

A look at invisible disabilities in society ♥

The Valuable 500
Global Trend Report

Issue Five – July 2021

In association with

MİNTEL CONSULTING **SHAPE YOUR FUTURE**

 **The
Valuable
500**

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Section 1:

Executive Summary.



Top Global Trends

1. Businesses are finding new ways to listen to and incorporate the needs of consumers with disabilities.
2. The fashion and beauty industries have made considerable progress in disability inclusion this quarter.
3. COVID-19 continues to disproportionately impact those with disabilities.

Top Regional Trends

1. There remains disparity across and within regions when it comes to D&I roles.
2. APAC, especially Indonesia, is developing the most disabled user- friendly experiences.
3. While South America, Europe and North America are focusing on more tech-based solutions.

Section 2:

A Global Overview.



Business leadership

1. While businesses continue to hire for internal diversity and inclusion roles, consultancies are also growing their expertise in this area.
2. Support schemes from governments around the world are being implemented to encourage employment and protection of disabled citizens.

Culture

1. Fashion and beauty companies are improving representation of the disabled community, with help from disabled influencers.
2. Mental health remains a top priority for consumers amidst COVID-19. Finding ways to help consumers manage long term conditions is paramount.
3. Social and environmental concerns can be addressed together. Companies need to acknowledge that representation and diversity plays an integral role in solving the climate crisis.

Brand Experience + Innovation

1. Representation of people with disabilities in the mainstream fashion and beauty industry is still low; brands need to work hard to overcome setbacks.
2. While businesses are happy to support disabled charities, there is much less innovation specifically targeted at disabled consumers. Innovation needs the backing and resources of global companies to make a significant impact.

Overarching trends

The global view

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Demand increases for diversity & inclusivity consultants



APAC

The government in Singapore has recently introduced new disability polices to help disabled people into work and support them through education.



Europe

There continues to be growth in diversity and inclusion roles, particularly in the fashion industry. In the UK, Birkbeck University is the first to open a centre researching neurodiversity at work. The pioneering team, who are neurodiverse themselves, plan to ensure 'that neurodiverse individuals receive the diagnosis, coaching and support that they need to thrive in the workplace'. They will also support 'employers to pre-empt any systemic barriers in human resource activities - including job design, well-being and performance optimisation'.



Latin America

Large corporations (e.g. Google) are advertising for diversity and inclusion roles in South America, with most being advertised in Brazil.



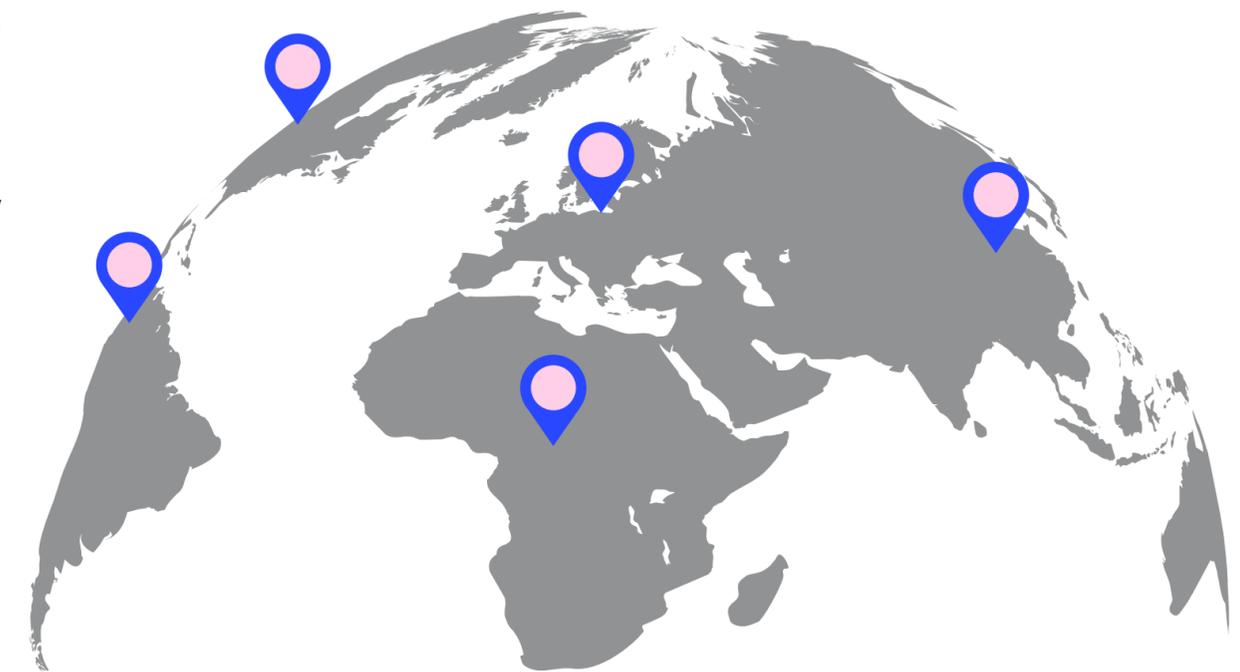
MEA

Hiring for diversity and inclusion is currently less of a priority in the Middle East and Africa, with only a few roles published for gender equality.



North America

Diversity and Inclusion consultant roles are increasing in number across the globe but especially in the US. This shows that companies are willing to outsource (and pay for) expertise in this area. Consultancy companies are primed to grow their capabilities in this area, as demand is set to grow considerably over the coming years.



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The diversity and inclusion conversation in Fashion + Beauty grows



Inclusive fashion experiences have remained in the spotlight this quarter, not only focusing on product innovation (i.e. the launch of the Nike FlyEase) but also on representation in marketing and communications.

In March, Vogue published an article on why disability representation is crucial to building a better fashion industry. Madison Lawson, a social media influencer and journalist with a rare form of muscular dystrophy, wrote the article. She wanted to know why disabled people - the largest minority group (15%) - were the most underrepresented in fashion and beauty. She argues that brands need to go beyond tokenism and focus more effort on hiring disabled people in positions of power - behind the camera, not just in front of it.



We need to see people who look like us in positions of power at magazines, at global beauty and fashion brands, at the teams behind fashion weeks, in casting agencies, in all of the places where we have historically been forgotten.

Madison Lawson

43%

of consumers agree that beauty brands ignore people with disabilities

Mintel Jan 2021, UK



Unilever is banning the use of the word 'normal' from all advertising and packaging of its beauty and personal care brands as part of its new Positive Beauty programme.

As part of the programme, Unilever carried out a review of global products and counted over 200 that included 'normal' in the label, and even more in brand communications. Unilever has also committed to no longer digitally altering a person's body shape, size, proportion or skin colour in its adverts or in paid-for influencer posts. It will increase the number of ads portraying people from diverse and underrepresented groups and grow its product offering for under-served groups.

Inclusive marketing and advertising can lead to growth

With the adaptive clothing market forecast to be worth nearly £280bn by 2026, it is unsurprising that a handful of brands have their sights on the disabled consumer group. Despite encouraging statistics and inclusive product launches, adaptive wear remains a niche market and is struggling to reach consumers. A recent New York Times investigation exposed how algorithms routinely block adaptive fashion adverts from platforms such as Facebook and Instagram. Mostly, it comes down to product misidentification: items promoting medical devices are automatically rejected for policy violation. Here, technology is an impediment for the adaptive wear market, but used correctly it offers vast potential.



This look, featured in a Yarrow ad, was accepted by the Facebook automated system. via Yarrow



Another Yarrow ad was rejected by the Facebook system. The pants are the same as those on the left, but they are designed for the "seated body." via Yarrow

Conversations around Fashion and Disability have grown by 14% in related posts from January to April 2021.



I don't only want brands to use me, but also other people with different disabilities, ethnicities and genders. It's all about creating awareness and making things more inclusive.

– Model and Influencer Gemma Adby

75%

of beauty users would like to see people with physical disabilities in advertising

Mintel Jan 2021, US

People are more likely to consider, or even purchase, a product after seeing an ad they think is diverse or inclusive, says Google.

Mental health remains a global concern for consumers

Mintel's Global 35 countries data shows an increase in mental health awareness over the last year amid the pandemic. Companies have been looking for new ways to maintain the wellbeing of their employees through new initiatives and technology.

Unsurprisingly, COVID-19 has highlighted the importance of wellbeing and also provoked growth in the industry - now worth \$4.5 trillion globally. Fitness app downloads increased by 50% in the first half of 2020 (WEF) and corporate wellness apps are seeing widespread adoption. Despite the obvious uptake and improvement in emotional support initiatives, wellbeing still doesn't accommodate everyone. For example a yoga session may be relaxing for the able bodied but may not for people with disabilities.

The [Shortlister Workplace Wellness Trends](#) report proves that wellness had already become a business objective for 68% of their respondents.

74%

UK adults had felt so stressed at some point over the last year they felt overwhelmed or unable to cope

- *Mental Health Foundation (2018)*

Impact of the pandemic on women

Research also shows that women are more likely to have suffered than their male counterparts as a result of the pandemic. The [European Commission](#) released a report on the adverse effects COVID-19 has had on gender equality, and it was revealed there was a decrease in employment rates for women, an increase in domestic violence and knock on impacts of childcare and work-life balance.

In the UK, some early steps are being taken to remedy the situation. Recently, the NHS announced it is launching mental health 'hubs' for new, expectant or bereaved mothers. The hubs are due to launch next April and will house physical check-ups and psychological therapy in the same buildings.

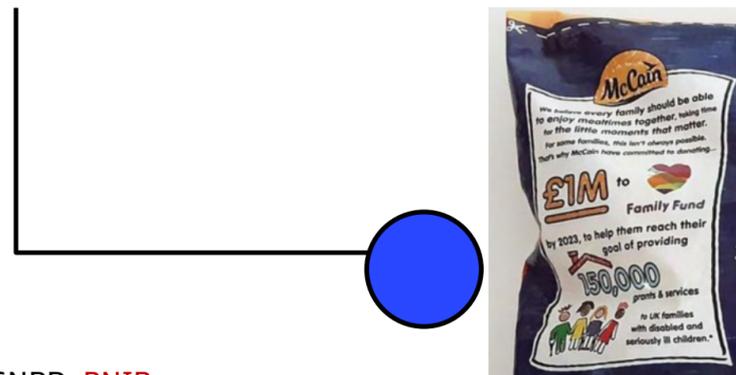


New product developments focus on charitable claims, rather than adaptable innovation

According to Mintel's New Global Product Development database, charitable 'disability' claims on pack have seen an increase (3.3%) over the last 3 years.

It seems brands are happy to support disability charities through the sale of their products, but are less inclined to create products specifically for disabled people's needs.

Below is a UK product example launched this year. McCain states on pack that it is committed to donating £1m to Family Fund by 2023 to help them reach their goal of providing 150,000 grants and services to UK families with disabled and seriously ill children. They recently launched their new [TV ad 'Little moments'](#) in support of the charity.



Inclusive innovation needs help to scale

RNIB recently published the research methods and industrial design of its prototype pregnancy test device in the hope that healthcare corporations will take notice.

The test displays results by raising tactile silicone bumps, rather than displaying text or lines on a screen. Charities and small scale research teams are pushing the boundaries of innovation for this demographic, but it remains important for larger companies to invest resources so that great ideas can reach the scale needed for global impact.



Section 2b:

Global Trends Drivers

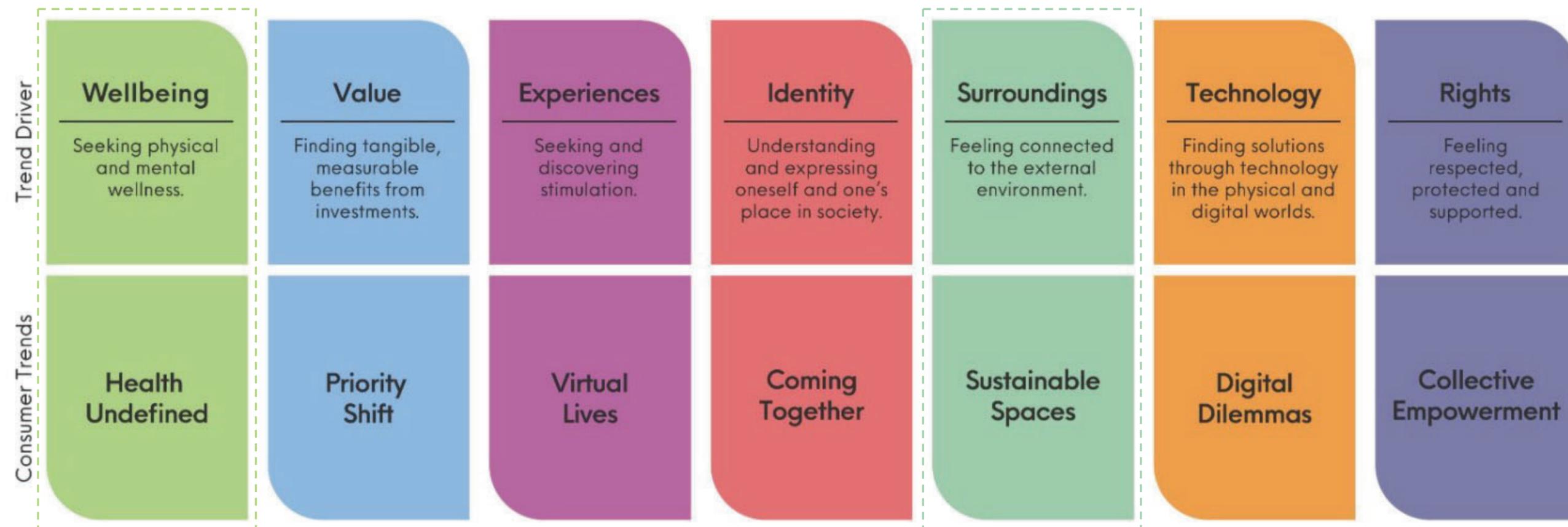




Mintel's Global Consumer Trends Drivers

In each of these reports we will address the most relevant trends driving consumer behaviour within the quarter. This time we will be looking at **Wellbeing** and **Surroundings**.

2021 Trends



Unsurprisingly, Wellbeing remains a key driver of consumer behaviour

Due to the pandemic, consumers are redefining what is encompassed within Wellbeing, and expecting brands to position themselves within the widening realm of physical/mental health, relaxation and financial wellbeing.

Mintel analysts believe mental health and technology will play a pivotal role in the development of wellbeing over the next few years.



Now: 12 months

- A disruption of the fundamental understanding of wellbeing, both individually and collectively.
- Mental health requires a new structure.
- Brands focus on a new health purpose.



Next: 18-24 months

- Burnout takes a new precedence.
- Wellbeing blends into everyday, routine tasks in the home and beyond.
- Continued innovation will be essential for inspiring consumers to stay focused on healthy habits.

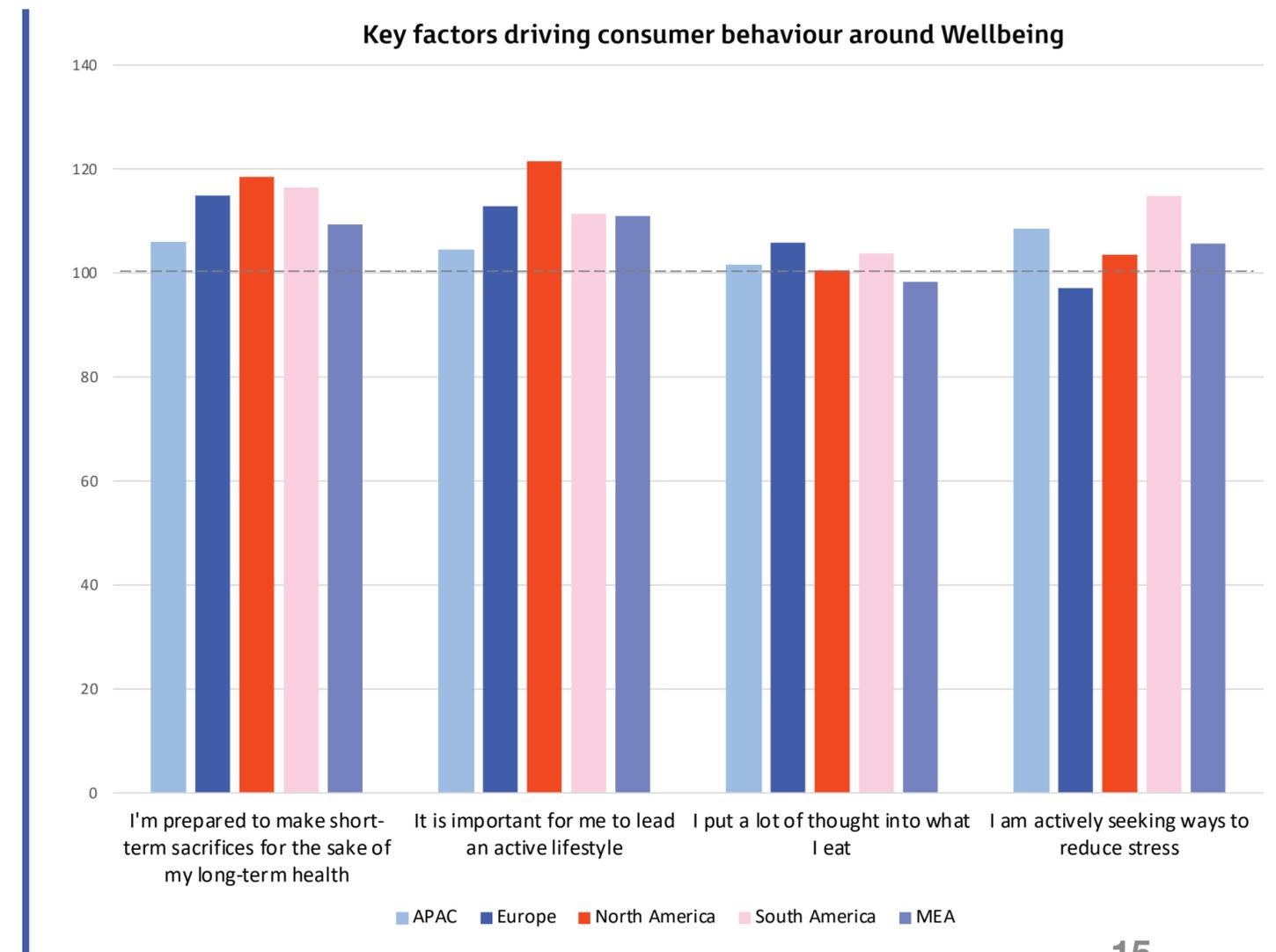


Future: 5 years+

- Technology creates more mainstream opportunities for consumers to take charge of their own health.
- The privacy of health data will become a more urgent push and pull between brand and consumer.
- Health ecosystems will emerge through consumer loyalty to tech companies.

As chronic illnesses and mental health conditions grow (see 'Let's Discuss'-page 48), the workforce will continue to demand a more balanced and flexible working life. This will only increase as Gen-Zers enter the workforce, making the time for action now.

Source: Mintel G35 Data, 3 months to March 2021, displayed as an index.





The local and global environments continue to shape consumer behaviour

Since the onset of COVID-19, many consumers have been limited to their residential areas – and have seen the power of community support as well as shopping with local businesses. At the same time, they have seen the impact that individual nations and global populations can have when everyone within those communities is working towards a common goal (in this case, virus reduction). The possibility of influencing climate change on a local and global level no longer seems such an insurmountable challenge for average citizens. However, consumers will likely look to brands to act as catalysts for change, with the power to influence urban design, energy use and ease of movement.

Mintel Analysts predict a move to a more human-centred design.

Now: taking personal responsibility

The next 12 months

In many markets, COVID-19's impact will be felt for months to come, as consumers realise no person or brand is an island. They will want to ensure the safety of their communities and seek more transparency from brands on how their activities help to protect and sustain their communities and the natural environment.

Next: the Earth fights back

18-24 months

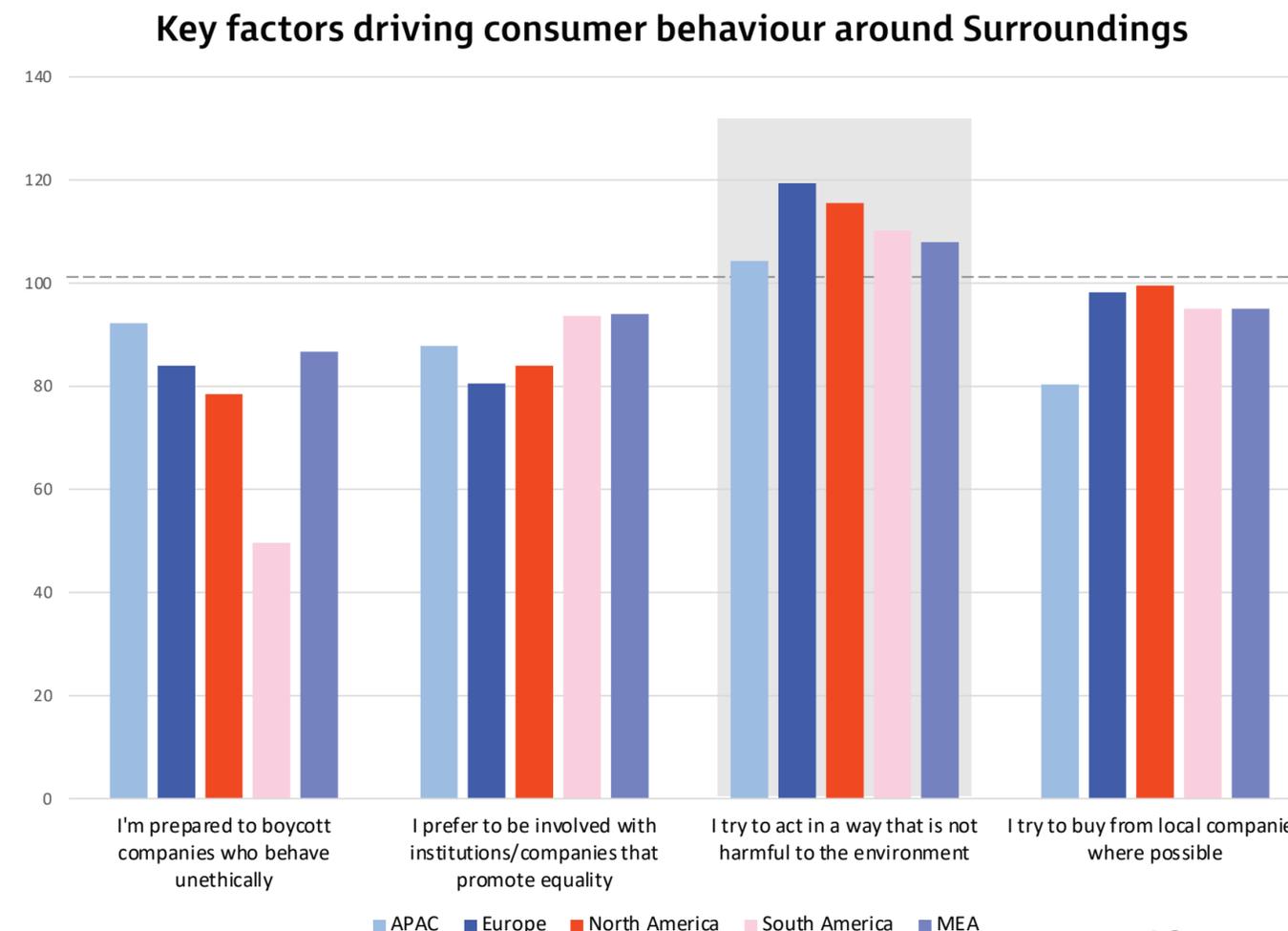
Actively dealing with the climate crisis will be even more urgent as effects of more extreme weather become increasingly salient to consumers. They will look to brands to help them not just survive a harsher climate, but thrive by finding balance between nature and man-made through giving them a sense of personal control.

Future: playing the long game

5 years +

Changes in the demographic makeup of countries will force a significant shift in how resources are allocated and distributed, and what products consumers need from brands. Spaces will be used differently and better, allowing for urban farming, a more circular economy and an end to 'waste' as we know it.

As the climate agenda develops, businesses need to consider the specific impact a changing world will have on vulnerable populations, and create protection plans in advance. With a heightened awareness of activism, consumers also demand that brands go beyond 'box ticking' inclusion initiatives and advocate for a safer, more inclusive and accessible world.



Source: Mintel G35 Data, 3 months to March 2021, displayed as an index.

Section 3:

The regional view.



Overarching trends

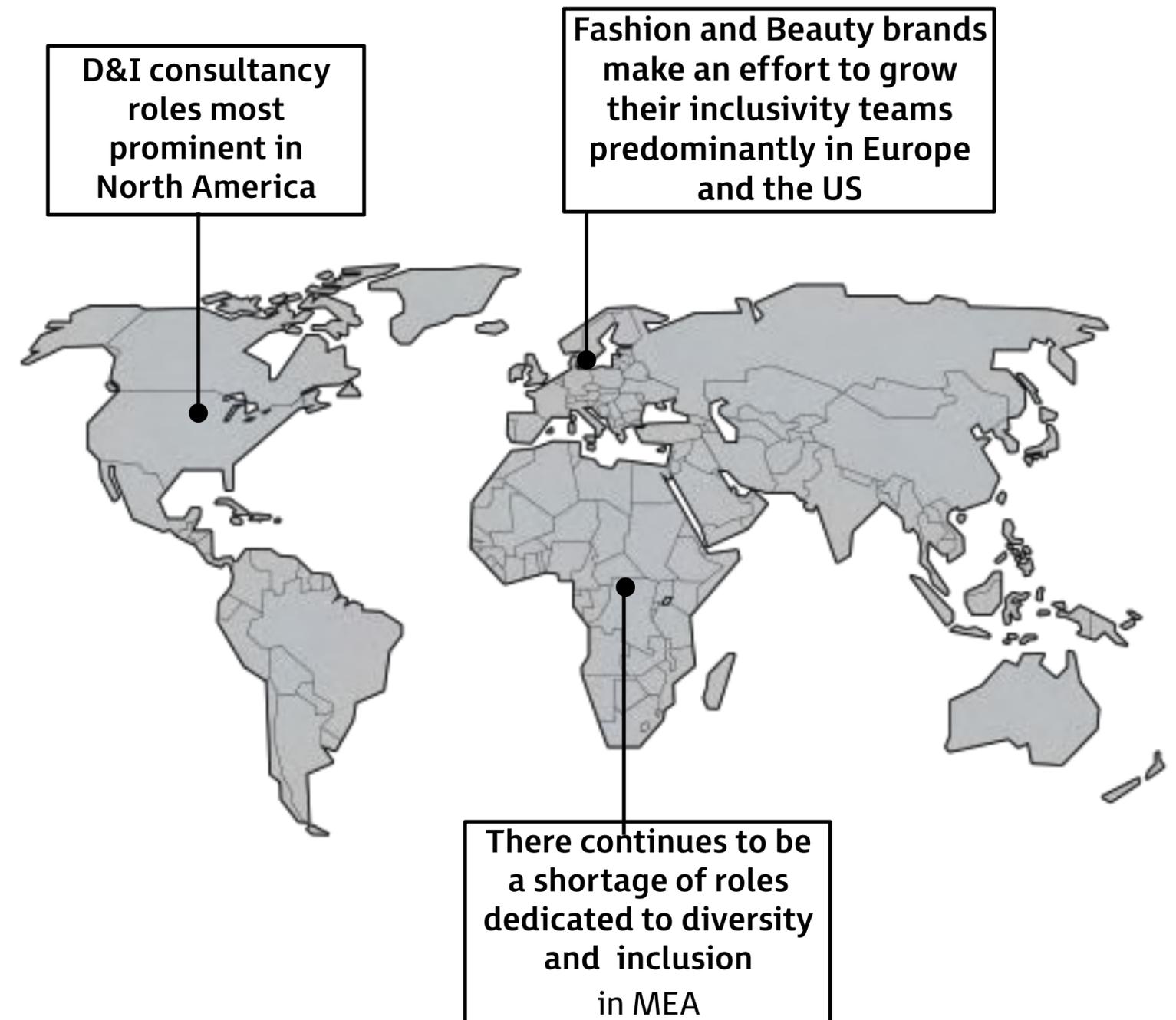
The global view

The regional view

Recommendations

Top 3 regional trends overview

1. **Businesses are hiring roles for consultants, mostly concentrated in North America** – As a result of this, brand experience will be more inclusive. Companies outside of North America with the resource to hire accessibility-dedicated roles should consider doing so.
2. **Mental health remains in the spotlight amid COVID-19** – Mintel found customers are looking to reduce their stress levels after a year in lockdown takes its toll on global mental health.
3. **Fashion and Beauty companies are making progress towards inclusivity of the disabled community** – This was most apparent in Europe and North America.



Section 3a:

Europe



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Europe

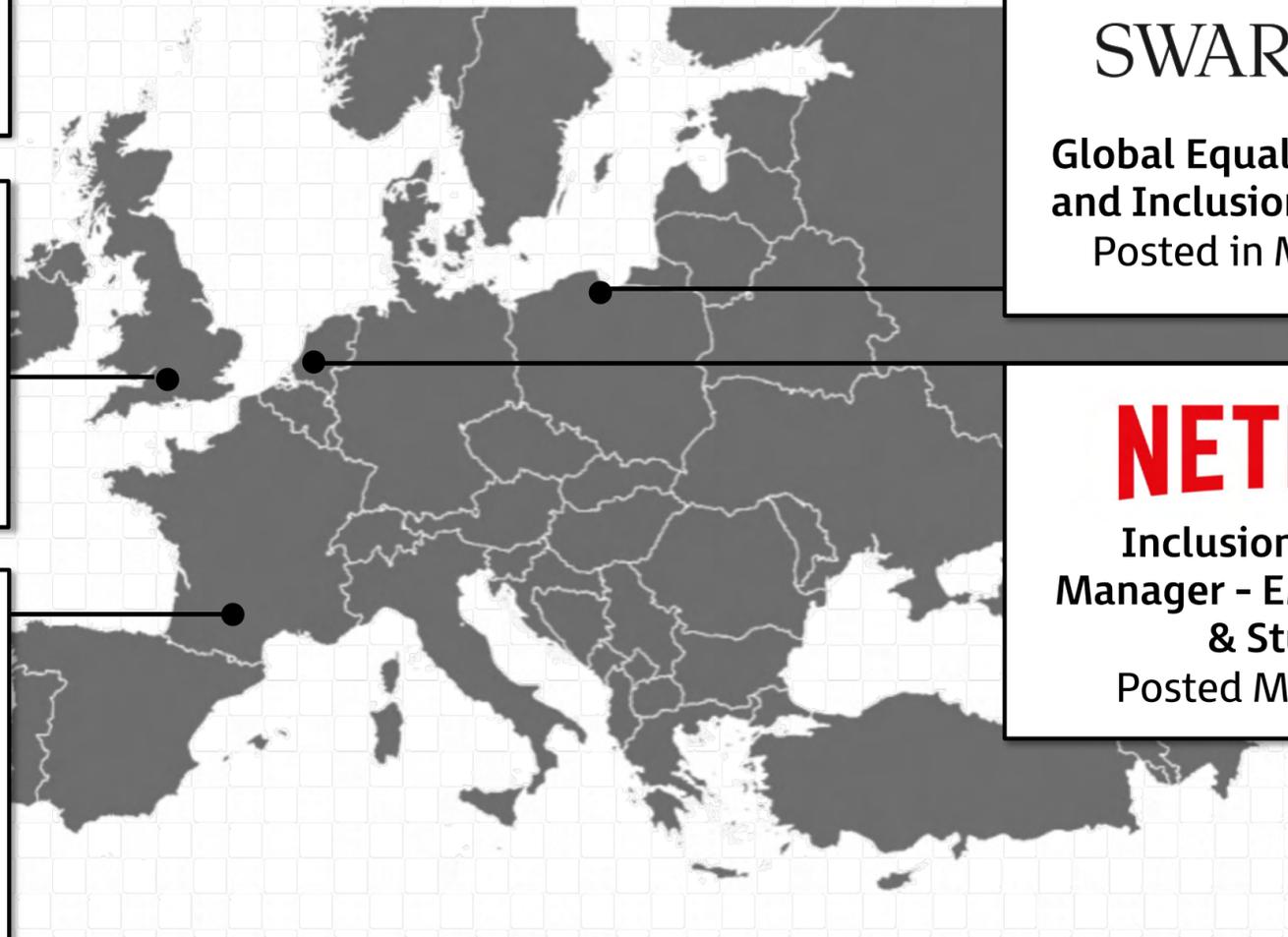
Diversity and Inclusion Hiring Trends

natura & co
Diversity & Inclusion
Advisor
Posted in April 2021 (UK)

KANTAR
Inclusion & Diversity
Consultant.
Posted in March 2021

K E R I N G

Diversity, Inclusion & Talent
Impact Manager.
Posted in March 2021



SWAROVSKI
Global Equality, Diversity
and Inclusion Consultant.
Posted in March 2021

NETFLIX
Inclusion Strategy
Manager - EMEA Content
& Studio.
Posted March 2021

- There were many job roles focusing on diversity and inclusion advertised in Europe this quarter. There was a continued rise in roles within the fashion, beauty and media sectors.
- UK and France are hiring the most diversity and inclusion roles. Meanwhile large corporations such as Uber and Netflix hire local roles in their offices across other areas of Europe.
- There has been an increase in diversity and inclusion 'consultants' in the last quarter, emphasising the high demand for this expertise.

Overarching trends

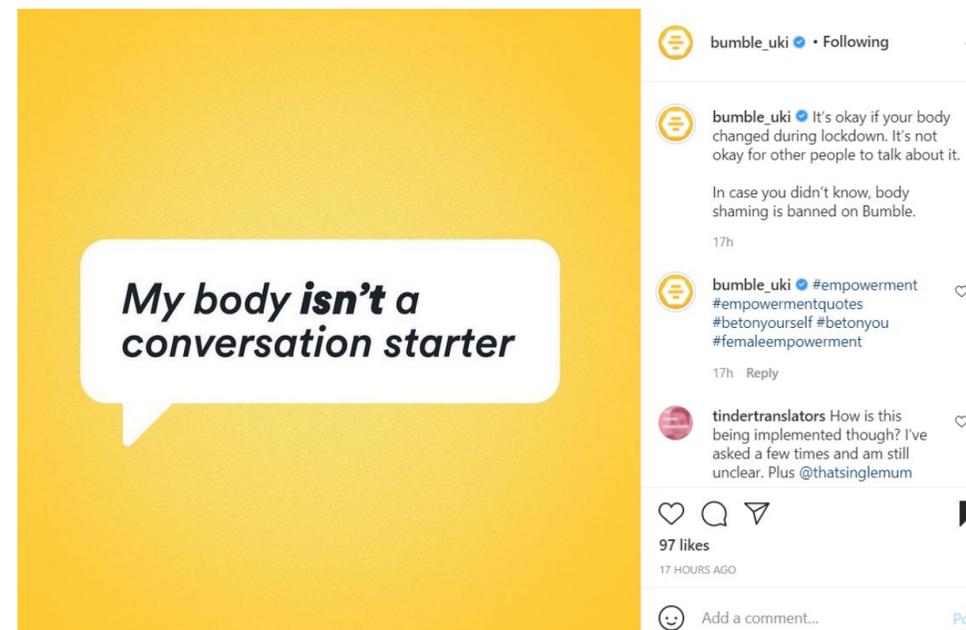
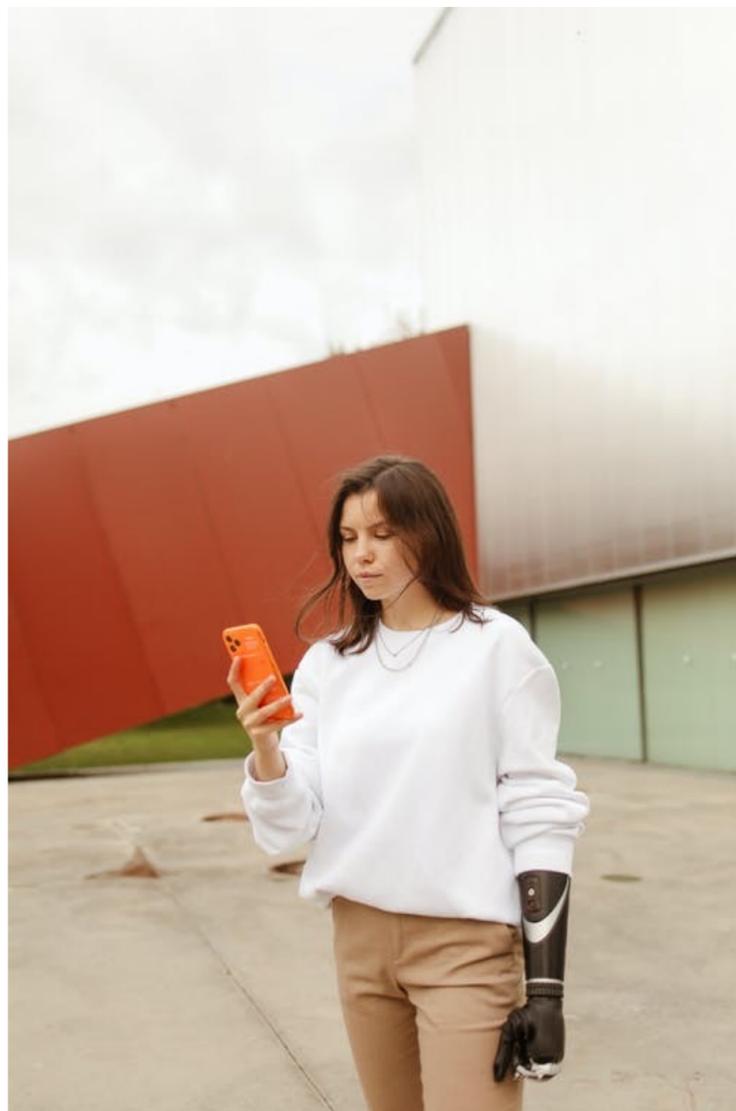
The global view

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Recommendations

Europe

Bumble announces intentions to ban any form of body shaming on its platform



51%
of consumers say they prefer to be associated
with companies that share their values
Mintel March 2021, UK

Policy has also been at the forefront of many companies' agendas. This quarter saw Bumble update its terms and conditions to more explicitly and intentionally **ban all forms of body shaming** from its platform. The app intends to ban "unsolicited and derogatory comments made about someone's appearance, body shape, size, or health" which includes any language deemed racist, fatphobic, colourist, ableist, transphobic, or homophobic.

Since its launch, Bumble has carved out a space in the dating app market not just by focusing on the user experience, but by being **values-driven**. The platform is focused on fostering respectful online connections and, most importantly, instituting structures and guidelines that better enforce those values. Bumble has been relatively unapologetic in doing so and its number of fans has grown because of it.

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Europe

British E-sports Association to launch gaming tournaments for people with disabilities

This year's Association of Colleges' FIFA Cup, included three disabled gamers. The students from National Star college in Gloucestershire, took part in the tournament, which led to the BEA's pledge to push for wider accessibility for disabled gamers. They aim to 'call on some of the biggest names in the technology industry to make that happen'.

They plan to use adaptive technology - like the Xbox Adaptive Controller - to run a pilot tournament.



Morrison's supports local community groups in need

This Easter, food retailer Morrison's gave away 100,000 Easter eggs to vulnerable people. They are working with community groups, food banks and charities to distribute the products. Customers also have the opportunity to get involved as Morrisons is setting up Easter egg donation stations in every store where customers can drop off additional eggs they have purchased.



40%

of consumers rank food poverty as their number 1 social concern

Mintel March 2021, UK

Overarching trends

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Europe

Technology and fashion combine to offer innovative smart-eyewear for disabled consumers

Fauna smart glasses are available in four models, two that have blue light filter lenses and two that have tinted lenses. All can be adjusted by an optician or optometrist to the individual's prescription. The glasses can be used to make hands-free and ear-free calls, play music for up to four hours and are Bluetooth-enabled with a 10-metre range. They are compatible with audio assistants, are touch-controlled and have a case with an integrated power bank.

Consumers are using new technology such as smart speakers and digital assistants to make tasks & operations easier, which is driving demand for brands to provide more choice of connected devices. We are seeing innovation that make common items into wearables to offer convenience and enhanced security, especially when combined with biometric technology. Aside from convenience, brands are also using wearable technology to assist consumer groups such as those with visual impairments, or to make common issues such as tracking pets, kids and even plants' growth more seamless.



As of March this year, envision glasses are now available worldwide. Envision has two solutions. Its smartphone app empowers blind and low vision users to be independent by 'speaking out' the visual world around them. The AI glasses use the power of speech to make everyday life more accessible for people with visual impairments. The glasses help disabled consumers sort through laundry by detecting colours, find missing objects with object recognition and share information.

Hear what you want to see.



Section 3b:

APAC



Overarching trends

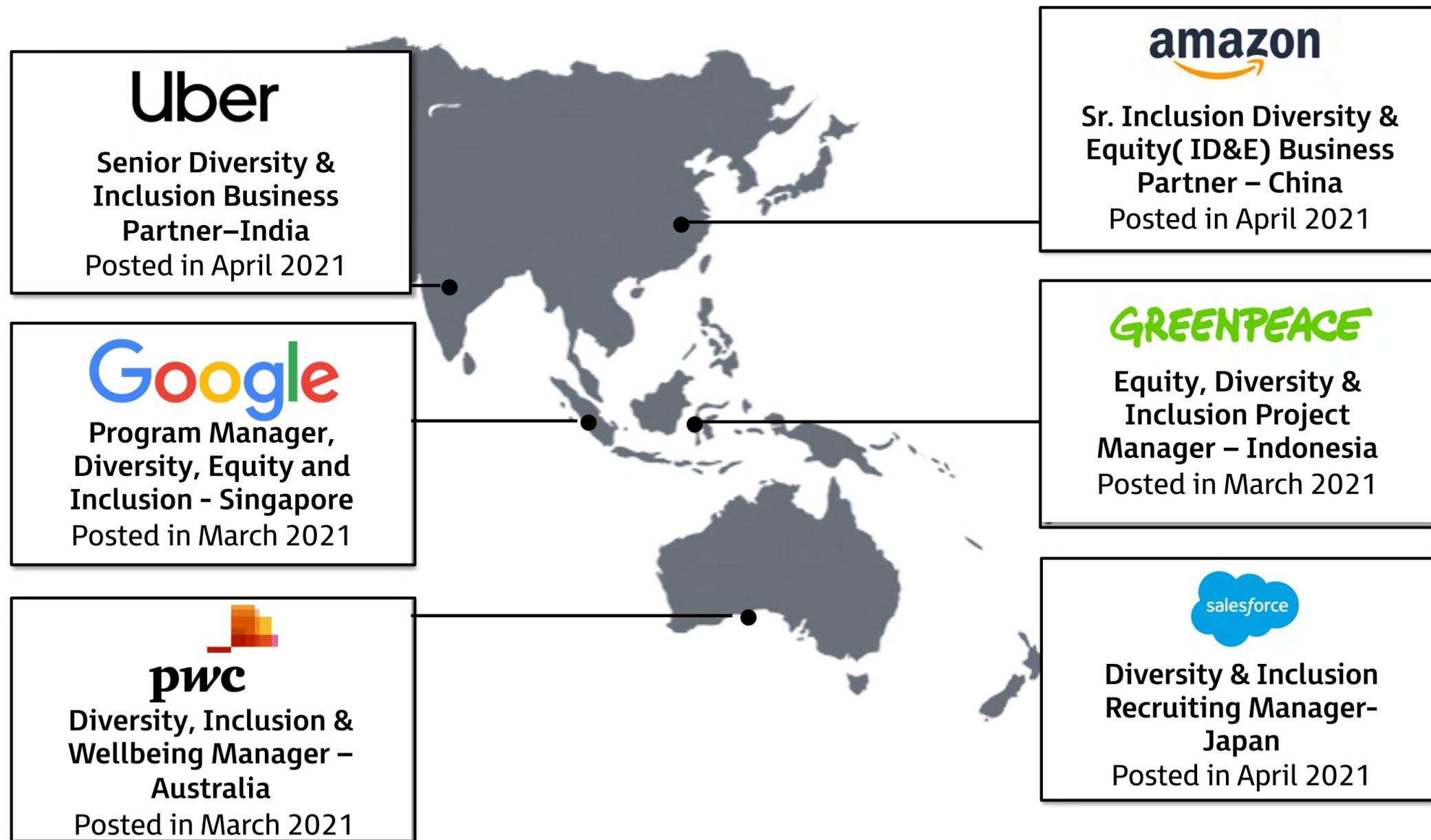
The global view

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APAC

Diversity in management



- There is consistently a wide range of diversity-focused roles in APAC. The majority of roles continue to be managerial or senior positions.
- Large corporations lead the way in hiring 'programme' and 'project manager' roles within diversity and inclusion.

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APAC

Singapore focuses on new programmes to encourage companies to employ more disabled people

The government in Singapore has recently introduced new disability policies. As of 2023, every preschool is to have an 'inclusion coordinator' to identify students who may have developmental needs, and The Ministry of Social and Family Development (MSF) and SG Enable are aiming to create 1,200 job opportunities for people with disabilities in 2021.

Three new programs are being launched to help upskill and train people with disabilities for employment. These include Place-and-Train, Attach-and-Train and Skills Development Programmes. Under the Place-and-Train programmes, people with disabilities will be assigned to employers and trained for new full-time or contract roles. The employers will also receive 90% salary support from the Government for the placements.



“Employers and host companies offering the Place-and-Train and Attach-and-Train programmes can also [access] the Job Redesign Grant under the Open Door Programme to [cover] the cost of equipment purchase, workplace modifications, job redesign or any efforts to accommodate people with disabilities in the workplace.”

26%

of consumers rank discrimination against disabilities as their number 1 social concern

45%

of consumers ranked discrimination against disabilities in their top 5 social concerns along side 'unfair pay of workers'

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APAC

Fintech start-up GajiGesa creates a new banking experience for the unbanked consumer

Fintech start-up GajiGesa will expand its services for “unbanked customers”. The app-based online banking startup says its mission is to “**help expand financial resilience**” across Indonesia. Its primary mission is to enable unbanked citizens to open a bank account and make and receive payments.

Around 66% of Indonesia’s 272 million population do not have access to a bank account, according to a study by Google/GfK. In addition, only 11% regularly use cashless payments. Reducing this vast gap in digital literacy and financial inclusion is a primary goal for Indonesia’s government.

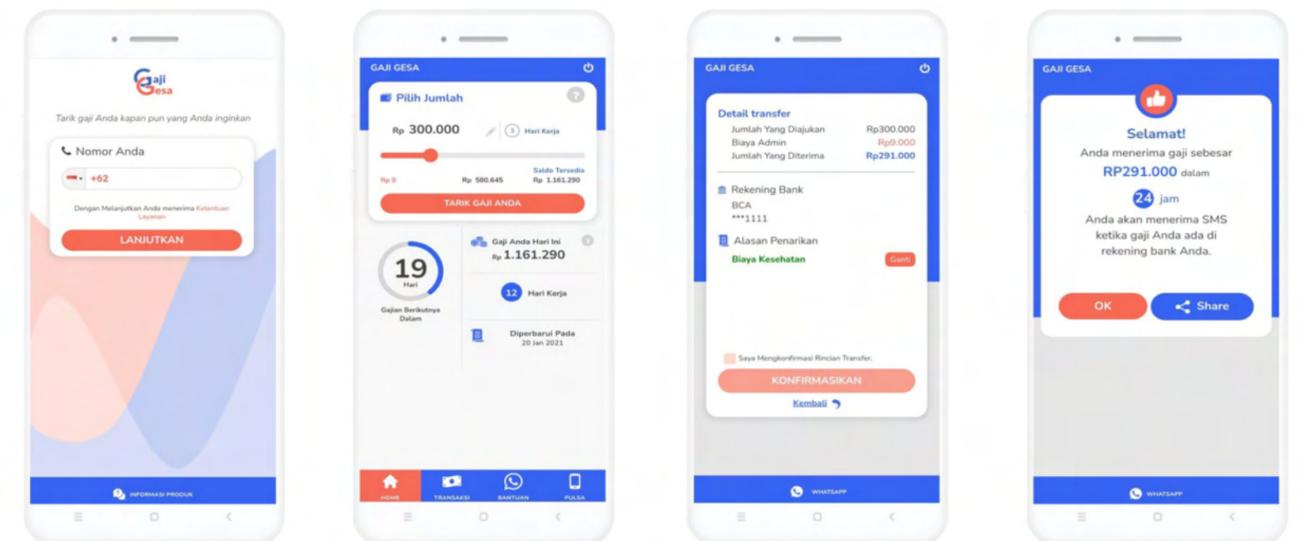
The nation’s banking institutions and fintech start-ups have been tasked with developing new online solutions to achieve this objective. Founded in 2020, GajiGesa partners with employers across Indonesia to help staff enjoy access to online financial services – in many cases for the first time. Using the app enables employees to track their wage earnings, pay bills, and make purchases using a prepaid card.

83%

of consumers have used their phone to manage their finances in the last 3 months

Mintel March 2021, Indonesia

For unbanked customers who deserve financial fairness, security and dignity.
GajiGesa



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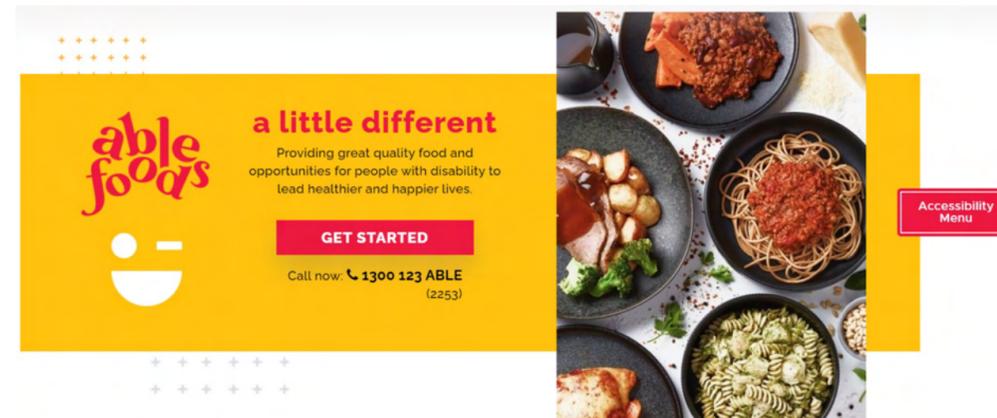
APAC

Paralympian launches ready meal range for people on Australia's National Disability Insurance Scheme

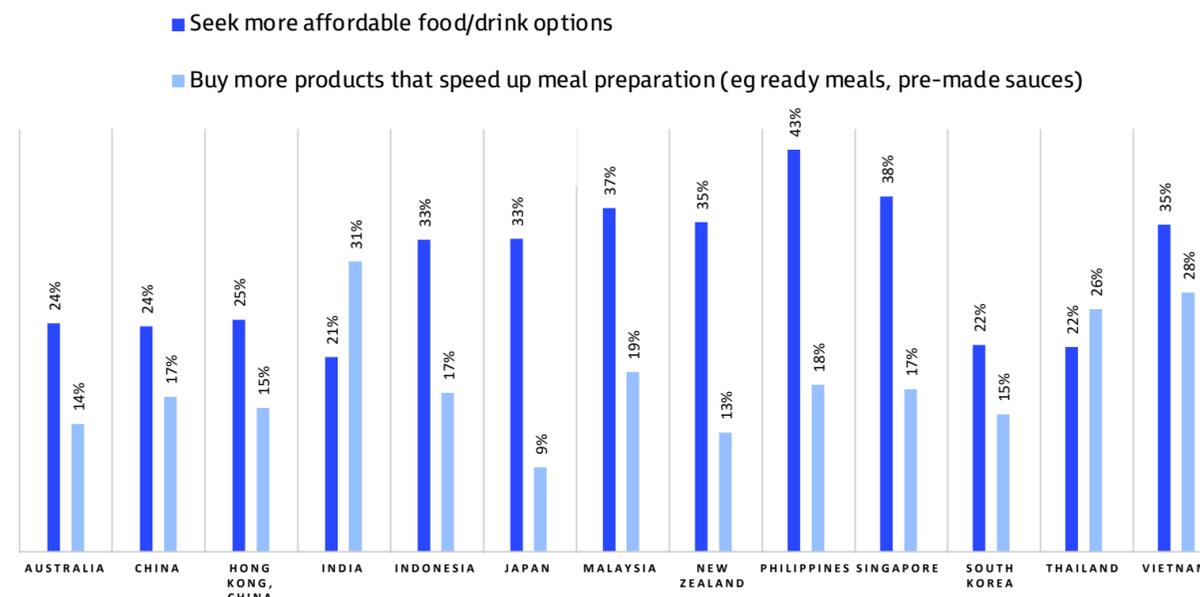
Australian Paralympian and radio personality Dylan Alcott has launched ready meal brand Able Foods, with the aim to produce inclusive, affordable and quality meals for people with disabilities.

The profit-for-purpose start-up has released 30 ready meals (remoulded texture-modified meals, desserts and snacks) for people on Australia's National Disability Insurance Scheme.

The packaging includes Braille stickers, and for eligible NDIS participants the price of a meal is less than AU\$3, while the cost of preparation and delivery is covered by the NDIS. The company is also providing opportunities by hiring people with disabilities throughout the business, from the warehouse to the marketing team, call centres and designers.



"Over the next 12 months, I plan to..."



Why is this important?
 For people living with a disability, self-sufficiency can be limited when products and services are not equipped to deal with different needs. Creating products with accessibility in mind – packaging that's easier to open, food textures that are easier to swallow, incorporating audio and haptic technologies in packaging – allows people more independence in their day-to-day lives, which could mean the difference when looking for work and living in their community. That this brand is founded by Dylan Alcott should also go some way to help mainstream these kinds of products, especially as they are set to compete with ready meals already on supermarket shelves.

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APAC

GrabAssist Plus increases mobility of disabled customers

Grab – the delivery and mobility company- is introducing GrabAssist Plus, which allows wheelchair users to board its private hire rides without dismounting from their wheelchairs.

All Grab drivers providing GrabAssist Plus will be specially trained to help wheelchair users. This new service is an improvement on the existing GrabAssist, which allows storage of folded wheelchairs but requires passengers to first dismount from their mobility aids. With GrabAssist Plus, wheelchair users will be able to smoothly board Grab vehicles while in their wheelchair the entire time, which can help such passengers to travel more independently.



Why is this important?

With social media giving more people a platform to speak up and share their experiences, consumers are becoming increasingly aware of the difficulties faced by people with disabilities when it comes to their day-to-day lives. Grab's initiative is a small but significant step in helping disabled people lead more independent lives, and Grab's large pool of users will also learn more about the importance of building a more accessible environment. Such initiatives can increase goodwill from consumers who prioritise doing good for the community, and can also normalise such measures – in turn paving the way for a more inclusive society.

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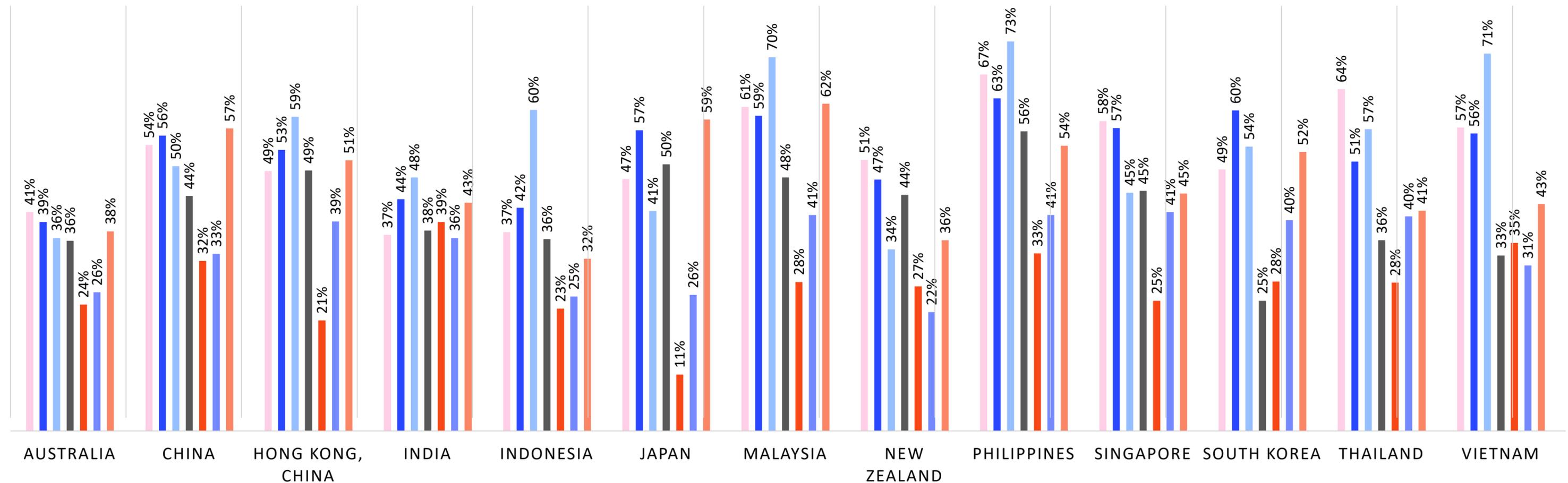
Recommendations

APAC

Health and finances remain the top concerns for consumers across the region

What are consumers most worried about?

■ My finances
 ■ My health
 ■ The COVID-19/coronavirus outbreak
 ■ My family's wellbeing
 ■ The environment
 ■ My job security ¹
■ My children's education ²



Source: Mintel G35 Data, Last 3 months to March 2021

Section 3c:

North America



Overarching trends

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North America

Diversity in management



- There were no shortage of diversity and inclusion leadership roles in North America this quarter. These roles are popping up in large tech, fashion and consultancy businesses.
- This quarter has seen an increase in consultant roles, especially for management consultancy firms. This shows that where companies don't have the internal expertise, they are willing to spend money on outsourcing it. This evidences the increase in demand for diversity and inclusion business transformation.

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North America

Nasdaq is set to advance diversity of top companies with new 'board-diversity rules'

Nasdaq's latest Board of Diversity Rules Proposal would require most companies listed on the exchange to have at least one director who identifies as female and one who identifies as an underrepresented minority or LGBTQ. However, this has received wide criticism from activist organisations, claiming it is a "narrow definition of diversity" and that disabilities should be included.



Including disability diversity in the corporate boardroom would mark a major turning point for disability rights and have the single largest impact on the economic independence and quality of life for millions of people with disabilities. If this omission persists, then Nasdaq and the Securities and Exchange Commission will miss an enormous opportunity to ensure that corporate leadership reflects the diversity of the U.S. and the world.

AAPD Chairman Ted Kennedy Jr.

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North America

Helping disabled people find jobs amid the pandemic

North Carolina Career Fair

On the 23rd March 2021 North Carolina office of State Human Resources held a virtual jobs fair for individuals with disabilities. The Government is “committed to creating an inclusive and welcoming workspace for individuals with disabilities”.

The virtual career event allows disabled people to connect with recruiters from the comfort of their own homes, while the pandemic continues to limit mobility.



VIRTUAL CAREER FAIR
FOR INDIVIDUALS WITH DISABILITIES
TUESDAY, MARCH 23, 2021
9 AM - 4 PM (EST)

#EmploymentFirst | #Work4NC

Are you a person with a disability looking for a career opportunity or internship?

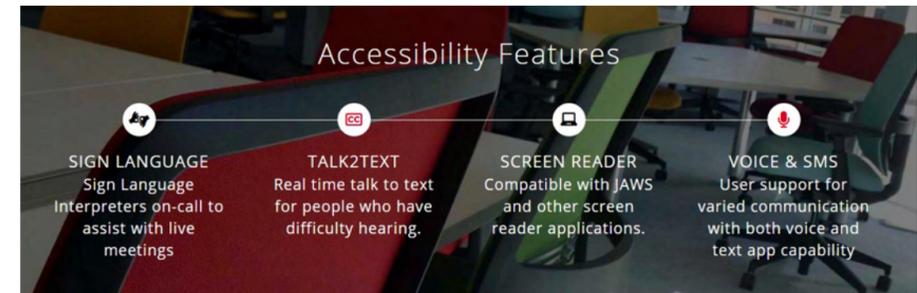
This Virtual Career Fair is **FREE** for jobseekers with disabilities to attend.

Date: Tuesday, March 23, 2021
Time: 9 a.m. to 4 p.m (EST)
Location: Virtual

[Register Here](#)

Ability Career Fair

Ability Magazine also ran an accessible online jobs event for people with disabilities in the US. There were several accessible features made available to participants including; Sign language Support, Screen readers, voice messaging and a talk2text application. Participants were also able to talk directly to recruiters, still giving them the option to connect ‘face to face’.



Accessibility Features

- SIGN LANGUAGE**
Sign Language Interpreters on-call to assist with live meetings
- TALK2TEXT**
Real time talk to text for people who have difficulty hearing.
- SCREEN READER**
Compatible with JAWS and other screen reader applications.
- VOICE & SMS**
User support for varied communication with both voice and text app capability

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North America

Sustainable agriculture meets social enterprise: How vertical farming is helping disabled communities

Urban hydroponic farm company Vertical Harvest is building urban housing developments that **combine low-cost housing with vertical farms**. The buildings will be in Westbrook, Maine, Philadelphia, and Chicago, serving as urban redevelopment tools that **grow local produce, employ under-served populations** (e.g. people with disabilities or formerly incarcerated individuals), and provide affordable housing.

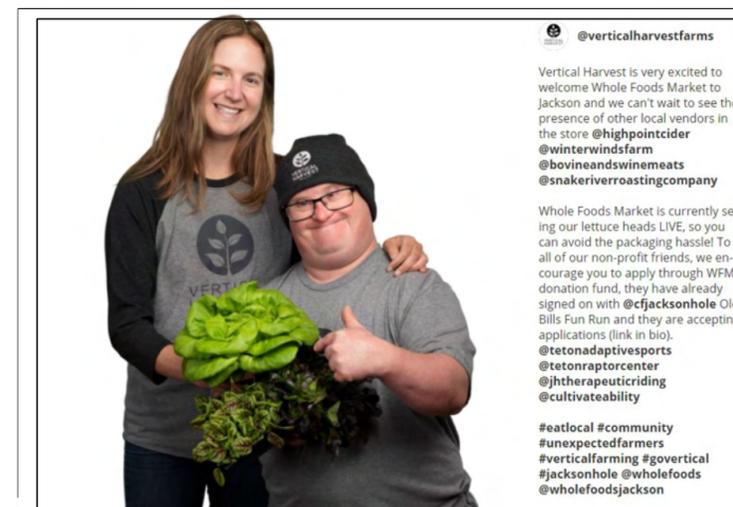
The ground floors of the buildings will be for community access and resources, while the 70,000ft² greenhouse will fill multiple floors above and grow around 1 million pounds of produce per year. The produce will be sold to residents on-site and also to supermarkets, restaurants, hospitals, and other large customers, with plans to subsidize 10-15% of the harvest for local food pantries and community organizations.



Developing others

Vertical Harvest is committed to developing all of their staff, no matter their abilities. They create career plans which “foster professional development, personal discovery and community impact through an inclusive approach.”

There are three key areas of focus, meaning employees can focus on professional, personal and community growth.



68%

of consumers say they try to buy from local companies where possible

Mintel March 2021, USA

Overarching trends

The global view

The regional view

Recommendations

North America

Target launches an inclusive kids campaign, while Trader Joe's builds an autism-friendly shopping experience

Marketing Innovation

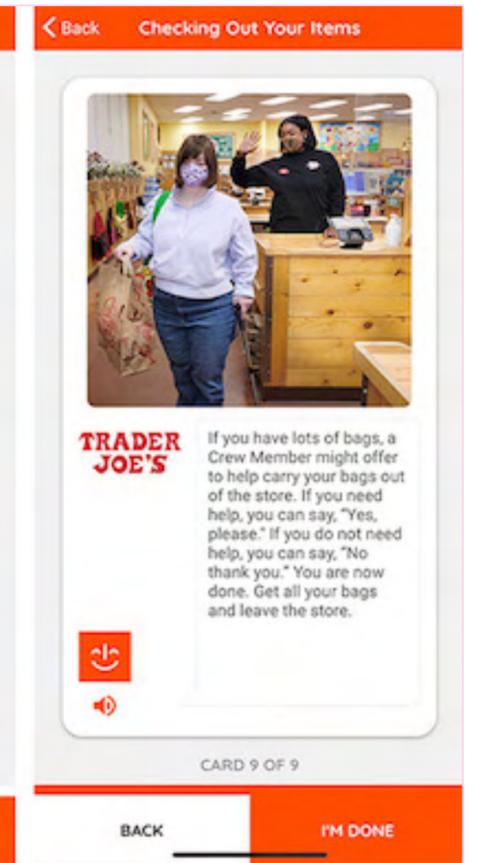
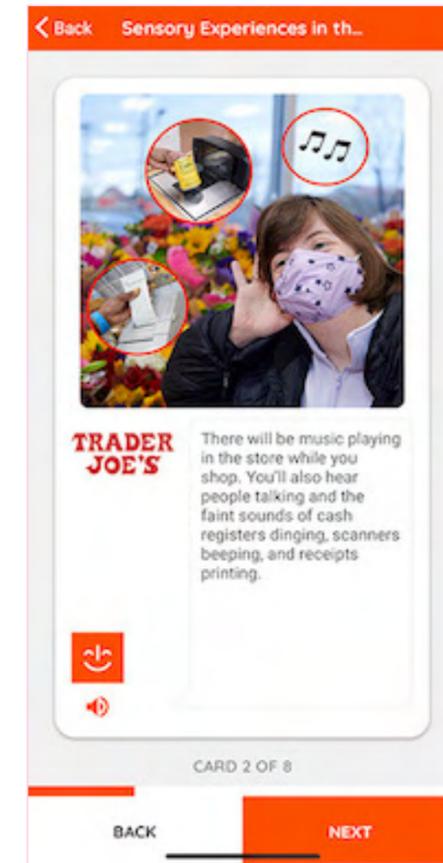
Target has launched an **inclusive kids campaign**, using a range of neuro-diverse models to showcase diversity.

Target have been leading the way in inclusive advertising, with their first diverse campaign launching in 2014 featuring Izzy a child with Down syndrome.

Digital Innovation

Trader Joe's has recently launched a new **application to better serve customers with autism**.

They have partnered with Magnusmode, a Toronto-based provider of solutions for the autism and disability communities, to offer MagnusCards, a free app that guides autistic and developmentally disabled customers through the shopping experience.



Overarching trends

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North America

Unilever launches first deodorant designed for people with disabilities

Product Innovation

In the United States alone, one in four people have a disability, yet beauty and personal care products often overlook their challenges and needs. As the world's No.1 antiperspirant and deodorant brand, Degree is taking action to change this. Degree – also sold as Rexona, Sure and Shield in different countries – believes movement has the power to transform lives and that everyone should be able to experience the incredible physical, mental and social benefits it can bring, whoever you are and however you move.

Degree Inclusive's hooked container is designed for one-handed usage. Enhanced grip placement and magnetic 'click' closures make it easier for users with limited grip or sight to remove and replace the cap. A larger roll-on applicator means the product reaches a greater surface area per swipe. The label also includes instructions in braille.



In partnership with the Muscular Dystrophy Association, non-profit organisations Open Style Lab and The Lighthouse Chicago, and a panel of engineers, designers and occupational therapists, Degree invited 200 consumers with a range of physical disabilities to trial its prototype roll-on. Their feedback will be applied to help improve the product for its future commercial launch.

Overarching trends

The global view

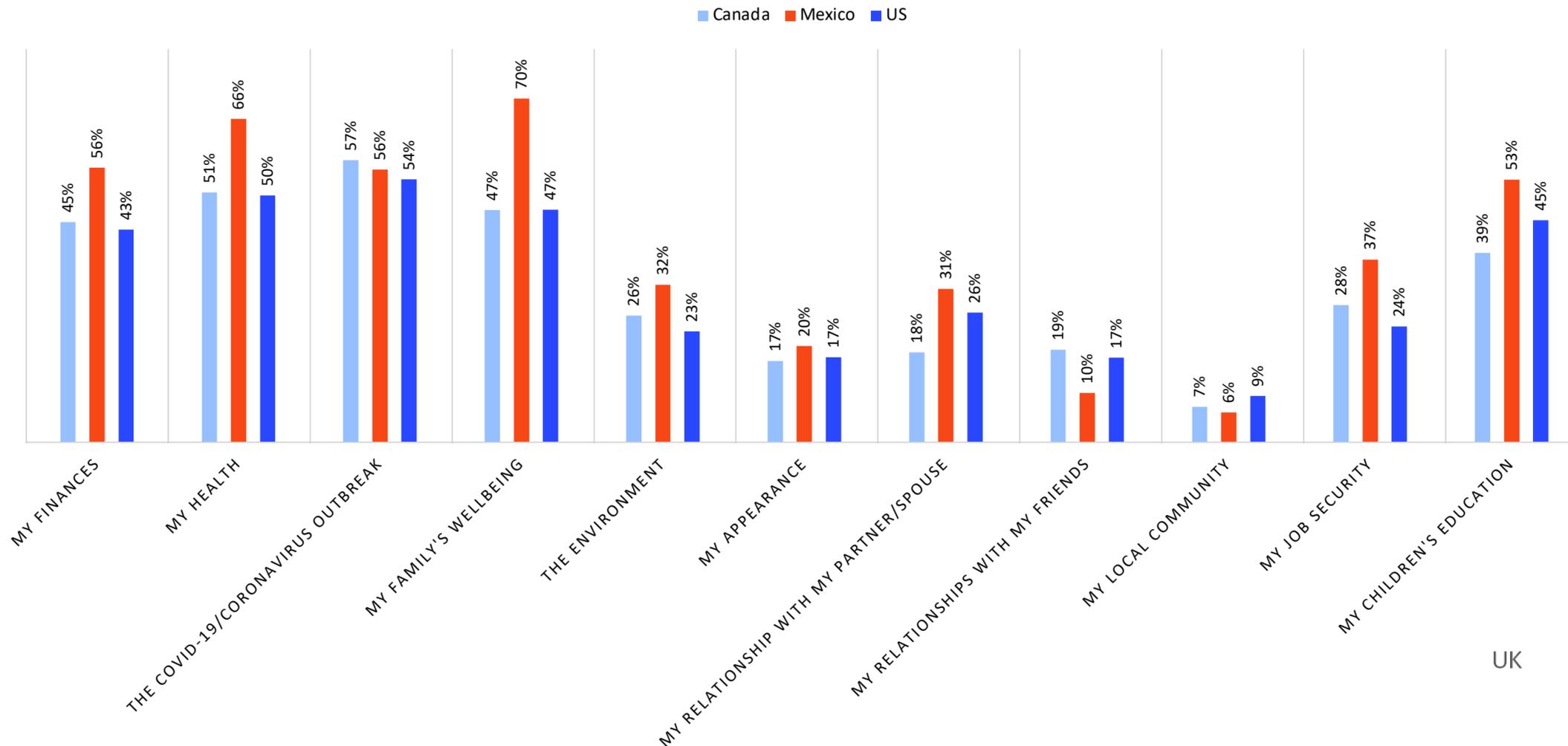
The regional view

Recommendations

North America

As the pandemic continues, businesses can't lose sight of their sustainability goals

What are consumers the most worried about?



Like other regions, the top concerns remain consistent; health is still the most important.

As the economic and social impacts of the pandemic polarise society, there is an increased duty to protect people at risk.

While COVID-19 and health concerns are front of mind for consumers right now, environmental concerns haven't disappeared. In other Mintel research conducted over the same time period, it was found that 82% of Canadians and 77% of Americans say they try to act in a way that is not harmful to the environment. Ignoring the climate crisis or failing to see the link between the pandemic and the environment will cause customers concern. Businesses need to make progress in all areas to reassure the consumer.

Section 3d:

South America



Overarching trends

The global view

The regional view

Recommendations

South America

Diversity in management



Global Equity, Diversity and Inclusion Fellow- Colombia
Posted in April 2021



Inclusion & Diversity Manager, LATAM- São Paulo, Brazil
Posted in March 2021



Diversity Equality and Inclusion Advisor Consultancy- El Salvador
Posted in April 2021



Program Manager, Diversity, Equity and Inclusion- São Paulo, Brazil
Posted in April 2021



Inclusion and Diversity Jr Manager- São Paulo, Brazil
Posted in March 2021

- As in the previous edition, diversity & inclusion roles were concentrated in São Paulo, Brazil, and many continue to be within technology companies.
- This quarter has seen an increase in D&I roles within global charities and research centres across the region.

Overarching trends

The global view

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Recommendations

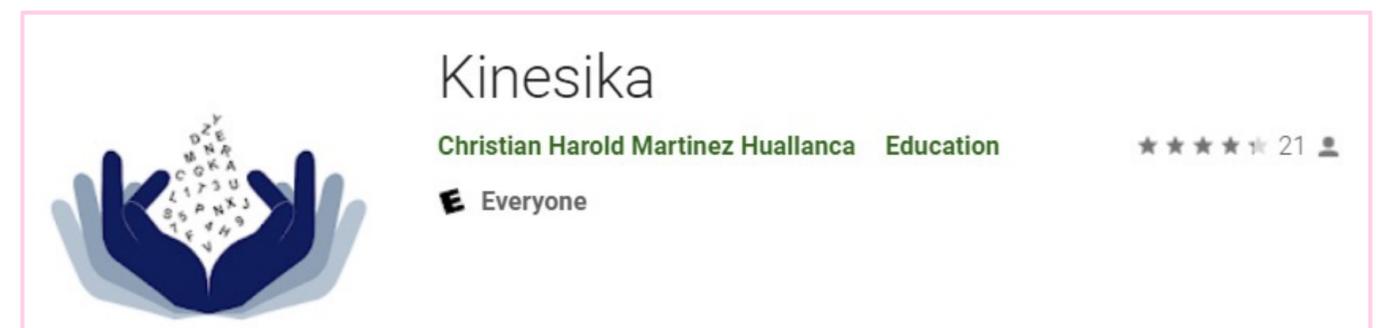
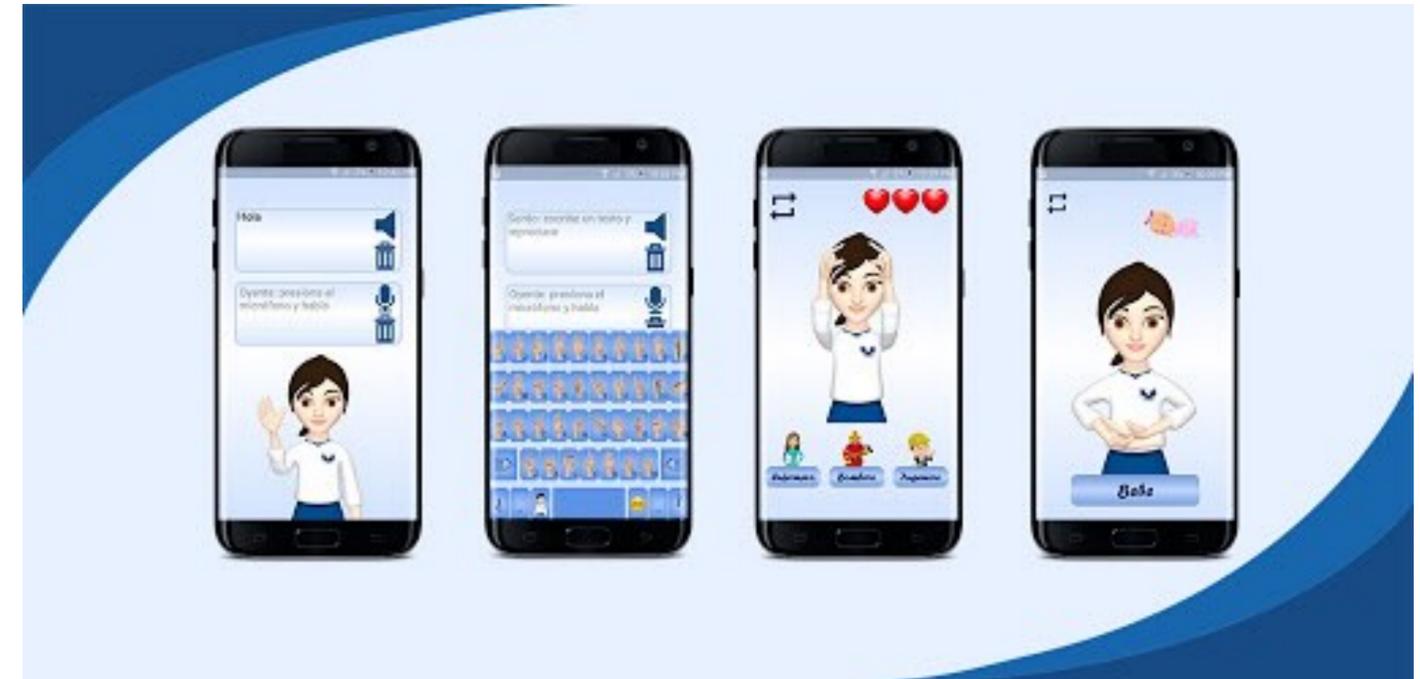
South America

The new Kinesika app turns sign language into text and voice in real time

Mobile app Kinesika translates sign language into text and voice in real time. The virtual interpreter can also translate audio information to sign language. Initially designed as a learning support tool to be used within classrooms, the app has already been downloaded 3,000 times and has 900 active users across Peru.

Why is this important?

Inclusivity has taken a central role for consumers today. In a society where disabilities are no longer seen as limiting, innovators are developing products that seek to help differently abled people to be included in practical ways. It seems clear that technology is playing a central role in the inclusivity movement. What is interesting here is that many of these new projects do not necessarily target disabled people, instead, they are designed to educate and aid able-bodied individuals in a bid to create a more equal dialog.



Overarching trends

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South America

South American consumers rank financial worries higher than other regions

What are consumers the most worried about?



Brazil continues to be impacted by the virus, with consumers worried about health, family and finances. Financial worries for South America are ranked highly compared to other regions, with 41% of Brazilian consumers claiming their finances have been negatively impacted over the last 12 months. Disabled people are more likely to live in poverty. The likelihood is that greater financial pressure of the pandemic is going to impact them more severely.

This breaks down to 44% of women compared to 38% of men. Unfortunately this isn't just an insight isolated to Brazil or South America. As mentioned elsewhere, women globally have been the most economically hard hit by the pandemic. The needs of women, especially disabled women, need to be incorporated into building back a better post-pandemic workplace.

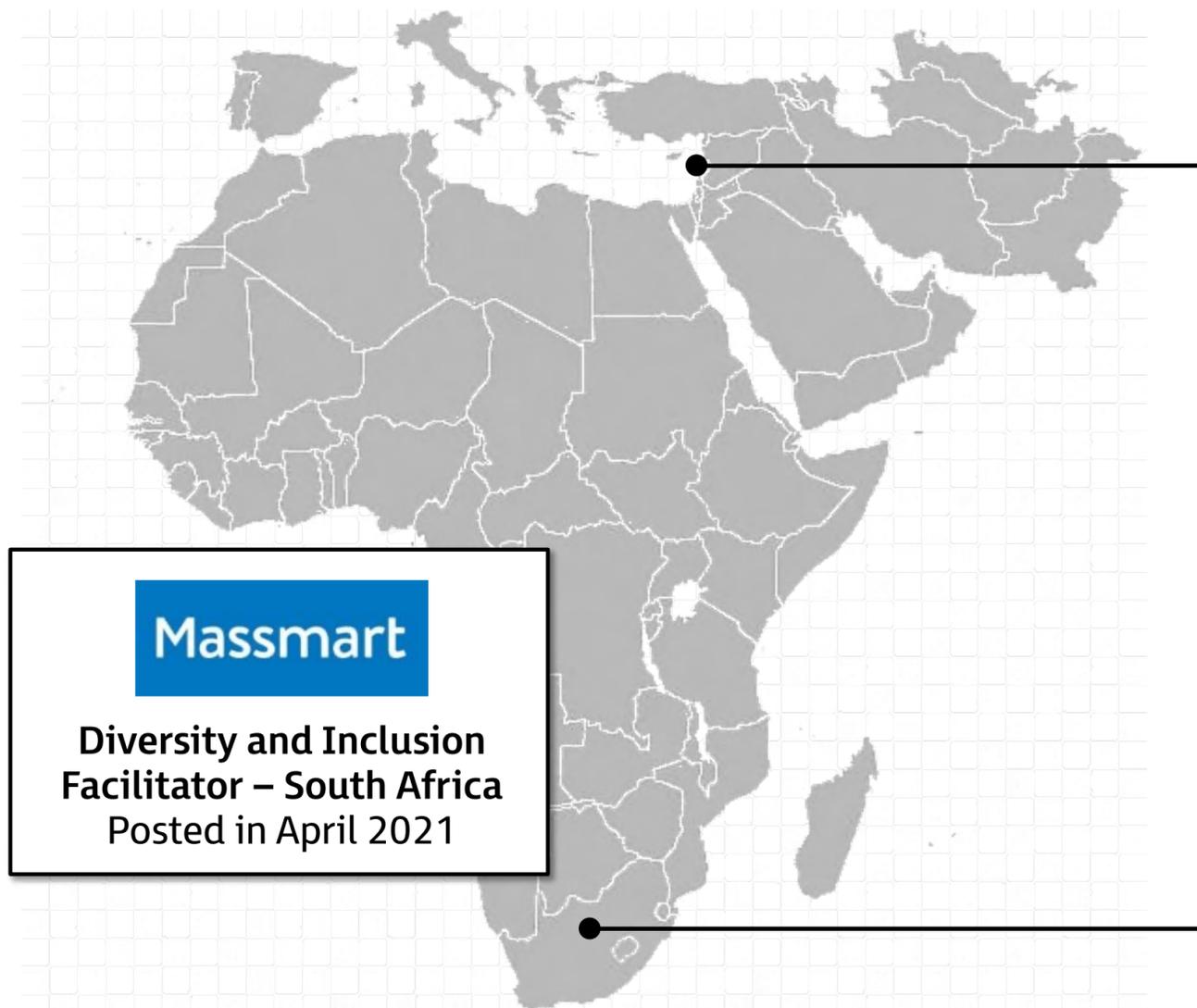
Section 3e:

MEA



MEA

Diversity in management



 IREX
Gender Equality and Social Inclusion Advisor
– Jordan
Posted in March 2021

 intel
HR Diversity and Inclusion Project Management
Student - Israel
Posted in April 2021

 Google
Equity, Retention and Progression Consultant,
Employee Engagement –
Johannesburg, South Africa
Posted in March 2021

- There was a limited amount of roles advertised in this region, however, like last quarter there was a higher number of roles focused on gender than disability.
- This quarter saw the emergence of student/ internship roles within Diversity and Inclusion in the region. Establishing expertise early on in careers will help build the skills needed to create impactful change.
- Diversity and inclusion roles were found in large tech and retail companies

Overarching trends

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MEA

The UAE Ministry of Health and Prevention (MoHAP) has launched a new initiative to provide Braille medicine labels for the visually impaired.

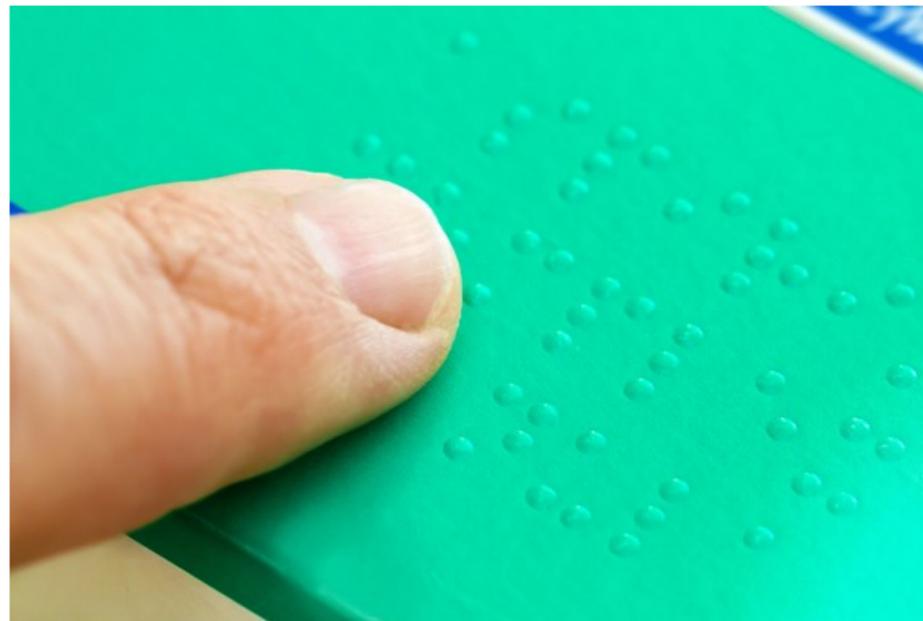
The UAE Ministry of Health and Prevention (MoHAP) has launched a new initiative in partnership with Zayed Higher Organization (ZHO) for People of Determination.

It will provide Braille medicine labels in Arabic, English and Urdu to help support and further integrate visually impaired people into society. Many consumer groups often require and rely on personal assistance in-store, but social distancing is now complicating this process and can leave those with disabilities feeling isolated. Brands that create empowering initiatives are perceived favourably and can become indispensable to people with disabilities by improving their overall quality of life and mental health. As consumers seek brands that share their own morals and values, and inclusivity and representation is a growing demand, brands that demonstrate this are setting a new standard.

Source: Mintel Trends, [MoHAP](#)

In most countries, the phrase “disabled access” is used. In the UAE, however, they say “people of determination”.

The new term was launched in April 2017 by HH Sheikh Mohammed bin Rashid Al Maktoum (vice president of the UAE and ruler of Dubai), as part of his national strategy for empowering people with disabilities.



What's Next?

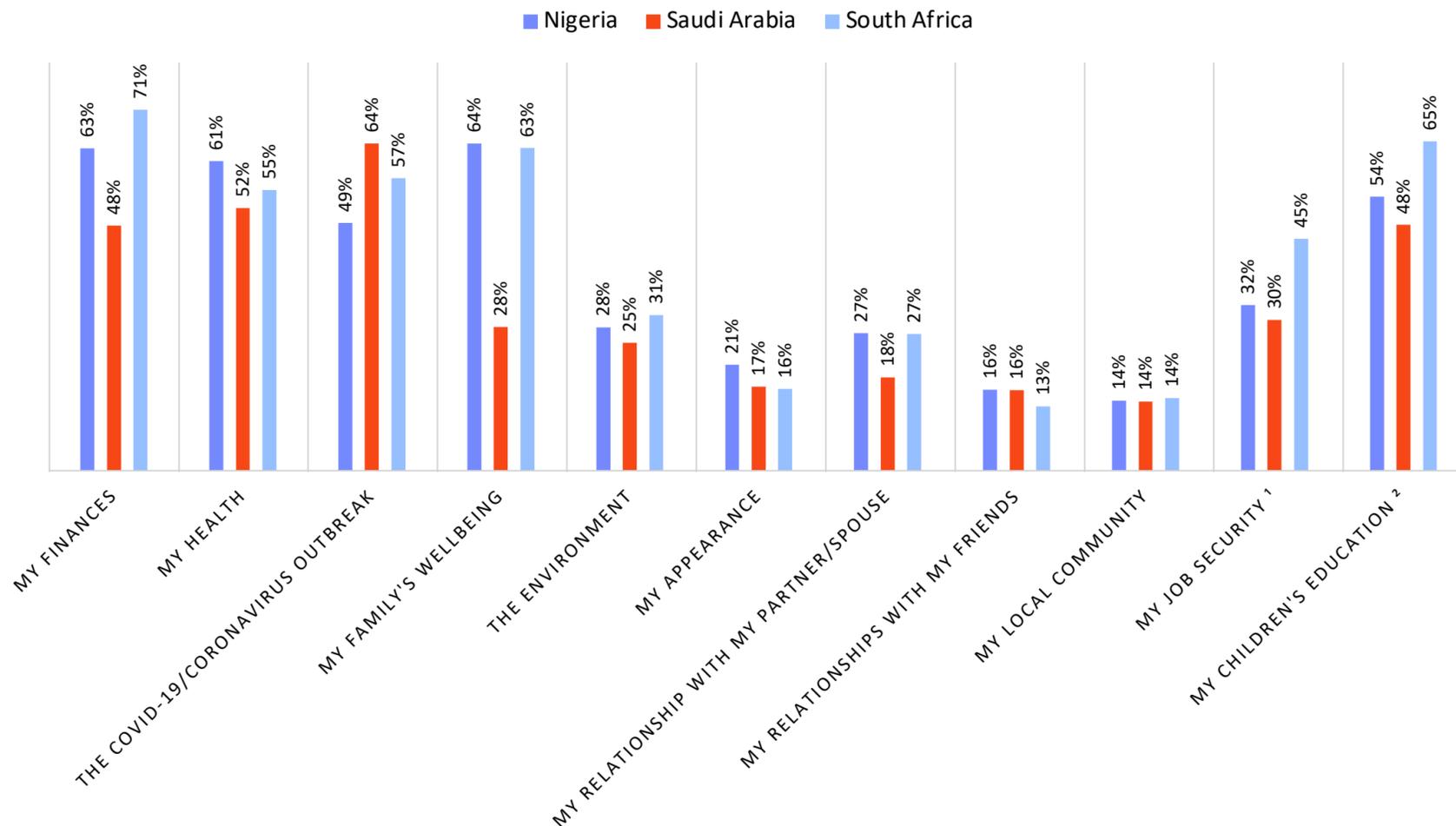
Consumers will increasingly expect and demand that brands protect them, especially when it comes to safeguarding the underprivileged in their communities. While Europe and North America are already leveraging technology, such as AI and robotics, to improve their offerings and representation of disabled consumer groups, MEA is focused on customer experience.

These innovations will help to assist those with disabilities by offering more personalised products and services. We can expect Braille to be incorporated into packaging, in-store displays and at checkouts. Smart biometric apps and devices will facilitate AI voice command across multiple consumer touchpoints from online and telephone to in-store services.

MEA

Consumers are worried about their family's wellbeing and education amid the COVID-19 pandemic

What are consumers worried about?



Wellbeing remains high on the agenda for Saudi Arabia and South Africa, with consumers saying they would like to have more time for wellness activities like exercise, relaxation and enough sleep.

Mental health continues to be a key concern amid COVID-19. 91% of Nigerians say they are actively looking at ways to reduce stress, with figures almost as high in Saudi Arabia (83%) and South Africa (81%).

Section 4:

Let's Discuss...



Section 4: Let's Discuss...

Let's Discuss: Invisible Disabilities amongst Young Consumers



In developed countries, more young people are suffering from chronic invisible illnesses, than one would assume. The lack of understanding around this topic is feeding misconceptions about invisible chronic illnesses and who they affect.

Long term health conditions grow amongst younger demographics

Blue Cross Shield recently released data that shows **1 in 3 millennials** are suffering from a long term health condition - "putting them on track to be one of the unhealthiest generations in US history". In other parts of the world, it's a similar story. In Australia, 35–39% of 15–24-year-olds had one or more chronic conditions in 2017/2018. Conditions like auto-immune diseases, chronic fatigue and anxiety or depression all appear invisible to the naked eye, but can have a huge impact on individuals' lives, including their work.

The recent pandemic is expected to send figures yet higher, with a predicted 10% of people infected expected to suffer from 'long-COVID'.

Source: Mintel, Raise the Bar, Blue Cross Blue Shield, Australian Bureau of Statistics, The Guardian



10%

of people infected expected to suffer from 'long-COVID'



Section 4: Let's Discuss...

The topic of invisible disability has been given more air time as celebrities, like Lady Gaga and Selena Gomez, have started to talk about their long-term illnesses, and we continue to see an increase in young, disabled influencers sharing their experiences on social media. It will become increasingly important to develop products, services, campaigns and flexible working patterns in order to stay in favour with the younger consumer and employee.

Young consumers expect inclusivity

This is reflected in Mintel's recent research into fashion and beauty. 75% of beauty users would like to see people with physical disabilities in advertising, increasing to 80% of 18-24 year olds. Younger generations are also more likely to say that seeing diversity in beauty campaigns tells them that a brand reflects their own values. 18-24 year olds are the most likely age group to have shopped from beauty brands that are minority-owned. 25-34 year olds are most likely to have paid more for a product from an inclusive brand. And yet, there is still a lot of cynicism towards 'forced' diversity. 56% of UK consumers say diversity has become a tick box exercise, suggesting authenticity is also important in appealing to the younger consumer.

So, next time you want to create dialogue with younger consumers, keep in mind how inclusivity and accessibility can make a huge impact in creating a safe and productive space to work.



25-34 year olds

are most likely to have paid more for a product from an inclusive brand

Section 5:

Conclusions.



Section 5: Conclusions

Overarching trends

The global view

The regional view

Recommendations

Consider outsourcing for additional expertise

Where businesses need additional advice, they should look to bring in help from the growing market of diversity and inclusion consultants. Field expertise and diversity of thought can add a valuable perspective, as can seeking the first-hand experiences and opinions of disabled consumers.

Back innovation for disabled people

Accessible innovation has a funding problem. To reach mainstream, disabled-friendly products and services (like the RNIB pregnancy test) need backing to ensure they will reach the consumers that need them most. Pledge to invest in *long term solutions* for your disabled consumers.

COVID-19 puts added pressure on mental health

Wellbeing takes top priority amid COVID-19 and as a result companies are encouraging wellness activities for customers and employees alike. This generates the impetus to consider the needs of disabled people in a currently ableist wellness space. For example, running a yoga session only works for able-bodied people. Build inclusive wellness initiatives that work for all.

Section 5: Conclusions

Overarching trends

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Recommendations

COVID-19 highlights the benefits of flexible working for disabled people

Global businesses should provide flexible plans for the 'roadmap' out of lockdown, which accounts for the differences in ability and circumstance. The pandemic has highlighted inequalities in society and the 'new normal' provides an opportunity to shun the 'one size fits all' approach. Some of the benefits of lockdown, including working from home, can make access to work easier and more convenient for disabled people.

Provide training programmes for disabled people

COVID-19 has hit certain industries particularly hard, but as lockdowns ease there is an opportunity to rebuild. Nestlé is helping to rebuild the hospitality industry by providing free accessible culinary training. Having dedicated programmes to upskill disabled employees will not only help economies, but also the lives of the vulnerable and marginalised.

Marketing Matters

Show customers you share their values by including spokespeople, influencers and models from diverse backgrounds, with diverse capabilities. However, to appeal to the younger consumer, this needs to feel authentic and not just a box-ticking exercise. Disabilities come in different forms; just because they aren't visible doesn't mean they don't need to be catered for.

Disability is your business.



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