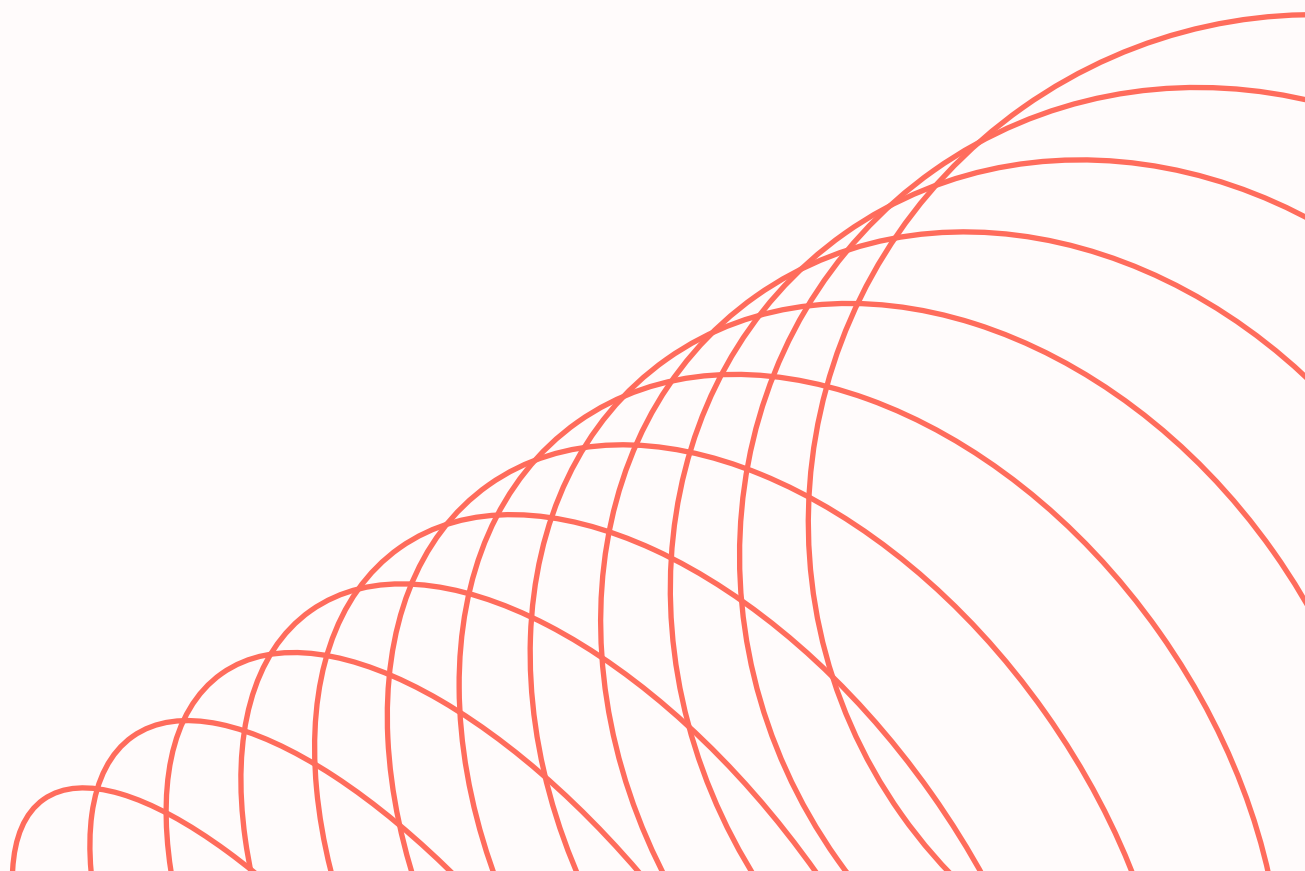


2024 Global Advertising Accessibility Index & Trends Report



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INTRODUCTION

Accessibility in Today's Cross-Channel Media Market

The creative and media landscape is as diverse and complex as it's ever been, making accessibility in advertising pivotal to ensuring ads have the opportunity to be seen, heard and understood by all audiences, irrespective of their physical or cognitive abilities. Put simply, accessible advertising incorporates features that eliminate communication barriers, allowing messages to reach and engage a broader audience. These can be features such as closed captions, subtitles or sign language for those with hearing impairments, audio descriptions for those with vision difficulties, and clear and simple messaging for those with cognitive disabilities.

Nearly 2.5 billion people worldwide will be living with some degree of hearing loss by 2050.¹

More than just fulfilling legal or ethical requirements, prioritizing accessibility in advertising is critical for advertisers to achieve reach, relevance and resonance across their target audiences. By making advertising content accessible to everyone, brands can expand and deepen engagement across a broader scale to drive better results, while also meeting inclusivity goals. As societal diversity increases, brands that focus on accessibility are more likely to build stronger connections with a wider demographic, fostering loyalty and business growth.

¹ World Health Organization, Feb. 2024

57% of consumers are more loyal to brands that commit to addressing social inequities.²

Leading brands, such as Procter & Gamble, Unilever, Mars, L'Oréal and Diageo, are at the forefront of championing enhanced accessibility features globally, advocating for advancements like audio description and sign language in ads. Their initiatives are part of a broader movement toward a universally inclusive advertising ecosystem, a shift fueled by evolving consumer expectations and technological progress.

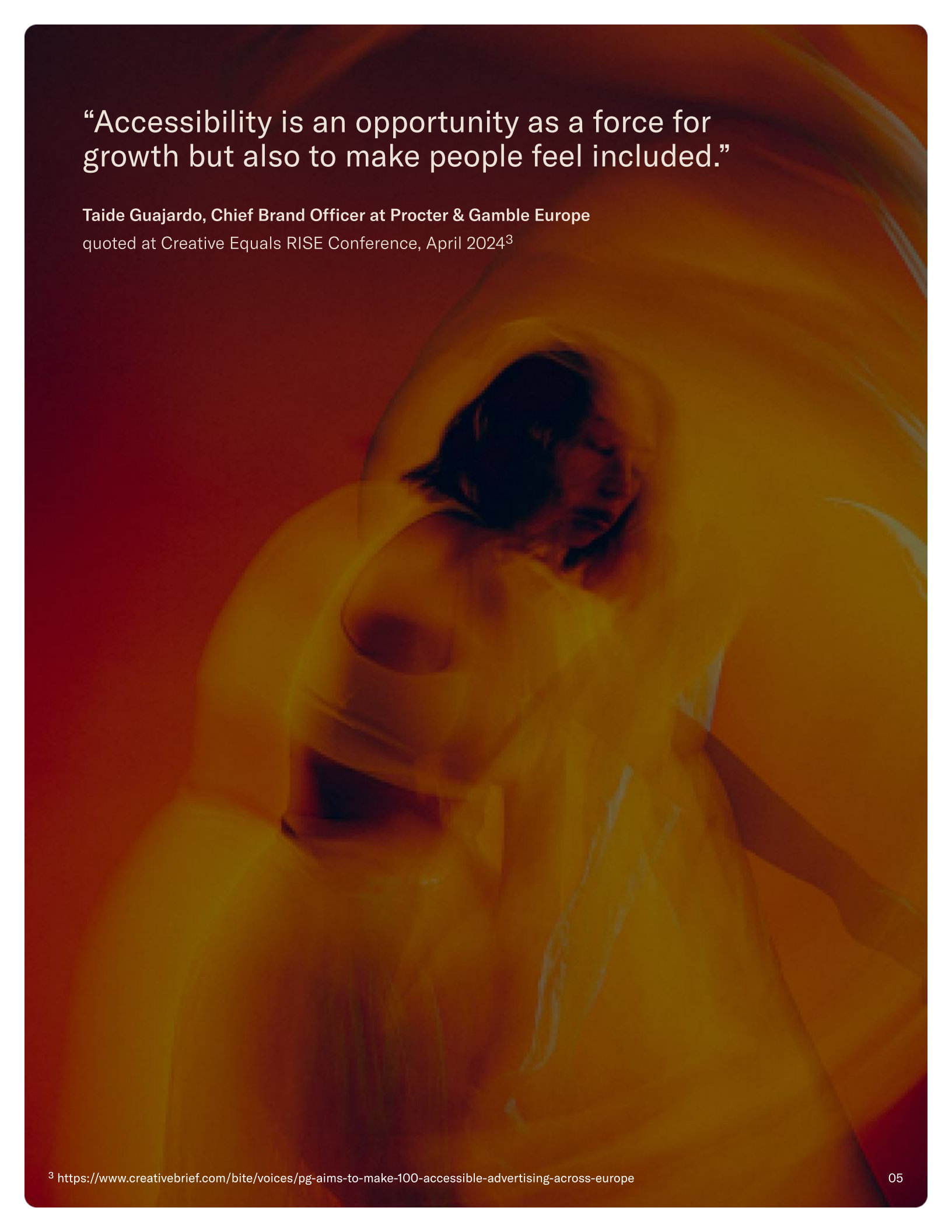
XR Extreme Reach's global platform is the largest distribution network, aggregating data and connecting creative to media at scale with automated and trusted linear TV delivery workflows, independent and MRC-accredited ad serving, plus other direct integrations across media channels. With XR at the intersection of creative and media, and responsible for delivering ads to 140 markets in 45 languages, we are uniquely positioned to provide a worldwide view of accessibility and the current state of maturity and adoption across markets.

METHODOLOGY & RESEARCH

XR conducted a comprehensive review of regulatory information related to accessible advertising across global markets, spanning North America, South America, APAC and EMEA, and analyzed 12-months of data across 102 countries, inclusive of 800,000 creative assets and 7.8 million ad deliveries to linear and digital platforms.



² Deloitte Global Marketing Trends Report, 2022

A person is shown from the waist up, wearing a white, flowing dress. A large, white, flower-like or shell-like structure is attached to the back of the dress. The person's face is partially visible, looking downwards. The background is a warm, orange-red gradient with soft, circular light patterns.

“Accessibility is an opportunity as a force for growth but also to make people feel included.”

Taide Guajardo, Chief Brand Officer at Procter & Gamble Europe

quoted at Creative Equals RISE Conference, April 2024³

³ <https://www.creativebrief.com/bite/voices/pg-aims-to-make-100-accessible-advertising-across-europe>

Achieving Greater Reach and Effectiveness

Accessible advertising is an undeniable lever for enhancing reach and effectiveness, both of which are critical to creating winning strategies that engage diverse audiences. By implementing accessibility features, advertisers immediately broaden their market segment with content that engages individuals with hearing or visual disabilities – currently representing over 8%⁴ of the world's population, equivalent to more than 680 million people.⁵

A Deeper Dive into the State of Accessibility

Advances in technology and ad formats are creating new opportunities for all sides of the ecosystem to embrace accessibility and develop more inclusive content. However, XR's analysis found that globally, only a small percentage of creative assets were optimized with key accessibility features such as closed captioning and audio descriptions.

Over a 12-month period, XR gathered and analyzed data from 800,000 creative assets and 7.8 million ad deliveries (spanning linear and digital) across 102 countries.

The extensive data collection was coupled with a comprehensive review of current regulatory information related to accessibility across key markets. XR's results provide new insights into the current state of accessible advertising and have led to the introduction of an industry-first Global Advertising Accessibility Maturity Index (AAMI).

XR's analysis shows that globally, only 17% of creatives analyzed had accessibility features, including either closed captioning, audio descriptions or a combination of both.

As XR explored the adoption of accessible advertising features, there were clear indicators of significant gaps, advanced market regulations and slow progress in key areas. Although many markets demonstrate good adoption of closed captioning, reaching as high as 100% of ads, audio descriptions are still very much under utilized, reaching only 4%, and in most markets, less than 1%.

The recent analysis found that acceptance varies significantly across publishers, with some markets having a high acceptance rate for closed captions, audio description and sign language, in contrast to most who have low to zero acceptance. This means that even when advertisers include accessible features, those ads are not necessarily able to be played out to the end user with closed captioning or audio descriptions enabled, highlighting operational and technological gaps.



⁴ <https://www.who.int/publications/i/item/9789241516570>

⁵ <https://www.who.int/news-room/fact-sheets/detail/deafness-and-hearing-loss>



Accessible Insights by Markets

Additionally, XR’s analysis highlights significant variances by market. In the United States, about 16% of linear ads include closed captions, while in Canada, stringent CRTC regulations⁶ drive 100% of broadcast ads to feature closed captions, making Canada a leader in accessibility. Brazil also shows robust adoption, with 20% of ads run on linear including closed captions, and 4% audio descriptions.

In Europe, the adoption of advertising accessibility varies significantly. Reflecting a growing industry-led push towards accessibility, Ireland leads with 30% of ads featuring closed captions, and 3% including audio descriptions. The UK follows closely behind with about 25% of ads including closed captions and 1% with audio descriptions. Spain shows moderate implementation with 6% of ads using closed captions and 2% featuring audio descriptions, indicating increased awareness and regulatory support with recent changes in the law for ads in specific industries.

Advertisers, broadcasters and publishers hold the power to transform the advertising landscape by placing accessible content at the heart of their campaigns. It’s our collective duty to ensure that every ad, no matter where it appears, embraces inclusivity as its cornerstone. XR’s new Global AAMI will help align the ecosystem to evolving global standards and meet increasing consumer expectations for responsible and inclusive advertising.



% of Ads Featuring Closed Captions

100%	Canada
30%	Ireland
25%	UK
16%	USA

⁶ <https://crtc.gc.ca/eng/industr/acces/index.htm>

A New Global Benchmark for Accessible Advertising

XR has spearheaded the Global AAMI as a strategic tool to benchmark and foster progress towards more inclusive advertising worldwide. This initiative was born out of the recognition of a significant disparity in accessible advertising practices across different markets and the subsequent need to systematically address this gap to more accurately reflect the diverse world we live in today. The AAMI evaluates how well countries integrate accessibility features into their advertising, assessing factors such as consumer interest, regulatory environments, and media capabilities.

The creation of this index aligns with our mission to move creativity forward, illuminating breakthrough intelligence that provides successful business practices and urging markets to enhance their advertising inclusivity. By setting a clear framework for assessment, the AAMI serves as a catalyst for change, encouraging an industry-wide movement towards a universally accessible and more inclusive advertising environment.

XR shows that of the 102 countries analyzed, only 15 had any material level of accessibility in their advertising, representing just under 15%.

2024 Global Advertising Accessibility Maturity Index



Maturity Defined and Evaluated Across Markets

Level 1 Nascent Interest

Limited consumer demand for accessible advertising

A minor number of advertisers see value in accessibility

Media owners support accessibility on a limited and manual basis

Germany

Italy

Portugal

Mexico

Colombia

Level 2 Initial Awareness

More accessible advertising seen but no broader social requirement

Advertisers considering accessibility, but not a widespread choice

Media owners have some options for accessibility that are not integrated

Spain

New Zealand

Level 3 Developing Interest

Notable rise in demand for accessible advertising, but not mainstream

Increased interest among advertisers in incorporating accessibility

Media owners implement basic accessibility features into workflows

USA

Brazil

Australia

Japan

France

Greece

Level 4 Expanded Interest

High social commitment to inclusivity from consumers and brands alike

Majority of advertisers view accessibility as valuable

Media owners handle many accessibility features and promote them regularly

Canada

UK

Ireland

Level 5 Fully Realized

Consumers expect and demand inclusive advertising consistently

Advertisers place high importance on accessible outreach

Media owners have integrated and standardized advance accessibility features in their workflows

There are no countries in this Level

Summary of Key Findings



Global Variance in Accessibility Maturity

No country has yet achieved a 'Fully Realized' level of accessibility maturity. Canada exemplifies a deep commitment to accessibility, bolstered by strong regulatory frameworks that hold brands and broadcasters accountable. The UK and Ireland follow Canada with significant improvements in their strategic objectives for accessibility. Markets such as the United States, Australia and France are seen as “developing interest” with a growing focus on mandates, while other countries such as Spain and New Zealand demonstrate progress in awareness.

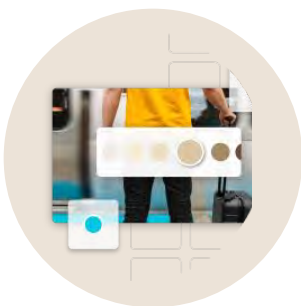
Prominent Role of Regulatory Frameworks & Industry Collaboration

Robust regulatory frameworks correlate with higher levels of advertising accessibility. Canada is a great example, mandating closed captions on all broadcast advertising, which is reflected in their 100% adoption rate. In 2025, the European Accessibility Act (EAA) is planned to roll out across the EU which may bring more attention to shift the maturity status of many markets.



The UK is highlighted for its proactive efforts through collaborations with organizations such as the Incorporated Society of British Advertisers (ISBA) and the World Federation of Advertisers (WFA) in addition to support from multinational corporations like Procter & Gamble, Unilever, Mars, L'Oréal and Diageo. These efforts are focused on integrating accessibility features from the planning stages of advertising campaigns. In the U.S., pressure by the FCC and National Association of Broadcasters (NAB) has influenced advertisers to embrace accessibility, but there are no official mandates in place requiring closed captions or audio descriptions for content under 5 minutes.

Growing Interest, Gaps in Adoption



There's a growing global shift toward accessible advertising as consumer preferences increasingly favor brands that demonstrate inclusivity. High-growth brands are notably weaving DEI objectives into their core strategies. In Asia, particularly in Japan, there is a slow, but positive trend towards better accessibility, with major broadcasters now fully supporting closed captions.

Even given this progress, accessibility features like audio descriptions remain underused worldwide, with utilization rates ranging from only 1-4% in select markets. Adoption rates for sign language are even lower. While adoption is growing for closed captioning, there is still a substantial gap to enable advertisers to reach all audiences without the inclusion of audio descriptions.



Advancements in Linear Progress As Digital Platforms Lag Behind

Despite advancements, the acceptance of accessible ads across both digital and linear platforms requires further enhancements and acceptance from publishers. For instance, in the United States, the largest digital ad serving market, closed captions and audio descriptions are still unable to be served due to technical restrictions in the digital player process. This gap underscores the need for a unified approach to accessibility across all media platforms to effectively meet evolving standards and consumer expectations.



CONCLUSION

The Path to Accessibility Maturity

As the industry navigates the evolving landscape of advertising accessibility, XR's analysis and the Global AAMI highlights several critical steps to enhance inclusivity and drive advertising effectiveness.



Here are some takeaways that can help the industry on their path to accessibility maturity:

Take a Consumer-Centric Approach

Paying close attention to consumer feedback on accessibility can guide broadcasters, publishers and advertisers in refining their strategies. Engaging with audiences who benefit from accessibility features can provide insights that lead to better and more inclusive advertising approaches.

Integrate Accessibility from the Start

Accessibility should be considered an integral part of the creative strategy from the outset, not an afterthought. This includes planning for accessible features during the conceptualization and design phases of advertising campaigns and exploring the media platforms that embrace accessibility.

Understand and Leverage Regulatory Frameworks

Stay informed and compliant with local and international regulations regarding advertising accessibility. Use these frameworks not just as guidelines, but as opportunities to innovate and lead within your market.

Collaboration and Partnerships are Key for Success

Collaboration between advertisers, agencies, technology providers, advocacy groups, publishers and broadcasters can lead to better outcomes. Shared knowledge, resources, and commitments can drive industry-wide improvements more efficiently than isolated efforts. Engage with organizations like ISBA and the ANA and follow the leading brands, who are pioneering accessible advertising.

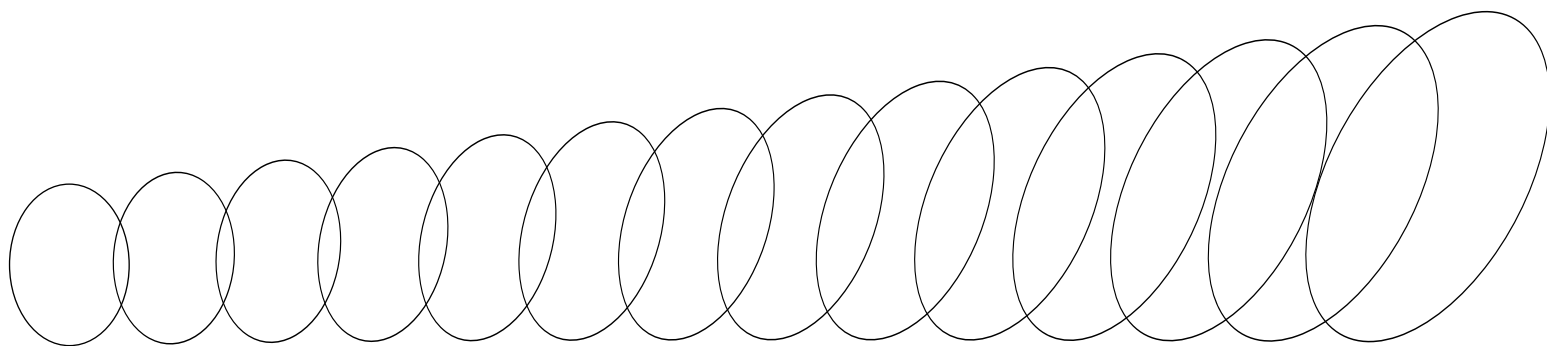
Prioritize Educating and Training Teams

Ongoing education and training for all stakeholders in the advertising process—creatives, marketers, and publishers and broadcasters—are essential. Understanding the needs and challenges associated with accessibility helps in creating more effective and inclusive advertising content for the cross-channel ecosystem

Monitor, Optimize and Measure Accessibility Impact

Utilizing tools like the Global Advertising Accessibility Maturity Index allows advertisers, broadcasters and publishers to benchmark their progress against global standards and strive for continuous improvement in their accessibility efforts. By leveraging accessibility within XR's ecosystem, creative assets are optimized by format and market, helping achieve greater relevance and resonance across addressable audiences, and leading to business growth and better results.

Embracing an accessible path enables all sides of the industry to win – advertisers can better reach audiences, broadcasters and publishers can create greater value across their inventory and all people can have the opportunity to connect with brands across the world. XR, along with its global partners and customers, are paving the way where accessibility is woven into the very fabric of all advertising, helping all businesses set new standards and meet new objectives for inclusivity. Accessibility practices go beyond helping advertisers achieve the holy grail of reach, relevance, resonance and results– it also lends itself to building a world that acknowledges and values every individual's experience.



Appendix

Methodology of the Global Advertising Accessibility Maturity Index

The Global Advertising Accessibility Maturity Index (AAMI) was developed by XR Extreme Reach to assess and compare the state of advertising accessibility across different global markets. This section outlines the methodology used to compile the Index, ensuring transparency and providing insights into the robust analytical processes behind the findings.

Data Collection

XR Extreme Reach collected data from a variety of sources to ensure a comprehensive analysis. This included:

- **Internal Data:** Analysis of over 800,000 creative assets and 7.8 million ad deliveries across 102 countries. This data provided a foundation for understanding the prevalence and types of accessibility features incorporated in each advertisement.
- **Regulatory Information:** Review of national and international regulations affecting advertising accessibility in each country. This helped in assessing the legal framework that supports or hinders the implementation of accessible advertising.
- **Industry Reports and Publications:** Examination of published materials from industry associations, accessibility advocacy groups and academic research to gauge the level of industry engagement and public discourse on advertising accessibility.

Rating Criteria

The Index rates each country based on three primary criteria:

- **Social Interest:** The degree of consumer interest in accessible content, often reflected through consumer loyalty to brands that demonstrate social inclusivity and adherence to accessibility standards.
- **Advertiser Interest:** Measured by the actions of advertisers within their marketing strategies, public commitments to accessibility and their participation in industry discussions promoting accessible advertising.
- **Media Enablement:** The extent to which media owners in each country have implemented technologies and practices that facilitate the delivery of accessible advertising, such as closed captioning, audio descriptions and sign language.

Scoring System

Each country was scored on a scale from 1 to 5, with 1 indicating "Nascent Interest" and 5 representing "Fully Realized" maturity in advertising accessibility. The scores were assigned based on a combination of quantitative data from advertising deliveries and qualitative assessments from regulatory and industry sources.

- Level 1 (Nascent Interest): Minimal accessible advertising features and limited regulatory or market drivers.
- Level 2 (Initial Awareness): Emerging awareness and adoption of accessibility features, with some regulatory influence.
- Level 3 (Developing Market): Moderate use of accessible advertising features, supported by more comprehensive regulations and growing market interest.
- Level 4 (Expanded Interest): High level of accessibility features in advertising, with robust regulatory frameworks and significant market engagement.
- Level 5 (Fully Realized): Comprehensive integration of accessible advertising features across all media, driven by strong market demand, full regulatory support and widespread industry adoption.

Analysis and Reporting

The final step involved synthesizing the collected data and insights into a coherent structure, providing a detailed narrative that explains the findings and implications for each country. Regular updates to the Index are planned to reflect changes in technology, market practices and regulatory landscapes.

About XR

XR Extreme Reach is a global technology company that powers the creative economy. XR moves creativity forward – uniting data at scale across content, media and productions to maximize business value through intelligence. Our platform empowers thousands of brands, agencies, publishers and studios to create, distribute and optimize advertising and productions that reach and engage audiences—on any screen, anywhere in the world. More than a billion brand assets and over \$100B in media and production spend is powered by XR's AI-driven enterprise platform. XR operates in 140 countries and has offices across North America, Europe, Asia and Australia.

