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The Click-Away Pound Report 2019

Revisiting the online shopping experience of customers with disabilities, and the cost to business of ignoring them.

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Introduction and Background

In 2016 we published the ground-breaking Click-Away Pound Report which analysed the experience of people with access needs when shopping online. It was the first research which quantified the online spend of users with access needs and the potential commercial opportunity represented by an accessible and inclusive web presence.

The original report has been cited by governments, charities and commercial organisations and its findings used worldwide, but its intention was to show businesses that there is a commercial opportunity in ensuring that their web presence is inclusive, and to quantify the scale of that opportunity. As we wrote in 2016, “If the law, advice, guidance and campaigning has not persuaded business of the need for universal access to websites then perhaps the argument needs more commercial clarity.”

Three years on, we thought it was time to see whether there is any evidence that online shopping is more accessible. Three years on, the 2019 survey reports on the changes and the challenges in online retail for the customer with access needs and the businesses who serve them.

This report centres on comparing the findings of the 2016 survey with those of 2019. The methodology used to conduct the survey remained the same as before; the survey was carried out entirely online using the Online Surveys tool from Jisc (formerly BOS developed at the University of Bristol). The Survey was launched from a dedicated website at ClickAwayPound.com, and participation was sought through website promotion, word of mouth, disability organisations and networks, social media and publicity through supporting organisations, e-mailshots and briefings at events. Participants were entirely self-selecting.

The 2019 survey repeated the 2016 questionnaire in full to enable a direct comparison of user responses. One section of the report is new for the 2019 survey; *CAP Focus* takes a closer look at one particular sector of the UK online retail market. In response to critical user comments in the 2016 survey, this edition’s *CAP Focus* looks at accessibility in the telecommunications sector.

In a further refinement we also sought specific data regarding the use of reCAPTCHA, as feedback from the 2016 Survey suggested this was a significant access barrier.

As in 2016, we encouraged participants to add their own comments about their online experience. Some of these comments have been cited in the report as reminders that the accessibility and usability issues highlighted here can have a significant personal impact on the individual.

Executive Summary

Our direct experience as accessibility advisers and practitioners over the past few years suggests that some organisations are taking this issue seriously. However, too many websites are still published with coding errors and omissions that fail the basic international standards, and are designed with little apparent consideration for the needs of the user with a disability.

In February 2019, WebAIM conducted an accessibility evaluation of the home pages for the top 1,000,000 web sites using their WAVE accessibility testing tool. Despite the fact that the study focused only on automatically detectable issues, 97.8% of home pages exhibited WCAG2 failures. [1]

The current state of web accessibility is, as WebAIM put it, "… a rather dismal picture" and continues to be an everyday challenge for the growing number of users with access needs.[2]

> Based on this survey's findings, we estimate that 7.15 million disabled internet users in the UK have access needs; an increase of more than 1 million since 2016.

Customer experience continues to demonstrate the low level of priority given by businesses to accessibility, perhaps because the mistaken perception remains that accessibility issues affect a small number of visually impaired people. Although visual impairment is the most obvious barrier which can impact on someone's ability to use what is still thought of as a predominantly visual medium, people with a wide range of auditory, physical, cognitive, neurological and speech disabilities also demand consideration. Taken together, there are very significant numbers of people with a broad range of impairments who face barriers and frustrations when using the internet. Yet no user with any of these impairments need be excluded if their access needs are considered appropriately.

[1] The WebAIM Million, February 2019.
[2] Those needs which arise because of the effects of someone's disability when interacting with a website or app.

Government figures show that more people are connected to the web, more money is spent online, and the number of internet users with a disability has passed 10 million; all these figures will continue to grow over time.

The online spending power of people with access needs in the UK is now £24.8 billion

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These figures underline the fact that the commercial incentive for making the online shopping experience as easy and accessible as possible is greater than ever. With the percentage of people with access needs who will click away from an inaccessible site remaining at almost 70%, the Click-Away Pound has risen to £17.1 billion.

The click-away pound in the UK in 2019 now stands at £17.1 billion

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Despite this clear commercial imperative, the findings of the 2019 survey point to a distinct and disappointing lack of progress over the last three years. As one survey respondent said,

> "I did this survey back in 2016 and to be honest things haven't improved. In fact, some of the modern ways of designing websites has made navigation even harder."

Table 1: Comparison of key findings, 2016 to 2019

Finding	**2016**	**2019**
Number of disabled people online with access needs	6.10m	7.15m
Percentage of disabled people with access needs who say they 'click away' from a site with barriers	71%	69%
Value of the 'click away' spend which went to more barrier-free sites	£11.75b	£17.1b

Percentage of users with access needs who feel accessibility is more important when making spending decisions than price	81%	75%
Percentage of users with access needs who would spend more if there were fewer barriers	82%	86%
Percentage of users with access needs who limit their shopping to sites they know are barrier-free	85%	83%
Percentage of users with access needs who contacted the site owner about barriers they experience	7%	8%

The results clearly show that business generally continues to ignore the issue despite increasing amounts of data highlighting the business issues, reputational risks, potential commercial loss and the requirements of the law.

Despite the attention on accessibility brought to bear through legislation and the media, and the support for change offered by charities and pressure groups, the current approach is clearly failing to improve the ‘dismal picture’ of the current state of accessibility for individuals with disabilities.

The Scale of the Click-Away Pound in 2019

The value of the Click-Away Pound has grown considerably. In 2016, the first CAP survey established that there were then 6.1 million internet users with access needs in the UK, with a spending power of £16.55 billion. The 2016 survey showed that 71% of those 6.1 million disabled internet users with access needs (4.3 million people) simply click-away when confronted with a problematic website. These figures equated to a click-away figure in the UK of £11.75 billion lost in 2016 from those sites which are not accessible to customers with disabilities.

In 2019, figures from the UK Office of National Statistics (ONS) show that not only has the UK population grown, but there are more people who report that they have a disability and a higher proportion of people with disabilities who are regular internet users.

- The most recent (ONS) estimate of the UK population is 66.44 million in mid-2018 [3]. 53.81 million are aged over 16, of whom 89.4% (48.13 million) have internet access [4].
- In 2016, ONS estimated there were 8.6 million internet users with a disability in the UK [5]. In 2019, ONS estimates that the number of UK disabled adults who are active internet users is 10.07 million.[6]
- This Survey found that the percentage of disabled internet users whose disability affects the way they are able to use the internet, remains unchanged from 2016 at 71%. However, the growth in the disabled adult population and in internet usage overall, results in a 17% increase in the number of disabled users with access needs to 7.15 million people (up from 6.1 million people in 2016. Figure 1).

[3] ONS: *Population Estimates for UK, England and Wales, Scotland and Northern Ireland: mid-2018*. June 2018
[4] ONS: *Internet Users, UK 2019*. May 2019
[5] Ibid.
[6] Ibid.

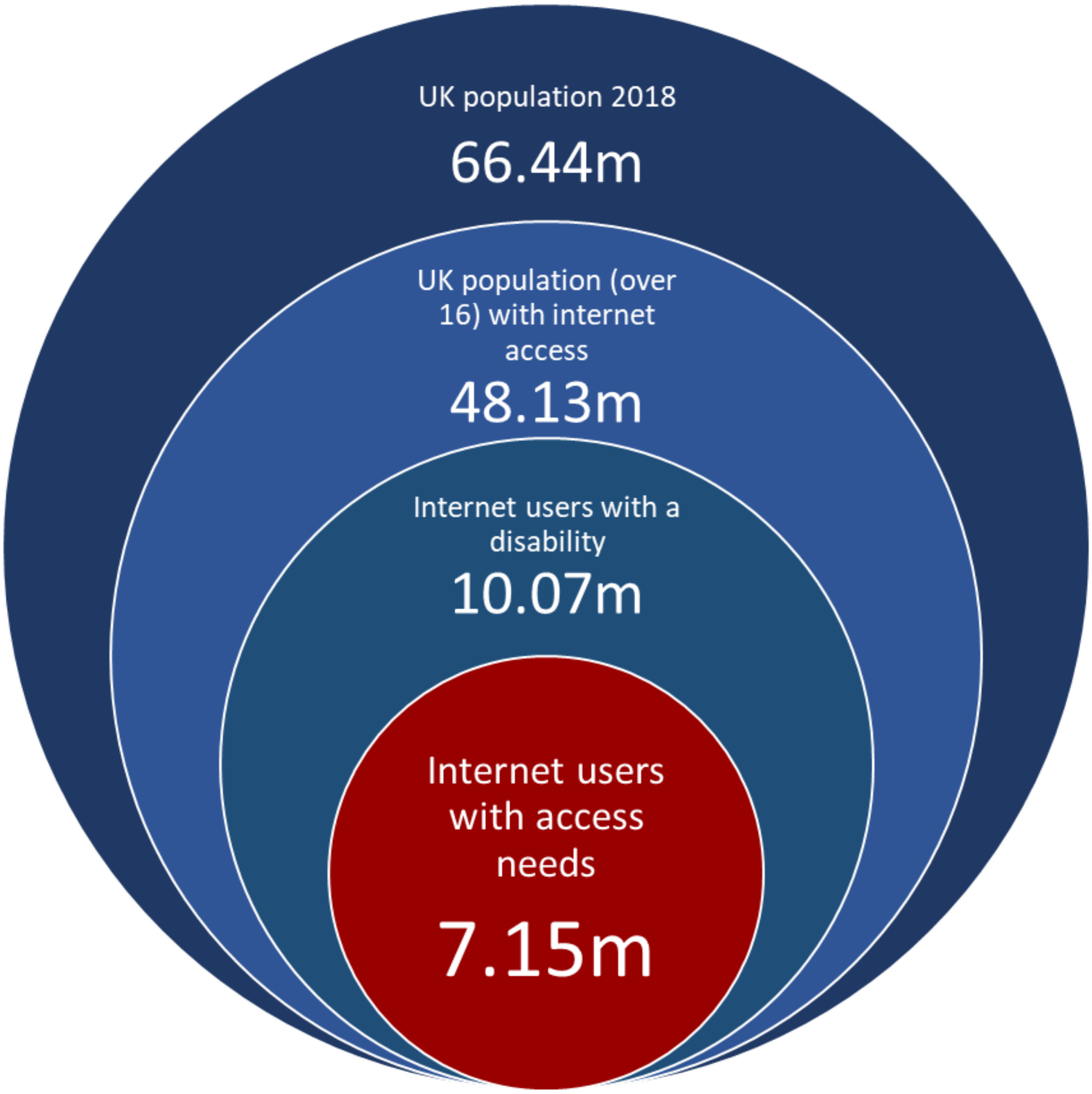


Figure 1: UK Internet users with access needs.

- IMRG Capgemini reported UK online retail spending in 2018 as £166.6 billion [7] equating to an average spend per person over 16 in the UK with internet access of £3,460.
- The 7.15 million internet users with access needs have a combined spending power of £24.8 billion
- The 2019 survey shows that the percentage of people who will simply click-away when confronted with a problematic website is 69% (down

[7] IMRG Capgemini: *e-Retail Sales Index*. January 2019

marginally from 71% in 2016), that is more than 4.9 million active users with an estimated £17.1 billion to spend.

- In the three years since the first survey in 2016 the size of the Click-Away Pound has risen from £11.75 billion to more than £17 billion, an increase of almost 45% (Figure 2).
- This spending is 're-directed' to barrier-free sites, as people who 'click away' will seek to find an accessible alternative and spend their money there.

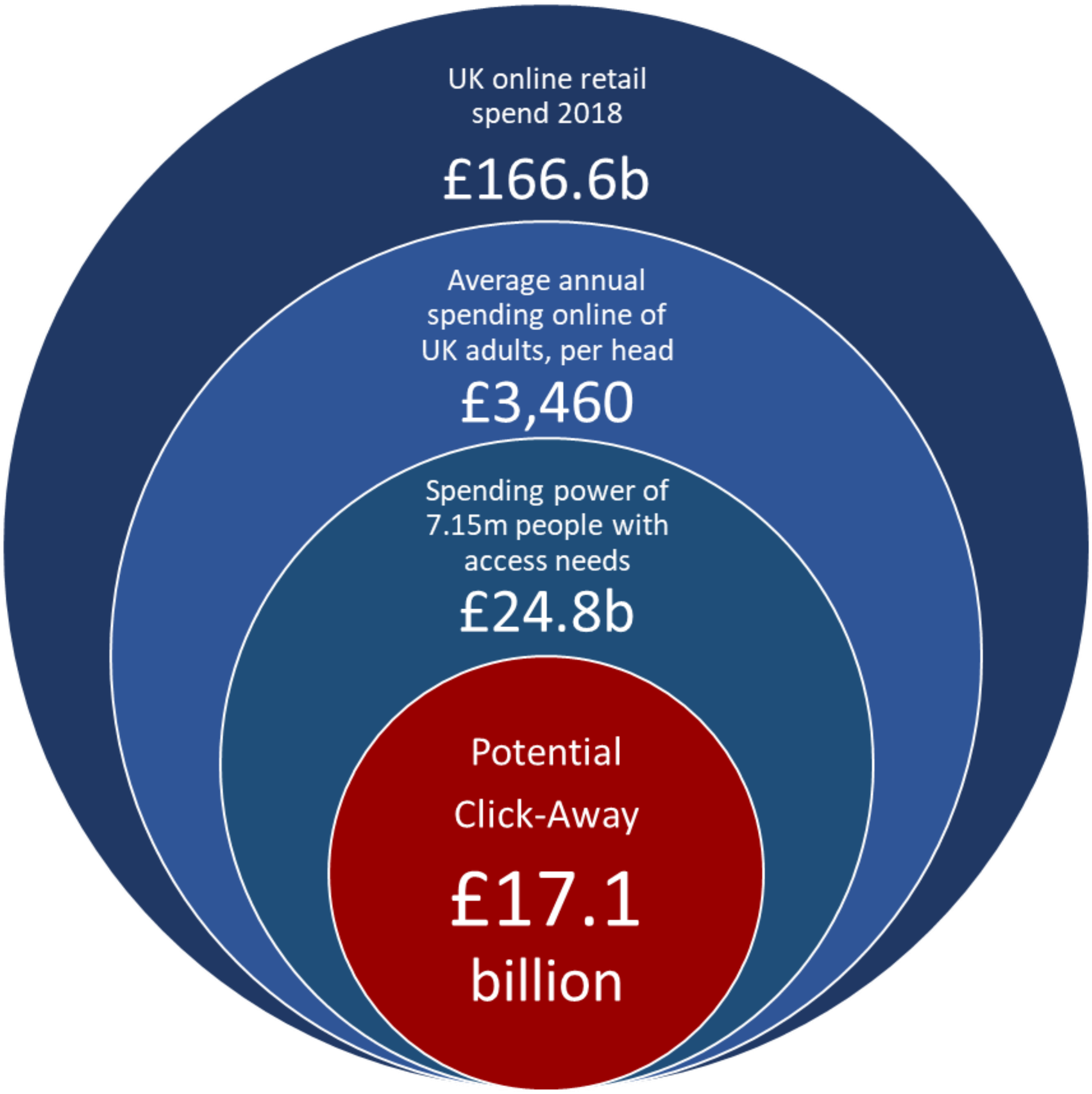


Figure 2: Potential re-directed spending because of inaccessible websites

Access Needs

71% of all survey participants said their disability had an impact on their internet use. This figure is unchanged since the 2016 survey.

Assistive technology

In 2016, 53% of all survey participants used some form of Assistive Technology (AT). In 2019, 63% of all respondents are using AT. In part, this may be related to the increased use of smartphones with inbuilt assistive technology.

In 2016, 58% of respondents who use any form of AT used a screenreader. In 2019, this has fallen to 52%. The proportion of respondents using magnification has risen to 27% (14% in 2016). Speech recognition usage has risen from 13% to 23%.

Preferred device

Use of smartphones in the UK has increased markedly. As Ofcom reported in 2018, "The proportion of people accessing the internet on their mobile has increased from 20% almost a decade ago, to 72% in 2018." [8]

IMRG Capgemini reported in March 2018 that over 40% of UK online sales were made through smartphones in Q4 2018/19, overtaking desktop's share of online sales for the first time. [9]

These findings are reflected in the CAP survey responses. In 2016, amongst all UK respondents, 7% cited their smartphone as their most commonly used device for online shopping. In 2019, this figure has risen to 30%. Amongst users with access needs, the desktop computer as the preferred device has fallen from 38% to 24%, and the laptop from 38% to 29%.

[8] Ofcom: *A decade of digital dependency*. August 2018
[9] IMRG Capgemini: *e-Retail Sales Index*. March 5, 2019

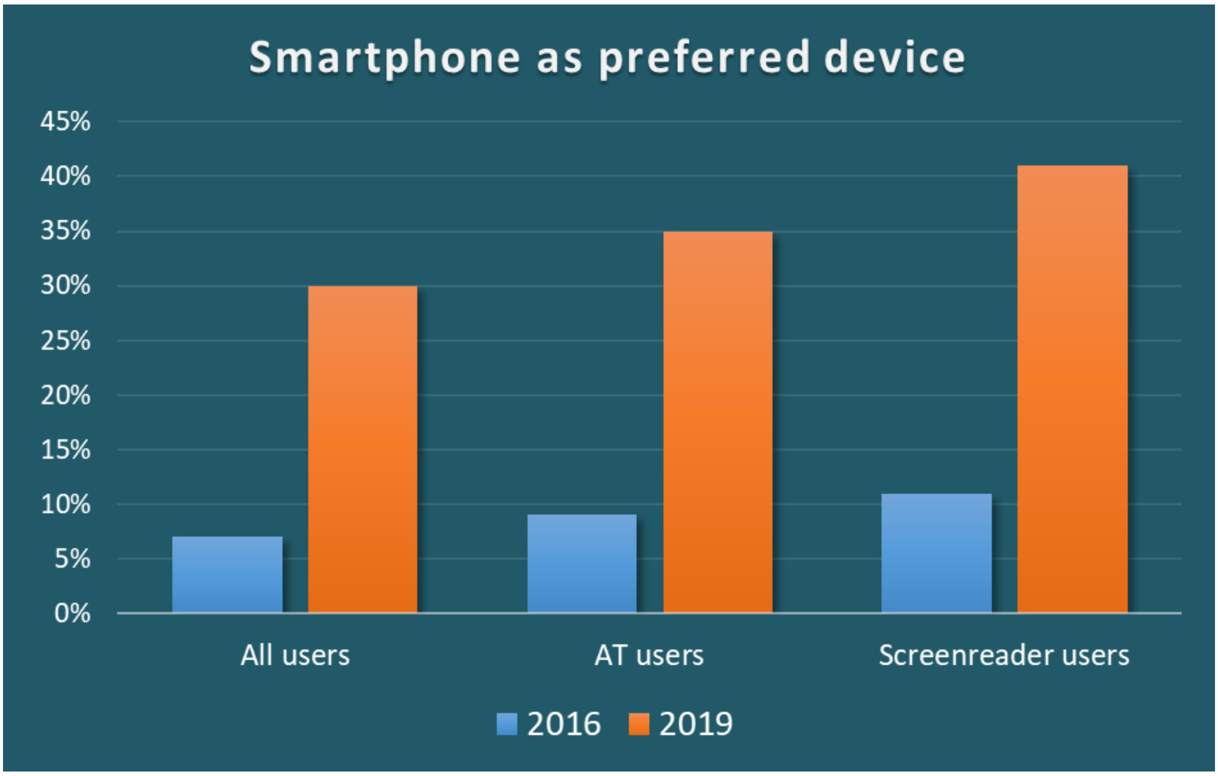
Amongst UK assistive technology users, the preference for smartphones has risen from 9% to 35%.

Amongst UK screenreader users, smartphone preference has risen from 11% to 41%. Amongst this group, a preference for the desktop computer has fallen from 44% to 22%, and the laptop from 38% to 26%. Tablet usage remains static at 21% for all respondents, amongst UK screenreader users remains largely unchanged at 11% (7% in 2016).

> "the software on my phone is free, software for the desktop computer is very expensive."

Table 1: Smartphone as preferred device for online shopping

User category	2016	2019
All users	7%	30%
AT users	9%	35%
Screenreader users	11%	41%



According to annual reports from online fashion retailer ASOS, in 2012 16% of the retailer's traffic came from mobile devices (including tablets). By 2017, mobile devices were making up more than three-quarters (77%) of ASOS' total website visits.

The growth in use of smartphones amongst users with access needs is in part driven by the accessibility features built into the market-dominating iOS and Android operating systems. In parallel, mobile apps are used more frequently for common online tasks. But the accessibility of such apps is still a cause for concern.

> "I find the inaccessibility of apps annoying as well. Some apps are easier to use than the equivalent sites, but some are not usable at all."

Access Barriers

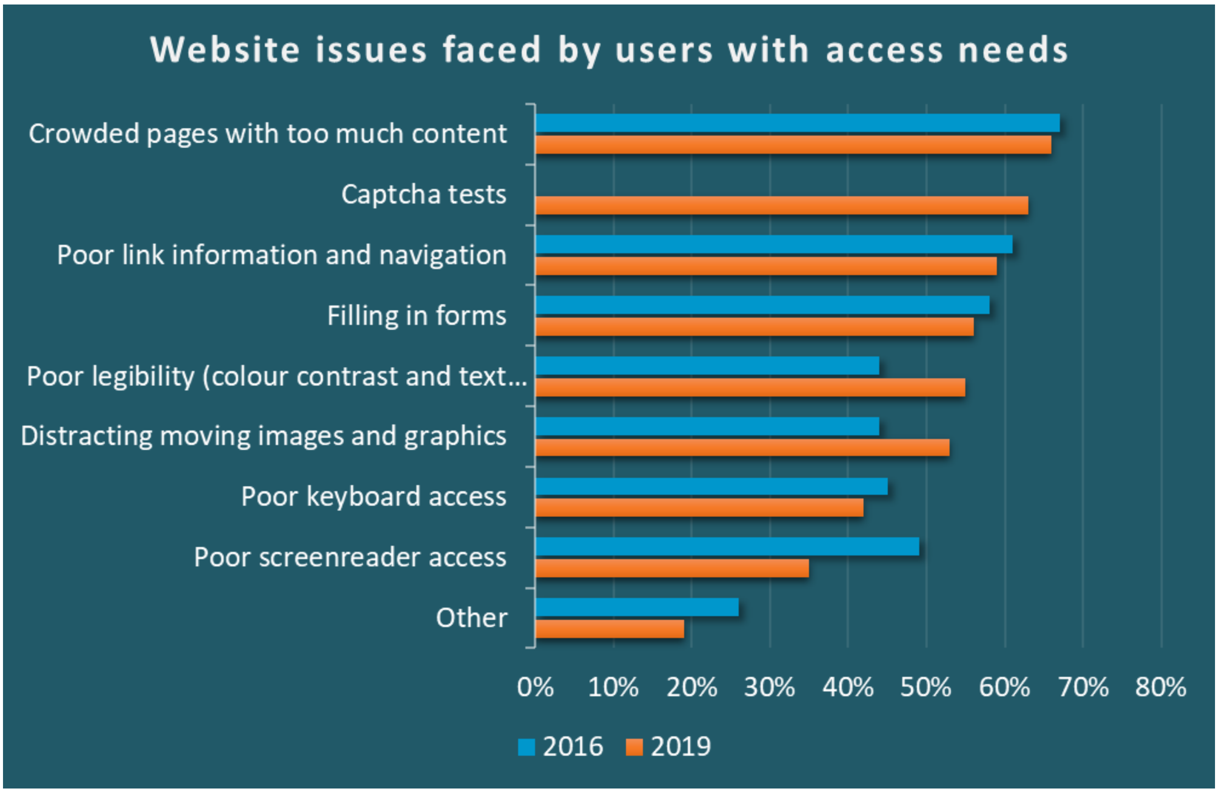
In the most recent survey 72% of participants with access needs said they experienced barriers on more than a quarter of websites they visit for the first time: this remains almost unchanged from the 2016 figure of 73%.

In 2016 we reported that 1 in 3 users with access needs found half of all retail websites difficult to use. In 2019, that figure has fallen to 1 in 4. Of course, what could be characterised as an improving picture still means that a quarter of users find it difficult to use more than half of retail websites. Amongst AT users, the proportion rises to 1 in 3.

Table 2: Ranking of most-common website issues faced by all users with access needs (includes those using AT)

Website issue	2016	2019
Crowded pages with too much content	67%	66%
reCAPTCHA tests	n/a	63%
Poor link information and navigation	61%	59%
Filling in forms	58%	56%
Poor legibility (colour contrast and text layout)	44%	55%
Distracting moving images and graphics	44%	53%
Poor keyboard access	45%	42%
Poor screenreader access	49%	35%
Other	26%	19%

(This is a multi-answer question; 100% would indicate that all this question's respondents chose that option.)



66% of respondents with access needs cited crowded pages as the most-common issue that makes online shopping difficult for them.

Amongst users with access needs, the sort of website issues that present them with particular challenges remains largely unchanged.

- The most commonly cited issue is crowded pages with too much content – 66% of respondents selected this issue, as against 67% in 2016.
- Poor legibility (colour contrast and text layout) is an issue for 56%, up from 44% in 2016.
- The distraction of moving images and graphics has become a more significant issue – 53% of people ticked this box as against 44% in 2016.
- Poor link information is an issue for 59% of people (61% in 2016), although this rises significantly to 77% for screenreader users (67% in 2016).
- Form filling is still an issue for 56% (58% in 2016)

The survey suggests that only screenreader access has improved significantly since 2016, being highlighted as a problem by 35% of users as against 49% in

2016. More negatively, the majority of difficulties reported by people with access needs remain virtually unchanged – crowded content, poor link information, and difficulty with form filling.

Alarmingly, legibility problems and the distraction caused by moving images have both increased significantly.

> "Sites I used to use with little issue are now becoming a problem as they are now taking on moving adverts and constantly loading more adverts as you shop."

The 2019 survey added reCAPTCHA tests to the list of options for the first time, in part because so many respondents mentioned them in the comment section of the first survey. Not surprisingly perhaps, 63% of respondents included reCAPTCHA tests amongst the issues that cause them most difficulty.

> reCAPTCHAs are difficult for me. I struggle with the images and having to type the numbers or letters. In the kind where I have to click which images have a shop or whatever, I always miss some or get confused and use up energy I don't have…

reCAPTCHA tests present most difficulties to screenreader users, of whom 80% selected this option in the survey. Our own research indicates developers address such barriers by providing audio alternatives, however, these are often difficult to understand whilst entering what may be complex data, usually with the screenreader 'speaking' at the same time. Generally, audio alternatives are equally ineffective and do not solve the barrier of the reCAPTCHA system.

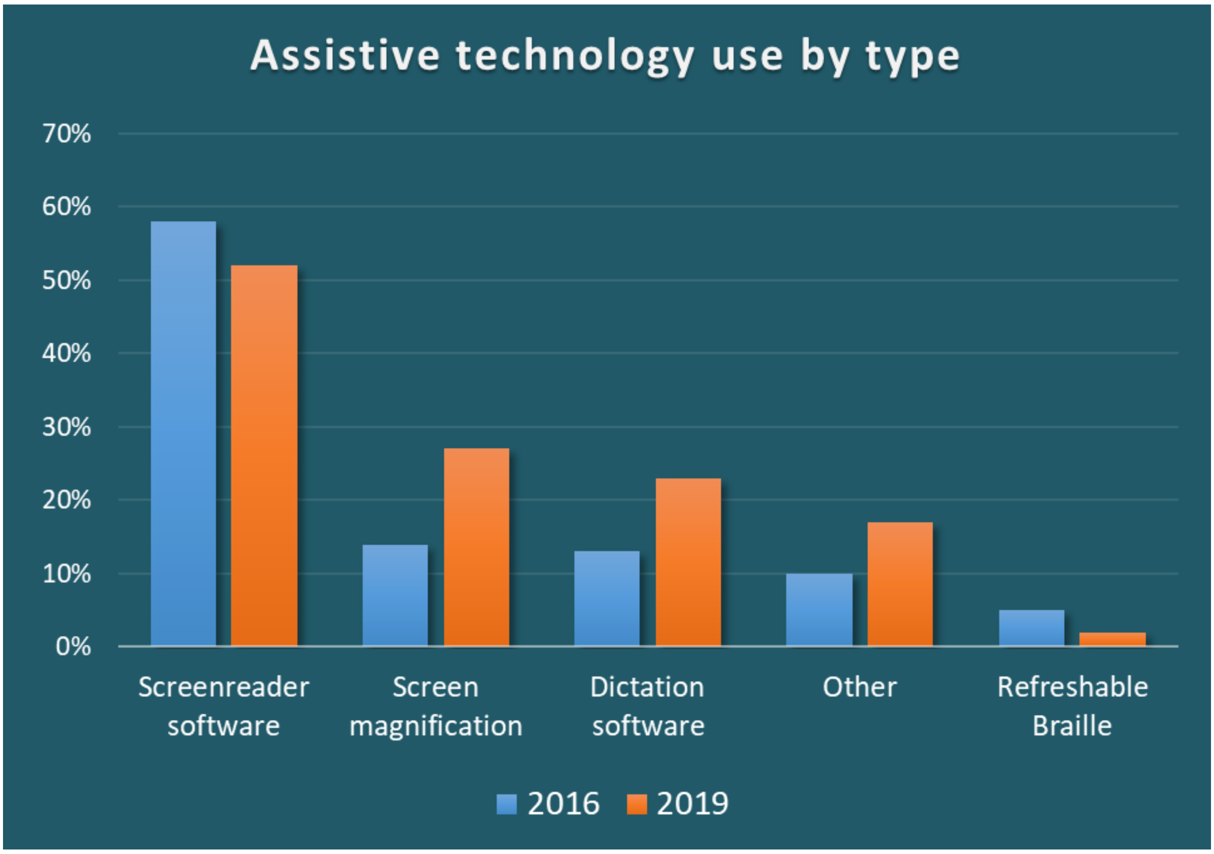
> "reCAPTCHA challenges with no audio alternative have often stopped me from completing a purchase."

Access Barriers for Users of Assistive Technology

53% of all 2016 respondents said they used some form of assistive technology (AT). In 2019, AT users constitute 63% of respondents. Interestingly, all respondents to the 2019 survey who said their impairment affected the way they use the internet (i.e. with access needs) also said they use AT. Of all AT users, 52% are screenreader users (down from 58% in 2016); 27% use magnification (up from 14%), and 23% use speech recognition software (up from 13%).

Table 3: Type of technology amongst AT users

Type of Assistive Technology	2016	2019
Screenreader software	58%	52%
Screen magnification	14%	27%
Dictation software	13%	23%
Other	10%	17%
Refreshable Braille	5%	2%



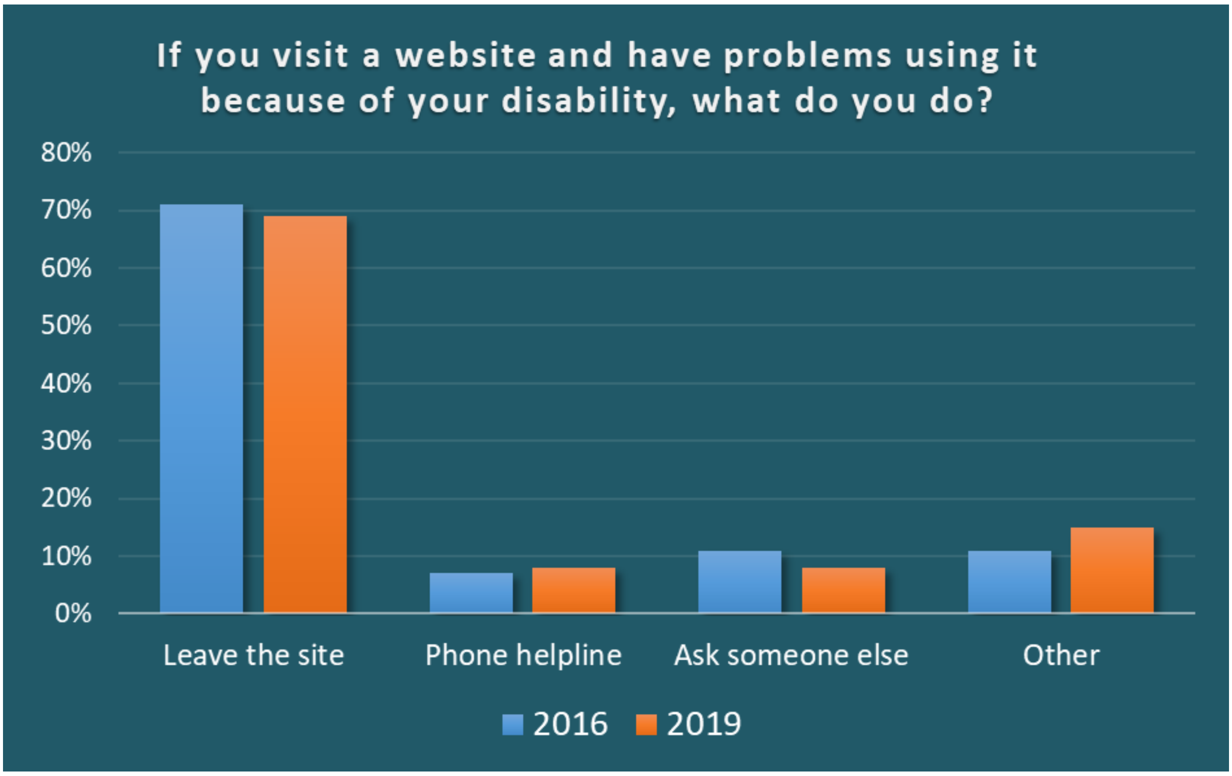
User Responses to Websites with Access Barriers

69% of participants with access needs will simply leave a problematic website.

In 2016, one of the headline findings was that 71% of participants with access needs will simply leave a problematic website and look elsewhere if at all possible. In 2019, the figure is 69%. Although there is no significant change to the percentage the 'lost spend' has increased significantly as the number of connected users and households continues to rise, the proportion of users with access needs also grows, and more retail expenditure takes place online.

Table 4: User response to inaccessible website (users with access needs)

User Action	2016	2019
Leave the site	71%	69%
Phone helpline	7%	8%
Ask someone else	11%	8%
Other	11%	15%



Online Retail Spend

Online retail spending levels

The Survey asked participants with access needs to quantify their expenditure on a monthly and yearly basis.

Table 5: Online spend in the average month by users with access needs

Spend	2016	2019
Less than £50	23%	26%
£50 to £100	28%	26%
£100 to £500	40%	38%
£500 to £1,000	8%	4%
£1,000 to £2,000	0%	4%
More than £2,000	1%	2%
Totals	100%	100%

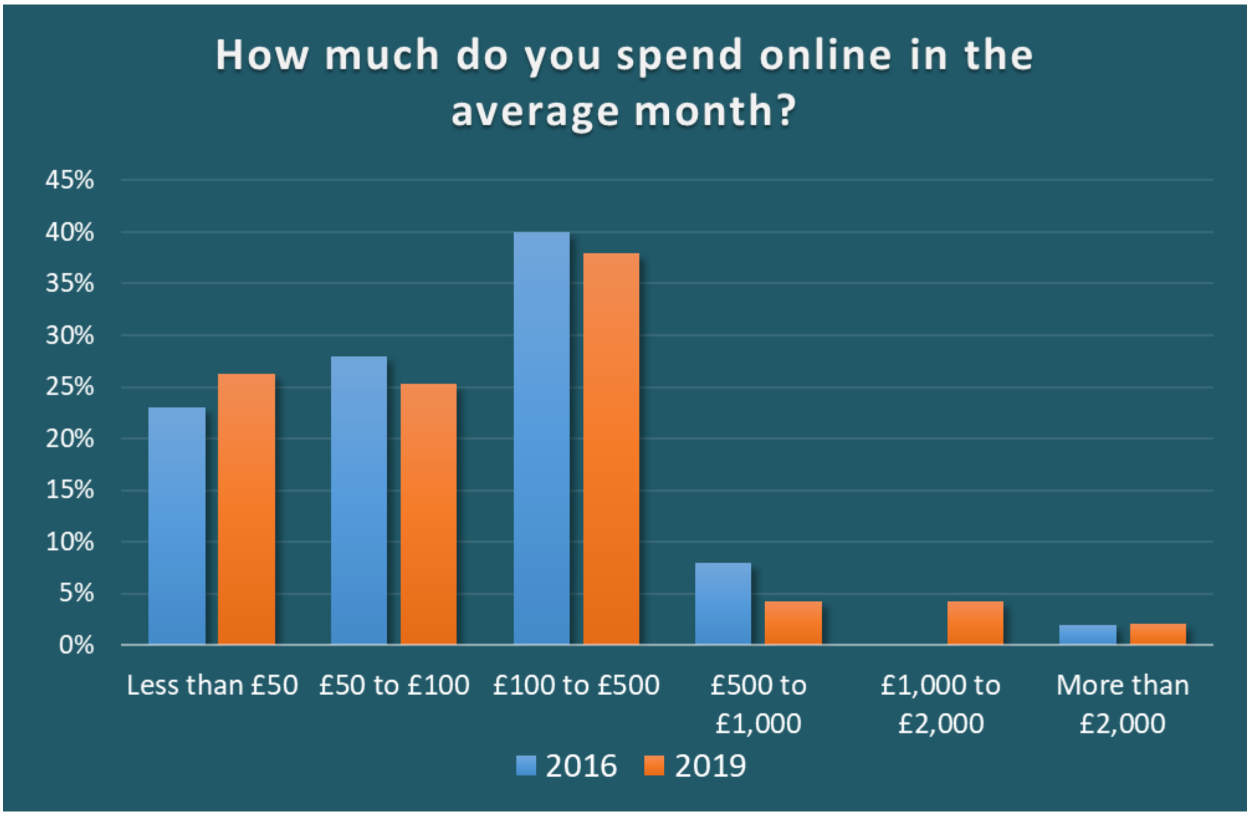


Table 6: Online spend in the previous 12 months by users with access needs

Spend	2016	2019
Less than £100	9%	9%
£100 to £500	18%	12%
£500 to £1,000	19%	20%
£1,000 to £5,000	28%	36%
£5,000 to £10,000	21%	15%
£10,000 to £20,000	4%	4%
More than £20,000	1%	4%
Total	100%	100%

Online spending frequency

The Survey asked respondents how often they purchase through retail websites.

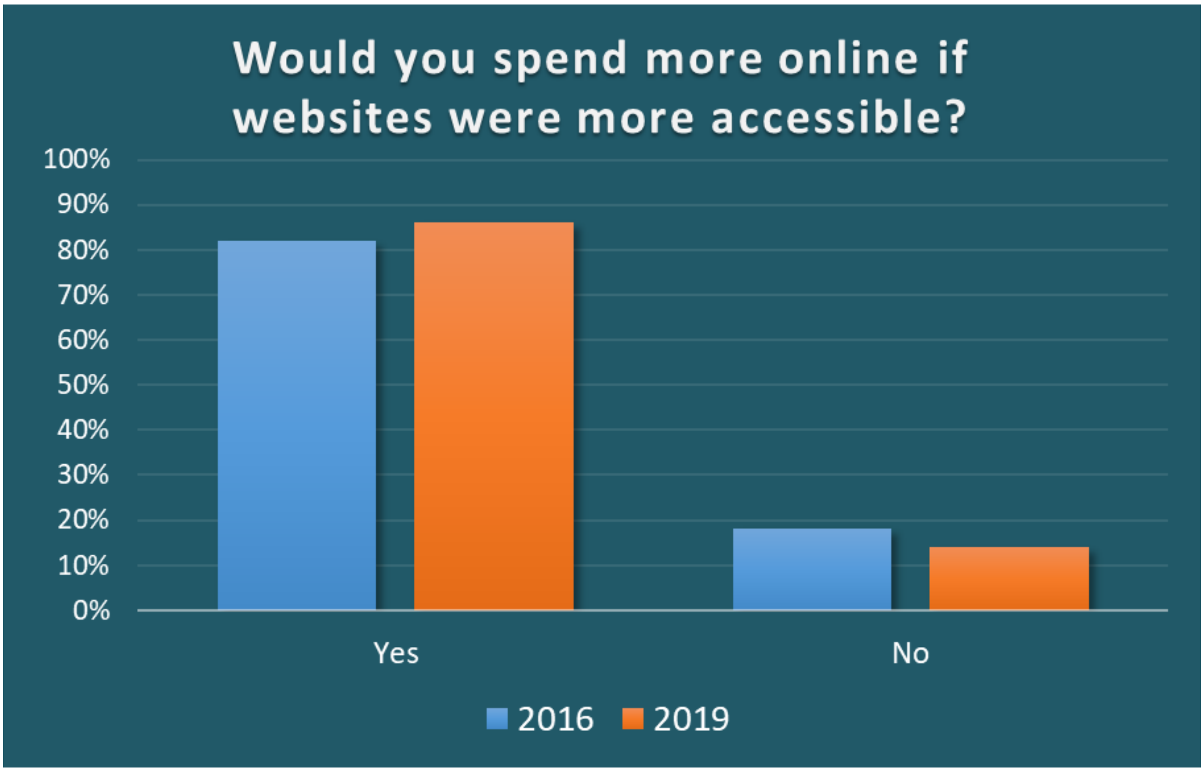
Table 7: Frequency of online purchase by users with access needs in last year

Spend	2016	2019
Every day	5%	2%
Several times each week	31%	32%
Once a week	22%	28%
Once or twice a month	29%	29%
Once or twice in the last year	8%	6%
Not at all in the last year	5%	3%
Total	100%	100%

Table 8: Relationship between online spend and accessibility for users with access needs

86% of participants with access needs said they would spend more if websites were more accessible.

Would you spend more online if sites were more accessible?	2016	2019
Yes	82%	86%
No	18%	14%
Total	100%	100%



In 2016, 82% of respondents with access needs said they would spend more if websites were more accessible. In 2019, the figure has risen to 86%, while 90% of screenreader users say they are held back from spending online by lack of website accessibility.

75% of participants with access needs have chosen to pay more for a product from an accessible website rather than buy the same product from a website that was less accessible.

In 2016 we also found that 81% of participants with access needs had chosen to pay more for a product from an accessible website rather than buy the same product from a website that was less accessible. In 2019, the figure is 75%.

For users with access needs it is clear that accessibility rather than price continues to be the main driving factor behind decisions to spend money on any specific site. There has been little movement in this position since the 2016 survey. This would indicate that site owners still do not appreciate the business case for the accessibility of their site and continue to ignore a significant part of their potential market.

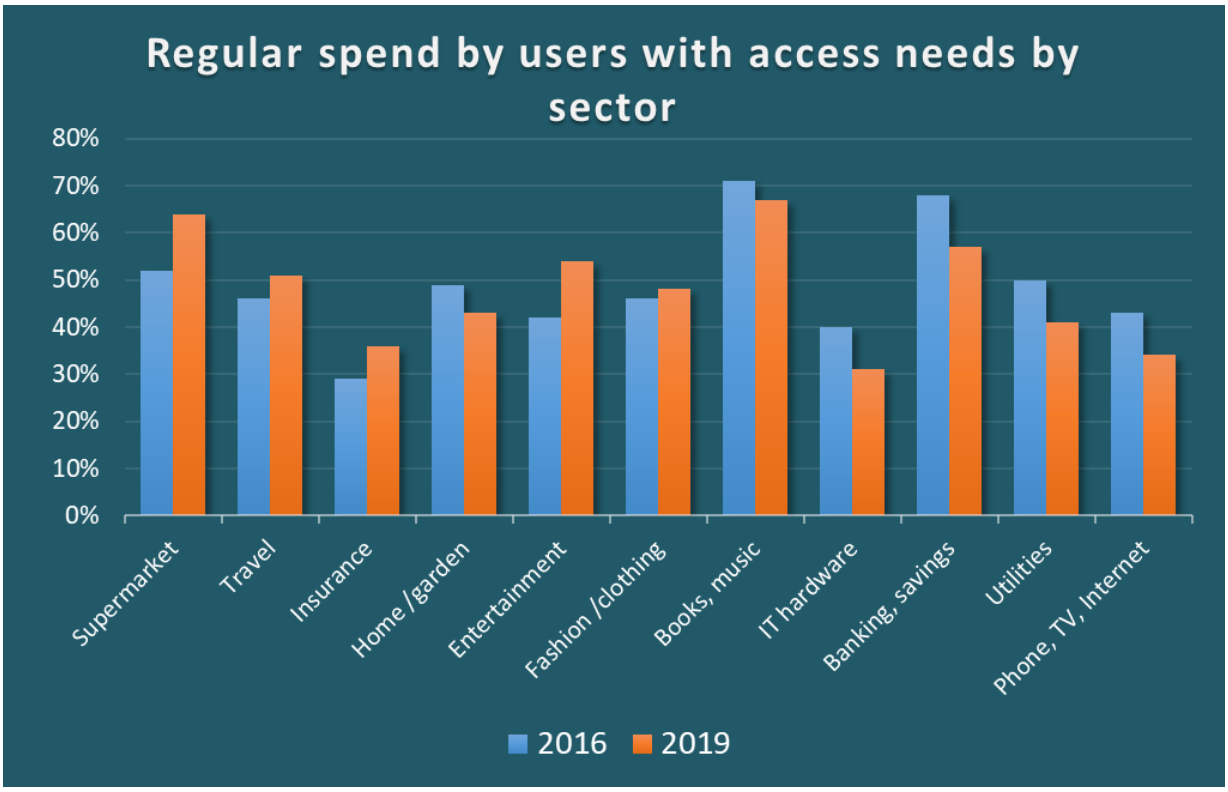
Online spend by sector

Participants' were asked to identify retail sectors in which they regularly shopped online (they could choose as many sectors as applied).

Table 9: Regular spend by users with access needs, by sector

Type of product	2016	2019
Supermarket goods and produce	52%	64%
Travel services (flight, train and bus tickets, etc.)	46%	51%
Insurance	29%	36%
Home and garden products	49%	43%
Entertainment tickets (theatre, cinema, concerts, etc.)	42%	54%
Fashion and clothing	46%	48%
Books, music and software	71%	67%
IT hardware (computer, laptop, tablet, etc.)	40%	31%
Banking, savings and investments	68%	57%
Utilities (gas, electricity and water)	50%	41%

Type of product	2016	2019
Telephone, television and internet services	43%	34%



(This is a multi-answer question; 100% would indicate that all this question's respondents chose that option.)

CAP Focus on the Telecommunications sector

For the 2019 survey, we chose to look in detail at the relationship that people with access needs have with the telecommunications sector; those companies that supply landlines, mobile phones, broadband and entertainment.

In large part, this focus was prompted by the remarks of respondents to the 2016 survey about their generally negative experience of complaints handling. Most online retail transactions tend to be one-off and the customer will form a judgement of a retailer or supplier on the basis of that single shopping experience. In these circumstances, we know from 2016 results that only 7% of users with access needs would contact a business when faced with an access issue; almost unchanged at 8% in 2019.

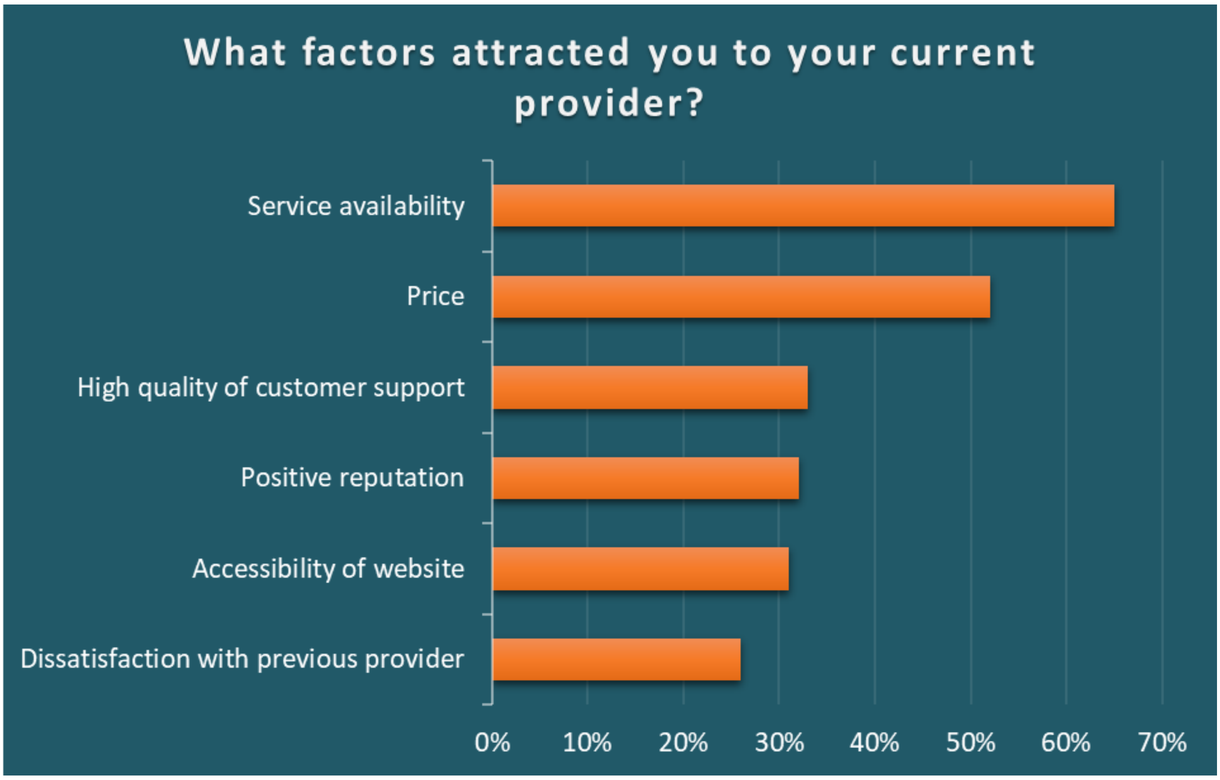
By contrast, a customer's relationship with a telecoms supplier is likely to be a longer term one over months or years where contact with the supplier is almost inevitable at some point. We were therefore interested to find out more about the user's experience of complaint handling when the option of shopping elsewhere is not so straightforward.

This is a new area of research for 2019, so there is no comparative data from 2016.

We asked about the factors that had attracted respondents to their current provider.

Table 10: What factors attracted you to your current provider?

Factor	
Service availability	65%
Price	52%
High quality of customer support	33%
Positive reputation	32%
Accessibility of provider's website	31%
Dissatisfaction with previous provider	26%



(This is a multi-answer question; 100% would indicate that all this question's respondents chose that option.)

Responses were dominated by service availability and price, but almost a third of respondents mentioned the accessibility of the provider's website as a factor in their decision making. This is a significant issue given the numbers involved and the increasing flexibility of the market and customers' increasing willingness to change provider.

Telecoms providers' responses to access needs

The survey asked, "*If your disability affects the way you use your mobile phone or TV or Internet, have you told your provider about the effects of your disability?*" 66% of respondents with access needs had not told their provider. 58% of AT users have not told their provider about the effects of their disability.

Reasons given included:

> "They just don't listen, don't make any record of it, and are patronising every time I try and call or message them."

> "My experience with the Call Centre would indicate that it would be pointless as they just don't understand the practical issues involved."

Amongst those who told their provider about their access needs, only 30% noticed an improvement in the service they received; 70% experienced no improvement in their service.

> "Customer support make a note of my comments, but services very rarely change. I am unsure if feedback is even taken into account or passed on, so have given up as I am just one person. If companies had a dedicated accessibility team, perhaps we would see more changes."

This reflects the findings reported in other research about the lack of understanding of frontline staff when dealing with people who have access needs. In 2018, the Communications Consumer Panel reflected that communications providers… "*continue to have significant room for improvement, not only in the flexibility of their processes, but in understanding and empathising with consumers*." [10]

Telecoms Helplines

One of the most noteworthy findings of the survey is that only 8% of users with access needs will contact a company if faced with website barriers in attempting a retail transaction. However, the longer-term nature of a customer's relationship with a telecoms supplier means that they have little alternative when faced with a service fault or disruption. The telecoms sector therefore provides us with a much larger sample of users with access needs who have experience of helplines.

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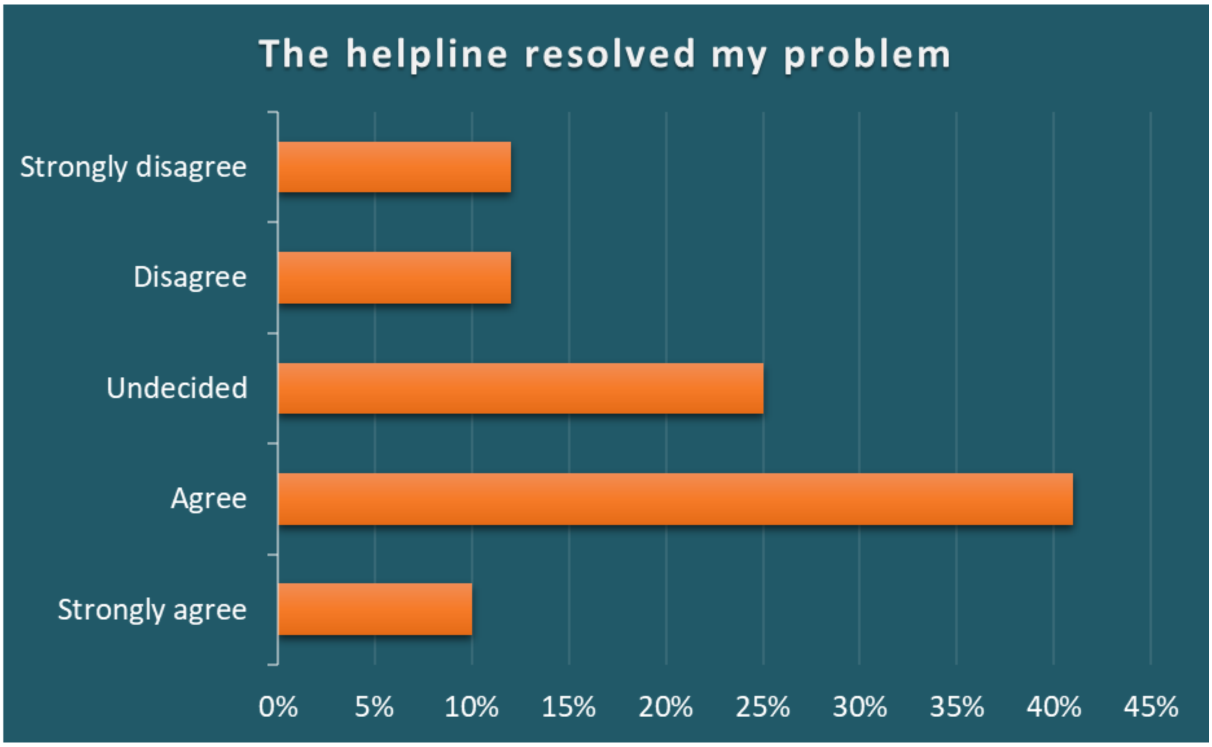
[10] *"Still Going Round in Circles: Complaints handling in telecoms",* Communications Consumer Panel, July 2018

81% of respondents told us that they have called their telecoms provider's helpline when they have had a problem, so the survey sought to find out how satisfied users are with the helpline service they received.

Table 11: The helpline resolved my problem (users with access needs)

Option	2019
Strongly disagree	12%
Disagree	12%
Undecided	25%
Agree	41%
Strongly agree	10%
Total	100%



Just over half of respondents with access needs who contacted a provider's helpline agreed that their problem had been resolved, although a quarter of users were left with the problem unresolved and a further quarter were undecided.

Whether the customer's problem was resolved or not, the survey also asked whether their dialogue with the helpline had made the customer feel valued.

Table 12: The helpline made me feel like a valued customer

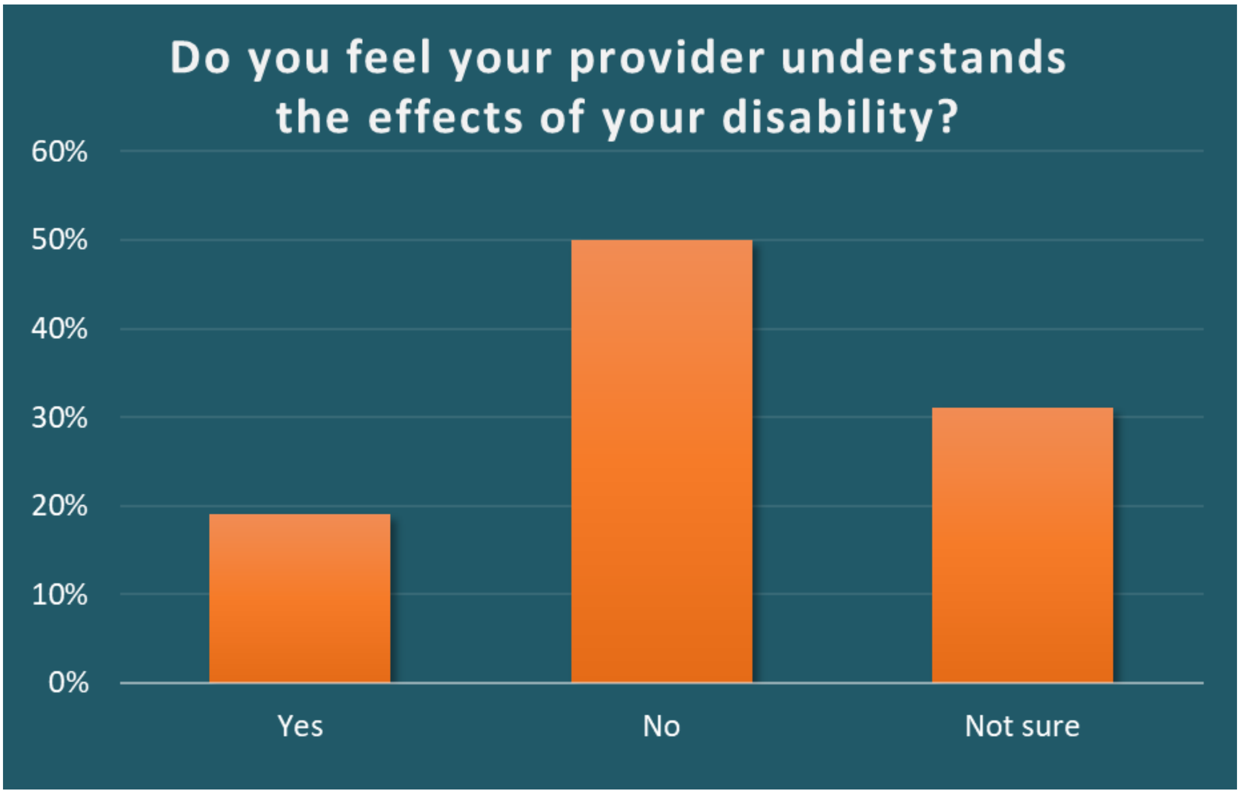
Option	2019
Strongly disagree	14%
Disagree	29%
Undecided	23%
Agree	22%
Strongly agree	12%
Total	100%

Only one third of customers felt positively valued. More concerningly, 43% of respondents did not feel that the helpline experience had made them feel valued, with a further 23% undecided. This appears to reflect the wider experiences of users with access needs. Nevertheless, perhaps recognising that they have little choice, 62% of respondents agreed that they would use a helpline again.

Of those respondents who have used their provider's helpline, the survey also asked, "*When you interact with your provider, do you feel they understand the effects of your disability?*"

Table 13: Do you feel your provider understands the effects of your disability?

	2019
Yes	19%
No	50%
Not sure	31%
Total	100%



50% of users with access needs said they did not feel that their provider understood the effects of the user's disability in the way they used the provider's services, with a further 31% undecided. This illustrates the on-going challenges faced by those with access needs in trying to resolve their issues.

> “Some small companies are easy to contact and talk to about access issues. The big ones don’t seem to care… and talking to the right person is impossible.”

Conclusion

The idea behind the original Click-Away Pound Survey in 2016 was to persuade businesses to develop accessible websites and apps for their customers by showing them the importance of website accessibility to their bottom line. The business case is laid out in full in the 2016 CAP Survey Report. Disappointingly, three years have gone by and there is no indication that business in general is listening or acting, although the commercial imperative has become even more compelling.

The issues we explored back in 2016 are as relevant now as they were then. Customers with access needs continue to find themselves in a position where lack of accessibility limits their ability to enjoy the same freedoms online as their non-disabled peers. The reasons for, and answers to, these issues were explored in detail in 2016 so we won’t repeat them here and there is no need to update them! As we said in 2016, “in many businesses, the negative online experience of disabled customers suggests that disability issues remain niche at best and the disabled customer remains peripheral.”

It is worth restating that this position exists despite the emergence of a clear business case, a plethora of published guidance, and the overt legal obligations set out in the Equality Act 2010. Recently however, and in recognition of the ongoing problem, the law regarding public sector websites and apps has changed. Since September 2018, the Public Sector Bodies Accessibility Regulations have placed specific requirements on the public sector; essentially requiring them to ensure their websites achieve WCAG2.1 Level Double-A.

Our experience over the last 20 years, combined with the results of the two Click-Away Pound Surveys and the general lack of progress in this field, has led us to the view that a different approach is needed.

The Equality Act 2010 and its predecessor the Disability Discrimination Act 1995 have played key roles in driving inclusion in many aspects of disabled people's lives. However, one weakness is the requirement for any legal action to be taken by the individual who has experienced the discrimination, which is a complex and difficult process. This approach has clearly failed in relation to the accessibility of websites given the ongoing scale of the issue and a complete absence of court cases.

Based on the current situation and lack of progress over 20 years it would seem that the only option left is to require the obligations placed on the public sector to be extended in law to include all websites and apps, and for site owners to be held to account against specific and measurable obligations. This performance needs to be formally monitored by an overarching body such as the Equality and Human Rights Commission. This monitoring body could then take action to require organisations to address the issues or face legal sanction.

Reluctantly we have come to the view that without such a sea change in approach it is unlikely that this issue will be addressed quickly or in any meaningful or consistent way irrespective of the arguments deployed.

Rick Williams & Steve Brownlow,

Brighton, UK. February 2020.