NOTHING ABOUT US WITHOUT US

The path to sustained progress and accountability in inclusive disability representation



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Foreword

Dear Colleagues, Advocates, and Allies,

Today, I am proud to present the findings of one of the world's most comprehensive, inclusive, and representative market studies on disability representation in media and branding. This white paper serves as a compass for a two-year roadmap in Inclusive Representation and a resounding call to global business: underperforming and underserving the disability market is neither ethical nor sustainable.

In my professional journey, spanning three decades in advertising before assuming the role of CEO at the Valuable 500, I have seldom encountered work as important and potentially transformative as this.

Reflecting on my tenure as a global advertising executive, one pivotal campaign stands out: Maltesers' "Look on the Light Side" in 2016.¹This campaign marked the brand's pioneering use of humour, candour, and authentic, everyday portrayals of disabled individuals. The purpose was to better reach the disabled consumer segment which had previously been a critically untapped market. We worked directly with disabled young women and asked them to tell their stories. We cast disabled talent and created ads that were funny, inclusive, and relatable, as well as producing Britain's first fully signed TV ad. The results were outstanding, and the impact was both immediate and profound:

- 1.5 million social media impressions within 24 hours.
- A 7% sales increase.
- A survey revealing that 44% of disabled consumers felt the campaign altered national perceptions of disability.

This endeavour, and the positive change it instigated for both our client (Mars Wrigley Confectionery) and the disability community, lit the fire in me that led me to my current role. Inclusive disability representation, authentic storytelling, and creating accessible content **matters**. They are not just proven business strategies but potent catalysts for systemic and societal change.

Unfortunately, too many companies falter when approaching inclusive representation and creating accessible content. There are many reasons for this, and our research suggests that companies are either overwhelmed by fear of the unknown or hindered by socio-cultural factors. What remains largely obscured is the pervasive impact of inadequate representation and accessibility on disabled consumers and job seekers worldwide.

At the Valuable 500, we recognised the need for a global picture of how products, media and marketing communication can work together to form an ecosystem of inclusive representation. The objective of this project is to encourage companies to put disability inclusion and accessibility into all external communications, branding, media, and consumer products. Not only is this a moral imperative, but it makes sound financial sense.

Let the data presented here guide our collective journey toward a future where all products, services, experiences, messages, and spaces are inherently inclusive and accessible. Together, let us champion the end of disability exclusion.

Warm Wishes,

Katy Talikowska, CEO of the Valuable 500

¹ <u>Maltesers - "Look on the Light Side".</u>



Executive summary

People with disabilities continue to be underrepresented and inauthentically portrayed across mainstream media, marketing communication, and the global marketplace. We know that creating disability-inclusive and accessible places, products, and communications drives greater social inclusion and access to untapped markets. Yet global business remains inconsistent in meeting access needs and accurately including disability in their communications and outputs. In many cases, companies lack the confidence, competence, and strategic vision to systematically embed disability inclusion and accessibility as core business processes.

The journey to achieving more widespread and positive disability representation begins with developing a compelling, data-driven case for companies to understand why and how to improve. It is important that companies realise that this journey can be undertaken regardless of their industry, size, or geography. While previous research has explored disability representation in specific media, markets and cultural contexts, important questions have remained unanswered. How might products, media, and marketing communications interconnect to create an ecosystem of inclusive representation? And how could this ecosystem become truly beneficial for disabled consumers, businesses, and broader society?

In 2023, the Valuable 500 partnered with Open Inclusion and Yale University on an ambitious research project. The objective of this project was to develop a consumer-driven imperative for companies to mainstream disability inclusion and accessibility into all external communications, branding, media, and consumer products. Our survey engaged over 1000 disabled individuals across 15 countries and 6 continents, encompassing diverse age groups, genders, and types of disability. Our focus groups brought together esteemed disability advocates and thought leaders from seven regions² around the world to gather unique insights and perspectives that cannot be captured by quantitative data alone. Finally, this report also includes case studies from partner companies of the Valuable 500, which offer tangible examples of best practices from companies who are leading the charge in inclusive representation across a range of industries.



² Focus groups were carried out in the US, UK, India, Japan, Australia, Kenya, and South Africa.

This comprehensive approach has created a data-backed narrative which uncovers systemic barriers and identifies opportunities for companies to drive positive change for people with disabilities. We paint a clear picture of how disabled people around the world define, experience, and value disability representation. Moreover, the report highlights how the business community as a whole continues to miss the mark in including disabled people in the media and consumer products.

It is clear that the status quo needs to change, and this research makes an emphatic case that confident, consistent, and authentic disability representation delivers strong commercial returns alongside social impact.

This whitepaper issues an imperative to the Valuable 500 and the broader business community, urging collective commitment and mutual accountability. This approach will achieve an elevated standard of performance across three key pillars:

- 1. Accessible experiences
- 2. Accurate representation
- 3. Authentic narratives

By offering concrete examples of recent successes and providing clear recommendations for improvement, we are laying the foundation for Synchronised Collective Action on Inclusive Representation.

We are calling on companies to join us in developing a shared, global standard and set of practices that can be applied across a wide range of organisations and industries.

Authentic disability representation matters.

 Disability representation in media and marketing matters, yet brands often fall short. Our global survey of disabled consumers found overwhelming demand for more inclusion and accessibility.
 Over 90% agreed brands should ensure communications are accessible and reflect disability accurately (92% and 91% respectively).

However, current media portrayals exhibit substantial gaps:

- Accessibility barriers persist, with over half (**56**%) of respondents regularly encountering inaccessible communications across news, TV/film, ads, and other media.
- Accurate disability representation is rare. Just **10%** felt their own disabilities were portrayed appropriately, with general disability depictions only marginally better at **12%**.
- Authenticity matters most. **76**% said casting actors with disabilities and **78**% said presenting authentic narratives are vital for getting representation right.

Brands have an obligation, and a major opportunity, to lead on disability inclusion. This requires accessible, accurate communications reflecting real experiences With great care and collaboration with the disability community, brands can make progress toward. representation that respects and empowers.



Introduction

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The global movement in authentic disability representation in media, marketing, and product design is advancing. There is a nascent but growing contingent of companies that have begun to systematically create products, media, services, and marketing campaigns that are inclusive and accessible by design. Emerging market research points to a general uptick of activity within the global business community to make media and branding both disability inclusive and accessible. These recent developments mark the continuance of a much-needed global shift in business as usual, but they are just the beginning.

Uncovering the truth

This publication is a direct result of significant research, study, and collaboration. In 2023, the Valuable 500 partnered with <u>Open Inclusion</u> and <u>Yale University</u> on a global study to shed new light on the current state of play regarding disability representation and accessibility in media, branding, and product design. The study sought to create a global snapshot of how authentic disability representation is defined, experienced, and valued across geographic and cultural boundaries to better understand how the business community is succeeding and where progress must be made in this area.

Our research displays a significant disparity in disability representation and genuine portrayal in media and the marketplace and indicates a widespread lack of authentic storytelling and accessibility. The data also sheds light on:

- Stark differences in experience and perspective across regions.
- The compounding effects of intersectionality on lacking media representation.
- Differing understandings of inclusion among various disability subgroups.

of surveyed individuals do not feel frequently and appropriately represented in advertising.

62%

84%

of respondents indicated that their specific disability was rarely or never appropriately depicted in TV and film.



The lack of representation underscores a broader call to action, with **86% of respondents emphasising that commercial businesses bear a significant responsibility to advance disability inclusion** through consistent and appropriate representation.

59% of respondents recognise some improvements in disability representation across media and marketing messaging within the past 5 years.

56%

of respondents suggested that some progress has been achieved in making products and experiences more accessible within the past 5 years. Crucially, our research highlights the immense unrealised opportunity that businesses can capitalise on by prioritising accessibility and authentic inclusion across the brand experience. Businesses risk losing out on the global disability community's \$13 trillion estimated annual spending power.³ The business case and opportunity for organisations to improve their performance (and to be transparent in their progress and efforts) has never been clearer.

Whilst we understand that there is a need for continued improvement, we are heartened that the majority of respondents from the Valuable 500 survey believe there has been some progress.

Data from our survey points to a discernible shift in positive disability representation in media and marketing. Participants in our survey, focus groups and interviews cite notable examples of increased visibility of disability issues, a wider range of portrayals, and more authentic casting and scripts that better reflect lived experiences – as evidenced in productions such as Apple's <u>The Greatest</u> and <u>The Lost</u> <u>Voice</u> campaigns, <u>37 Seconds</u>, or <u>Raja the</u> <u>Great</u>.

There also have been wider commitments to advance accessibility and inclusivity as core business objectives within the global business community. Organisations have displayed their commitments to the Valuable 500, ILO GBDN, and other global and regional business and disability partnerships. Evidence of increased investment in accessibility in recent years suggests the beginning of a shift away from a

³ The 2022 Valuable Truth Report by the Valuable 500.

purely legal (or reactive) approach to addressing accessibility. Instead, there is evidence of a shift towards a more intentional and proactive approach to meeting customer access needs. For example, in a global survey of more than 500 companies from around the world, Forrester found that 60% of executives have committed to creating accessible products. 27% of design professionals said their teams were going to hire roles in accessible and inclusive design in the next year.⁴ This proactive stance suggests a growing recognition of the importance of intentional efforts to meet the needs and expectations of a diverse customer base, but there is still work to be done.

What does "better" look like in disability representation, and how do we get there?

This paper paves the way for companies to make meaningful and measurable progress on disability inclusion and representation across all industries. The Valuable 500 is positioned to be a driving force and convener of expertise and thought leadership from disability and business for the work ahead. We are committed to supporting the global business community to improve their understanding, performance, and accountability in this space through Synchronised Collective Action. We define inclusive disability representation in the media and marketplace as the systematic and genuine portrayal of disability across all media, communications, and consumer touchpoints. These portrayals authentically reflect the lived experiences, intersectional identities, and access needs of people with disabilities.

Disability must be depicted accurately by casting disabled talent in meaningful and non-tokenistic roles, co-creating narratives with disabled communities that move beyond reductive tropes and stereotypes.

Inclusive representation also means making consumer-facing products, services, and packaging inclusive and accessible, ensuring they are representative of the diverse needs of disabled consumers.

Fundamentally, inclusive representation involves systemic efforts to shift entrenched norms and unlock the \$13 trillion disability market for the benefit of society as a whole.

⁴ <u>2023 Bright Spots and Opportunities in a Year of</u> <u>Accessibility Research.</u>



This paper is our first step on this journey; in it, we recommend actions and strategies for businesses to mainstream authentic disability representation as a scaled and sustained standard practice. We also provide case studies of world-leading examples of product innovations and branding campaigns which focus on authentic disability portrayals and accessibility.

Lastly, this whitepaper is a call to action to the Valuable 500, the disability community, and the broader business sector to work together and hold each other to account to achieve a higher standard of performance in this area. We invite our partners to join us in producing a global standard for inclusive representation to inform companies on how to systematically improve performance across three key pillars:

- Accessible experiences.
- Accurate representation.
- Authentic narratives.

Perspectives from the global disability community

Despite evident signs of progress and isolated examples of best practice in authentic disability representation, the global business community as a whole is lagging in its understanding and performance in this space. The Valuable 500's study paints a picture of how the disability market remains largely unaccounted for in the development of products, branding, and media. The insights gathered from the study point to three pillars of inclusive disability representation:

ACCESSIBLE EXPERIENCES refers to accessible communications, products and physical spaces which promote equity through inclusive design. Without access, any representation is meaningless. Access enables direct experience, without which value is lost along with any sense of inclusion or belonging.

ACCURATE REPRESENTATION focuses on accurately reflecting the prevalence and diversity of disabilities in society in branding and product design. Specifically, it does so by focusing on how individuals with disabilities interact with brands or products as mainstream consumers rather than in tokenistic representations.

AUTHENTIC NARRATIVES explore

attributes, stories, and lived experiences of people with disabilities depicted in media and advertising. More authentic narratives can powerfully usher in new attitudes and a deeper understanding of disability in society. In the following sections, we provide an overview of the state of play within the global inclusive representation ecosystem. We unpack the systemic barriers which prevent the widespread adoption of authentic disability representation in media, marketing communication and inclusive experience design.

Our research delves into how the global disability community experiences disability representation in mainstream media (TV, film, news, and current affairs) and consumer brands (advertising, business communications and products). In particular, we sought to understand how representation and accessibility (or lack thereof) affects brand value. We also reflect on how effective representation conditions the interactions disabled consumers and jobseekers have with brands, media, and products.

Accessible experiences

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Ensuring that all consumers have equal access to experiencing a product or service along with its related marketing media and messaging should be the cornerstone of any company's disability inclusion journey. Nevertheless, our research reveals that accessibility is an ongoing challenge for most disabled people around the globe. Over six in ten (63%) respondents to our survey encounter obstacles preventing access to marketing communication preventing meaningful consumer engagement and harming both individuals and businesses alike.

Accessibility issues were pervasive across all forms of media:

- •54% of respondents encountered barriers accessing, perceiving, or understanding news and current affairs content at least some of the time.
- •**57%** experienced accessibility obstacles with TV and film.
- •**53%** struggled with inaccessible advertising.
- Brand communications posed even greater challenges, with **63%** facing barriers at least occasionally.

Respondents also expressed the urgent need for improvement when it comes to accessible practices in corporate communication, as well as the critical role of accessibility in building truly inclusive brand experiences and furthering a sense of belonging. **92% of respondents believe that brands have a duty to ensure accessible communications**.

A brief business case for accessibility

The case for businesses to invest in accessible design for products, services, and communications is compelling and multifaceted. Accessibility – in its various forms and meanings – is not only a fundamental right but also a key driver of market expansion and customer satisfaction. Pervading research suggests that there is a significant, yet largely untapped, market for accessible products. The Return on Disability Group's 2020 Annual report estimated that the global disability market controls \$13 trillion of disposable income, and that the disability community, immediate family, and friends make up 73% of the global population.⁵ Similarly, a US-focussed study conducted by the American Institutes for research conducted in 2018 states working-age Americans with disabilities command about \$490 billion in expendable income.⁶

While this market remains largely untapped, research points to the steady demand for accessible products from consumers, financial ROI companies realised from developing accessible products and spaces, and increased brand affinity for companies who prioritise accessibility. The State of Digital Accessibility 2022 - a global study on current trends and outcomes in the accessibility industry - found that 74% of respondents prioritise buying a product or service because of its accessibility. 2018 research from Forrester Research estimates that for every dollar spent on accessibility features and inclusive design, companies see an average revenue return of over nine dollars.⁷ Making products and messaging universally accessible opens up the experience to all consumers, increasing the likelihood that consumers will remain engaged and loyal to brands.

Reaching and retaining consumers with disabilities is one compelling case, yet another overlooked benefit is the bottom line. Developing communications, products, and services that are accessible by design has the potential to streamline and save on operating costs. Many companies taking a proactive, built-in approach to accessibility in product development and corporate communications – including utilising accessibility design standards and consistently testing through the development cycle – will yield products that are made accessible by design. This saves both the time and cost of having to retrofit or remediate an inaccessible product and gets it to the marketplace faster.

This data highlights the potential financial and social benefits of making digital and physical products, services, and messaging accessible to all by design. Rather than catering to only a niche market, accessible design opens organisations to a customer base of over 1.3 billion people with disabilities worldwide.

Economic implications of inaccessibility

The inaccessibility of digital spaces, products, and advertisements has real consequences for businesses and consumers alike. 71% of disabled people say they have abandoned a website due to excessive barriers,⁸ costing businesses potential customers and market reach. In the UK alone, businesses lose an estimated £17 billion annually in revenue by failing to accommodate disabled customers.⁹ Studies also suggest that improving the accessibility of e-commerce sites for disabled users could contribute £420 million in new revenue for UK businesses.¹⁰



⁵ <u>Return on Disability Annual Report 2020.</u>

⁶ <u>A Hidden Market: The Purchasing Power of Working-Age Adults with Disabilities.</u>

⁷ The Billion Customer Opportunity: Digital Accessibility.

⁸ The Click-Away Pound Report 2016 (PDF document).

⁹ The Click-Away Pound Report 2019 (PDF document).

¹⁰ Inaccessible Websites Cost Businesses £412m During Pandemic.

There are also considerable legal ramifications for companies who choose to ignore accessibility in their products and communications. This is particularly true in the information and communication technology (ICT) industry - there are many countries and regions around the world that have legislation requiring ICT product manufacturers to create accessible products. Websites, including e-commerce marketplaces, branding spaces, applications, and video streaming services in these countries are subject to these laws.

The cost of non-compliance is often substantial. In the United States, the cost of litigation can range from the tens of thousands of dollars into six figures.¹¹ In 2023, there were more than 4,600 ADA digital accessibility suits filed across the United States alone, with the vast majority being filed against consumer goods, retail and services sector.¹² Accessibility enables equitable participation and acts as the gateway for authentic disability inclusion across the consumer journey. If customers cannot access a physical or digital space and experience products and services, all other inclusion efforts ring hollow. Companies must acknowledge the opportunity that accessibility offers. They must also understand the consequences of inaccessibility. There must be a shift from a compliance-driven approach to a proactive accessibility culture to design and produce products and communications more efficiently and for all consumers.

- ¹¹ <u>A Recap of 2022 Website Accessibility Lawsuits.</u>
- ¹² ADA Accessibility Lawsuit Tracker.

We gathered several examples of innovative practices and campaigns from Valuable 500 partner companies in the space of accessibility and inclusion. More detail about each of these companies' efforts can be found in Appendix A.

Jaguar Land Rover: Innovative inclusive mobility

JLR's inclusive vehicle design initiative, developed in collaboration with injured veterans and individuals with complex health issues, has led to innovations such as emergency autopark assist and adaptive interiors. Their commitment to inclusive mobility is reshaping the automotive industry.

Lancôme (L'Oreal): Revolutionizing beauty accessibility with HAPTA

Lancôme's HAPTA, a device designed for people with limited dexterity, stabilises beauty tools and counteracts tremors. Prominent disabled brand ambassadors and a strong marketing campaign have positioned Lancôme as a leader in accessibility, with HAPTA winning accolades for its innovation and social impact.

Procter & Gamble: Pioneering accessible advertising

Seeing a need for equal access to advertising that shapes choices, Procter & Gamble launched the Advertising Accessibility Alliance to progress toward 100% accessible ads through descriptions and captions, collaborating with disability organizations on implementation best practices, running an audio-described Super Bowl ad, and working with media partners on digital accessibility features, while also engaging with European broadcasters, agencies, and associations to raise awareness and set new inclusion standards across the industry value chain.

Sony: Inclusive design in tech

Sony is committed to incorporating inclusive design in its products by fiscal year 2025, focusing on extensive employee training and fostering a diverse workplace culture to address the needs of users with disabilities. This initiative has already led to innovative features in products like cameras and sensor devices for mobility aids, signalling Sony's progress towards a more inclusive product range.

Zalando: Advancing adaptive fashion and online shopping accessibility

Zalando enhances its online fashion retail by integrating adaptive clothing and utilizing machine learning for detailed product descriptions. This innovative approach caters specifically to the needs of visually impaired customers, providing them with a clearer understanding of products. By focusing on digital accessibility and responsive feedback, particularly from the disabled community, Zalando is redefining inclusive fashion standards.

Accurate representation

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Accurate representation in media, marketing and product design strives to mirror the actual prevalence and diversity of disabilities in society. This means moving beyond tokenistic representations that generate an impression of inclusion and instead depicting individuals with disabilities as they truly are – mainstream consumers with unique lived experiences who interact with products and services on a daily basis. This involves capturing the diversity within disability communities in a way that authentically reflects their everyday experiences and resonates with how disabled consumers engage with brands and products.

Types of accurate representation: striking a balance

Accurate disability representation in media and marketing comms can be categorised into three distinct approaches:

- Incidental representation sees the inclusion of disabled individuals without explicitly highlighting their disability. This helps to mainstream disability within media and marketing contexts, but care should be taken to avoid tokenism that overlooks the nuances of lived experience.
- Integrated representation involves the visible presence of disabled people, with aspects of their disability reflected in contexts that are relevant to the narrative. Moving beyond visibility and avoiding tropes and stereotypes fosters greater representation and understanding of the diversity of disabled experiences while ensuring accurate and respectful portrayals.
- Integral representation places disability at the centre of the narrative and ensures that the experiences of disabled individuals are the focal point of the story. This highlights and prioritises disabled perspectives, which in turn fosters understanding, empathy and inclusivity within broader social perceptions of disability.

I want to see myself in the brands I want to invest in.

Mike Adams, CEO of Purple, Valuable 500 focus group participant (2023) These approaches should be thoughtfully considered and used in careful balance to ensure the authentic and respectful depiction of disability that recognises the diverse experiences of the disabled community. Most importantly, it is crucial to consult disabled people, embrace lived experience, and cocreate with communities to ensure accurate and meaningful representation.

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It's so extremely important that there is a true representation on television, as you would [see in] outside in the world. Where there's variance, there's difference. It's important that people see themselves represented for social cohesion.

Tarryn Tomlinson, South Africa, Valuable 500 focus group participant (2023)

The stark reality of underrepresentation

Both our survey results and recent market data reveal that **there is a consistent lack of accurate representation across all media types, including marketing communication, TV and film, and news media**.

- •46% said disability overall was rarely or never appropriately represented in news.
- •60% said their own disability was rarely or never appropriately represented in news.
- **46%** said disability overall was rarely or never appropriately represented in TV and movies.
- •62% said their own disability was rarely or never appropriately represented in TV and movies.

This is consistent with recent market research published by Valuable 500 companies. A Channel 4 study found that only 4% of UK TV ads in 2021 featured disabled characters, and a mere 1% of these spots were prominent.¹³ An Annenberg Inclusion Initiative study of 1,300 popular U.S. films from 2007 to 2019 found that only 2.3% of speaking characters were depicted with a disability.¹⁴

¹⁴ Inequality in 1300 Popular Films (PDF document).

¹³ Channel 4 challenges UK advertisers to improve disabled representation in advertising campaigns.

Channel 4, a Valuable 500 partner, has set a benchmark for authentic disability representation in media, from including programming like the Paralympics to innovative marketing campaigns featuring disabled people in dynamic roles. Channel 4 has doubled down on disability inclusion through initiatives like:

- Committing to employing 50% more disabled presenters and creatives.
- Consulting with disabled audiences to develop inclusive content, policies, and terminology.
- Launching the £1 million Diversity in Advertising Award, aimed at encouraging inclusive portrayals in advertising

This multi-pronged approach has catalysed a cultural shift, with Channel 4 leading by example to show that authentic representation requires a move beyond tokenism to empower disabled voices across all aspects of business.

Adding to these efforts, Channel 4 also recently launched an industryfirst <u>Code of Portrayal</u> focusing on disability representation in media. Developed in close consultation with disabled viewers, the Code establishes clear guidelines for portraying disability across Channel 4's commissions in an authentic, respectful manner. Despite recent examples of films and advertisements that have prioritised disability inclusion, statistics point to an actual decline of disability representation in TV and film proportionally to the amount of new content being generated on an annual basis since 2019.¹⁵

In the case of advertising, inclusion and accurate representation have a notable impact:

- •**56%** said they would be more likely to recommend an inclusive, disability-friendly company or brand to their friends and family.
- •54% reported being more likely to purchase a product or service if its advertising represented disability appropriately.
- •**34%** said appropriate disability representation in brand advertising would make them more likely to seek a job with that company.

The return on accurate representation

Our research indicates that **disabled audiences**, **consumers**, **and job seekers are more likely to positively interact with a brand**, **show**, **or product if they see themselves portrayed in them**.

The effectiveness of diverse advertising is supported by System1's research. Their "Feeling Seen" study in the USA found that diversity-



¹⁵ Seen on screen: The importance of disability representation.

themed ads scored an average of 3.8 Stars on a 5-Star scale, significantly higher than the 2-Star average for US ads.¹⁶ These trends extend beyond traditional media and branding mediums as well - Nielsen's 2023 analysis of branded Instagram posts revealed that content creators with disabilities outperform and provide more value than their non-disabled counterparts. Posts from creators with disabilities scored 21.4% better in average media value than posts from creators without disabilities and drove 20.5% more interactions.¹⁷

When done thoughtfully, accurate representation fosters feelings of belonging, inclusion, and community. It does this by showing disabled individuals as valued members of society whose needs and perspectives matter. Making disabled individuals feel recognised and seen in marketing and branding helps to create a culture of belonging where disability is accepted, understood, and incorporated into how companies approach consumers and communities.

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We are going to be your customers. Our families are going to be coming to support your restaurant and watch your movies. There is money there, but it's bigger than that. You're creating awareness and making new role models.

Emma McKinney, South Africa, Valuable 500 focus group participant (2023)



¹⁶ <u>Feeling Seen: Getting Inclusive Advertising Right.</u>

¹⁷ With limited inclusive content in traditional media, brands and people with disabilities are finding representation on social media.

Authentic storytelling

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Aside from appropriate and proportionate depictions of disability, it is crucial to consider the authenticity of storytelling about disabled characters in media and marketing communication. The telling of stories is one of the most powerful tools used to educate, persuade, and influence society. Providing authentic portrayals of lived experience in storytelling can be transformational, especially in the case of individuals with disabilities and others who historically have sat on the margins of mainstream media and advertising.

Despite progress, the need for a coherent standardised approach to authentic storytelling has never been more evident.

Our global focus groups and surveys consistently referenced deep-rooted cultural biases and stereotypes, highlighting significant barriers to implementing scalable and sustainable practices for authentic disability representation.

76%

of survey respondents emphasise that authentic storytelling and representation should be a top priority for corporations.

98%

of these respondents feel that their experiences aren't consistently and accurately represented in current media and marketing narratives. Our research also points to vast disparities in the way authentic disability storytelling is defined and how it appears in media and branding across geographical and cultural barriers. These differences are often tied to pervading cultural norms and the degree to which disability rights and inclusion are entrenched as social tenets. In some cultural contexts, for example, it is customary to view disabled people as objects of pity or charity rather than complex, independent individuals. In others, disability discourse may have advanced to enable more nuanced and holistic depictions of disability. Multinational brands and media content producers must consistently consult with local disabled advocates and content creators to fully understand current language usage, variation in preferences and attitudes and other relevant nuances on disability in order to portray disability in a way that is authentic and culturally appropriate.



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Disability doesn't look like one thing. Not the superhero or tragedy narrative. Nothing sensational. Just me as I live my life.

Tiffany Yu, USA, Valuable 500 focus group participant (2023)

One-dimensional storytelling perpetuates misconceptions

In many societies across the globe, disability storytelling is centred on one-dimensional stories and over-simplification of the disabled lived experience to elicit a range of emotions from audiences including pity, fear, sympathy, or over-hyped admiration/inspiration. On one end of the spectrum, disability is portrayed in a harmful manner that either hyper-medicalises disability or relies on outdated tropes and stereotypes about the bodies, behaviour, and lived experiences of disabled people. Disabled people are also portrayed variously as 'objects of pity', as 'vengeful villains', or as the 'sweet innocent'. In some contexts, negative cultural beliefs, or fear of disability lead to overtly negative or evil character portrayals of disabled characters.

On the other end of the spectrum, there is a tendency to place individuals with disabilities on pedestals, depicting them as inspirational superhumans and aligning them with so-called 'inspiration porn'. While well-intentioned, this once again reduces disabled people to onedimensional symbols of triumph over adversity without acknowledging the very complex lived experience each individual has.

For most disabled people, the authentic reality of their life lies somewhere in the middle and somewhat removed from this spectrum. Authenticity is nuanced, unique for each individual and doesn't exist to seek validation because of an emotional response. Many of our focus group participants felt that the storylines they most connected with were those that celebrated the complex, yet ordinary lives of disabled people rather than the superhero or charity tropes.

To move beyond harmful portrayals and foster authentic representation, it is crucial to challenge the impulse toward these kinds of simplistic narratives. Raising the standards of representation not only benefits the disabled community but also contributes to a more comprehensive understanding of disability for society as a whole. Authentic disability narratives need to be informed by disabled people. For media production companies, this means hiring disabled talent and behindthe-camera personnel, as well as prioritising accessible and inclusive production settings to be able to retain disability informed talent and ensure they can be equally effective and thrive in their roles.

The rise of streaming series has brought more diverse disability portrayals into mainstream storytelling. Acclaimed shows like Sex Education (Netflix) and CODA (Apple TV+) are stand out examples in this realm. Sex Education features meaningful representation across multiple disabled characters over several seasons, played compellingly by disabled actors themselves.

Likewise, CODA tells the story of a young woman who is the only hearing member of a deaf family. The story's unique authenticity comes from both its relatable storyline and the fact that each of the actors playing the main character's deaf family members had lived experience.

Both avoid stereotypes or ableist tropes, emphasising the fully realised humanity and complex identities of these individuals. Rather than confining disability to inspirational tragic side plots, Sex Education and CODA make it a consistent thread and fact of life interwoven into each show's fabric.

Addressing the lack of intersectional storylines

Current approaches to disability representation often treat the disabled community as a homogeneous group. These approaches neglect the nuanced experiences and challenges faced by individuals whose experiences intersect with various identity factors like race, gender, sexual orientation, and socio-economic status. Recognising and respecting this multidimensionality is crucial in understanding the full scope of an individual's identity and the richness of the disabled community.

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I'm 36 and I've only ever seen 5 disabled people of colour on my screen. I know the difference it would have made to me to see accurate portrayal of disabled stories, intersectional stories.

Dr. Shani Dhanda,

Award-winning disability rights advocate and social entrepreneur (2023) Narratives about disability, as well as the people who shape them, need to mirror our society's diversity and the kaleidoscope of intersectional identities therein. For example, research shows that only 7% of TV characters with disabilities in 2020 were LGBT0IA+, while Black characters account for just 16.1% of disabled TV roles, despite black Americans facing disability at twice the rate of white Americans.¹⁸ Embracing intersectionality in disability representation contributes to a richer and more inclusive cultural landscape, not only providing more compelling storylines for audiences and gaining crucial buy-in from marginalised groups who seek authentic portrayals of their identity groups in the media.

In 2019, Netflix produced Special, a semiautobiographical comedy series based on the memoir of Ryan O'Connell, a gay man with cerebral palsy pursuing independence, romance, and friendship. O'Connell portrays himself in the show and also served as the show's executive producer, ensuring that both the storyline and character's portrayal were authentic to both his identities as both a gay and disabled man. The series won an Emmy nomination and acclaim from the disability community for its authenticity.

The case for diverse and inclusive casting

In front of the camera, practices like "Cripping Up" (where non-disabled actors play disabled characters) and "Hear-Washing" (involving hearing actors in Deaf roles) remain prevalent globally. This often leads to the watering down of lived experiences of disability, as well as the derogatory mimicry of physical or vocal aspects of an impairment by those with little or no real-world experience. This not only blurs the line between role-playing and authentic representation but also overlooks the wealth of disabled performers who have frequently been overlooked for roles that depict aspects of their own lived experience.

As of 2020, in the Oscars' 93-year history, there were 61 nominations for actors playing characters with disabilities, with 27 winners.¹⁹ Notably, only two of these winners had a disability. Moreover, a third of all lead actor Oscars have been awarded to non-disabled actors portraying disabled characters. Troy Kotsur's 2023 Oscar win for his role in CODA marked him as only the third disabled actor to receive this accolade.²⁰

Another prime example is Adam Pearson, who was overlooked for the role of Joseph Merrick in a planned BBC adaptation of The Elephant Man, despite having a personal connection to the condition that Joseph Merrick had. The role instead went to a non-disabled actor.

¹⁸ Where We Are on TV Report – 2020.

¹⁹ <u>Time for Hollywood to make disabilities more than just Oscar material.</u>

²⁰ Disabled actors in disabled roles should be a given – why is Hollywood still getting it wrong?

The Ruderman White Paper on Authentic Representation in TV revealed that in the top 100 films of 2019, only 22% of characters with disabilities were portrayed by actors with disabilities. This underscores the need for more diverse and inclusive casting practices, where disabled actors are considered for both disabled and non-disabled roles, to ensure authentic representation of disability on screen.²¹

76%

of respondents to our survey felt that casting people with lived experience of disability is one of the most important aspects for getting disability representation right.

Behind the camera, there is a concerning lack of meaningful engagement with disabled communities across content development and creative processes. A 2023 survey by the 4A's revealed most advertising agencies fail to even track disability status in diversity data. Separate research from All In found that only 11% of nearly 19,000 surveyed marketing professionals identify as disabled, with just 8% in senior leadership roles.²² Making space for stories written by and centred on the real lived experiences of disabled creators and cast members ensures more authentic representation.

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If we want the world to be accessible to the disability community, then let's make the ideas and the experiences surrounding disability more accessible to the world.

Emily Ladau, as quoted by Tiffany Yu in the USA, Valuable 500 focus group participant (2023)

²¹ The Ruderman White Paper on Authentic Representation, 2018.

²² <u>Disability in the advertising industry: Where are we in 2023?</u>

Ensuring cultural visibility for disabilities across the spectrum

Often, there is a skewed emphasis on visible disabilities, which are easier to depict, while less visible disabilities go underrepresented. This imbalance is further compounded by the over-reliance on disability symbols like wheelchairs and white canes, which represent only a small segment of the disabled community.

Storytelling efforts should reflect the broad spectrum of disability experiences including neurodivergence, intellectual/developmental disabilities, chronic illness, and mental health representation. To truly reflect the diversity and richness of the disability community, media and marketing must strive to capture a more comprehensive range of disabilities. Achieving authentic disability representation requires a multifaceted approach centred on elevating diverse disabled voices and empowering disabled people to shape the cultural narratives about their communities. The impact of raising these standards goes beyond compelling storytelling – it fosters empathy and catalyses social change. Authentic representation matters because it has the power to transform attitudes and advance disability rights globally.

Progress achieved, barriers remain

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While notable strides have been made, the path to a universal understanding of the value of disability representation and accessibility, as well as the establishment of standardised approaches to high performance in this space, is marred by lingering challenges. Here are some of the systemic barriers that remain in our collective journey:

Limited presence of disabled people in production and design processes

The greatest challenge facing businesses and the disability community today is that decisionmakers, creatives, producers, and creators simply lack in their understanding of the disabled experience. This is in large part due to the absence of disabled people throughout the design and production cycle of brand campaigns and media content. The Diamond Disability Deep Dive Report of 2022, for instance, reports that representation of disability in both on and off-screen roles remains significantly below 10%,²³ less than half of the disability prevalence rate in the UK. The absence of disabled perspectives suggests that they are either being misunderstood and misrepresented, left out entirely, or treated as a tick-box exercise, which can yield more harmful portrayals than simple omission.

Few standardised approaches to creating inclusive content exist

There are precious few companies that have created internal guidelines or standards to serve as guideposts for creating inclusive content. Examples of such resources like Google's All In Inclusive Marketing Insights or Current Global's Accessible by Design Guidelines provide the right guidance but often are either overlooked or do not make it into the hands of decision-makers and content producers. This lack of available guidance for creators and producers to use in developing branding or media content creates a vacuum of competence, practice, and accountability in getting inclusive representation right. Such standards not only ensure that products and campaigns being produced today are made inclusively, but they also allow for this knowledge to be transferred to others and for practice to be sustained over time.



²³ The Fifth Cut: Diamond at 5.

Improvements and consistency are needed in workplace inclusion efforts

The physical accessibility of a workplace, how prospective or current disabled employees are supported while at work, and how your organisation chooses to celebrate or encourage disability identity are three of many important factors which dictate a company's ability to hire and retain disabled talent. Poor workplace accessibility and inclusion remain major barriers for disabled content creators and professionals in the media and marketing industries. For instance, production sets, writers' rooms, and external agencies often lack basic accessibility features, accommodations, and inclusive hiring and retention practices. This forces disabled creators and talent to navigate inaccessible environments and advocate for their own accommodations. To improve representation on screen and behind the scenes - and across business in general - organisations must prioritise disability accessibility, accommodations, hiring, education, and retention across all levels - from executives to hourly workers and suppliers.

Pervasive disability-related stigma affects business decisions

In certain markets, deep-rooted cultural biases and stereotypes create significant barriers to the implementation of scalable and sustainable practices for authentic disability representation. Our focus groups and surveys conducted in India, Japan, and South Africa provide evidence of societies that are still grappling with charity-based or medical-based portrayals of disability. This reality affects businesses' willingness to portray disabilitybased imagery in their advertising and also enables sometimes problematic portrayals of disability in film and television.

Lack of nuanced understanding of the spectrum of accessibility needs

Diverse needs across different disability categories demand nuanced understanding. The absence of knowledge or expertise on access needs further widens representation gaps. Even within the deaf community, varied types of hearing loss require different modes for optimizing comprehension - with a combination of signing and captioning needed to equitably serve broader preferences.

Internal accessibility knowledge and competence gap

Despite the economic impact or legal mandates to improve digital or product accessibility, many organisations often lack the internal expertise to consistently create scalable and accessible products by design. The State of Accessibility Report states that, out of the companies and organisations surveyed, over half (53%) report not having sufficient accessibility competence within their engineering and development teams to make their products accessible. This results in companies often having to hire external consultants to remediate or redesign products to comply with accessibility standards.

The way forward – next steps

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In response to the urgent need for the disability community to be counted in mainstream media and the marketplace, as well as the numerous rationales for companies to act, the Valuable 500 is outlining a set of harmonised strategies aligned with our 3 identified pillars – accurate representation, authentic narratives, and accessible experiences.

1. Build awareness and set intent

- Understand the need: Recognise the importance of disability representation and accessibility in reaching a diverse audience and its impact on both business and broader society.
- Set clear goals: Establish clear, measurable objectives for integrating disability inclusion and accessibility into marketing strategies and product design.
- Adopt a positive attitude: "Just start somewhere," advises a Valuable 500 focus group participant, emphasising the importance of initiating the process. "Be brave, not stupid," suggests another disability advocate, highlighting the need for a balanced and informed approach.
- Enlist Executive-level support: The majority of successful and sustainable disability inclusion and accessibility strategies or initiatives involve C-Level buy-in.

2. Engage and empower the right people

- **Start small:** Initiate the journey with a small, highly engaged group to champion disability inclusion and accessibility.
- Empower affinity groups or disability ERGs: Disability ERGs are a great source of subject matter expertise, feedback, and overall direction in improving accessibility, representation, and inclusive design. ERGs can also be powerful allies in raising awareness of a specific accessibility or inclusive programme or product.
- Employ and empower disabled people: Actively recruit and consult with individuals with disabilities, ensuring their perspectives are integral to marketing and design strategies.
- Know your scope: Emphasise the importance of understanding your capabilities and where external support might be needed.



3. Ensure inclusive casting and production environments

- Ensure authentic casting: Cast individuals with a lived experience of disability for roles that represent their experiences, sometimes considering non-actors.
- **Represent diverse disabilities:** Aim to depict a wide range of disabilities, including physical, sensory, and cognitive disabilities.
- Embrace diverse and inclusive casting: Employ casting methods that disregard conventional physical characteristics, embracing diverse disability representations.
- Employ disabled talent on and behind the camera: Strive to hire crew members with disabilities for various roles in production to embed perspectives from the disability community throughout the process.
- Adapt spaces to ensure accessibility: Assess and modify filming and production environments to ensure physical accessibility for talent with disabilities. This includes providing necessary accommodations, such as sign language interpreters, assistive technology, and tailored transportation options.

4. Use processes and tools to embed capability

- Develop inclusive processes: Ensure disability inclusion and accessibility are part of every marketing and product design process for consistency and effectiveness. Many organisations have developed their own inclusive design guidelines or have used the aforementioned external guidance as a means to standardise approaches to inclusion and accessible design.
- **Building skills and knowledge:** Provide relevant accessibility and inclusion training across the product or campaign development cycle to ensure that all practitioners and decision-makers are equipped to advance accessibility and inclusion at every design or planning stage.
- Make space for procurement and expertise: Partner with specialised agencies and experts in disability representation for enhanced insights and creativity.
- **Create accessible content:** Leverage technology and tools that facilitate the creation of inclusive content.
- **Build momentum:** "By myself, I can go fast. Together, we can go far," reflects a disability advocate, underlining the power of collective effort.

5. Cultivate an inclusive culture

- **Assess and improve:** Regularly assess the organisational culture for inclusivity and manage areas of weakness.
- **Build on strengths:** Utilise existing organisational strengths as a foundation for promoting inclusivity.
- Establish disability representation and accessibility roles: Foster internal subject matter experts and leaders to set strategy, lead in creating supporting infrastructure, provide training to colleagues, deepen the culture of inclusivity within the company, and hold all teams accountable to established goals.

6. Measure, test, and learn

- Continually research and feedback: Conduct ongoing research and testing to understand the brand experience and perceptions among disabled customers. Ensure that the involvement of any disabled consumers or testers is done in an accessible and inclusive manner.
- Embrace iterative learning: Apply a testand-learn approach to refine strategies based on real-world feedback.
- **Track progress:** Employ metrics to gauge the effectiveness of inclusion strategies and inform data-driven decisions.



Our call to action

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Systematically, sustainably, and authentically including disability inclusion and accessibility into marketing, media, and the marketplace is not just a moral imperative but a strategic business decision. By fostering relevant education and professional development, refining processes, driving cultural change, and continuously measuring progress, organisations can make much-needed, meaningful progress. The journey towards holistic inclusion demands continuous commitment, learning, and adaptability.

The Valuable 500 will be developing the Synchronised Collective Action on Inclusive Representation in the coming months based on our findings. This resource will be instrumental in educating leaders, perpetuating good practice, and achieving greater consistency in performance in the corporate world. It will emphasise the importance of weaving disability inclusion into all business activities and decisions in order to make external-facing products, experiences, messaging and spaces inclusive and accessible. This multi-level tool will also reinforce the need for continuous improvement while also promoting sustainable and globally scalable progress. The collective work ahead promises to reshape the narrative of disability representation, benefitting the 1 in 6²⁴ of us with a disability and global society at large.

²⁴ WHO Disability fact sheet (2023).

Acknowledgements

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The Valuable 500 would like to thank our research partners, <u>Open</u> <u>Inclusion</u> and <u>Yale University</u>, for their outstanding contributions and work toward making this report possible. The Valuable 500 commissioned Open Inclusion to design and conduct quantitative and qualitative research to identify and evidence the insights for this report. The research included a pan-disability consumer survey of 1,000 people conducted across 15 countries and 7 focus groups held in seven countries with experts in disability representation who each also have personal lived experience.

Open Inclusion is a disability and age-inclusive research and design agency based in London and operating globally. Research was designed with input from team members with a diverse range of disabilities and disability organisation partners in each region. The regional partners helped to ensure both linguistic and cultural suitability as well as trusted local outreach. All participants engaged in this research were compensated for their valuable insights.

We also thank Dr. Mary Davis and her cohort of student researchers from Yale University's <u>Jackson School of Global Affairs</u> for their immense contributions in supporting Open Inclusion's research analysis as well as conducting the field interviews and writing our case studies. This work was part of the students' Capstone Program, a signature of the Jackson School's curriculum, and is emblematic of its commitment to training a new generation of leaders to tackle the world's most daunting challenges by crafting thoughtful, evidence-based policy solutions. These researchers included: Kaleb Assefa, Amy Brooks, Kate Carmain, Pierce Daly, Faith Evanson, Grace Freedman, Aditi Narayan, Mao Shiotsu, Bea Soto, and Edmund Zheng.

We would also like to thank Sony, Zalando, Procter & Gamble, L'Oréal, and Jaguar Land Rover for working with us to develop case studies on their innovations and best practices in including disability and accessibility in their products, services, and messaging. Their examples will help guide other companies' future efforts and decision-making in this space. We thank them for their contributions and for doing their part to include people with disabilities in everything they do.

Lastly, we would like to thank all of the disabled people who supported our research by participating in our survey or in one of our focus groups. This work, and all of the work the Valuable 500 does, is informed by and done in collaboration with the disability community. We thank you for lending your voices and thoughts to this piece of research that we serve as a seed for systemic change.



Appendix A – case studies

Driving Inclusion:

Jaguar Land Rover's Journey Towards Accessible Automotive Innovation

Overview

Driven by research from their customer insights team calling to improve their product accessibility and inclusivity, Jaguar Land Rover (JLR) has embarked on an ambitious initiative to reimagine the development process of their vehicles to better meet the access needs of disabled consumers. JLR partnered with the London-based Studio Exception Consultancy to gather insights from consumers across a wide spectrum of disabilities to make their vehicles more inclusive and accessible to all.

Problem definition

JLR's accessible product development journey began in 2015 in their Customer Insights Team, who flagged the company's need to address certain market segments, including the disability community. The company subsequently led an internal discovery process through which it the discovered that product features, retail experiences, and advertising were all areas in which disability inclusion and accessibility could be better integrated as core strategic elements. Without a systematic and streamlined approach to inclusion and accessibility, the company risked leaving out a massive and untapped market.

Approach

One of JLR's keys to success started with their partnership with the Invictus Games, with whom they worked closely to gain valuable and diverse consumer insights from injured veterans. The JLR Customer Insights and Product Development teams invited disabled athletes from the Invictus games to provide accessibility feedback by interacting with their fleet of current and future vehicles. More recently the JLR Defender brand has worked with trailblazers including disabled athletes as part of its Rugby World Cup partnership.

Recognising the diversity in experience and access needs in the disability community, JLR worked closely with Studio Exception to identify individuals with multiple diverse medical and accessibility considerations who could provide additional feedback. JLR worked with a 9-year-old boy with complex medical needs and his family to test drive their vehicles and offer insights into what considerations would be needed to make providing consistent care to a loved one in transit more seamless and comfortable. They also worked with a wheelchair user to prototype ways to control their vehicles using different types of input devices and controls and ensuring that the individual's end-to-end product experience was inclusive and accessible.

The result of these consultations was the ideation of multiple, potentially groundbreaking features within JLR's fleet of vehicles, including features to assist drivers in medical distress, car interiors that can detect and adapt to passengers' stress levels, in-vehicle communication systems, and features for on-board storage for medications. Features account for both visible and hidden disabilities, with the goal of applying key learnings across models and categories.

Impact

The foresight of involving the disability community in informing the development of its new vehicles is a game-changer for JLR. Not only has this feedback process generated several features that can make JLR's vehicles more comfortable and accessible to all, but this process also supports the JLR brand's inclusion objectives while pioneering an underexplored market. The team also recognised the need to holistically build accessibility across retail, advertising, and community engagement. Weaving the Exception Method into JLR's product development process has also guaranteed the long-term sustainability of this practice.

Looking ahead

Leveraging platforms like the Rugby World Cup Trailblazers and disability organisations for continued co-creation is critical, as groups' needs evolve across geographies and demographics. JLR is well-positioned to lead the charge on inclusive mobility given current momentum and executive alignment.

Embracing Inclusivity:

L'Oréal's Strategic Vision for Disability Inclusion in the Beauty Industry

Overview

As part of its long-term and comprehensive commitment to Diversity, Equity & Inclusion, L'Oréal embraces its role as a pioneer and leader in disability inclusion within the beauty industry, implementing a wide range of disability inclusion initiatives targeted internally at its employees and workplace, and externally at its consumers and external partners. L'Oréal has notably developed (1) the #BreaktheSilence campaign to dismantle stigma and raise awareness surrounding disability by encouraging L'Oréal employees to disclose if they have disabilities, (2) Beauty Tech, particularly under Lancôme with HAPTA, to leverage technology for good and make beauty accessible for all, and (3) groups and events that are intended to incentivize focus on disability inclusion, such as the Beauty of Inclusion Awards—a competition that recognises and celebrates the most inspiring initiatives led by L'Oréal's teams worldwide in Diversity, Equity & Inclusion, including projects focusing on the inclusion of people with disabilities, whether for employees, consumers or communities.

Problem definition

The importance that L'Oréal assigns to authentic disability representation stems primarily from the Group's Sense of Purpose to Create the Beauty that Moves the World, and also from an aim of the industry more generally: to make people feel beautiful. Given the current social stigma and lack of understanding and awareness surrounding disability in society overall, people with disabilities can feel excluded from existing beauty standards. As the global leader in Beauty, L'Oréal wants to lead by example and call to action on the topic for the public good.

L'Oréal is committed to creating a more inclusive and diverse workplace and society, where people with disabilities are fully empowered and valued. L'Oréal understands that disability inclusion is not only a matter of social responsibility, but also a source of innovation and creativity. The Group has therefore identified three main areas of action to advance disability inclusion: increasing disability representation within their workforce, enhancing the accessibility of their beauty products for customers with disabilities, and raising awareness of the challenges and opportunities faced by people with disabilities.

Approach

Recognising the need to address disability inclusion internally to also successfully meet the needs of customers externally, L'Oréal has engaged in several workplace inclusion and awareness initiatives in the past decade and more. The #BreaktheSilence campaign, rolled out annually, encourages L'Oréal employees to disclose disabilities by raising awareness on the topic. This initiative has created opportunities for events, peer-to-peer learning and support, and many other iterations, always adapted to local specificities and workstreams in which disability inclusion and accessibility are at earlier or more advanced stages of understanding and adoption. #BreakTheSilence has been rolled out globally and has acted as



the main awareness-raising communication campaign for employees, in addition to numerous ongoing training and disabilityspecific hiring programmes.

From a product development and branding standpoint, L'Oréal encourages its various workstreams to boost creative thinking and innovation on developing accessible and inclusive products through internal awards and incentives. The L'Oréal Beauty of Inclusion Awards is a global internal competition that values and celebrates concrete actions fostering Diversity, Equity & Inclusion. One of the winning projects in the 2022 edition consisted in placing QR codes on product packaging, identified by embossing or a relief varnish, enabling audio reading of L'Oréal websites using the Voiceover application on iPhones, commonly used today by people with visual impairments. This is a significant initiative which demonstrates how packaging can drive accessibility and inclusion. L'Oréal actively pursues cross-brand and cross-region knowledge sharing to accelerate learnings.

Impact

The impact of L'Oréal's consistent investment has been felt across the company: the number of L'Oréal employees that identify as persons with disabilities increased. In 2022, there were 1,625 employees at L'Oréal who disclosed their disabilities, and the proportion of L'Oréal employees with disabilities in France has increased from 4.33% in 2010 to 5.6% in 2022.

An extensive DE&I learning programme is available to all employees, including 14 specific e-learning courses on a selection of DE&I topics as well as a selection of podcasts. Specific DE&I modules are embedded in several L'Oréal University programmes and other targeted learning programmes (Management, Marketing, Human Relations, Corporate Affairs & Engagement...).

An Inclusive Leadership programme was launched in 2022 and is currently being rolled out across all Divisions, with the aim for all members of management committees to be trained by the end of 2024.

Hundreds of teams throughout L'Oréal participate in the Beauty of Inclusion Awards, promoting the most inspiring initiatives that advance DE&I at the Group level.

One of the greatest success stories has been in the development of the HAPTA technology under the Lancôme brand.

Inclusive beauty revolution:

Lancôme's HAPTA and the path to accessible makeup for all

Overview

Many people with limited mobility struggle applying makeup, preventing individuals from experiencing independence in self-care and hindering self-confidence. Aligning to their ethos of inventing a powerful beauty experience with a positive impact on women, Lancôme created HAPTA - the world's first handheld computerized makeup applicator designed for users with limited hand and arm mobility.

Applying makeup often requires a range of mobility, strength and dexterity that many individuals - with and without disabilities - do not have. This is especially true for individuals with limited mobility due to disability, ageing, chronic illness, or short or long-term injury rehabilitation. HAPTA provides a solution which facilitates makeup application and promotes independence and dignity for users. Today, HAPTA helps stabilize lipstick application, counteracting movements via self-levelling technology. Lancôme prototyped it extensively, putting users at the centre and consistently testing and refining the technology in collaboration with the disability community. In early 2023, Lancôme revealed a brand campaign for HAPTA, featuring real women from the disabled community, further representing the vast diversity of the beauty consumer. The message is simple: Beauty (if defined as "makeup") should be universally attainable, and thus there should be no barriers to applying makeup. The campaign was a smashing

success, generating 7 billion impressions and spotlighting how HAPTA empowers people to independently enjoy beauty rituals.

HAPTA was named one of TIME Best Inventions 2023 based on consumer enthusiasm for both the product and Lancôme advancing inclusion. It cements Lancôme as an innovation leader making beauty more welcoming through smart design. There is clear demand for more tools creatively tackling accessibility barriers. Further research can uncover more needs, seeding the next generation of inclusive beauty inventions. Lancôme is committed to pushing boundaries on not only who engages with beauty, but how.

Looking ahead

L'Oréal continues prioritizing product accessibility innovation and championing their internal workplace inclusion initiatives. Their continued efforts have positioned L'Oréal among disability inclusion leaders both globally and within the beauty industry. With robust infrastructure in place empowering brands, L'Oréal aims to lead the way in developing beauty products that embrace diversity and inclusivity.

Procter & Gamble's innovative journey in disability inclusion and product design

Overview

Procter & Gamble is a global company that is focused on disability representation and accessibility, with a decade-long track record of disability-inclusive innovation, spanning inclusive and accessible advertising, accessible product branding, employee recruitment, and inclusive product development. P&G's efforts in this space are being driven by multifunctional teams as it embeds inclusive design across marketing, research and development (R&D) and engineering – and this is manifested through introduction of audio description and captioning in advertising, tactile, ergonomic and sensory packaging improvements, intuitive and easy opening and usage, in-store navigation technology assistance and digital accessibility consultations.

Problem Definition

There are 1.3 billion people in the world with a disability and often products and services are not designed with their inputs and needs. They can spend an extra 30 minutes on average buying a product; and that time does not account for the associated challenges in opening and using a product. This is a fact that the vast majority of able-bodied individuals are not aware of but one that produces a complex but solvable challenge: creating products and packaging that are differentiated using tactile, ergonomic, sensory and cognitive cues, and developing packaging that is easier to navigate for consumers of all abilities.

Approach

P&G's Accessibility team sought to raise awareness of this issue through experiential learning opportunities, with leaders from all the teams involved in the product life cycle. Through the use of sight loss simulation glasses and sensory deprivation gloves, members of P&G's R&D, Marketing, and Communications teams, as well as senior leaders in the organisation including the CEO, were able to experience the vision, strength, dexterity challenges many of the company's consumers face. This experience revealed a business challenge that many in senior leadership were unaware of - their product offerings were not creating an equal experience for all users. In fact, those using the goggles and gloves were unable to tell the difference between P&G shampoo and conditioner bottles and struggled to open packages of P&G's Pampers diaper brand. This experience helped spark a company-wide sense of duty to make P&G's products more accessible for all users.

P&G introduced tactile labelling to create additional differentiation through touch. That was followed by scannable identification barcodes on packaging, helping visually impaired customers independently distinguish items via audio guidance. Both required extensive collaboration internally among marketing, design, and engineering functions, as well as direct input from consumers with disabilities. It has evolved into design standards and capabilities that will be embedded in the organisation for years to come. Executives also witnessed first-hand challenges faced through the experiential learning they undertook as part of this initiative. This built empathy and urgency to address unmet needs. Ongoing training combats unconscious bias while recruitment programs strengthen the company's disabled talent pipelines.

Impact

The efforts that have been made by P&G have increased brand recognition and value among the disability community, while allowing to better meet the needs of ALL consumers. As new launches adopt tactile, scannable features, products provide more intuitive usage - fulfilling ethical and business imperatives. Though specific ROI is unclear, early indicators including consumer feedback proved promising.

Looking Ahead

P&G expects to drive scale as more of their products progressively integrate inclusive design principles in packaging and digital interfaces. Continued R&D focus on assistance technologies can further ease shopping and usage friction. Ongoing internal education such as an Inclusive Design Playbook, Disability Confidence training and disabled community engagement will inform efforts.

Envisioning a barrier-free world:

Sony's strategy for inclusive design and accessibility

Overview

Sony's Purpose, to "fill the world with emotion, through the power of creativity and technology," has been the bedrock of their commitment to enhancing accessibility for both customers and employees. In the fiscal year 2022, Sony took a significant leap by implementing a policy to incorporate inclusive design into their product commercialisation processes by the fiscal year 2025. This initiative is a part of Sony's broader commitment to providing equal opportunities for collaboration and dialogue, especially for individuals with disabilities. This ethos is deeply rooted in the principles of Sony's founder, Masaru Ibuka, who established Sony/Taiyo, where over 60% of the workforce comprises persons with disabilities. Each group company leverages the knowledge gained at Sony/ Taiyo and promotes employment for people with disabilities. Sony's approach to inclusive design is comprehensive, cutting across various product lines and involving extensive employee training and workshops to foster an understanding and collaboration with the disabled community.

Problem definition

Sony's accessibility focuses on the universal usability of their products, services, and content, irrespective of the user's age, disability, or other personal characteristics. Following Masaru Ibuka's vision, Sony has been dedicated to supporting people's independence and creating environments conducive to this goal. The company is acutely aware of the global prevalence of disability and other limiting factors and recognizes its responsibility as a technology leader to drive innovation that doesn't exclude anyone from experiencing emotion, or Kando, as they term it.

Approach

In response to these challenges, Sony initiated a policy in the fiscal year 2022 to infuse inclusive design into their product commercialization by the fiscal year 2025. This effort received backing from accessibility promotion heads appointed in each business segment, and senior executives (, in charge of business, sustainability and quality). The strategy involved consultations with Human-Centred Design experts. Sony's approach to inclusivity extends beyond product design to its hiring practices, as seen with Sony/Taiyo, and encompasses the development of a workplace culture that values diversity.

To facilitate this, Sony organised inclusive design workshops and e-learning courses, engaging over 1,000 employees in hands-on learning and over 50,000 in digital courses, emphasising collaboration and understanding of the needs of people with disabilities.

Impact

Although the full impact of Sony's initiative will be more measurable after 2025, early signs are promising. The company has already introduced inclusive features in products like TVs, cameras, and smartphones. Feedback from corporate events and exhibitions, notably own Sustainability Meeting and CEATEC in Japan, suggests a positive reception to these initiatives and an anticipated increase in brand



value. An innovative product in development is the Going Out Walking Support Project, a sensor device for walking canes designed to enhance the mobility of visually impaired users through advanced sensing and communication technologies.

Looking ahead

Implementing inclusive design across Sony's diverse product categories poses significant challenges, particularly concerning time and

resource allocation across different business segments. However, Sony remains committed to overcoming these obstacles and achieving its inclusive design goals by the fiscal year 2025. As Sony continues this journey, the focus will be on further integrating inclusive design principles into their products, thereby reinforcing their commitment to creativity and technology that elicits emotion and delivers innovation for an accessible future.

Zalando's journey in adaptive fashion and digital accessibility

Overview

Zalando, a prominent online fashion retailer, has embarked on a transformative journey to promote inclusive representation in the fashion industry. Their endeavour focuses on integrating adaptive fashion apparel into their offering, aiming to cater to the diverse needs of customers, especially those with disabilities. This initiative transcends mere product offerings, as it's part of a holistic diversity and inclusion strategy that also aims for a more inclusive workplace beyond disability inclusion.

Problem definition

Zalando faces two primary challenges. The first is raising awareness about their adaptive clothing range. Despite offering a diverse array of adaptive clothing, Zalando grapples with the task of effectively communicating the availability and benefits of these products to the disabled community. The second challenge is maintaining the accessibility of their digital platform. As an online retailer, ensuring that their website and digital interfaces are accessible and user-friendly for customers with various disabilities is paramount. This challenge is not merely about complying with accessibility standards but about creating a genuinely intuitive and helpful online experience for users with disabilities.

Approach

In response to these challenges, Zalando has adopted innovative solutions and formed strategic partnerships. They have implemented continuous training for their product development teams, focusing on enhancing digital accessibility. This includes workshops and collaborations with experts in the field to ensure a deep understanding and commitment to accessibility principles.

A significant part of their strategy involves the use of machine learning algorithms to create detailed and meaningful product descriptions. This technology is particularly beneficial for visually impaired customers, as it provides them with a clearer understanding of the products.

Actively seeking and integrating user feedback, particularly from disabled users, is another cornerstone of Zalando's approach. This iterative process ensures the continuous improvement of their website's accessibility features, aligning them with the practical needs of the disabled community.

After a successful launch campaign, Zalando's marketing and communications teams first focused on informing the fashion industry about their adaptive wear collections. Next, they'll integrate them in a cohesive way throughout their various local activations across the markets to reach the disabled communities.

Zalando's partnerships play a crucial role in their inclusive strategy. Their collaboration with Ottobock, a leader in prosthetics and orthotics, provides valuable insights into the specific needs of customers with physical disabilities, guiding the design and functionality of their adaptive products. Additionally, partnerships with organizations like All is for All help gather feedback from a community of people with lived experiences of disabilities, further informing product design and functionality. Moreover, Zalando's inclusion of high-profile adaptive clothing lines, such as Tommy Adaptive by Tommy Hilfiger, expands their product range with options that are both fashionable and functional. The collaboration with The Valuable 500 assists in raising awareness among the disabled community, addressing outreach challenges and setting new disability inclusion reporting standards.

Impact

Zalando's comprehensive approach to offer customers stylish adaptive fashion across price and functionality in one place is refreshing, with around 300 styles available. Through their dedication to addressing the unique needs of the disabled community, coupled with their commitment to ensuring digital accessibility, Zalando hopes to inspire other brands and platforms that don't yet cater to the disabled community but also highlights the economic potential within the adaptive fashion market. Their initiatives reflect a blend of teams' dedication to inclusivity and a keen understanding of market opportunities.

Looking ahead

Looking to the future, Zalando is committed to further enhancing their range of adaptive products. In 2024, they are planning to expand on their collections, adding new propositions to their catalogue next to improving the accessibility of their digital spaces. They aim to strike a balance between functionality and fashion appeal, ensuring that their products are aligning with contemporary fashion trends, on top of being accessible and affordable. Through ongoing research, continuous customer feedback, and enduring partnerships, Zalando is poised to redefine standards in inclusive fashion, creating a shopping experience that empowers style and accessibility for all individuals.

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