



VALUABLE TRUTH REPORT 2022

Tracking Progress In Global
Business Disability Inclusion





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INTRODUCTION

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A Letter From Our Founder

Our 2022 Valuable Truth survey is a testament to the commitment the Collective has undertaken to hold honest dialogues about the challenges faced, and openly share discoveries and breakthroughs so we can all get better, together, faster.

There are so many accomplishments to keep us focused on the long road in front of us. I am incredibly proud of the strides taken by the Collective and greatly anticipate the positive impact we will make as we work together to drive system change across our six pillars: C-Suite, Culture, Customer, Reporting, Representation, and Research.

Whilst each member of the Valuable 500 is at a different stage of their disability inclusion journey this report highlights the importance of eliminating groupthink. By diversifying old notions of what it means to be inclusive and accessible we can lay an effective framework that considers all parties. With 81% of our respondents stating an improvement on their pre-pandemic disability strategies and 87% now charting DE&I efforts within their annual report – we are certainly making progress. Nonetheless, empty platitudes will no longer suffice, and the Collective are actively moving from commitments to action.

The Valuable 500's existence is not merely a business case on the merits of capitalising on disabled talent or consumer share – it is a human case. Only by putting disabled staff and customers at the heart of business strategies will companies rewrite the cultural narrative necessary to transform how we do business. Inclusion is about choice, equitable investment of resources, and leadership. It is time for our intention to be reflected by greater action.

“ Only by putting disabled staff and customers at the heart of business strategies will companies rewrite the cultural narrative necessary to transform how we do business. ”

**CAROLINE CASEY
FOUNDER
THE VALUABLE 500**





The Valuable 500

The Valuable 500 was announced at the World Economic Forum Annual Meeting in January 2019. Today, the Valuable 500 is the largest community of Global CEOs committed to disability inclusion in business.

Since its creation, the Valuable 500 has achieved its initial goal of getting 500 multi-national organisations to make a public commitment to disability inclusion in their organisation, igniting a historic global movement for a new age of diversity in business. The Valuable 500 and their global impact partner, The Nippon Foundation, will be working closely with the World Economic Forum and International Disability Alliance – bringing together a leading philanthropic organisation with the most prestigious global business network and the voice of the global disability community.

By engaging with the world's most influential business leaders and brands, the network now has a combined revenue of over \$8 trillion, combined market capital of \$23 trillion, and employs a staggering 22 million people worldwide. Its members include 15 global CEOs and companies who will be spearheading the transformation programmes and services to be offered under Phase 2 – under the pillars of Culture within organisations, C-Suite storytelling, the Customer journey, Reporting, Representation and Research.

After reaching this important milestone, the Valuable 500 is determined to create a community that supports and empowers its 500 members to systematically transform their businesses, so they include the 1.3 billion people living with disabilities worldwide, thereby unlocking their business, social and economic potential.

We believe that if business takes the lead, society and government will follow. Truly inclusive businesses can build truly inclusive societies.

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\$8 trillion

combined market capital of

\$23 trillion

and employs a staggering

22 million

people worldwide



The Valuable 500 Members

ABeam Consulting	Auto Trader	Bridgestone Corporation	Cognizant	Edelman	Grant Thornton LLP	ISS A/S
Accenture	Aviva	Bristol Myers Squibb	Coles Group	EDF Energy	Greencore Group	ITV
Accor	AXA	British Airways	Colt	EDP	Greene King	IWG
Acosta	Axel Springer	British Land	Comcast NBC Universal	Egged	Greggs	Jacobs
Addleshaw Goddard LLP	Ayalon Insurance Co. Ltd.	Britvic	Compass Group	Electrocomponents Plc	GSK	Jaguar Land Rover
Adecco	Azrieli Group Ltd.	Brookfield Properties	Concentrix	Endava	GSMA	Japan Airlines
Adobe	B&Q	BT	Costain Group	Endesa	Gulf International Bank	Jardine Motors
AESC	Babcock International	Bupa	Credit Suisse	Enel	H&M	John Sisk & Son
AGL	BAE Systems	Burberry	Cummins	ENEOS Holdings, Inc.	Hachette UK	Johnson & Johnson
AIB Group	Baker McKenzie	Buzzfeed	Daimler	Enterprise Holdings	Harel Insurance	Johnson Controls
AIG Israel	Bank Hapoalim	Calvin Klein, Inc.	Daiwa House Industry Co., Ltd.	Euromoney Institutional Investor	HCL	Johnson Matthey
Aioi Nissay Dowa Insurance	Bank of America	Canada Post	Dalata Hotel Group	European Investment Bank	Heathrow Airport	Jurys Inn and Leonardo Hotels
Airbnb, Inc.	Bank of England	Canal Plus Group	Danske Bank	European Space Agency	Hempel	UK and Ireland
AKBANK	Bank of Ireland	Capco	Deckers	Eversheds Sutherland	Herbert Smith Freehills	Kantar
Allegis Group	Bank Yahav	Capgemini	Delek Group	Exal Corporation	Hertz	Kao Corporation
Allianz	Barclays	Caretech Holdings PLC	Deloitte	Expedia	Hewlett Packard Enterprise	Kawada Technologies
Allied Global Services	Barilla	Carnival UK	Deloitte Tohmatsu Group	EY	HGS	KBZ Bank
Alstom	Barratt Developments Plc	CBI	Deloitte UK	FARFETCH	Hilton	Keelings
Altria	BASF	Cellcom	Dentsu	Fast Retailing	Hitachi Group	Keio Plaza Hotel
American Express	Bayer	Centene	Deutsche Bank	Fattal Hotels	HOBAN Recruitment	Kerry Foods
Amot Investments Ltd.	BBC	Central Group	Deutsche Bank India	Fidelity International	Hogan Lovells	Keter
Amplifon	Benesse Holdings, Inc.	Centrica	Deutsche Bank UK	Financial Times	Hoxby Limited	Kidzania
AMS	Bespoke Hotels	Cerealto Siro Foods	Digicel Group	Firmenich	HSBC	Kin + Carta
ANA	Bezeq	CGI IT UK Limited	Direct Line Group	FleishmanHillard	HSBC Mexico	Kingsley Napley
Anglo American	Bezeq International	Channel 4	DMM.com LLC	Flex	HSBC UK	Kmart
Anthem	Birds Eye	Charles Russell Speechlys LLP	DNP Group	Fossil	Hypovereinsbank	KNT-CT
ANZ	Black & Veatch	CIBC	Dow	Freshfields	IBM	KOKUYO
AON	Bloomberg	Cinema City	DPD Group	Fujitsu	IFF	Korn Ferry
APM	BMW AG	Cinépolis	Dr. Reddy's Laboratories	Galaxy Surfactants Ltd.	IHG	KPMG
Apple	BNY Mellon	Circle Health Group	DSM	Gatwick Airport	InMoment	Kurt Geiger
Aramco	Boeing	Cisco	DTE Energy	Gett Delivery	Innocent Drinks	L'Oréal
Arkia	Booths	Citigroup Inc	DTEK	GHD	Inside Ideas Group & Oliver	Laguna Clothing
Aroma Espresso Bar	Boston Consulting Group	Citrix	DTSS	Gilbert + Tobin	Intel	Lenovo
ARUP	bp	CLAL Insurance	Dubai Expo 2020	Gleneagle Group	Interbrand	Liberty Global
Ashurst	Bradesco	Clifford Chance	Dupont	GNP Seguros	Intertek	Lidl
Assuta Medical Centers Ltd.	Brambles	Clinigen Group	Dynapack Asia	Gojek	Invesco	Lilly
Aston Martin	BraunAbility	Close Brothers	EBARA Corporation	Google	Ipsos Mori	Linde Group
ATOS	Bren Corporation	Coca-Cola	Ecolab	Grafton Group	Isracard Group	Linklaters LLP
Audi AG	Brenntag	Coca-Cola European Partners	Ecopetrol	Grainger	Isrotel	Lloyd's of London



The Valuable 500 Members — Continued

Lloyds Banking Group	Nationwide Building Society	Places Leisure	Sage Group	Slalom	The Clorox Company	Virgin Red
Logitech	NEC Corporation	Pladis	Sainsburys	Slater & Gordon	The Estée Lauder Companies	VMWare
London Luton Airport	Nestlé	Porter Novelli	Salesforce	Slaughter and May	The Lalit Suri Hospitality Group	Vodafone
London Stock Exchange Group	News UK	Prada Group	Sanofi	SMBC Group	The Migdal Group	Vontier
Macquarie Group	Nielsen	PremiQaMed Group	Sansera	Smurfit Kappa	The Nippon Foundation	Voya Financial
Magic Leap, Inc.	Nissan GB	PSEG	Santander	Sodexo	The San-in Godo Bank, Ltd.	Weill, Gotshal & Manges LLP
Mahindra Group	Noritz Corporation	Publicis Groupe	Santen	SoftBank Corp.	The Yomiuri Shimbun	West Ham United
Manpower	Norsk Rikskringkasting (NRK)	PVH Corporation	SAP	Software AG	ThoughtWorks	Westpac
Marks & Spencer	Novartis AG	PwC	Sarovar Hotels and Resorts	Sompo Group	TikTok	Westrock
Marui Group	NTT Group	PwC Australia	Savers	Soneva	Tnuva Group	Whistl UK
Mastercard	Nuance Communications	PwC Austria	Savills	Sony Group	Tommy Hilfiger	Wickes
Maximus	ÖAMTC	PwC Chile	Savola Group	Sony Life Insurance Co., Ltd.	Total	Willis Towers Watson
Maxon Group	Odgers Berndston	PwC France	Schindler	Sony Music UK	TOTO Group	Wilson James
Mazars	Old National Bank	PwC Germany	Schindler China	Spark Minda Group	Travis Perkins	Wipro Limited
Mazda Motor Corporation	Olive Bar & Kitchen	PwC Italy	Schindler India	Specsavers	Trivago	WIX
McCann Worldgroup	OM Metals Infraprojects Ltd	PwC Japan	Schlumberger	Spotify	TSB	WPP
McLaren Racing	OMD Worldwide	PwC Netherlands	Schroders	Springer Nature	Twitter	WSP
Medtronic	Omnicom Group	PwC Switzerland	Scottish Water	SSEN	Tyson Foods	Xceed
Meitav Dash	OmniServ	PwC Turkey	Sega Sammy Holdings, Inc.	St James's Place Wealth Mgmt	UBS	XPS Group
Menora Mivtachim	OMRON	PwC UK	Seibu Group	Standard Chartered Bank	Ugg	Yahoo
Merlin Entertainments	Onest Mexico	Quadrat	Seiko Holdings	Startek	Unicharm Group	yes
Mersen	Oracle	Quilter	Sekisui House, Ltd.	State Street	UniCredit Bank Austria	Zain Group
Mesoamerica	Orange	Qurate Retail Group	Sephora	Steelcase	Unicredit Group	Zalando
Michelin	Ornua Co-op	Raiffeisen Bank International	Serco	Stephenson Harwood	Unilever	ZamZam Iran Co.
Micron Technology	Ottobock	Ralph Lauren	ServiceNow	Strauss	Unisys	Zappos
Microsoft	P&G	Randstad	Shell	Sumitomo Life	United States Steel Corporation	Zebra Technologies
Mintel	PageGroup	RAPP	Shimizu Corporation	Suntory Group	Urban Research Co., Ltd.	Zur Rose Group AG
Mirvac	Partner	Reach plc	Shinsei Bank	Super-pharm	Vaultex	Zurich Insurance Group
Mishcon de Reya	Paypal	Reed Smith	Shionogi & Co.,Ltd.	Superdrug	VCCP	Zurich UK
Mitsubishi Chemical	Pearson	Refinitiv	Shiseido	Syngenta	Verbund	Zwanenberg Foods
Mitsui Chemicals, Inc.	Pelephone	Regions Bank	Shizuoka Bank, Ltd.	Tag	Verizon	
Monex Casa de Bolsa	Pepsico	RELX	SHL	Taisei Corporation	Vestas Wind Systems A/S	
Monex Group	Perrigo	Resource Solutions	Showa Denko	Taldor	Viacom CBS	
Mount Sinai Health System	Pets at Home	Roche Products Ltd	Shufersal	Tara Chand Logistic Solutions	Vindhya	
Mphasis	Philip Morris International	Royal Bank of Scotland	Siemens	TD Bank Group	Virgin	
MSD	Philips	RPG Group	Simmons & Simmons	Telefonica	Virgin Active	
MullenLowe Group	Phoenix Group	RSA Group	Singtel	Telstra	Virgin Atlantic	
National Australia Bank (NAB)	Pictet Group	RSM	Sky	Tesco	Virgin Media O2	
National Grid	Pinsent Masons LLP	Safaricom	Skyscanner	The Asahi Shimbun Company	Virgin Money/ CYBG	



Valuable Truth Contributors

Denise Brodey, Author

Denise Brodey is the founder and CEO of Rebel Talent.

Under her leadership, Rebel Talent became the first neurodivergent-led consulting and marketing firm to create training for top-level leaders and management to understand their own mental health challenges, learning and attention differences and use their strengths to help mentor and sponsor projects focused on invisible disabilities. C-suite leaders at universities, in ERGs and in neurodiverse talent recruitment agencies are being approached and will complete sponsor training in 2022.

Brodey is also an award-winning business and health journalist and author, whose book, 'The Elephant in the Playroom', is now in its 8th printing. In 2021, she was recognised as a Champion by Broad Futures for breaking down barriers and erasing stigma. She is a senior contributor at Forbes and Psycom, has bylines in The New York Times and Boston Globe, and has held top management positions at Condé Nast, USA TODAY and Meredith. Brodey is based in Boston and is proudly ADHD, dyslexic and is certified in Mental Health First Aid.

[elephants-everywhere.com](https://www.elephants-everywhere.com)





Valuable Truth Contributors – Continued

C Space, Research

We believe in a better way of doing business. Of treating customers as humans. Not as targets, data points or subjects who need convincing... but as people who need a little help.

Being human is about valuing what's important to people – their emotions, their lives, dreams, realities. It's about building relationships between a company and its customers on equal ground. Because relationships are the source of results.

By humanising business – breaking down the walls, departments and structures that keep customers on the outside – companies can integrate the people they're trying to serve into the ways they work. To create change. To weave customers into the fabric of a company's culture. To see bigger possibilities for customers, employees, and business.

To maximise growth and minimise risk. Working with customers, on equal ground, for mutual benefit, creating something we call Customer-Inspired Growth.

[Find out more at www.cspace.com](http://www.cspace.com)

The logo for 'c_space' features the lowercase letter 'c' in a large, bold, black serif font. A solid blue horizontal bar is positioned directly beneath the 'c'. To the right of the 'c' is an underscore character, followed by the word 'space' in a smaller, black, lowercase serif font.



Valuable Truth Contributors – Continued

ilumino, Accessibility

We at ilumino make it possible for people and organisations to understand the WCAG guidelines and develop a manageable and strategic approach to achieving their compliance goals.

We are proud members of the IAAP, and our team is composed of senior accessibility experts and developers. Having a development background ensures we deliver results with actionable feedback and support to help with any brand requirements. We are known for our flexibility to integrate into your process and our white-glove support that fosters the knowledge transfer to help your team grow. Our services span from accessibility audits to training, remediation, and consulting. Find more information about us at www.ilumino.co





The Nippon Foundation

Founded in 1962, The Nippon Foundation is an independent, non-profit, grant making foundation which provides humanitarian aid globally.

MR. YOHEI SASAKAWA
CHAIRMAN
THE NIPPON FOUNDATION



The Nippon Foundation's disability portfolio and philanthropic support is one of our largest programmes. **To date, we have invested \$1.2 billion USD for social inclusion of people with disabilities.** Our efforts reach countries throughout the world, with an especially strong focus on Southeast Asia.

We run various projects such as providing opportunities for higher education to over 3,000 leaders with disabilities and deploying international standard prosthetics and orthotics in health systems of Southeast Asian countries, resulting in impacting the lives of 500,000 patients throughout Asia.

Together with the Valuable 500, we promote economic participation for people with disabilities.





The Value Of Belonging

For inclusion initiatives to make a lasting impact, companies need to cultivate a sense of **belonging**.

One word? Yes. A simple concept? Possibly. Yet the truth within this one-word concept is nothing short of revolutionary.

As we have seen through participation in the Valuable 500, companies reported that their progress on inclusion is more focused and committed, better informed and more closely aligned to their core business, and strategically strengthened through the collective work of the Valuable 500 CEO community. That's a lot of confidence and a lot of possibility.

The confidence and commitment now need to be highly focused in two ways: First, **aligning words with actions** to make valuable contributions to the disability landscape that are profitable for companies while also improving societal impact.

Second, **broadening business perspectives** by leaning in and sharing more knowledge across the corporate landscape, with consumers, employees, and the disability community, even when it is uncomfortable.





The Value Of Belonging – Continued

There was once a charitable notion that businesses did good by hiring people with disabilities, but the tables have turned. Now, it is imperative that companies diversify their thinking about what it means to be inclusive for people with disabilities. Disability is not a monolith: it appears in all shapes and forms across all cultures, but one key thing it can do is to bring shareholders, markets, suppliers, and consumers far better products and more growth.

The Valuable Truth today is that global businesses need to dive into the inclusion imperative, that the future of work and consumerism includes an ever-growing disability presence, and companies need to move their inclusion strategies from concept and intention to concrete steps and actions. These actions will improve business while having a societal impact for the 1.3 billion disabled people living in this world.

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1.3 billion

disabled people living in this world.





The Value Of Belonging – Continued



The Valuable 500 companies, along with their global company commitments, have people talking, but that is and must be just the beginning of the story. Yes words matter, people's stories matter. They're powerful, but there is no substitute for action. The Valuable Truth 2022 is a call to engage.

“Now is the time to move from strategising to bringing a culture of inclusion and belonging alive across the value chain.”

As Peter Drucker famously said, “culture eats strategy for breakfast”. Now is the time to move from strategising to bringing a culture of inclusion and belonging alive across the value chain. It is everybody's business.

So, as you read through the 2022 data, we begin with a call to action: if you rolled up your sleeves before, roll them up further. The heat is on. If you are new to this work, you are in the right place for collaboration and action.

This second report covers qualitative research that shows where corporate efforts are successful, and where perception is greater than reality. Part of that reality is the nature of the moment we are in following a pandemic of historic proportions. Even our best intentions are muddled by uncertain events beyond the pandemic: global economics, politics, and the health of our very own workforce.



Methodology

We created a survey with the support of C Space, Savanta, and ilumino to measure and understand the year-on-year change that our companies have experienced within their disability inclusion and accessibility initiatives.

We asked companies a series of questions relating to our transformation programme solutions (catering to their customers, marketing representation, C-Suite engagement, internal culture, research, and reporting).

These questions made up the core survey and will remain the same year on year. In 2022, we also added an expanded section on self-identification efforts and representation. We included a 'tracking' section which allows us to add topical questions each year as we see fit.

Survey and sample specifications:

- We sent a link to the survey to the Valuable 500 Collective.
- Results of this report are anonymous.
- Fieldwork took place from 29 October 2021 to 31 March 2022.

To note: The following report captures year on year movement where applicable. Any differences noted are considered significantly different (at 90% confidence level).



REPORT FINDINGS

- 17** Culture
- 27** Customer And Representation
- 36** C-Suite
- 43** Research And Reporting
- 49** COVID-19 And Well-Being
- 60** Accessibility And Inclusion By Design



CULTURE

Culture is, in essence, an exercise in reaching potential. We've referenced the 1.3 billion people living in this world with a disability – but let's focus on the workplace power and potential being harnessed from this statistic when looked at as an under-tapped talent pool.

Many disabled employees are confident and thriving at work due to increased flexibility and more autonomy over hours and location. However, being seen as equal depends greatly on a culture of inclusion and not being seen as 'less than' by employees, at any level, who may be largely unfamiliar with the lived experience of disability.

People living in the world with disabilities have a distinctly less positive view of actions taken towards inclusivity than the business world. It is still difficult to account for the exact level of difference between an employee's trust and a company's intentions. What we do know is that year-on-year data shows respondents (companies) feel they are improving at similar rates as the previous year.



What Are The Trends?

The impact of the COVID-19 pandemic and global economic downturn slowed, halted, or stalled major gains in employment and culture improvements – but has not dampened intention, commitment, or enthusiasm.

In 2022, 54% of companies said their organisation has a disability inclusion accessibility policy in place vs. 58% in 2020. Half of the companies surveyed are essentially stuck at the halfway point. This downturn needs to be further examined and considered in light of the makeup of the first Valuable 500 survey respondents (2020). The 2020 companies were early

adopters of the Collective movement, and many were quite advanced in their inclusion efforts. Companies now represented within the Collective are at all levels (advanced, intermediate, and the early stages) of their inclusion journeys.

Recruitment is a top priority – 74% of companies report that they highlight the fact that they are an inclusive employer when advertising. A majority are drilling down to make sure the details of the hiring process change and improve, too, adjusting their interview process (65%) and encouraging disabled applicants to apply (62%).

Despite these efforts, overall, inclusive recruitment efforts are stalled year on year, with no difference in resolving the most significant barriers reported as lack of staff awareness (49%) and lack of candidates (49%).

54%

of companies said their organisation has a disability inclusion accessibility policy in place vs. 58% in 2020.

74%

of companies report that they highlight the fact that they are an inclusive employer when advertising.

49%

reported a lack of staff awareness (49%) and lack of candidates (49%).



What Are The Trends? – Continued

Respondents noted big picture changes – for example, a majority had a key internal role within their company tasked with advancing disability inclusion. But day-to-day internal culture change remains flat per the data.

Companies report that they are actively investing in services and support for disabled employees; 70% have a resource network and/or a support group in place. But investment in new disability resources offerings remains flat year on year – and some key supports, such as executive sponsorship, have dropped.

70%

have a resource network and/or a support group in place.





How Are Our Respondents Tracking?

89%

of respondents feel that they have made progress on their Valuable 500 commitment since joining the Collective.

54%

have an active disability inclusion accessibility policy and 17% don't have one in place. Year on year there was no improvement on implementing these policies.

81%

of respondents report they are better placed than last year; 18% feel that they are in the same place. (2020: 87% feel they are better placed).

85%

are working to remove the top barriers to recruitment: lack of staff awareness (49%) and lack of candidates (49%). Year on year, there has been no difference in seeing these barriers being resolved for the recruitment of candidates.

70%

of companies have a resource network and/or support group. However, in comparison to 2020, companies have not made the same level of advances in offering disability resource networks where one did not exist previously.



What's On Their Minds?

VERBATIM

We've gathered some key insights from the voices of our survey respondents to further illuminate the story the data is telling us:

"Some of the talks [with guest speakers from the outside] were particularly hard hitting and difficult to listen to which were very impactful."

"Having made commitments externally has kept us motivated and focused. We set a high bar on our targets, but we are on track (70% of pledges completed) and now progress must be reported to the board."

"A guide about disabilities is available to every employee to demystify what disabilities are and to raise awareness of the importance of individual and organisational practices to support people with disabilities daily."

"We did not have a strategy for disability inclusion, whereas now this is on the company's agenda, and we are developing a plan to tackle accessibility, media and marketing, accessibility and raising awareness within our leadership teams."

"Providing increased flexibility in the workplace and leveraging technology to break down physical barriers where individuals can complete work remotely and opens up a wider talent pool."

"We have trained over 2,500 Mental Health Advocates who signpost colleagues to support... and we have provided resources. Our efforts are paying off as we have seen an increase in the number of colleagues that feel comfortable to talk about their mental health in our most recent colleague survey."

"The level of engagement (within the company) has been quite low and mainly driven by us (CEOs)."

"We prepared an awareness module to introduce disability integration and present the disability group policy."

"Most employees had a chance to work with people with disabilities and this was a really positive learning experience."

"We have 1) revised our recruitment and selection process, [and] 2) developed inclusive recruitment guides to support R&S operational teams, HR professionals, and managers on their recruitment decisions."



How Can We Accelerate Change?

1.

Identify, promote, and follow leaders

who have the internal power to create change and new opportunities and act on your new understanding of what employees and consumers with disabilities need.

Top companies invested in their disabled employees by providing resources including valuable disability pension information, work experience including internships, and accessibility guidance for professionals.

2.

Share learnings

“We rewrote our Inclusive Office Design Guides which are now used by our architects. We have commissioned experts in inclusive design to support this work.”

3.

Utilise channels

including intranet, social media, LinkedIn groups, internal communications, guest speakers, and Q&As with C-Suite.

4.

Storytelling via social media

and training on intranet channels are two interactive ways to engage employees – and make sure that messaging is seamless and clear – across a variety of geographies and in a hybrid workforce.

One company’s verbatim statement included information on a public talk on making the business case for inclusivity that garnered more than 1 million views.

5.

Public messaging

can bridge the emotional divide between the amount of prejudice the disability community feels and the perception of people who do not have connections to disability. One company is building a campaign around new attitudes towards families with disabilities; another campaign promotes inclusivity in public life and spaces.



CASE STUDY OVERVIEW

The Valuable Truth Commitment In Action: Case Studies

The 2022 Valuable Truth Case Studies highlight impact actions taken by Valuable 500 companies to advance disability inclusion across the value chain. Each of these companies is making significant moves alongside its initial commitment to inclusion and has moved towards implementation.





“ Strong cultures of trust and belonging are needed to drive participation. ”



CASE STUDY CULTURE

Valuable 500 Self-Identification Incubator

“How many employees identify as having a disability” is the fundamental question most companies cannot answer fully. This question is central to guiding their inclusion journey and lies at the heart of assessing the effectiveness of culture and recruitment programmes to meet employee needs, and externally for public reporting and legal compliance, related to disability employment mandates and data collection requirements.

The astute reader will most likely notice that the remaining case studies in the 2022 Valuable Truth Report highlight examples of individual company commitment to action and their resulting impact.

However, for culture, we feel the challenge of employee disability data is critical to the future of

work and requires the collective power of the Valuable 500 to address together. Getting to the answer (or answers, given the range of applications) presents a set of hurdles that not one company we know of has solved at a global level. And it comes with important questions and needed involvement from individual employees and disability experts.



CASE STUDY

Valuable 500 Self-Identification Incubator — Continued

So, here is how we are addressing the issue. The Valuable 500 is bringing together interested member companies, who employ millions collectively, all with a range of self-ID experience and approaches, to share their learning, co-create, and collaborate. Convening known experts from the disability field together with these members, we are seeking a systemic solution to corporate disability self-ID. The goal is to empower companies to collect and share harmonised self-ID data for key disability employment metrics, enable consistent approaches and meaningful reporting, and assist them in building an inclusive culture of trust and action, rather than merely compliance.

The response has been tremendous. Following targeted outreach to a small number of Valuable 500 companies with actual experience or investment in the effort, we have eighteen companies and ten global disability experts engaging in the self-ID Solution.

Immediate learnings: we have brokered one-to-one company discussions and begun larger learning circles that are reinforcing what we have learned from the Valuable Truth, where results show **51% of companies have completed or are in the process of completing a self-ID campaign**. They confirm key challenges around winning employee trust, differing definitions of disability, and legislative hurdles. Time will tell about the sea-change impact from this initiative as we engage with companies on a “design sprint” toward our solution throughout 2022.

Some major takeaways from our discussions so far are:

- Data collection must move from pure compliance toward inclusion.
- Strong cultures of trust and belonging are needed to drive participation.
- Employees must know why they are disclosing, what is to be done with their data, and how safe they are in the process.
- Culture data should drive investment on improving hiring, promotion, retention, career development. Data gives a voice.
- Self-ID is different than self-disclosure, which often happens with one’s manager to obtain a workplace adjustment or professional support.
- Privacy and security challenges must be addressed.



Important Definitions To Understand

Important Definitions to Understand: Self-Identification and Self-Disclosure are not the same thing.

Self-Identification (self-ID) is a “check the box” data gathering exercise that says an employee identifies or qualifies as disabled, a disabled veteran, or someone with a chronic illness. Companies most often ask for self-identification through annual employee engagement surveys or targeted campaigns to better understand employee data.

Self-Disclosure often involves speaking about a disability with a supervisor or human resource manager to ask for workplace support, accommodations, or awareness. Self-disclosure can be about workplace needs and/or it can be about wanting to be seen more fully in the workplace as one’s authentic self.





CUSTOMER AND REPRESENTATION

What if you saw yourself truly reflected in a product – for example an advert pictured someone with the exact same disability as yours. And when you tried the product, it felt made for you. Accessible. Flexible. Unique. Beautifully designed. That's exactly how the disabled consumer wants to feel.

When thinking of those who experience disability as a viable consumer market, it is imperative to continue to return to the numbers. According to “The Return on Disability Report” the disability market is larger than China and is emerging as other markets have in the past – 1.85 billion people (according to the CDC) and \$1.9 trillion in annual disposable income. Consumer insights experts also monitor and include the friends and family of disabled individuals, which adds another 3.4 billion potential consumers –

who act on their emotional connection to people with disabilities when it comes to spending choices. Together, they control over \$13 trillion in annual disposable income. It is important to note that the Valuable 500 currently uses the 1.3 billion population statistic from the World Health Organisation but recognise that other entities use the 1 in 5 (1.85B) global population statistic.

It's a huge market. And yet, most businesses are only scratching the surface. Why?



What Are The Trends?

CEOs and C-Suite leaders hold a positive belief that things are improving – 69% of companies feature people with disabilities in their communications or marketing campaigns.

But the products and services for disabled consumers often feel bolted on. More than 15% of the world has a disability, but the societal stigmas disabled people encounter are too often still considered niche.

Data from Valuable Truth respondents reinforces what consumers are seeing and saying: fewer than half of companies are clear on the needs of their disabled consumers. To win this substantial market segment, companies will need to take action to align their positive beliefs with reality. In the 2020 survey, companies were beginning to understand the marketplace – how they were doing competitively and how to better serve the disabled consumer. An important note is that of the 500 company commitment statements, customer-focused improvements are the second largest pool of disability inclusion goals, behind commitments focused on

actions related to culture. You can find all the company commitment statements here: <https://www.thevaluable500.com/members>

In 2022, the challenge will be to involve divisions across the value chain to better understand consumer needs and to actively listen to people with lived experience at every stage, from development and design to marketing and distribution. As consumers become more vocal about their needs, companies must pay more attention to innovating and creating experiences that are inclusive.

Valuable 500 companies' verbatim comments reassure disabled consumers that, despite the upheaval in global markets due to the pandemic, their commitment level remains unchanged. But in line with the data trends across culture, though intention and commitment have remained unaffected, the current climate has hindered progress over the last two years.

69%

of companies feature people with disabilities in their communications or marketing campaigns.

>15%

of the world has a disability, but the societal stigmas disabled people encounter are too often still considered niche.



How Are Our Respondents Tracking?

69%

have featured people with disabilities in communications in the last 12-month period (66% sometimes, 14% usually).

70%

would like more production advice/guidance for creating inclusive campaigns and 77% seek case studies from other inclusive campaigns to use as resources.

30%

of respondents have conducted external research on disabilities and acted on initiatives.

44%

have not done external research yet - efforts have been stagnant between 2020 to 2022.

24%

are not currently invested in exploring inclusive design innovation opportunities for consumers (vs. 15% in 2020).



What's On Their Minds?

VERBATIM

We've gathered some key insights from the voices of our survey respondents to further illuminate the story the data is telling us:

"We supported public research on inclusive service in core B2C areas and created open recommendations for business on how to develop an inclusive service."

"It is something we'd like to initiate but we need some help in that space and we also need to be open to the findings and to looking at our business with a different eye."

"When addressing the community, words matter, and the community has been hard at work developing a thoughtful approach to bring difficult topics to the forefront and creating space for members' perspectives on topics."

"There is no direct investment in the disabled consumer or disability market."



How Can We Accelerate Change?

The Valuable 500 companies can expect to see greater results by learning from colleagues, sharing resources, seeking external expertise, and by accessing more frequent and relevant corporate case studies. Knowledge sharing is at the core of the Valuable 500 mission to revolutionise disability inclusion.

It is through leadership that culture and brands transform. A company that makes a specific commitment and investment around one area, such as HR, digital transformation, or consumer experience, is often driven by a small number of employees. Making those efforts more widely known internally and externally can exponentially hasten progress.





DAVID S. TAYLOR
EXECUTIVE CHAIRMAN
P&G

P&G Commitment Statement:

<https://www.thevaluable500.com/member/pg>

P&G Website:

<https://us.pg.com/>

CASE STUDY CUSTOMER

P&G

Whether you follow the research positioning the global disability population as 1 in 7 people (1.3B) or 1 in 5 people (1.85B), it does not change the fact that this is a significant and rapidly growing consumer market. Valuable 500 Iconic Member P&G recognises this truth and is actively harnessing the power of disability ingenuity to improve product design – by using the insights of those with lived experience across the creative process.

The initiative encompasses product ideation, packaging, advertising, and facilities to create improved and accessible brand experiences. Only 4% of companies are actively designing products for people with disabilities, and P&G is at the forefront of this movement. Over the past year, several

brands launched multiple products with improved accessibility. For example, the Herbal Essence hair care line added touch inclusion features – tactile lines on the shampoo bottle and dots on the conditioner bottle to address the needs of the 253M people around the world who are blind or have low-vision.



CASE STUDY

P&G – Continued

That statistic represents the combined populations of Mexico and Japan. Additionally, P&G responded to feedback about the difficulty in opening Olay jars for people with motor skill disabilities, the aging population, and the visually impaired. As a part of the design assessment the Olay team realised they needed to focus not on the lid but on the cover disk.

The results of testing, feedback, and assessments led P&G to a newly designed disk that is easier to lift for all consumers. The Olay team also recently announced a limited-edition prototype – a winged outer cap – developed for “consumers with a wide range of conditions, from dexterity issues, limb differences, to chronic issues causing joint pain and vision impairments.” The prototype will be available only

online. The consumer-forward commitment did not end with product design but is extending to inclusive advertising with the addition of audio descriptions across most of their ads in the UK, US, and Spain. And, if you missed the Sunday edition of the New York Times featuring the winged cap prototype, you missed a company using critical advertising resources to highlight an inclusive product.

The Valuable 500 knows companies are at the beginning of a watershed moment of truly inclusive and accessible design for disabled consumers. Companies like P&G are leading the way by demonstrating that inclusive design is a profit centre, driven by the huge market of disabled consumers, friends and loved ones.

“ Only 4% of companies are actively designing products for people with disabilities, and P&G is at the forefront of this movement. ”



CASE STUDY REPRESENTATION

ITV

All it takes is a quick read of ITV's Diversity Acceleration Plan, commitment statement, and understanding of their investment in disability representation to know that the oldest commercial network in the UK is incredibly progressive and forward-looking when it comes to disability inclusion efforts both in front of and behind the camera.

CAROLYN MCCALL
CEO
ITV

ITV Commitment Statement:

<https://www.thevaluable500.com/member/itv>

ITV Website:

<https://www.itv.com/>

It is stepping boldly into representation efforts with the goal that 10% of all on-screen talent will have a perceived disability. In 2021, working in partnership with Scope and ITV Creative, ITV launched an on-air marketing campaign to highlight invisible disabilities, as part of their commitment to help create culture change around disability perception.

Their ITV Signpost division is employing at least 50% disabled crew on every production and is also committed to running a new trainee scheme with the British Sign Language Broadcasting Trust for Deaf filmmakers and production talent breaking into the industry. Their website also clearly highlights the process for prospective disabled applicants as well



CASE STUDY

ITV – Continued

as the protection and support they will receive in the employment process. All of this, while 2021 figures were lining up to be ITV Hub's biggest year yet. ITV also more than doubled the amount of content on ITV in 2021. ITV's Managing Director, Rufus Radcliffe said, "2021 has been a terrific year of growth for ITV Hub... it's a testament to our fantastic programmes, as well as the improvements we're making to the service, that this year is on track to be our most successful

year yet." The number of ITV Hub users grew by 20% in 2021, and to date the ITV Hub has achieved 1.5 billion streams, up 26% year on year. These figures are critical to the conversation that growth and fiscal responsibility and viability are not sacrificed, but in fact can be enhanced and cultures improved – when companies embrace inclusion efforts across employment and core business objectives.

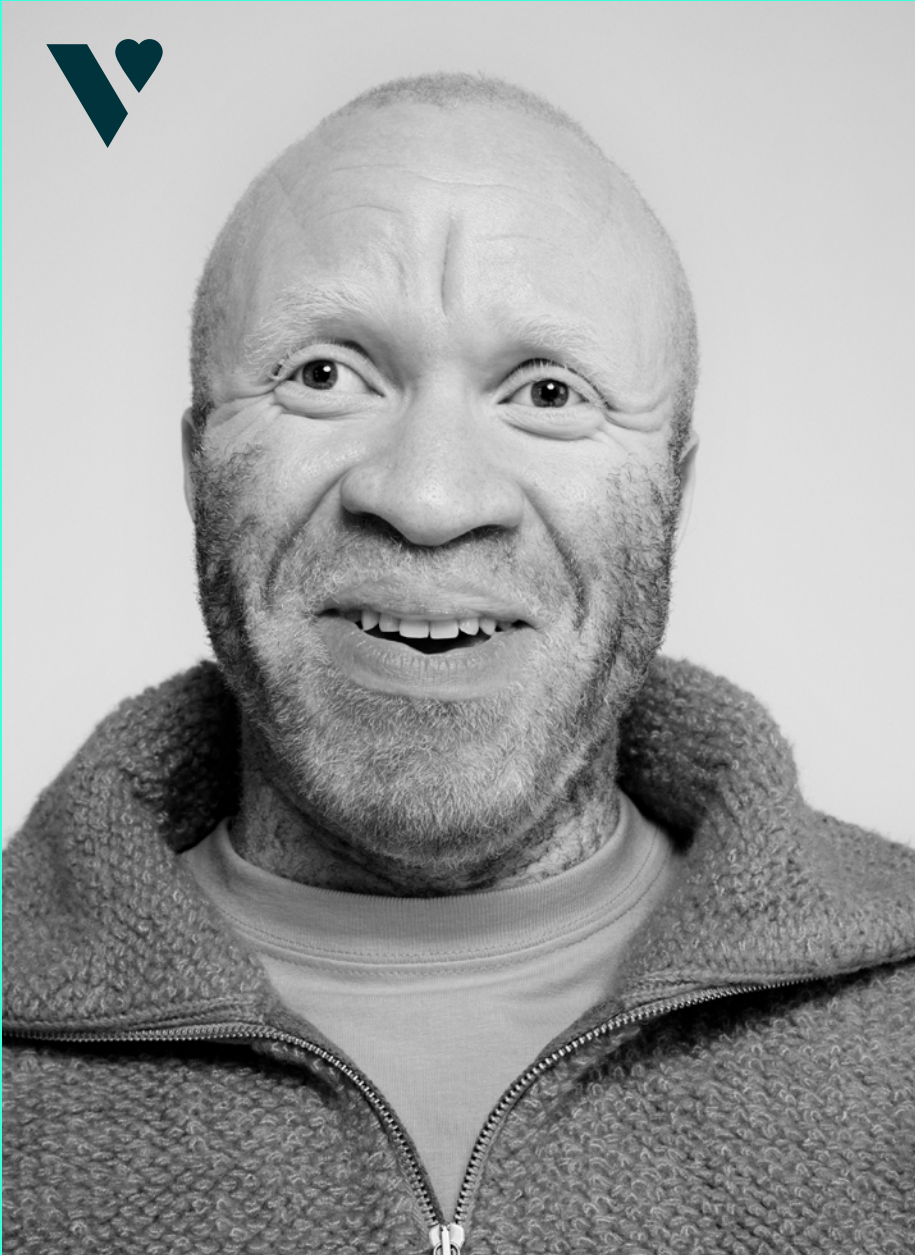
ITV's Signpost division is employing at least

50%

disabled crew on every production



“ These figures are critical to the conversation showing growth and fiscal responsibility are not sacrificed, but in fact can be enhanced. ”



C-SUITE

The business case for inclusion and accessibility is undeniable. Though the community is anything but a monolith, when taken as a whole, the sheer size of the talent pool, the depth of the consumer market, and the benefit in accessible and inclusive design, means that competitive companies must take the trends seriously.

Now is the time to build competence in top leaders and grow executive sponsorship of inclusion that goes beyond conversation and exploration. Now is the time to bring the conversation to the board agenda and ensure that more CEOs, like the 500 CEOs within the Valuable 500, are using their position of power to advance inclusion.



What Are The Trends?

This year we found a clear disconnect between actions taken to improve disability inclusion and some of the overall outcomes and results. 81% of respondents said they are in a better place when it comes to their inclusion strategy and initiatives than pre-pandemic. They describe their efforts as 'advancing'.

While the world is changing quickly, the essentials of moving forward will be familiar to most leaders – a combination of empathy, innovation, risk-taking, and listening. None of those seem to be in short supply.

Inclusion is not, by nature, a solo pursuit. The Valuable 500 was formed to surface the best practices and to give insights to decision-makers that would lead to goals aligned with the core of the business, actionable steps, and forward movement – using a collective of high-level learnings to prove profitability and impact. The singular position of the Valuable 500, when it comes to disability inclusion, is its ability to provide trends and insights across 500 companies from multiple industries, employee bases, and geographies.

Communicating to many: leadership priorities have a better chance of adoption if they are communicated throughout the corporate ecosystem, on digital platforms, within departments, and via person-to-person interaction with passionate advocates.

Crucial to success: executive sponsors experienced in navigating across departments who may have vastly different priorities and experience with inclusion. Disabled talent is in demand but it's not being mentored. The need for more executive sponsors is clear, particularly leaders with lived experience. However, only 3% of leaders openly discuss their disability or primary caregiving role.

81%

of respondents said they are in a better place when it comes to their inclusion strategy and initiatives than pre-pandemic. They describe their efforts as 'advancing'.

3%

of leaders openly discuss their disability or primary caregiving role.



How Are Our Respondents Tracking?

59%

of respondents have an executive sponsor responsible for the company's disability inclusion performance (down from 74% in 2020).

54%

of respondents have a disability policy in place (vs. 58% in 2020).

4%

have had to pause efforts around this issue while focusing on COVID-19 (vs. 14% in 2020).

3%

of leadership openly discuss their own disability or primary caregiving role.



What's On Their Minds?

VERBATIM

We've gathered some key insights from the voices of our survey respondents to further illuminate the story the data is telling us:

"We refer often to our commitment with the Valuable 500 to reinforce the message and to push on more results thanks to the benchmark we can do with other companies. But at the same time, we hope in a next step to reinforce and refresh this message in an interview with our CEO, a case study on inclusive mobility, and more."

"Our executive sponsorship is strong – we have renewed enthusiasm and support through our Executive Sponsor and CHRO (Chief Human Resources Officer) who are championing our burgeoning Disability BRG (Business Resource Group). Participation has increased dramatically in this BRG over the course of 2021 (about 500%), and we are supporting our commitment to creating safe spaces for people with visible and non-visible disabilities."

"In order to increase the employment and active participation of persons with disabilities, we actively carried out PR and sales activities within the group companies and increased the amount of work. Specifically, we appealed our efforts on the intranet, worked on key people in each department, and requested cooperation in promoting the utilisation of persons with disabilities at department head meetings of each department."

"Creation of a senior leadership team dedicated to advancing what our organisation does for our disabled colleagues, and creation of a global recruitment team to evaluate and improve our recruitment practices globally so they are more inclusive."



How Can We Accelerate Change?

C-Suite leadership, specifically CEOs, need to become comfortable with the “uncomfortable”. Candid and effective storytelling by CEOs and C-Suite leadership about their direct connection to disability through lived experience or family connections will unlock culture barriers and address critical leadership representation. Edelman's trust barometer has shown year on year that direct connections and personalisation are key to brand trust and loyalty. Storytelling and disability training at the executive level is the first step toward this goal.

Invest in disability talent at the upper management levels so that people with lived experience are rising into executive levels and changing the landscape of tomorrow's C-Suite.

Create a disability council across business lines that is responsible for reporting progress to the CEO about inclusion goal gains on a quarterly or annual basis. It's imperative to ensure that P&L divisions are included in the conversation to understand how innovation and accessible design thinking can drive profitability.

C-Suite leadership, specifically CEOs, need to

become comfortable with the “uncomfortable”.



BOB MORITZ
GLOBAL CHAIRMAN
PwC

PwC Commitment Statement:

<https://www.thevaluable500.com/member/pwc>

PwC Website:

<https://www.pwc.com/us/en>

CASE STUDY C-SUITE

PwC

PwC outlined an extremely specific commitment at the global level: to "appoint a Global Disability Leader". The impact behind this one-sentence commitment cannot be underestimated or understated. In 2021, this global solutions powerhouse, which calls itself a "passionate community of solvers coming together in unexpected ways", appointed Leandro Camilo, a partner in PwC Brazil, as Global Disability Leader with a mandate to drive accelerated change across the network.

Research on the Valuable 500 conducted in 2021 in conjunction with Tortoise Media highlighted the absence of disability roles within the C-Suite as well as among board directors, finding that within FTSE 100 companies there were zero executives with a known disability. This statistic is both stark and staggering

and simply does not add up when compared to the actual percentages of disabled people in the population. This means that increasing the presence of executives with disabilities and of C-Suite roles with a disability inclusion business mandate is game-changing. The Valuable 500 exists to bring disability

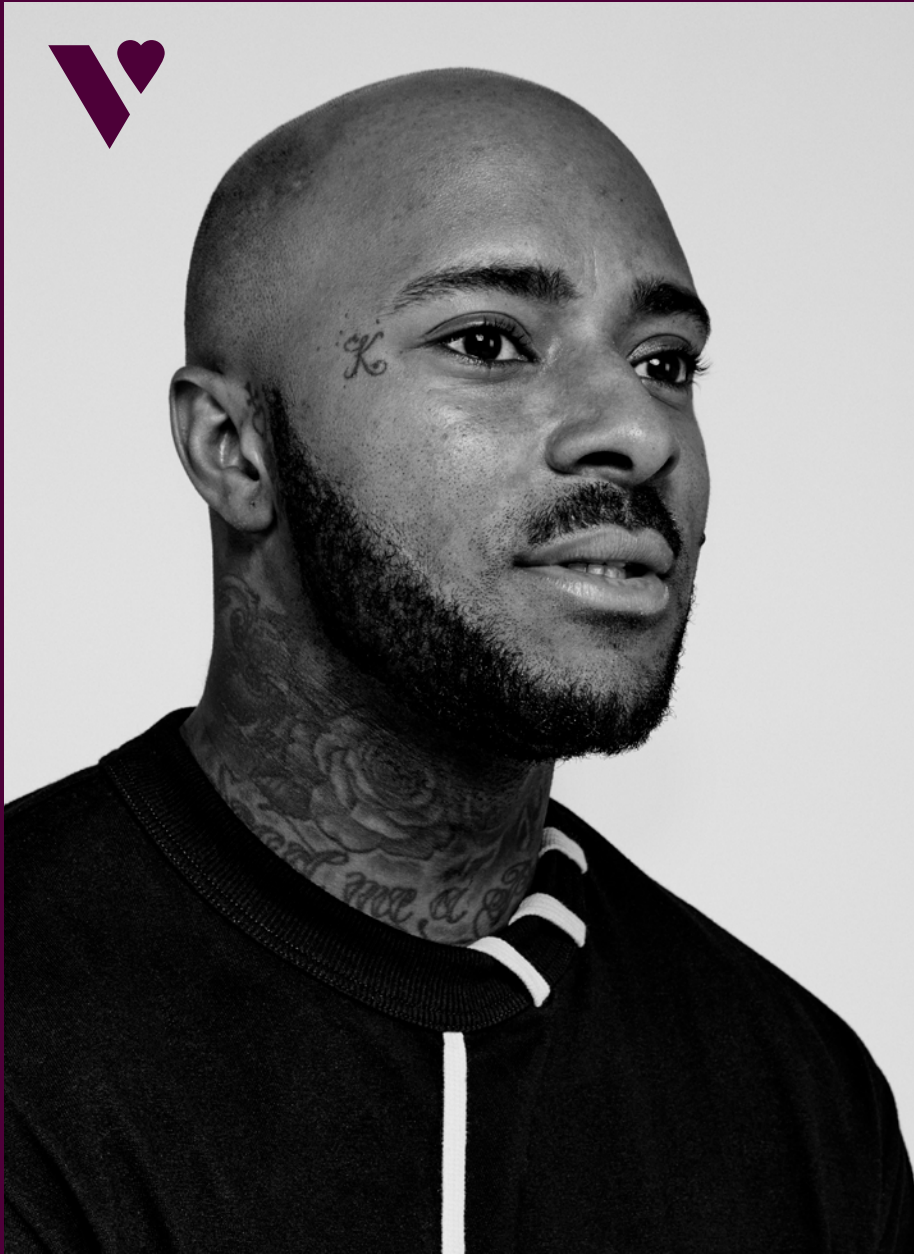
**CASE STUDY**

PwC – Continued

to the leadership agenda and PwC answered that call in force with the global commitment by Chairman Bob Moritz and with eleven of its divisions then following suit with individual firm commitments – the most of any company within the Valuable 500 Collective. The most recent commitment is from PwC Japan, under the leadership of Group Chairman and Territory Senior Partner, Koichiro Kimura. PwC Japan created a multi-pronged commitment to build a stronger inclusion culture through its “Be yourself. Be different.” initiative, removing employment barriers for people with disabilities, and supporting a programme for athletes with disabilities. Additional examples are PwC Australia’s Ability@PwC employee network which delivered disability confidence training firm-wide in Australia, and PwC Brazil’s Mentoring Programme (launched in 2021) to eliminate barriers and enhance

the careers of employees with disabilities through internal process improvements, soft and hard skills development, and one-to-one mentoring sessions with PwC Brazil partners. Example after example of PwC’s commitment in action highlights that their significant leaders are rolling up their sleeves to advance the work of inclusion across the corporation.

“ This means increasing the presence of executives with disabilities and C-Suite roles with a disability inclusion business mandate is game-changing. ”



RESEARCH AND REPORTING

The declared intention, forward movement, and tipping point of corporate action to advance disability inclusion must be recognised for what it is – momentous.

Why is this an important preface to research and reporting? Because the en masse business movement of disability inclusion is in its incubation and proof point period. What waits ahead are stronger linkages to the profitability derived from inclusive cultures, and accessibility by design products and systems.



Research And Reporting – Continued

We take this work seriously – it’s more than backing up a business case long believed to be true, it’s about measuring it. The data will systemically and systematically lead the way, demonstrating that companies who embrace accessibility and inclusion have a fiscal edge. The reality is that we’re not there yet.

We believe this deeply enough that we’ve chosen not to include a research and reporting case study in the 2022 report. The way forward is clear. We are working with companies to delve into their own ESG data and materiality assessments, begin reporting outcomes at all levels and in multiple ways (internally, at board level, and within annual reports).

We are working to advance the connection and addition of disability to global indices, ESG standards and frameworks, and public disclosures. Without a doubt, the power lies within the data. This is the heart of what is ahead for the Valuable 500 – transparent, game-changing, irrefutable data proves that inclusion by design is an integral lever to the future of work across the corporate value chain.

“ This is the heart of what is ahead for the Valuable 500 – transparent, game-changing, irrefutable data proves that inclusion by design is an integral lever to the future of work across the corporate value chain. ”



What Are The Trends?

Connecting brand to beliefs is the next step in the disability journey. There is no way to buy consumer trust. But there are new ways to find it. As our research shows, experimentation and active listening that focuses on the public and disability are solid investments.

Turning goals into actions, even having a model for system change, can be thrown off course quickly by local and regional legislation that prevents data collection. These laws, and cultural sensitivity to the disclosure of any kind of disability, vary widely

by culture. Southeast Asian countries reported not having many official structures yet to identify and support people with disabilities. In other places, such as Brazil, employment quotas and the adopting of positive measures exist. Still, strong granular data that might help shape programmes is unavailable and it is most difficult for global companies that exist in some instances in up to 70 countries.

In the absence of reporting or research availability, some Valuable 500 companies are pushing forward with special programmes and collaborations, including fruitful partnerships and self-identification campaigns. Tools to educate and build awareness, promote advocacy, and provide support, are all part of the Valuable Transformation Programme currently in development.





How Are Our Respondents Tracking?

47%

of respondents have researched brand integration and usability.

45%

reported that product innovation and business development teams do research around disability.

50%

disclose disability data internally more often than externally.

87%

of respondents include a section on social investment and/or diversity, equity, and inclusion efforts in their annual report.

56%

of respondents mention their participation in the Valuable 500 in their annual report.



What's On Their Minds?

VERBATIM

We've gathered some key insights from the voices of our survey respondents to further illuminate the story the data is telling us:

"We supported public research on inclusive service in core B2C areas and created open recommendations for business on how to develop inclusive services."

"We engaged with a disability specialist organisation to conduct an audit of our recruitment processes."

"We report our disability data to the Board on a quarterly basis and have introduced a new real-time diversity reporting tool at the leadership level which looks at representation, attrition, and pay gaps broken down by departments, which allows for greater transparency and accountability. We have made a commitment to doubling our workforce disability target from 6 to 12% by 2023. We continue to provide information to our leadership team and provide updates on our employee targets with our employees. We're currently measuring 11% disabled employees with a target of 12% by 2023."

"We still have not been able to research and report due to resource constraints."

"Regional legislation has made data collection very difficult, and we have low rates of employees willing to share in some locations where it is particularly culturally sensitive to ask employees to share."

"Understanding how many of our people identify as being disabled or having relevant caring responsibilities and trying to understand their needs [is a challenge that] keeps us from identifying ways we can further [provide] support."

"Knowing the 'type' would allow companies to demystify the large spectrum of disabilities and to better direct [their] efforts."

"Local and regional legislation prevents disability data collection."

"To share our pledge to further disability inclusion with our business and the world, we have continued to share our support and actions with our internal organisation and externally through... Company-wide emails, DEI events hosted internally and during our People with Disabilities conferences."



How Can We Accelerate Change?

1.

Partnerships: “Inspired by the Valuable 500 approach, we gained a partnership with institutes of higher education and other corporate Valuable 500 members and social enterprise.”

2.

“Flipping the script on risk mitigation. With so much emphasis on reducing exposure, it may be possible to take learnings and transform them into positive actions that benefit people in the organisation. That is exactly what the Valuable 500 Iconic members have set as a goal – to build vision, strategy and engagement, all positives, and embed positive disability inclusion into an ecosystem of CEOs.”

3.

“Being open to difficult conversations about research from pulse surveys and employee surveys.”

4.

“Connecting learnings from internal research on disability to the business case for disability employment from leaders in the field, such as Microsoft, which is now an Iconic Leader of the Valuable 500.”

5.

Being accountable, transparent, & getting the numbers out: Reporting employment data, both to the board and in external annual reports, are best practice actions. Forward-thinking companies are including DEIA data as a part of their Environmental Sustainability Goals (ESGs). Making specific commitments to targeted populations, specifically disability, about representation, attrition, pay gaps, and promotions into leadership are action examples from the leading inclusion actors.



COVID-19 AND WELL-BEING

Pandemic shifts, such as hybrid work and protecting frontline workers, required a degree of flexibility many companies may not have thought previously possible. But changes to the workplace puzzle demanded that leadership put a new 'normal' into place, and fast.

This ability to find a new flow suggests that the early stages of change don't need to move slowly in order to protect productivity and established processes. Members of the Valuable 500 are at a crucial tipping point – now is the time to move into action for the very same reason as during the pandemic – the well-being of a company's employees is their business.



What Are The Trends?

COVID-19 changed us in profound and uncomfortable ways, and redefining well-being as a workplace right and a right in which everyone shares responsibility was one of them.

This new world order impacted disability inclusivity efforts in positive ways, spotlighting conflicts that needed to be solved, and helping people commit to goals. The heightened focus on well-being and workplace flexibility addressed issues disabled workers have raised for decades but have often been told are too expensive or time consuming to tackle.

Words followed by action is the next phase of disability inclusion. In 2020, surprisingly few companies paused inclusivity plans to focus on bigger business challenges, and trends show that efforts are proceeding. **Actions will separate the true change makers in the inclusion movement from those who can't reduce disability to anything other than a category or number.** This is about being human, connecting people across departments and even countries, not to agree on generalisations, but to help individuals feel more welcome, respected, and valued.

So that the work can be more innovative, productive, and consistent across the board.

Some of these changes are well under way, those that concern hybrid working models, recruitment through virtual and digital platforms, and more inclusive onboarding options. Respondents told us verbatim in their comments that they understood the experiences of people with disabilities in greater depth and had uncomfortable conversations.

“ Empathy sprouted in unlikely ways, but room for growth was sometimes missed in the most obvious places, such as reporting disability at the board level (15%) or investing in accessible design (less than 25%). ”



How Are Our Respondents Tracking?

14%

of companies paused their disability efforts because of COVID-19 in 2020; 4% have continued to pause in 2021/22. The inverse is that 82% of companies did not pause their actions and efforts due to COVID-19.

54%

are as committed to inclusion as they were in 2020 when COVID-19 upended the world.

51%

completed or are in the process of completing a self-disclosure campaign that will help to tailor health and well-being offerings to employees' needs, such as dealing with the impact of COVID-19.

65%

of companies include interview adjustments in their top 3 recruitment changes that encourage inclusivity and advertise as an inclusive employer (74%).

68%

of CEOs communicated internally about the company's commitment to disability inclusion.



What's On Their Minds?

VERBATIM

We've gathered some key insights from the voices of our survey respondents to further illuminate the story the data is telling us:

"This year proved that greater flexibility at work is highly valued by team members, supportive of disability inclusion, sustainable for enterprises, and a competitive business driver."

"COVID-19 has caused serious economic damages to our markets. We have been forced to decrease [the] number of investments and made organisational changes."

"In some ways, the pandemic has helped us support those who are disabled to work more comfortably through remote working, [fewer] accessibility issues, less societal pressure. Others have found it more difficult in getting the right IT equipment and tailored chairs/software."

"We have cared more for flexible work arrangements, remote work infrastructure, employees' mental wellness."

"Our aim is to foster an environment that provides individuals with apparent and non-apparent disabilities the psychological safety required to self-identify as such. We have long had a self-identification process in place, though [we] have recently begun an initiative to revamp our approach by seeking updated legal advice to expand the jurisdictions in which we capture disability personal identification around the globe."

"Due to COVID-19 we realise more than ever that the work and efforts we do on disability inclusion [are] needed for this group. Our business is still the same, but we need to build on ongoing efforts to provide more career opportunities and greater workplace inclusion for people living with disabilities at our company."

"COVID-19 didn't change our perspective on disability."

"It has been challenging to accommodate everyone's needs due to not only the pandemic but also because of the political situation."

"We understand the experience of staff with disabilities [who] were disproportionately impacted by the pandemic."



How Can We Accelerate Change?



The dysfunctions of a team that affect overall well-being are not always easy to see until people sit down with those outside their organisation and compare notes.

Asking about company norms during COVID-19, sharing vision statements, explaining how targets are decided upon now that the pandemic is in its third year, and listening to people with lived experience are valuable ways to gain knowledge and bring it back to the office to share with others.

Talking more about the case for inclusion and how well-being and health improve the bottom line is a win-win. Not only will you see a rise in engagement

in teams that may have been sceptical of such efforts, you are also validating the people who need it most – those working in your organisation who have disabilities but have never had a platform in which to discuss it.

Knowing that CEOs play an outsized role in communicating priorities and helping to find corporate sponsorship for inclusion efforts, it's wise to think about regularly sharing communications about disability inclusion progress in the coming years. Communications internally must now shift to what is being done, who is spearheading projects, and how to learn more about the progress of initiatives across industries ranging from transportation to fashion, from Boston to Bali.



“ The hope is that the gains... will not slide back down the hill to pre-pandemic practices. ”

CASE STUDY COVID-19 AND WELL-BEING

COVID-19

It is not a revolutionary statement to say that the life-altering disruption of the COVID-19 pandemic changed the mental health landscape in all of its aspects. Areas on the rise over the past two years include: increased awareness, increased need for and use of mental health services, and an influx of demands from employees and consumers to provide workplace flexibility, well-being support, and technology solutions to help all of us function in this new “normal”.

While these are all adaptations voiced for decades as important for equitable inclusion by the disability community, it was not until an uncontrollable force mandated a shift that the global business community reacted in masse. The hope is that the gains – updated accommodation and well-being policies,

flexible scheduling, and the location of an employee’s “desk” without reduced pay, and an overall willingness to examine the efficacy of historic processes – will not slide back down the hill to pre-pandemic practices. But, the early warning signs of backsliding are beginning to appear.

**CASE STUDY**

COVID-19 – Continued

The European Commission unsurprisingly highlighted the importance of well-being and the fact that COVID-19 also provoked growth in the wellness industry - now worth \$4.5 trillion globally. Fitness app downloads increased by 50% in the first half of 2020 (World Economic Forum) and corporate wellness apps are seeing widespread adoption. Many companies within the Valuable 500 responded with swift and supportive culture and business-line changes. We are highlighting the activities of five of our companies and the actions they took to respond to the health of their employees, their company, and their community.

NTT

Network technology company NTT Communications Corp., at the height of COVID-19 had about 80 percent of its employees working remotely and adopted specialised software to arrange accessible online consultations between the workers and their superiors with opportunities to hear directly from and provide feedback to leadership.



JUN SAWADA
CEO
NTT GROUP

NTT Global Commitment Statement:

[https://www.thevaluable500.com/
member/ntt-group](https://www.thevaluable500.com/member/ntt-group)

NTT Global Website:

<https://www.global.ntt/>



CASE STUDY

COVID-19 – Continued

“ To support their people through the pandemic, EY enhanced an already comprehensive suite of offerings around emotional well-being. ”



CARMINE DI SIBIO
CEO
EY

EY Commitment Statement:

<https://www.thevaluable500.com/member/ey>

EY Global Website:

https://www.ey.com/en_uk

EY

“To support their people through the pandemic, EY enhanced an already comprehensive suite of offerings around emotional well-being. Employees can access free mobile apps for building emotional resilience and improving sleep habits. In addition to one-to-one counselling with EY or external clinicians, the company added daily group counselling sessions for parents, adult caregivers, and people caring for family members with disabilities. To supplement its free twelve-week course on mindfulness and daily scheduled practice sessions, EY began daily drop-in sessions combining short mindfulness

exercises with practical tips for managing anxiety, social isolation, or feeling overwhelmed. Backup adult and childcare support was extended and virtual yoga, workout classes and volunteer opportunities were added. A few weeks into the crisis, EY’s Global Chairman personally launched a recognition programme highlighting EY people doing exceptional things to support one another, their communities, or their clients. On social media, via video, in articles and on live webcasts, top leaders share their stories and how each “EY hero” is living our purpose of Building a Better Working World.”



COVID-19 – Continued

THE FINANCIAL TIMES

“Here at the Financial Times, we have really shifted the focus onto the mental well-being of our employees and how we can best provide support. We have mobilised our internal network of mental health ambassadors to ensure all employees know they have that resource for support. We have also partnered extensively with our Employee Assistance Provider to not only provide their regular one-on-one counselling but also to provide bespoke webinars for our employees on a variety of topics. “We already provide meditation via Headspace, but they have been a helpful partner in providing free meditation sessions for our non-members. In addition, one of our colleagues

leads a weekly, virtual, guided meditation session for all to join. “We have also tried to understand the impact that a reduction in social connections may have on employee’s mental well-being, so we hold a fortnightly “keeping connected” session during which we meet on video and share tips on topics like staying active and great podcasts. Finally, the team planned for their annual mental health awareness week in the middle of May to continue virtually. They held several workshops on topics like better sleep, in addition to some animal therapy with a virtual tour of an animal sanctuary which employees were invited to attend with their families.”

“ We hold a fortnightly “keeping connected” session during which we meet on video and share tips on topics like staying active and great podcasts. ”



JOHN RIDDING
CEO
FINANCIAL TIMES

Financial Times
Commitment Statement:
<https://www.thevaluable500.com/member/financial-times>

Financial Times Website:
<https://www.ft.com/>



CASE STUDY

COVID-19 – Continued

“ Johnson & Johnson committed to remain on the front lines of this health crisis during the COVID-19 pandemic and stated that their response would be to focus on adapting the work environment. ”



JOAQUIN DUATO
CEO
JOHNSON & JOHNSON

Johnson & Johnson's Valuable 500 Commitment Statement:
<https://www.thevaluable500.com/member/johnson-johnson>

Johnson & Johnson's Website:
<https://www.jnj.com/>

JOHNSON & JOHNSON

For more than 50 years, Johnson & Johnson has promoted a culture of health with access to resources both for physical and mental well-being and its importance to employee satisfaction. They have embedded the practice in the built environment of the company, in online services, and through employee programmes. As a leader in global health, Johnson & Johnson committed to remain on the front lines of this health crisis during the COVID-19 pandemic and stated that their response would be to focus on adapting the work environment, policies, and benefits to

support employees in balancing their personal and professional responsibilities and prioritising emotional, mental, and physical health and well-being so they can be at their best. To protect the health and safety of employees, Johnson & Johnson provides state-of-the-art, integrated health and well-being services with an emphasis on prevention and education, as well as immediate injury/illness care, occupational health, and personal health coaching. This includes 119 on-site healthcare clinics in 35 countries across all sectors. These services are offered free to all employees.



CASE STUDY

COVID-19 – Continued

VERIZON MEDIA

(A DIVISION OF VERIZON)

“At Verizon Media the focus was on breaking down stigma and encouraging empathy for employees’ mental health and emotional wellness. In the wake of COVID-19, Verizon Media expanded resources to support employees’ mental health. They launched a daily newsletter providing resources to help cope with isolation, anxiety, and stress, and created toolkits with tips for leaders to support their teams. The Neurodiversity Employee Resource Group led a conversation on mental health and neurodivergence co-occurrence. They expanded their mindfulness programme to offer alternative resources that help employees manage stress, improve sleep and

cope with anxiety, and access to virtual crisis counselling sessions. They featured stories from employees in the hopes of sparking important conversations to foster a supportive and inclusive workplace. And, finally, they donated \$10 million in ad inventory to five non-profit organisations raising awareness on mental health, WHO (World Health Organisation) and the CDC to provide a platform for their public service advisories on COVID-19 and to ensure high-risk communities have access to the latest science-based information. They also partnered with the Ad Council to support their PSA campaigns to raise awareness on social distancing and mental health.”

“ Verizon Media launched a daily newsletter providing resources to help cope with isolation, anxiety, and stress, and created toolkits with tips for leaders to support their teams. ”



HANS VESTBERG
CHAIRMAN & CEO
VERIZON

Verizon’s Valuable 500**Commitment Statement:**

[https://www.thevaluable500.com/
member/verizon](https://www.thevaluable500.com/member/verizon)

Verizon’s Website:

<https://www.verizon.com/>



ACCESSIBILITY AND INCLUSION BY DESIGN

While three-quarters of businesses feel they are better positioned to provide digital accessibility, the reality is they are far from meeting their targets.

And to be fair, the targets keep moving as technology, cultural norms, and the state of the pandemic shape-shift around the globe. First, that's money left on the table. Disability is not a minority issue. Businesses can't afford to ignore the value of those 1.3 billion people. This is \$13 trillion a year in disposable income, according to estimates. This population is not only underserved, but also an untapped source of talent.



What Are The Trends?

The year-on-year trendline is disappointing: inclusive design innovation has been placed on the back burner as more companies are not currently exploring inclusive design innovation opportunities.

Diversity, Equality, and Inclusion (DEI) has been brought to the forefront of customers' perceptions of businesses, affecting how customers interact and make decisions about a brand. Businesses are pressured to be experts and advocates for digital

accessibility and accommodate a wide variety of disabilities at all levels of the business. The problem? One-quarter of the Valuable 500 do not engage in consumer stakeholder insights at all and less than a third of respondents do not target a disabled consumer.

There is a genuine misunderstanding of how digital accessibility impacts people with disabilities – or it is approached piecemeal – without an over-arching corporate understanding of its impact.

Collecting and promulgating this information feels as though it is labour intensive and a place where talking points won't cut it. The feedback from customers can be swift and brutal – or incredibly appreciative, but whichever the case, it's very real and a volatile area.



What helps?

Sharing the value of disability in numbers everyone can understand.



How Are Our Respondents Tracking?

58%

of companies have started or invested an adequate amount in exploring inclusive design innovation opportunities; 33% have not started.

15%

are not currently exploring design innovation opportunities vs. 24% in 2020.

29%

of companies have a targeted network of disabled consumers or stakeholders they tap for product innovation/ research/solutions.

32%

of companies use customer insights, but they are not targeted at disabled customers.

25%

do not engage in consumer/stakeholder insights at all.



What's On Their Minds?

VERBATIM

We've gathered some key insights from the voices of our survey respondents to further illuminate the story the data is telling us:

"In April 2021, an employee accessibility website and dedicated email address was developed and launched. The site promotes disability inclusion and serves as a central repository of accessibility information, tools, and resources, as well as a way for employees to reach the Accessibility team directly."

"We continue to work on our online booking tool (it's a global tool that we are trying to define for our European locations) so that our disabled customers can have the same booking experience as other customers."

"Since joining we have taken our disability employee network global and appointed regional leads, including in East Asia and India (previously our network was very UK centric). We have held an accessibility awareness week and promoted some of the tools we have available internally."

"We conduct audits of our buildings to assess the level of accessibility and to provide enhancements."

"We are working on creating a universal design website and building digitally accessible products and services our clients request."

"We are creating audio content for the visually impaired."

"We will continue to create homes and communities that not only provide safety and security but also comfort through rich tactile experiences and function, as well as utilising our new Smart Universal Design philosophy for designing living environments that provide vibrant experiences for all people."

"We are currently in the processes of arranging delivery of accessibility training to our Brand and Communications teams and exploring ways to build this training into firm-wide guidance."

"We have a customer-facing Disability Support Team to answer and escalate digital accessibility questions or issues."

"We have increased awareness of accessible technology through firm-wide communications and introduced captioning as standard to our internal meeting platforms and videos."

"Increased online (video) training and enhanced accessibility of information, including setting up subtitles."

"Our company developed corporate accessibility design standards and worked with a disability-led firm to conduct an audit of our buildings. These recommendations are available to other Valuable 500 businesses."



How Can We Accelerate Change?

Use employee feedback

whether individually or from resource networks, to understand inclusion and accessibility challenges with internal and external digital systems.

Host internal hackathons

to solicit the feedback and ingenuity of employees to present future-of-work solutions to current gaps and issues areas as it relates to accessibility.

Make real investments in accessibility teams

charged with accelerating and innovating the rate of inclusion innovation. The commitment can go further if more companies create C-Suite leadership roles specifically focused on accessibility.





NITIN RAKESH
CEO
MPHASIS

Mphasis Commitment Statement:

<https://www.thevaluable500.com/member/mphasis>

Mphasis Website:

<https://www.mphasis.com/home.html>

CASE STUDY ACCESSIBILITY AND INCLUSION BY DESIGN

MPHASIS

Making significant strides in assistive technology is the Indian-headquartered IT-leader, Mphasis. One of their guiding principles is that "customer-centric enterprises bridge the businesses and the human sides of the story. Businesses listen, co-create, and innovate to stay relevant in the ever-changing marketplace."

As an example of their human-centred approach, Mphasis chose two primary DEIA focus areas - gender and disability. They are now on the journey of shifting culture, internal design thinking, and external social impact funding to support those goals.

At the close of 2021 the company was honoured with not one, but two Zero Project Awards for its work in advancing inclusion. The Zero Project Awards are a significant global programme finding and sharing solutions that improve the daily lives and legal rights of people with disabilities.

**CASE STUDY**

Mphasis – Continued

The first project made possible through Mphasis' capital support was a collaboration with the technology company Uber, to launch uberASSIST and uberACCESS. The programme increased accessible vehicles in India for disabled passengers and training for drivers.

“ **Businesses listen, co-create, and innovate to stay relevant in the ever-changing marketplace.** ”

The second project directed financial and incubation-growth support to tech innovation start-ups building solutions for people with disabilities. Through Social Alpha, an investment company, Mphasis funded 14 assistive technology start-ups advancing disability inclusion solutions; for example, an electric wheelchair created for tough terrain, and a Braille lab. The initiative utilised the power of Mphasis' reach and corporate focus to assist the start-ups with improved manufacturing opportunities, broader distribution channels and market entry support. Ten of the start-ups have moved their innovations to market since the programme's inception.

“ **We have pioneered a number of initiatives with a sharp focus on promoting accessibility for people with disabilities.** ”



CONCLUSION

When all of the information is compiled, and the 2022 data is pulled into a unifying story – we are left both hopeful and galvanised. We're hopeful because the numbers prove companies are committed to disability inclusion and aren't going anywhere. That truth is more than valuable, it's imperative.



Conclusion – Continued

We're galvanised because the force of global business is listening, investing, and beginning to implement strategies with impact.

But what the Valuable 500 and this unprecedented Collective must do next is to dig in and truly invest in understanding the power and the profitability of living within the disability community. Early research has shown the beginnings of that truth, but further study and a holistic view that examines programmes across the entire business value chain are needed – including everything from inclusive design at inception, to stronger culture programmes, and consumer insights and brand experience. Business is listening and committing, and when those commitments are followed by actions – cultures, products, and programmes are improved.

The Valuable 500's primary funder, the Nippon Foundation, in making their

\$5 million

stake in the ground commitment, launched the beginning of system change

This transformation can only take place when lessons are learned across companies and access to interfacing with the ecosystem is not only possible, but also the most plausible way to be financially competitive. This financial gain is not at odds with inclusion, it is an outcome of it.

And yet few people know the business case, but it is at the centre of why we say disability is everyone's business, and for all to benefit, it must become known.

The belief that when the global business community embraces disability inclusion as a profit centre companies become more competitive, and the subsequent outcome is that the daily lives of the disabled community are improved – is the “future is here” imperative. The data is showing it's working, but we're at the beginning of the Collective acting, collaborating, and learning from one another. Sleeves are rolled up and people are doing the work. If you are a business leader, this imperative belongs to you. If you are a disabled entrepreneur or practitioner, this growth and future impact belongs to you. If you are a person with lived experience, this story belongs to you.

Disability is ALL of our business.



DISABILITY IS OUR BUSINESS

Visit the Valuable 500 website:
thevaluable500.com