.
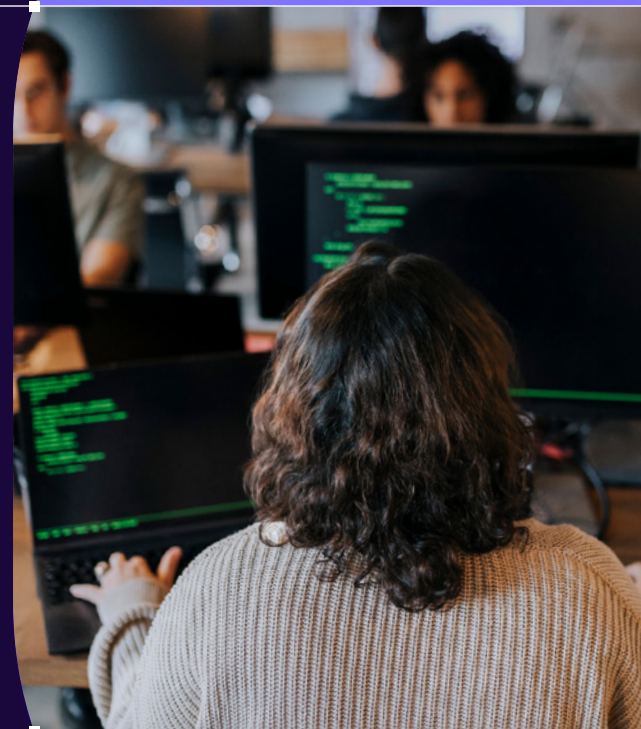
Digital accessibility policies are standard practice.

The majority (72%) of survey respondents report that their organization has a digital accessibility policy, underscoring the mainstream adoption of accessibility practices.

Our survey suggests that digital accessibility policies are most common among organizations in retail, distribution, and transport, where 84% of these respondents indicate that their organizations have a policy in place. Financial services organizations follow, with 81% of respondents stating that their employer has a policy. Given that retail and banking have historically been common industry targets of web accessibility lawsuits, it's perhaps not surprising that organizations within these industries are codifying and communicating their digital accessibility efforts.

Digital accessibility is good for business.

As organizations embed digital accessibility into their business practices, they report many benefits from this decision. Respondents overwhelmingly say that accessibility has improved their organizations' performance in key areas, including user experience and customer satisfaction as well as bottom-line revenue.

Reported performance improvements as a result of digital accessibility

| Category	Percentage
User experience	87%*
Customer satisfaction	81%
Brand reputation	79%
Customer acquisition	70%
Customer retention	68%
Revenue	61%
Legal costs (including settlements and staff hours)	57%
Time required to handle lawsuits	55%
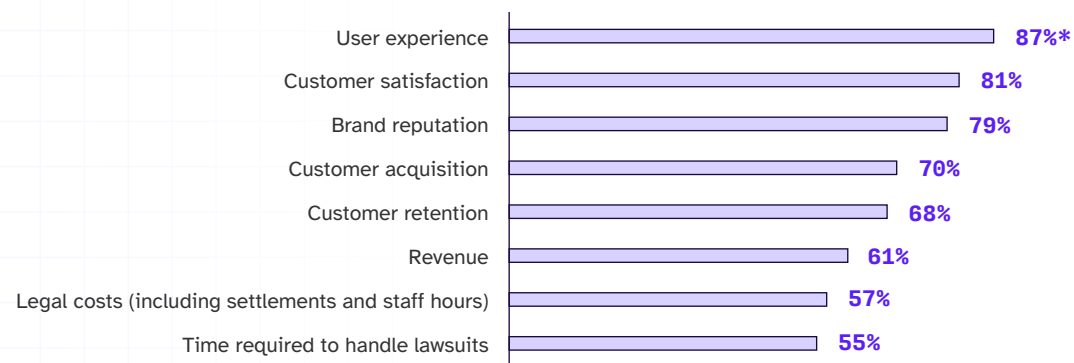
*Percentage of respondents who say their organization's performance in this area has improved as a result of digital accessibility

Given the positive impact that respondents indicate digital accessibility has on key business objectives, it follows that 85% of those surveyed believe that prioritizing accessibility is a competitive advantage for their organization. Notably, respondents at organizations that sell to other businesses are more likely than those at purely consumer-facing organizations to consider digital accessibility a competitive advantage: 85% of respondents at business-to-business (B2B) organizations, and 87% of those at organizations that operate in both a B2B and business-to-consumer (B2C) capacity, say it's a competitive advantage, compared to 79% of those at strictly B2C organizations. This may be attributable to the frequency with which digital accessibility is a requirement in B2B procurement processes.

Accessibility is a common requirement in digital product procurement.

Organizations' widespread commitment to digital accessibility is shaping how they approach the procurement of digital technology. Almost six in 10 (58%) respondents say that accessibility is a requirement at least most of the time when their organization purchases software and other digital products. Among senior leaders, who tend to hold more sway in buying decisions, this figure rises to 73%.
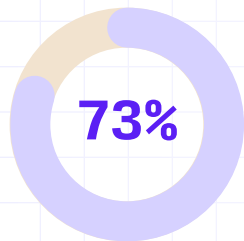
73% of senior leaders say that accessibility is a requirement for digital product procurement at least most of the time.

In which industries are respondents most likely to consider digital accessibility a competitive advantage?

92%*
Business or professional services

91%
Retail, distribution, and transport

88%
Manufacturing and production
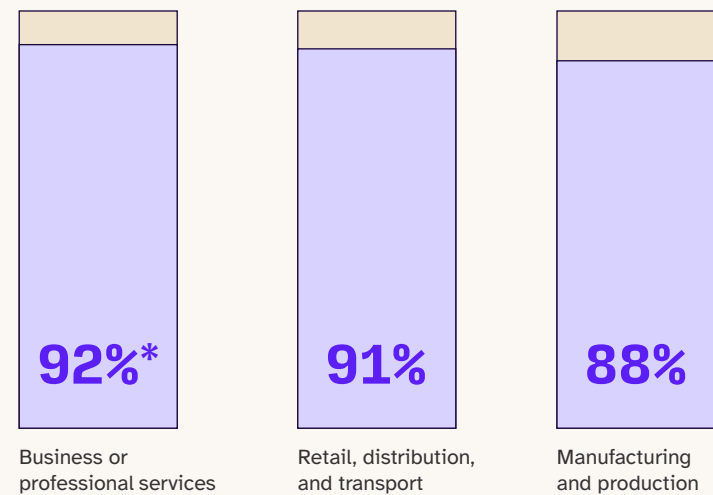
*Percentage of respondents who believe digital accessibility is a competitive advantage for their organization

Despite their commitment, organizations lack clarity and alignment about their state of digital accessibility.
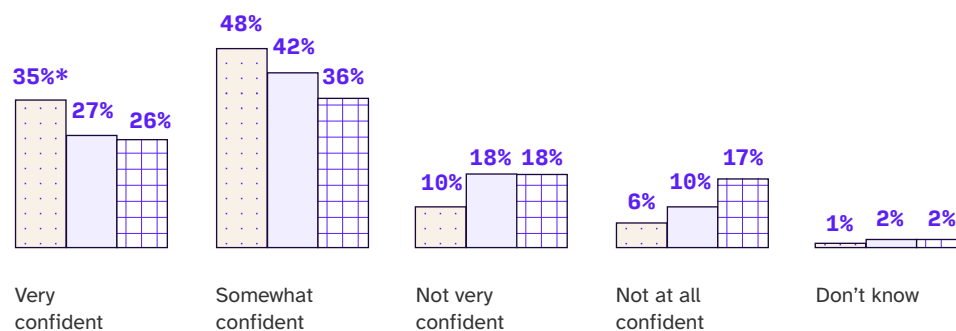
While most respondents report that their organization has a policy indicating their commitment to digital accessibility, our research suggests that there's confusion and misalignment surrounding the performance of accessibility programs, particularly as it relates to compliance.

Respondents are confident, but not certain, that their organizations' digital experiences are accessible.

When asked about their level of confidence in the accessibility of both external-facing and internal (employee-facing) digital experiences, most respondents were at least "somewhat" confident their organization's assets were accessible. However, a much smaller number were certain. For example, while 83% of respondents were at least "somewhat" confident in the accessibility of their organization's primary digital experience (for example, a website or e-commerce platform), just 35% were "very" confident. Respondents' relative uncertainty indicates a lack of clarity about whether their organizations' digital experiences conform with established accessibility guidelines.

Confidence in the accessibility of different digital experiences

	Very confident	Somewhat confident	Not very confident	Not at all confident	Don't know
Your organization's primary digital experience	35%*	48%	10%	6%	1%
All other external digital experiences	27%	42%	18%	10%	2%
Internal digital experiences	26%	36%	18%	17%	2%

*Percentage of respondents

- Your organization's primary digital experience (e.g., your website or e-commerce platform)
- All other external digital experiences
- Internal digital experiences

Our insight

A variety of possible factors may be contributing to respondents' confusion about the accessibility of their organization's digital experiences. These include a lack of (or unreliable) reporting, failure to adopt specific accessibility standards as part of their policies, or insufficient awareness of their accessibility programs' operations. Future research might explore the precise reasons for this gap in information.

Where is confidence in digital accessibility highest?
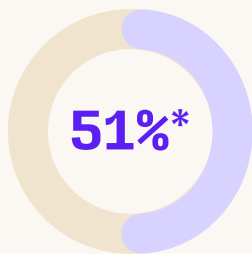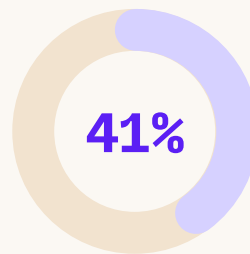
51%* Retail, distribution, and transport

41% Business or professional services
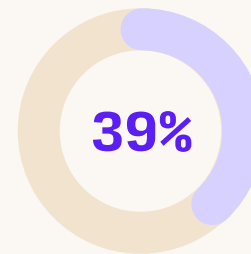
39% Manufacturing and production

*Percentage of respondents who are "very confident" their organization's primary digital experience is accessible

There is a gap in confidence between senior leaders and practitioners.

In addition to a general lack of certainty about digital experiences' accessibility, there is misalignment in confidence levels between those most senior in the organization and those doing the work: senior leaders are 64% more likely than practitioners to be "very confident" that their organization's primary digital experience is accessible. Notably, senior leaders are also much more likely to consider their digital accessibility practice "developed," and roughly twice as likely to rate it as "highly developed." These divergent perspectives may reflect differences in how these groups understand the seriousness of accessibility concerns. This is consequential, as senior leaders' relative assurance could impact their decisions about investing in, and prioritizing, digital accessibility.

Confidence in the accessibility of primary digital experiences, by seniority

	Very confident	Somewhat confident	Not very confident	Not at all confident	Don't know
Senior leaders	46%*	47%	6%	1%	0%
Practitioners	28%	49%	13%	9%	1%
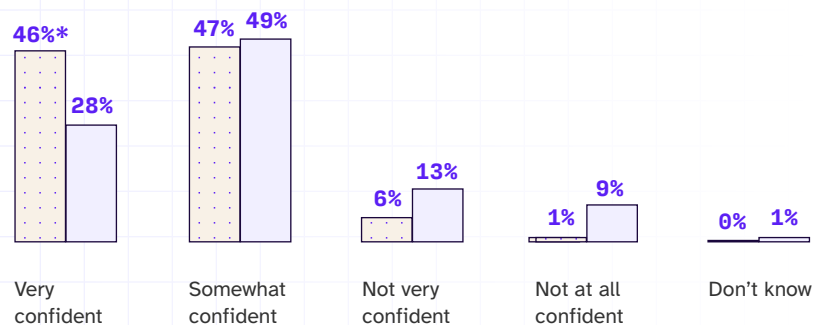
Reported development of digital accessibility practices, by seniority

	Very confident	Somewhat confident	Not very confident	Not at all confident	Don't know
Senior leaders	45%	35%	15%	4%	0%
Practitioners	23%	32%	21%	22%	1%

*Percentage of respondents
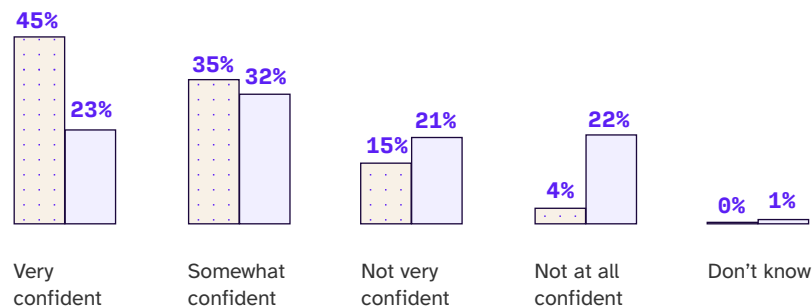
■ Senior leaders   ■ Practitioners

Our insight

One possible explanation for this misalignment is that senior leaders may not be fully aware of the state of practitioners' day-to-day operations for ensuring digital accessibility, or the roadblocks they encounter along the way. This could be due to a lack of tooling for generating accurate, easy-to-reference progress reports, and / or a lack of structured processes by which practitioners can consistently communicate challenges they're facing to senior leadership. Other potential factors may include differing priorities, different definitions of "done," or simply the desire to be perceived as leading an effective team.

Respondents are more confident in the accessibility of external-facing experiences than in employee-facing digital experiences.

While 83% of respondents are at least "somewhat" confident that their organization's primary external experience is accessible, and 69% are at least "somewhat" confident that all other external digital experiences are accessible, just 63% of respondents were at least "somewhat" confident in the accessibility of their organization's internal digital experiences (such as intranets and software used by employees). And only 26% of respondents were "very confident" in the accessibility of those experiences. Organizations are clearly prioritizing creating accessible experiences for customers and visitors—but to foster an inclusive workplace, they need to ensure they're also meeting the needs of all employees.

Around one in four, or 26%, of respondents were "very confident" that internal digital experiences were accessible.

Legal activity related to digital accessibility is widespread.

Despite respondents' reported confidence in the accessibility of their organizations' digital experiences, their employers are hardly immune from litigation. In fact, two in five (40%) respondents say that their organization has been involved in legal action regarding digital accessibility (such as receiving an ADA demand letter or being served a lawsuit) in the past 12 months. It's worth noting that accessibility-related litigation is hardly a new concern: roughly one in five respondents to our 2022 survey also said their organization had been sued more than once.

Additionally, more than half (53%) of all respondents, and 80% of general counsel and legal decision-makers, think that their organization is at risk of digital accessibility-related legal action in the next 12 months. Senior leaders tended to be more wary of future legal activity than practitioners: 62% of the former cohort say they believe their organization is at risk, compared to 46% of the latter cohort.

Respondents at B2C organizations report the highest rates of legal action, but B2B organizations aren't immune.

B2C organizations

49%*

B2B organizations

28%

*Percentage of respondents who say their organization has been involved in digital accessibility-related legal action in the past 12 months

Our insight

Respondents' confidence in their organizations' digital accessibility performance, despite high rates of legal action received, is interesting to explore. This disparity may be due to a lack of clear understanding of the legal requirements governing accessibility, as well as a lack of central visibility into the true state of accessibility at their organization—a problem also suggested by the misalignment in confidence between senior leaders and practitioners.

In addition, it's worth noting how many respondents—particularly those in senior leadership roles—are confident about digital accessibility yet anticipate facing legal action. Future research might probe perceptions of the legal landscape surrounding accessibility: respondents are clearly aware that legal action is widespread and may not understand that ensuring conformance with compliance standards will mitigate legal risk.

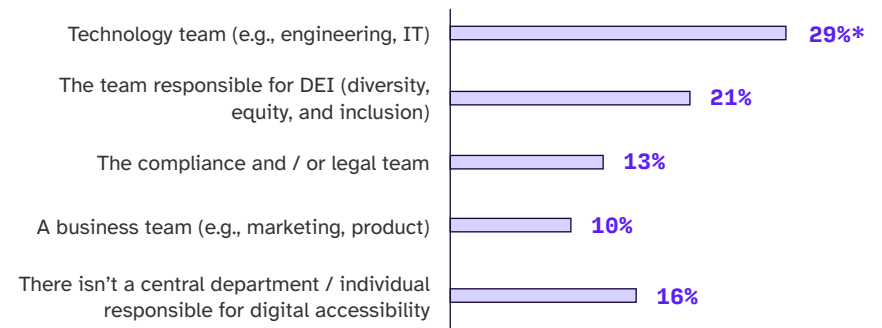# How organizations approach digital accessibility

Although respondents' organizations may lack alignment on the details of their digital accessibility performance, their dedication to providing equitable experiences is evident. So, how are teams translating their commitment into action? In this section, we'll provide an overview of how organizations are currently addressing digital accessibility, including which team is accountable, what resources are in place, and which practices are making the biggest impact.

Who is accountable?

Almost three-quarters of respondents (74%) report that their organization has a department or individual that is centrally accountable for overseeing the adoption of digital accessibility. Senior leaders are far more likely than practitioners to say that there is centralized accountability in place: while 91% of the former cohort felt this was the case, just 61% of the latter cohort agreed. This discrepancy suggests that senior leaders' ideas about how their organizations' digital accessibility practices function may not align with practitioners' day-to-day reality, a gap in understanding that could impact senior leaders' decisions about allocating additional resources and support to accessibility efforts.

When it comes to the specific department or individual accountable for digital accessibility, respondents most commonly indicate that a technology team, such as engineering or information technology (IT), fills this role, followed by the team responsible for diversity, equity, and inclusion (DEI).

Where does accountability for digital accessibility sit within organizations?

Technology team (e.g., engineering, IT)	29%*
The team responsible for DEI (diversity, equity, and inclusion)	21%
The compliance and / or legal team	13%
A business team (e.g., marketing, product)	10%
There isn't a central department / individual responsible for digital accessibility	16%

*Percentage of respondents who say this team is primarily accountable for digital accessibility at their organizations

What resources are in place to support digital accessibility?

Nearly all (93%) respondents say that their organization has resources in place to support their digital accessibility work, ranging from technology and training to dedicated staff hours. More than half (52%) of respondents indicate that their organization has implemented accessibility software used by designers or developers, and many respondents' organizations also leverage accessibility consulting services or provide role-specific employee training. However, only a third (33%) of respondents say they have a dedicated budget for digital accessibility, suggesting that, in many respondents' organizations, those involved in accessibility may have limited autonomy when it comes to making decisions about procuring tools, services, and headcount to strengthen their efforts.

Resources in place to support digital accessibility work

Resource	Percentage
Digital accessibility software or platform used by designers and / or developers	52%*
Accessibility consulting services	47%
Role-specific employee training	47%
Executive support	44%
Dedicated designer / developer working hours	41%
Website accessibility widget, plugin, or overlay used on live websites	34%
Dedicated budget	33%
We do not dedicate any of the above to support digital accessibility in my organization	6%

*Percentage of respondents who say this resource is in place at their organization

What actions are moving the needle for organizations?

While respondents' organizations are using a variety of tools and strategies to move digital accessibility forward, certain efforts are driving especially meaningful outcomes. When asked to choose the most impactful actions their organizations have taken to improve digital accessibility, respondents' top choices are incorporating accessibility when designing (56%) and testing for accessibility during development (52%). Both practices are integral to proactively embedding accessibility in digital experience creation.

Additionally, nearly half (49%) of respondents consider implementing training for employees one of their organization's most impactful steps toward improving the accessibility of digital experiences, highlighting the key role of education in an effective practice.

Most impactful actions taken to achieve or maintain digital accessibility

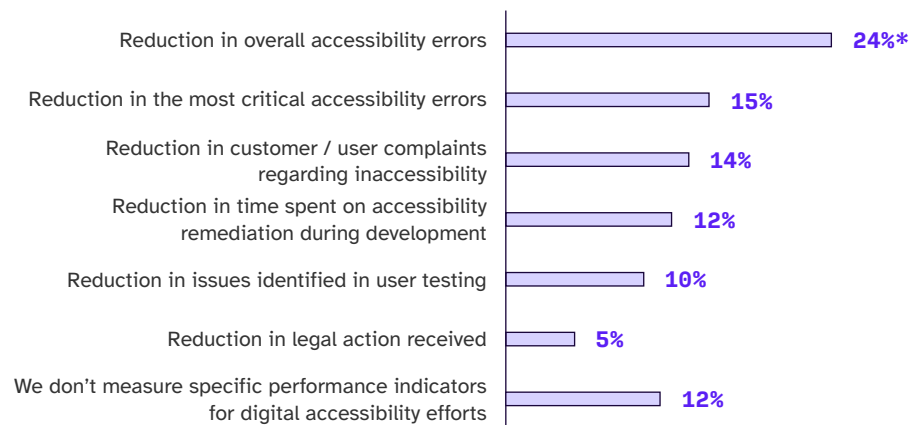| Action	Percentage
Incorporating accessibility when designing	56%*
Testing for accessibility during development	52%
Implementing digital accessibility training for employees	49%
Obtaining one or more accessibility audits	38%
Continuously testing live digital content for accessibility	35%
Including people with disabilities in user research	34%
Publishing a public accessibility statement	29%

*Percentage of respondents who ranked this action among the top three most impactful actions for achieving or maintaining digital accessibility at their organizations

How are organizations measuring progress?

Professionals clearly have opinions about the most impactful aspects of their digital accessibility practices—but how are they assessing their performance? Having specific metrics for evaluating and reporting on digital accessibility is often considered a marker of program maturity, and the metrics that organizations track can shed light on how they understand the value and impact of this work.

Around four in five survey respondents (82%) report that their organization measures specific performance indicators for digital accessibility. The most frequently cited metric is reduction in overall accessibility errors, with 24% of respondents saying they use this data to understand their progress. A slightly lower number (15%) report that they focus on reduction in the most critical accessibility errors, i.e., those that have the greatest potential to negatively impact a user's experience. Reduction in accessibility-related complaints from customers / users, selected by 14% of respondents, ranks as the third-most-commonly tracked performance indicator.

Primary performance indicators for digital accessibility

Indicator	Percentage
Reduction in overall accessibility errors	24%*
Reduction in the most critical accessibility errors	15%
Reduction in customer / user complaints regarding inaccessibility	14%
Reduction in time spent on accessibility remediation during development	12%
Reduction in issues identified in user testing	10%
Reduction in legal action received	5%
We don't measure specific performance indicators for digital accessibility efforts	12%

*Percentage of respondents who say their organization uses this metric as a performance indicator for digital accessibility

Other performance indicators for digital accessibility

Beyond these commonly tracked metrics, 5% of respondents chose "Other," reporting that their organizations take a variety of different approaches to understanding digital accessibility success. Alternative performance indicators that respondents themselves provided include:

- An accessibility health score from a third-party solution provider
- Completion of digital accessibility training courses by employees
- Resolution of legal complaints received

- Conformance with product procurement requirements
- Number of internally defined accessibility goals achieved per project

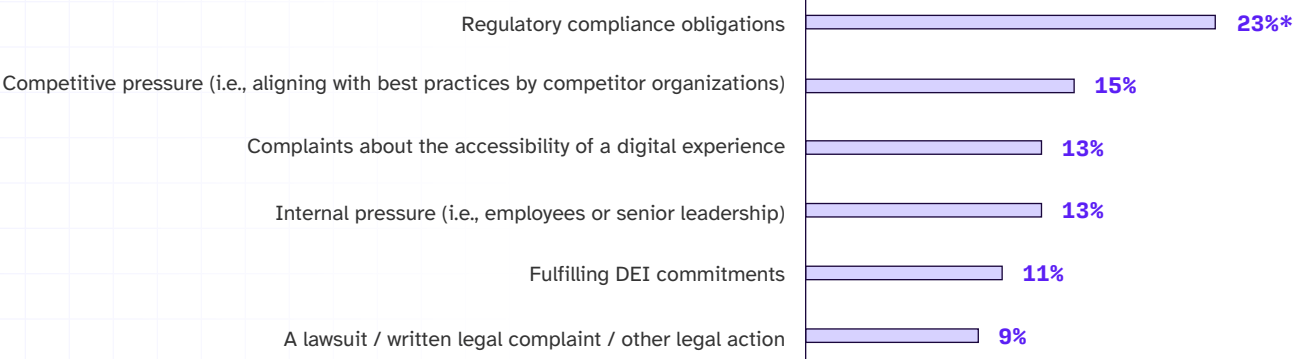# What motivates organizations to prioritize digital accessibility?

A wide range of factors—from ethical imperatives to legal risks—can motivate organizations to adopt, and maintain, digital accessibility. To better understand the key motivators for accessibility practices today, our research explored both the initial reasons that organizations began working toward digital accessibility and why they continue to make it a priority.

When asked about the primary factor that motivated their organizations to start addressing digital accessibility, respondents are most likely to cite regulatory compliance obligations. This is hardly a surprising finding, given the rapid escalation of legal activity in this area in recent years and the significant number of respondents (40%) who say their organization received accessibility-related legal action in the last 12 months. However, improving usability for all is the most common reason that respondents reported their organizations continue to prioritize digital accessibility, with compliance following closely behind. The difference in reported motivators for starting, versus sustaining, accessibility work suggests that as teams make progress, and begin to benefit from their efforts, their focus expands beyond mitigating risk: first and foremost, they aim to make a positive impact on users.

Notably, respondents to last year's survey widely ranked providing the best experience for all users among the top three reasons their organization is addressing digital accessibility. This indicates that the connection between accessibility and usability is not new to teams involved in experience creation and that providing positive, inclusive experiences for customers and visitors is an ongoing priority for organizations.

The fact that this year's respondents also ranked other factors—such as fulfilling brand promise, expanding their consumer audience, and increasing procurement opportunities—relatively evenly suggests consistent awareness of benefits beyond usability among our sample.

Original reasons for addressing digital accessibility

Regulatory compliance obligations	23%*
Competitive pressure (i.e., aligning with best practices by competitor organizations)	15%
Complaints about the accessibility of a digital experience	13%
Internal pressure (i.e., employees or senior leadership)	13%
Fulfilling DEI commitments	11%
A lawsuit / written legal complaint / other legal action	9%

*Percentage of respondents who cite this as the primary reason their organization began addressing digital accessibility

Key factors that continue to drive digital accessibility

Improving usability for all	60%*
Regulatory compliance	46%
Fulfilling brand promise	35%
Expanding consumer audience	34%
Competitive pressure (i.e., aligning with best practices by competitor organizations)	33%
Increasing procurement opportunities	32%
Lawsuit prevention	31%
Fulfilling DEI commitments	30%

*Percentage of respondents who include this among the factors that continue to drive digital accessibility at their organization

Competing demands and resource gaps represent barriers to progress.

The vast majority (89%) of survey respondents say they feel their organization could be doing more to address digital accessibility. While this finding underscores the fact that organizations understand the value of accessibility, it also signals that there's room for improvement in organizations' current approaches. So what's limiting teams' progress?

68%
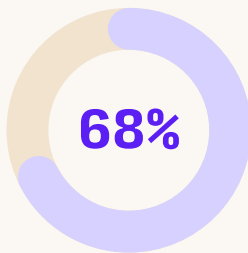
Just 68% of respondents are satisfied with the extent to which their organization considers the needs of people with disabilities regarding digital experiences.

While 83% of respondents are at least "somewhat confident" about the accessibility of their organization's primary digital experience, just 68% report feeling satisfied with the extent that their organization considers the needs of individuals with disabilities in regard to digital technology.

Our insight

This discrepancy is worth exploring further. It may signal that respondents feel their organizations lack an awareness of the benefits of digital accessibility beyond compliance, or that they could make more of an effort to involve people with disabilities in their accessibility practice. For example, use case testing by people with disabilities is an impactful way to identify issues that negatively affect user experience, even if they are not the type of barrier to access that would render a digital experience non-compliant.

Competing priorities

Three-quarters (75%) of survey respondents report that their organization wants to prioritize digital accessibility but has too many competing demands. This challenge is especially common among smaller enterprise organizations, with 85% of respondents at organizations with between 1,000 and 2,999 employees agreeing that competing demands limited their accessibility efforts. The fact that digital accessibility is perceived as competing with other organizational priorities may indicate a need for accessibility tools and processes that integrate with how teams already work, minimizing the impact on existing processes.

Senior leaders are more likely than practitioners to feel that competing demands make it difficult to prioritize digital accessibility.
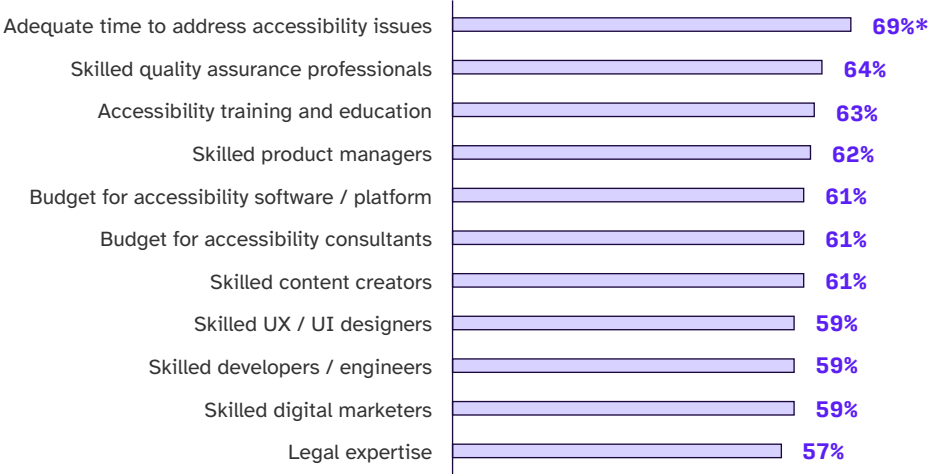
Senior leaders
80%*

Practitioners
71%
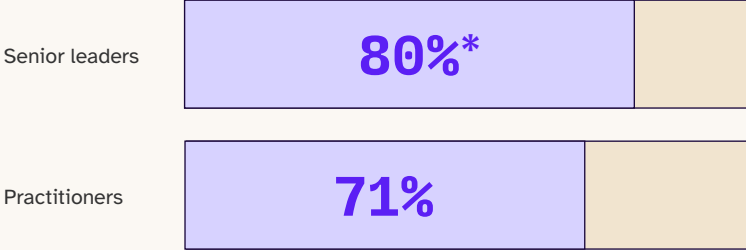
*Percentage of respondents who agree with the statement, "My organization wants to prioritize digital accessibility, but has too many competing demands."

Insufficient resources

Although the majority of respondents say their organizations have some resources in place to support digital accessibility, respondents widely report feeling under-resourced across crucial aspects of their programs, including time, training, budget, and headcount. The largest gap in resourcing pertains to time: 69% of respondents indicate that they lack adequate time to address accessibility issues. This is followed by demand for quality assurance (QA) professionals skilled in digital accessibility, an area where 64% of respondents feel their organization is deficient, and accessibility training and education, for which 63% of respondents say they lack resources.

Notably, a lack of time to fix accessibility issues and a lack of digital accessibility training ranked among the three challenges most widely reported by respondents in last year's State of Digital Accessibility survey as well, indicating that these remain ongoing areas of difficulty.

Resource gaps within organizations

Adequate time to address accessibility issues	69%*
Skilled quality assurance professionals	64%
Accessibility training and education	63%
Skilled product managers	62%
Budget for accessibility software / platform	61%
Budget for accessibility consultants	61%
Skilled content creators	61%
Skilled UX / UI designers	59%
Skilled developers / engineers	59%
Skilled digital marketers	59%
Legal expertise	57%

*Percentage of respondents who say their organization is not adequately resourced in this area

Our insight

Strained resources underscore the need for organizations to consistently approach digital accessibility proactively, reducing the time and costs associated with reactive remediation after experiences are live. In particular, by accounting for accessibility in design and development, organizations can minimize workloads for over-stretched QA professionals.

Practitioners are more conscious than senior leaders of limited resources.

Respondents in practitioner roles are more likely than those in leadership roles to report being under-resourced across all categories. The largest disparity between the two groups regards time to address accessibility issues: 73% of practitioners feel their organization lacks sufficient resources in this area, compared to 63% of leaders.
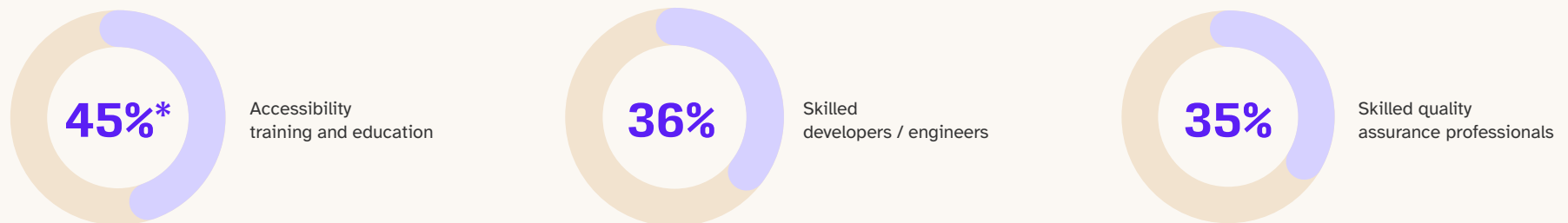
Our insight

This discrepancy may not be surprising, given that practitioners are typically tasked with the hands-on work of implementing fixes, and would therefore be most familiar with the time needed for that implementation. Nevertheless, it speaks to a need for more transparent communication about digital accessibility work across levels of seniority. This discrepancy in understanding may also help explain why two-thirds (67%) of respondents say they lack a dedicated budget for accessibility: senior leaders may be less inclined to spend in this area if they're unaware of resource deficiencies.

What are organizations' resourcing priorities?

When asked about the top three areas they would prioritize when improving their digital accessibility programs, respondents put training and education at the top of their wish list. As is noted in the previous section of this report, training is one of the most impactful actions that respondents identify for improving accessibility. However, 63% of those surveyed feel under-resourced in this area, making this an obvious area of consideration for senior leaders wondering where to allocate resources.

Respondents' top priorities for digital accessibility program improvement

45%* Accessibility training and education

36% Skilled developers / engineers

35% Skilled quality assurance professionals

*Percentage of respondents who include this in the top three areas they would prioritize when improving their digital accessibility programs

Centralized accountability and proactivity set successful digital accessibility programs apart.

With many organizations striving to improve digital accessibility, it's helpful to understand what teams excelling in this area are getting right. In this section, we will explore two key characteristics that surfaced in the data we received from respondents who ranked their programs as "highly developed": centralized accountability and a proactive approach. By familiarizing themselves with the commonalities between successful accessibility practices, senior leaders and practitioners alike can identify actionable steps toward elevating their own organization's efforts.
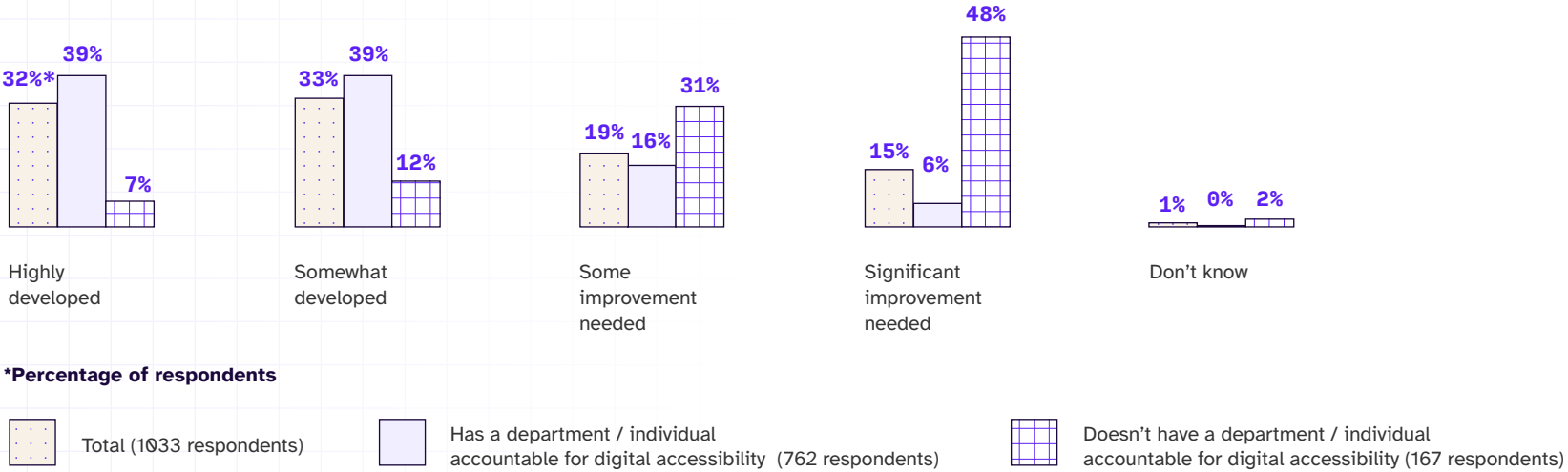
Centralized accountability

Assigning accountability for digital accessibility adoption to a central party can help organizations establish consistent processes for managing and tracking progress across different digital experiences, and across brands and markets within an enterprise. This reduces the risk of misalignment across teams and roles, ensuring everyone involved in digital accessibility is upholding the same standards.

In light of these benefits, it follows that respondents at organizations that have a central department or individual accountable for overseeing the adoption of digital accessibility tend to rate their programs as more highly developed than those at organizations without centralized accountability. More than three-quarters (78%) of respondents whose organizations have centralized oversight consider their accessibility practices "somewhat" or "highly" developed, while just 19% of those whose organizations lack centralized oversight feel the same.

Meanwhile, the majority (79%) of respondents at organizations with no central department or individual responsible for digital accessibility say that their organizations' practices need improvement, with 48% saying that significant improvement is needed.
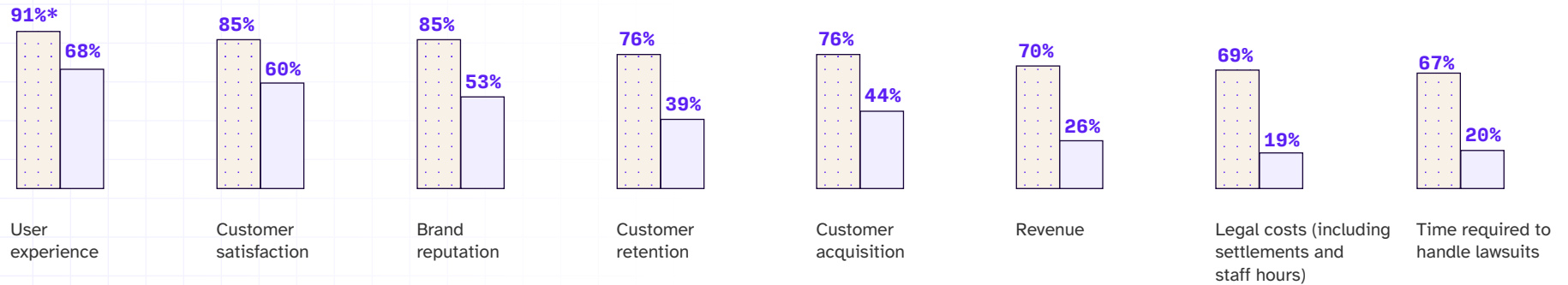
Reported development of digital accessibility practices, by centralization of accountability

Highly developed: 32%* / 39% / 7%

Somewhat developed: 33% / 39% / 12%

Some improvement needed: 19% / 16% / 31%

Significant improvement needed: 15% / 6% / 48%

Don't know: 1% / 0% / 2%

*Percentage of respondents

- Total (1033 respondents)
- Has a department / individual accountable for digital accessibility (762 respondents)
- Doesn't have a department / individual accountable for digital accessibility (167 respondents)

When accountability for digital accessibility adoption is centralized in their organizations, respondents are also more likely to notice business improvements resulting from their accessibility efforts, including stronger bottom-line revenue. Seven in 10 (70%) respondents who report having centralized oversight for digital accessibility at their organizations say that accessibility has contributed to improved revenue, while just one in four (26%) respondents who report that there's no central oversight agree.

Beyond revenue, respondents who say their organizations have centralized accountability for digital accessibility indicate benefits from legal risk mitigation more widely than those without centralized accountability. Respondents in the former group were over 260% more likely than those in the latter group to report reduced legal costs due to accessibility, and over 230% more likely to report that the amount of time required to handle accessibility-related lawsuits has decreased.

Performance improvements as a result of digital accessibility, by centralization of accountability

91%*
68%
User experience

85%
60%
Customer satisfaction

85%
53%
Brand reputation

76%
39%
Customer retention

76%
44%
Customer acquisition

70%
26%
Revenue

69%
19%
Legal costs (including settlements and staff hours)

67%
20%
Time required to handle lawsuits

*Percentage of respondents

☐ Has a department / individual accountable for digital accessibility

☐ Doesn't have a department / individual accountable for digital accessibility
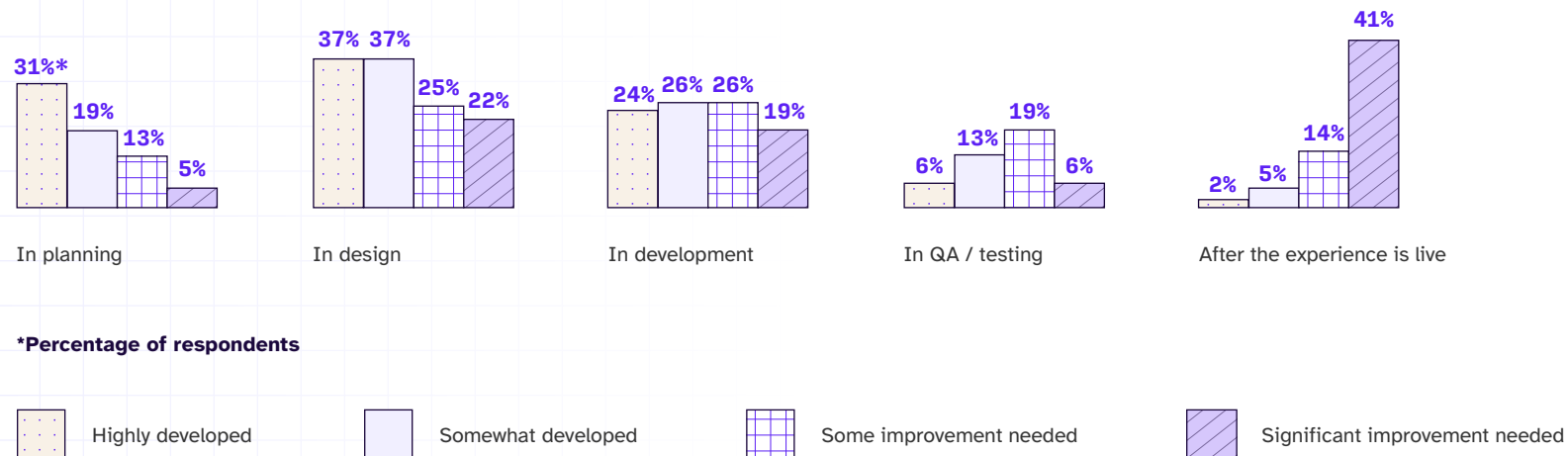
Our insight

Centralized accountability can help organizations ensure their entire digital portfolio meets consistent accessibility standards, reducing the risk that unreported issues in one or more digital experiences trigger a lawsuit. Additionally, when a central party is driving organization-wide digital accessibility efforts, they can more easily align accessibility with key revenue-driving initiatives—such as new product launches, website redesigns, or major marketing campaigns.

Addressing accessibility early in the digital experience creation life cycle

With 69% of respondents struggling to find adequate time to fix accessibility issues, it's clear that efficient processes are key to making digital accessibility sustainable. The earlier organizations incorporate accessibility into digital experience creation, the less time they typically need to spend implementing fixes later on in the software or product development life cycle, when it's more challenging, and usually more expensive, to do so. As a result, proactive organizations can accomplish more with fewer resources.

This year's research suggests that considering accessibility during the early stages of digital experience creation is a marker of a mature practice. More than two-thirds (68%) of respondents who rate their digital accessibility practices "highly developed," and 56% of those who rate their practices "somewhat developed," say their organization begins addressing accessibility in either planning or design. Meanwhile, the majority of those who indicate that their program needs improvement report that their organization doesn't tackle accessibility until development, testing, or production.
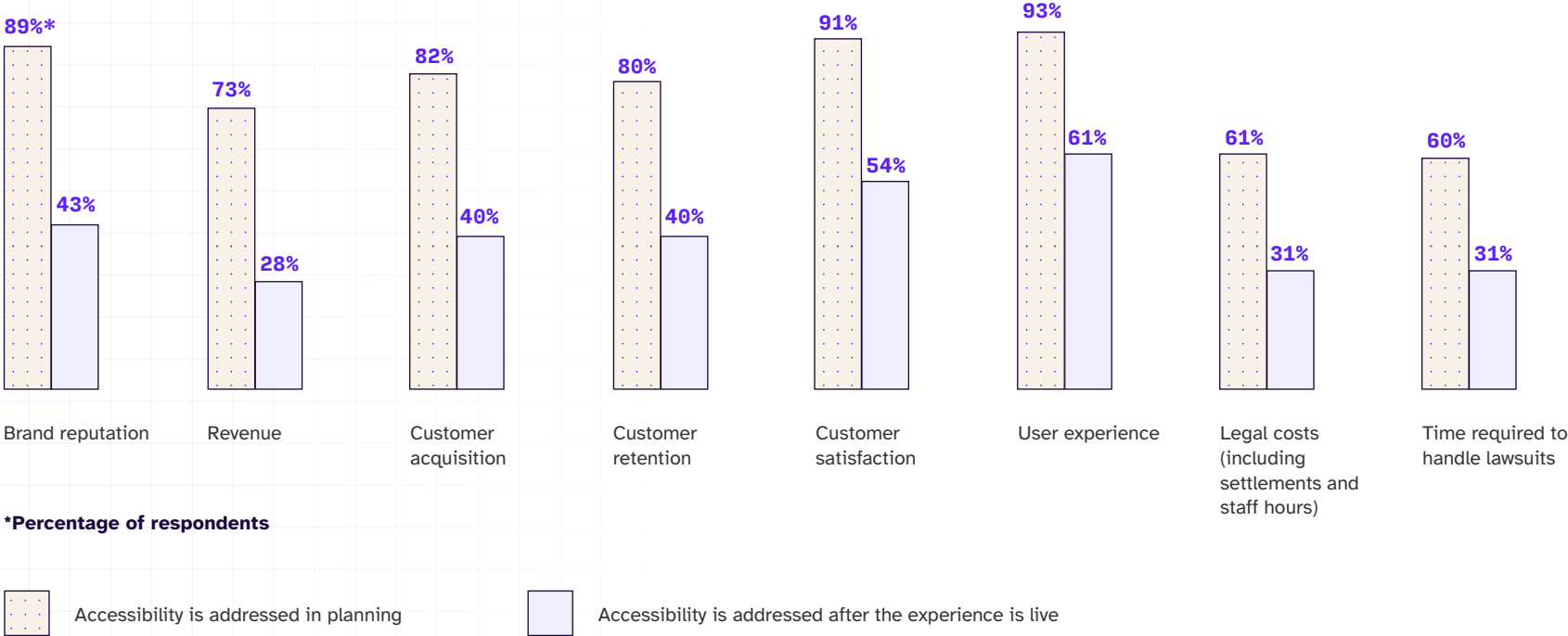
Stage of experience creation at which digital accessibility is addressed, by reported level of development of accessibility practices

In planning — 31%*, 19%, 13%, 5%
In design — 37%, 37%, 25%, 22%
In development — 24%, 26%, 26%, 19%
In QA / testing — 6%, 13%, 19%, 6%
After the experience is live — 2%, 5%, 14%, 41%

*Percentage of respondents

Legend:
- Highly developed
- Somewhat developed
- Some improvement needed
- Significant improvement needed

Historically, organizations have found it difficult to shift to a more proactive approach: incorporating accessibility earlier in the process of creating a digital experience was the single most widely reported challenge among respondents in last year's survey. However, our findings suggest that organizations who do make this process adjustment benefit.

Respondents at organizations that approach accessibility in the earliest stage of digital experience creation—planning—are more likely than those who take a reactive approach to report improved business performance due to digital accessibility. Specifically, the 20% of respondents who say their organizations consider accessibility in planning report improvements in brand reputation, revenue, and other organizational priorities at much higher rates than the 11% who say they rely on retroactive remediation of live experiences.

Performance improvements as a result of digital accessibility, by stage of experience creation at which accessibility is addressed

Category	Accessibility is addressed in planning	Accessibility is addressed after the experience is live
Brand reputation	89%*	43%
Revenue	73%	28%
Customer acquisition	82%	40%
Customer retention	80%	40%
Customer satisfaction	91%	54%
User experience	93%	61%
Legal costs (including settlements and staff hours)	61%	31%
Time required to handle lawsuits	60%	31%

*Percentage of respondents

Legend:
- Accessibility is addressed in planning
- Accessibility is addressed after the experience is live

Section 04

Conclusion

As digital technology continues to advance, it's poised to play an ever-more-integral role in how we find the information, products, and services we need to live fully. Digital accessibility is essential for ensuring an equitable world, where everyone can participate in this connected future.

As organizations aim to meet the needs of all users—both today and tomorrow—it's crucial that they understand accessibility isn't a one-time box to check. It's an ongoing practice that's part of, not separate from, other organizational priorities, from fulfilling DEI commitments to retaining customers.

Section 05

Recommendations

Based on the findings in this report, we recommend organizations take the following actions to strengthen their digital accessibility practices in 2024 and beyond.

- **Communicate about successes and challenges.**
  The fact that practitioners are roughly half as likely as senior leaders to consider their digital accessibility practices "highly developed," and more likely to report resource gaps, points to a need for more frequent communication at all levels of seniority. In addition to discussing the positive impact of digital accessibility, it's important that senior leaders and practitioners maintain an open dialogue about challenges limiting their progress and the resources needed to overcome them.

- **Make legal counsel a stakeholder in digital accessibility.**
  Given that 80% of general counsel and legal decision-makers report that their organization is at risk of digital accessibility-related legal action in the next 12 months, compared to just 53% of respondents overall, it's clear that legal teams are invested in digital accessibility. As the team that's often the most well-versed in an organization's compliance obligations, legal counsel should be empowered to help other team members better understand the legal requirements for digital accessibility, realistically assess the risk of legal action, and prioritize work that will meaningfully reduce this risk.

- **Start addressing digital accessibility in planning.**
Respondents who say their organizations begin addressing accessibility in planning are more likely to report improved user experience, customer acquisition, and even revenue as a result of digital accessibility than those who start later, once development is underway. By enabling product managers and designers to incorporate accessibility into the earliest stages of experience creation, team leaders can reduce the amount of time needed to fix issues, and ultimately deliver more accessible, valuable experiences.

- **Invest in accessibility training.**
Education is integral to effective, sustainable digital accessibility, so it's no surprise that respondents put it at the top of their wish list of desired resources for improving their programs. Providing every team involved in digital experience creation and maintenance with role-specific training will ensure they have the skills necessary to prioritize accessibility in their day-to-day responsibilities.

- **Establish centralized digital accessibility governance.**
Respondents who say a central party is accountable for their organization's digital accessibility efforts are nearly 170% more likely than those without central oversight to report revenue improvements as a result of digital accessibility. Implementing an organization-wide framework for governing and managing accessibility is the best way to establish centralized accountability, particularly at large organizations. This framework should include creating a policy with clear standards, and consistently reporting on conformance with these standards.

Section 06

About us

About Level Access

After more than 20 years as a dedicated partner to organizations of all sizes, across industries, we understand the challenges that organizations face when adopting and scaling their digital accessibility practices. Our unified solution combines advanced technology with the market's deepest bench of expertise, empowering organizations to confidently navigate these challenges and ensure their digital experiences are accessible to all.

The Level Access Platform provides a single source of truth for tracking, managing, and reporting on accessibility across your digital portfolio, serving as a central system of record for decentralized workflows. Additionally, our tools for practitioners involved in the software or product development life cycle seamlessly integrate with the platforms teams are already using, making it easy for experience creators to proactively embed accessibility in their day-to-day work.

Beyond technology, our expert managed services include manual testing (with use case testing by people with disabilities), detailed Design Evaluations, demand letter review, and support with program management. And with on-demand role-specific training through our Academy, it's easy to equip every team with the skills they need to adopt an effective, sustainable approach to accessibility.

**To learn more, visit LevelAccess.com.**

info@levelaccess.com
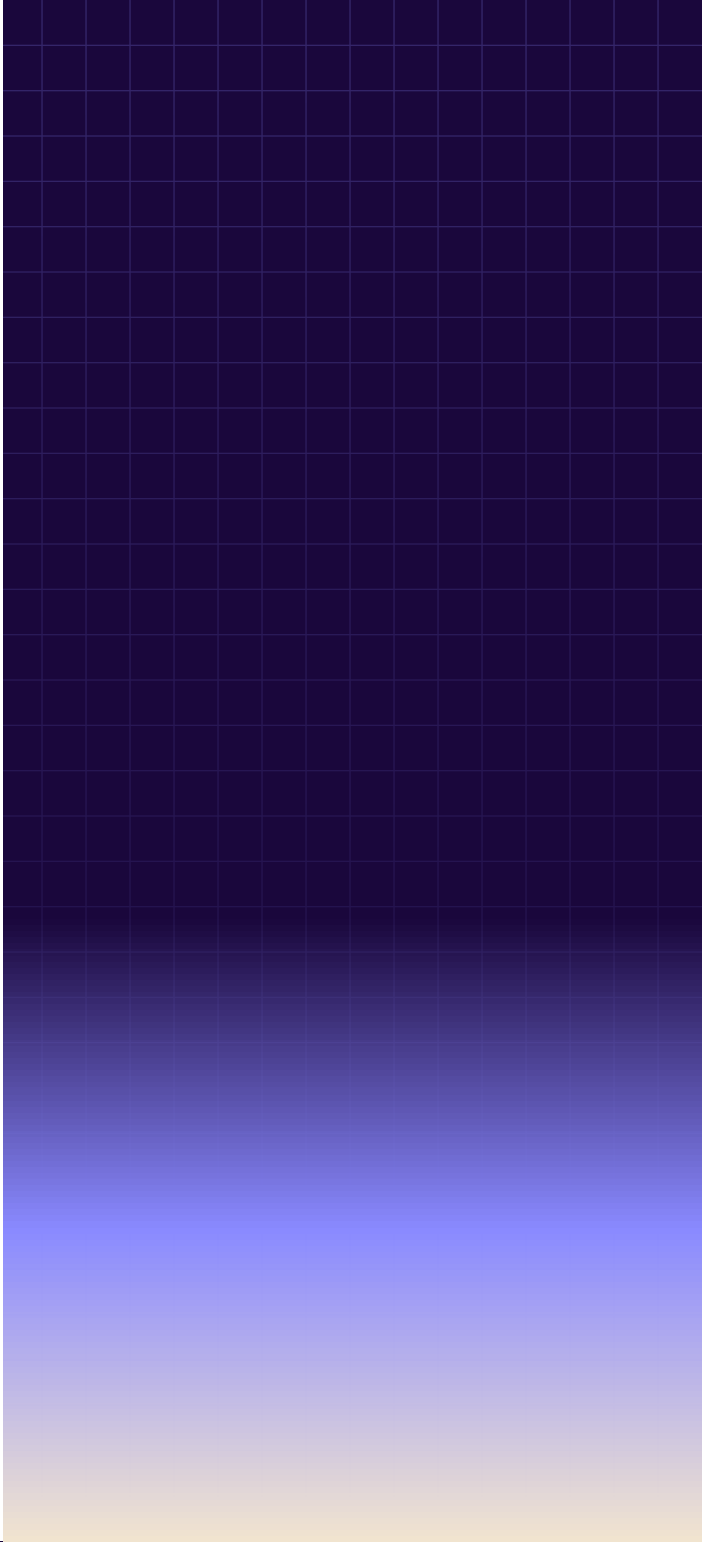
About G3ict and IAAP

The Global Initiative for Inclusive Information and Communication Technologies (G3ict) is a nonprofit organization formed by leading industries, disability advocacy groups, and public organizations in cooperation with the United Nations Department of Economic and Social Affairs to address the inequality and lack of accessible products and services for persons with disabilities. For more information about G3ict, please visit www.g3ict.org.

The International Association of Accessibility Professionals (IAAP), a division of G3ict, has a mission to define, promote, improve, and diversify the accessibility profession globally. IAAP equips organizations to build a skilled workforce and develop accessibility maturity by providing certifications, professional education, solution-based tools, and subject matter expertise. For more information about IAAP, please visit www.accessibilityassociation.org.
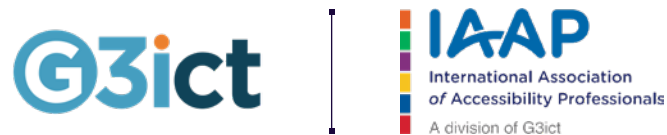
About Vanson Bourne

Vanson Bourne is an independent specialist in market research for the technology sector. Their reputation for robust and credible research-based analysis is founded upon rigorous research principles and their ability to seek the opinions of senior decision makers across technical and business functions, in all business sectors and all major markets. For more information, visit www.vansonbourne.com.