

## Microsoft Accessibility Survey

### Organizations see accessibility as an important factor in the development of their products and services.

With the right resources accessibility could play an even bigger role in business considerations.

A recent survey of IT managers for large and medium-sized organizations in the US, UK and Germany regarding their IT development found that accessibility<sup>1</sup> is viewed as one of the most important business considerations organizations look at when designing and building their products and services. Among those surveyed, 63% ranked accessibility among their top four considerations behind reliability (77%), information security (73%), and privacy/online safety (67%).

Furthermore, an overwhelming majority (93%) of IT managers surveyed believed accessibility should play an even bigger role in their organization than it currently does. When asked why accessibility wasn't playing as important a role in their organization as they believed it should, a lack of resources (43%) was most commonly cited as the reason (**Table 1a**).

Business strategy, regulatory compliance, product and service differentiation are the key aspects around which accessibility plays a key role. This could probably be the reason why accessibility is considered to be an important part of the product development cycle itself.

Technology standards, consultants, professional organizations and industry are the most popular sources organizations leverage to learn more about accessibility (**Table 1b**). However, the data indicates that *there is no single place, resource or body that companies or organizations can turn to in order to appropriately find and evaluate skills related to accessibility*. Centralized industry resources for information, professional certification, and education could reduce costs and improve consistency in design consideration.

Customer satisfaction is the main tool used to measure the impact of accessibility externally. The other external tools used to measure impact are third party reviews and market research tests with customers. Internally, usability testing, functional testing, customer complaints, and internal product reviews are the main tools used to measure the impact of accessibility (**Table 4**).

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<sup>1</sup> For purposes of this study, accessibility was defined as “making it easier for everyone to see, hear, and use technology, and to personalize their computers to meet their own needs and preferences regardless of age or ability.”

## Accessibility is an important business consideration

- More than half of businesses surveyed (63%) consider accessibility to be an important business consideration.
- Accessibility is an important business consideration for organizations that cater to business support (68%), computer related products & services (67%), and finance and insurance (66%). This is likely due to the need to be accessible to a diverse customer base across age and ability. Services which are available online have significantly higher accessibility requirements.
- Enterprise organizations (66%) prioritize accessibility over medium-sized business organizations (59%). This indicates that bigger organizations have more of the resources necessary to dedicate toward accessibility and further validates that resource constraints are a big challenge.

## Businesses use several different resources to learn about accessibility—there is no single accessibility resource

- Lack of resources is the main reason why accessibility does not play a more important role in the US (51%) and UK (49%). However, in Germany, along with lack of resources (27%), it is also a lack of understanding and education about accessibility (27%) that represent a challenge.
- In Germany, learning about accessibility is mostly done through consultants (51%), whereas in the US and UK information is gathered through technology standards (63%) and industries (52%) respectively.

**Table 1a: Why accessibility doesn't play a more important role**

Reason	Total	US	UK	Germany
<i>Base</i>	<b>557</b>	<b>181</b>	<b>193</b>	<b>183</b>
Lack of understanding and education	29%	27%	35%	26%
Lack of resources	43%	27%	51%	49%
Low perceived ROI/Business value	29%	24%	29%	33%
Not relevant to our business strategy	18%	23%	16%	15%
Unable to find qualified/knowledgeable employees	22%	23%	23%	19%
Not integrated into business processes including product development or testing	13%	13%	10%	15%
Unable to measure impact of accessibility investments	17%	21%	18%	12%
Others	3%	4%	4%	1%

**Table 1b: Information sources leveraged to learn more about accessibility**

Information sources	Total	US	UK	Germany
<i>Base</i>	<b>601</b>	<b>201</b>	<b>200</b>	<b>200</b>
Technology standards (ARIA, WCAG, KCAG, ISO, W3C etc.)	49%	<b>63%</b>	46%	39%
Professional organizations	47%	58%	47%	37%
Consultants	47%	49%	42%	<b>51%</b>
Industry	47%	53%	<b>52%</b>	37%

## Evaluating knowledge about accessibility

- Organizations primarily (45%) build additional accessibility knowledge through internal training and hiring across all three countries/regions. While employees appear to be hired with clarity in role to be performed and domain experience, it appears there is a gap in the industry. Unlike Privacy or Security, Accessibility does not have an established professional society or development certification program for developers and other Accessibility professionals.
- Job description (68%) and job experience (63%) are the key means for evaluating required accessibility knowledge of new employees. However, vendors and other outsourced third parties are evaluated based on business references, recommendations, certifications and accreditation.

**Table 2: Parameters to identify and evaluate required knowledge for accessibility: new employees, vendors and outsourced third parties**

Evaluation Parameters	New Employees	Vendors	Outsourced Third Parties
<i>Base</i>	<b>601</b>	<b>601</b>	<b>601</b>
Included in job descriptions	<b>68%</b>	25%	14%
Job experience	<b>63%</b>	35%	25%
Certifications	39%	<b>44%</b>	<b>30%</b>
Business references, recommendations	35%	<b>46%</b>	<b>30%</b>
Accreditation	31%	<b>39%</b>	<b>28%</b>

- Organizations self-identify as having an above average level of knowledge and expertise (85%) in designing and building products that are accessible to people of all ages and abilities. Organizations in the US (52%) report a very high level of knowledge about accessibility compared to Germany (38%).

**Table 3: Organizations knowledge and expertise level across countries about accessibility**

Knowledge level	Total	US	UK	Germany
<i>Base</i>	<b>601</b>	<b>201</b>	<b>200</b>	<b>200</b>
<b>Top 2 Box* knowledge and expertise</b>	<b>85%</b>	<b>89%</b>	<b>84%</b>	<b>81%</b>
Very high knowledge and expertise	44%	52%**	41%	38%
Above average knowledge and expertise	41%	37%	43%	43%
Average knowledge and expertise	13%	10%	14%	17%
Below average knowledge and expertise	1%	1%	3%	1%
Very low knowledge and expertise	0%	-	-	2%
<b>Bottom 2 Box* knowledge and expertise</b>	<b>2%</b>	<b>1%</b>	<b>3%</b>	<b>3%</b>

\*Top 2 box (Very high + Above average knowledge and expertise); Bottom 2 (Very low + Below average knowledge and expertise)

\*\* Significant at 95%

## Tools used to measure impact of accessibility internally and externally

- Customer satisfaction (56%), third party reviews (46%) and market research tests with customers (46%) are the most common tools used to measure accessibility across all three countries externally.
- Internally, usability testing (51%), functional testing (50%), customer complaints (49%), and internal product reviews (48%) are the most common tools used to measure the impact of accessibility.

**Table 4: Tools to measure impact of accessibility externally and internally**

External tools used to measure impact of accessibility externally	Total	US	UK	Germany
<i>Base</i>	<b>601</b>	<b>201</b>	<b>200</b>	<b>200</b>
Customer satisfaction with accessibility	<b>56%</b>	<b>60%</b>	<b>60%</b>	<b>50%</b>
Third-party reviews	46%	57%	42%	40%
Market research tests with customers	46%	47%	46%	45%

  

Internal tools used to measure impact of accessibility internally	Total	US	UK	Germany
<i>Base</i>	<b>601</b>	<b>201</b>	<b>200</b>	<b>200</b>
Usability testing	51%	54%	53%	46%
Functional testing	50%	53%	48%	50%
Number of customer complaints	49%	49%	43%	54%
Internal product review	48%	57%	44%	45%

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