# IDEA

## INCLUSION • DIVERSITY • EQUITY • ACCESSIBILITY

TREND & INSIGHT REPORT FOR INCLUSIVE MARKETING

OCTOBER 2022

# TREND & INSIGHT REPORT

This Designsensory Intelligence report is our series covering current trends and hidden insights for a variety of market segments. Our research analysis provides guidance and recommendations on how businesses and agency clients can take advantage of these opportunities and prepare for upcoming challenges.

This series will cover seven verticals which we will refresh quarterly:
1. Travel & Tourism
2. Inclusion, Diversity, Equity, Accessibility (IDEA)
3. General Marketing
4. Sports & Entertainment
5. E-Commerce
6. Economic & Community Development
7. Higher Education

Utilizing the research and analysis from these verticals will enhance your business and clients by understanding the current environment and being able to make stronger connections with consumers and audiences.

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# IDEA: OVERVIEW

Inclusion, Diversity, Equity, and Accessibility (IDEA) are all growing as a priority among key market stakeholders when evaluating a company's values and practices. The concern for these elements have spread beyond marginalized and excluded communities. Society as a whole is evolving in its social conscientiousness as the voice of previously silenced groups is being heard.

This report focuses on the most recent issues and changes needed for accurate representation in marketing and advertising. Namely, disability continues to be a key problem area for marketers. The community is still greatly undervalued from the advertising perspective. People with invisible disabilities are even more overlooked.

Other large demographics are being either misrepresented or underrepresented as well. The section on ageism dives into common myths about people over the age of 50, and how these myths are both harmful to the community and costly to negligent businesses.

Furthermore, minority races, LGBTQ+, and women face inaccurate depictions of their community in advertising. This report does not cover all populations. It's important to conduct your own thorough research during campaign and ad development to ensure that everyone is included and respected.

This report also highlights that prioritizing diversity and inclusion in advertising is not only rewarded by the related populations, but by all consumers in the U.S.

# IDEA: OVERVIEW

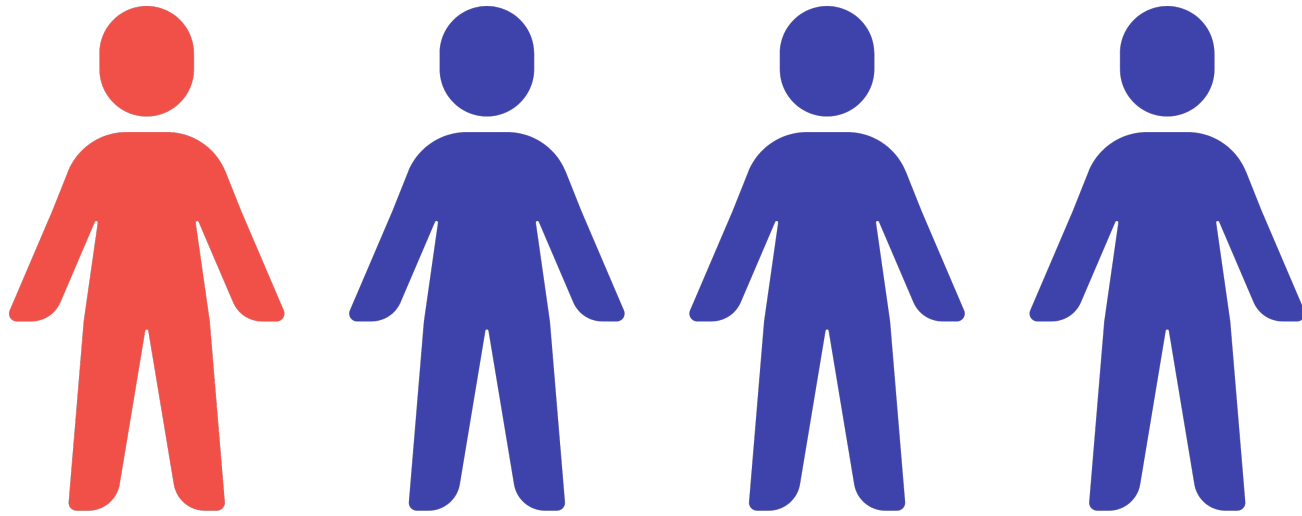**Groups needing more diversity and inclusion in advertising according to U.S. industry professionals[4]**
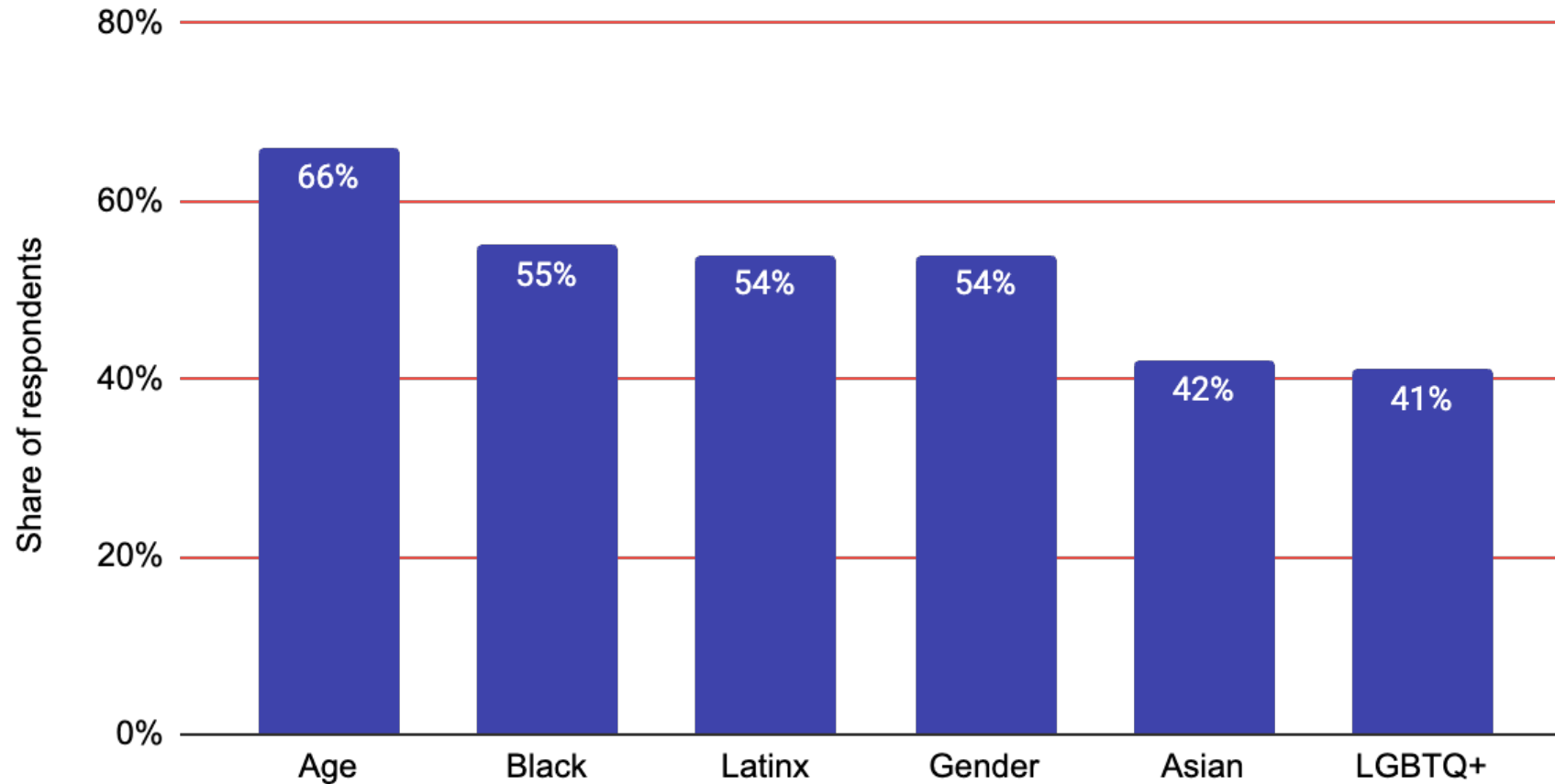
# DISABILITY

# DISABILITY



## Over 25% of people in the United States have at least one disability[6]

U.S. adults with disabilities have $490 billion in total disposable income. Comparable to Black Americans at $501 billion and the Hispanic population at $582 billion.[8]

As a collective, U.S. adults with disabilities have enormous spending power but still face underrepresentation in marketing and advertising.

Prioritizing disabled people as consumers will enable companies and clients to understand how their products and services add value to their everyday life.

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# DISABILITY

**1%**

Disability in advertising is often exclusive to products specifically for treating disabilities. What is missing are advertisements that show disabled people in their daily life doing things such as working, hobbies, parenting, etc.

A study in February 2021 found that among 450,000 primetime ads on broadcast and cable TV, only 1% included representation of disability-related themes, visuals, or topics.[17]

This is despite the fact that households with disabled people had more frequent shopping trips and on average spent more per trip than households without disabled people. Disabled persons are also found to be more loyal to brands.[8]

# DISABILITY

Companies face a large opportunity cost because both disabled and non-disabled consumers support businesses that appropriately represent disability in their marketing.

- 66% of U.S. consumers will purchase goods and services from business that features individuals with disabilities in their advertising[8]

- 65% of U.S. consumers are less likely to purchase goods and services from a business that has been fined by the federal or state government because they discriminated against individuals with disabilities[15]

- 62% of U.S. consumers believe that businesses don't do enough to market to consumers with disabilities[15]
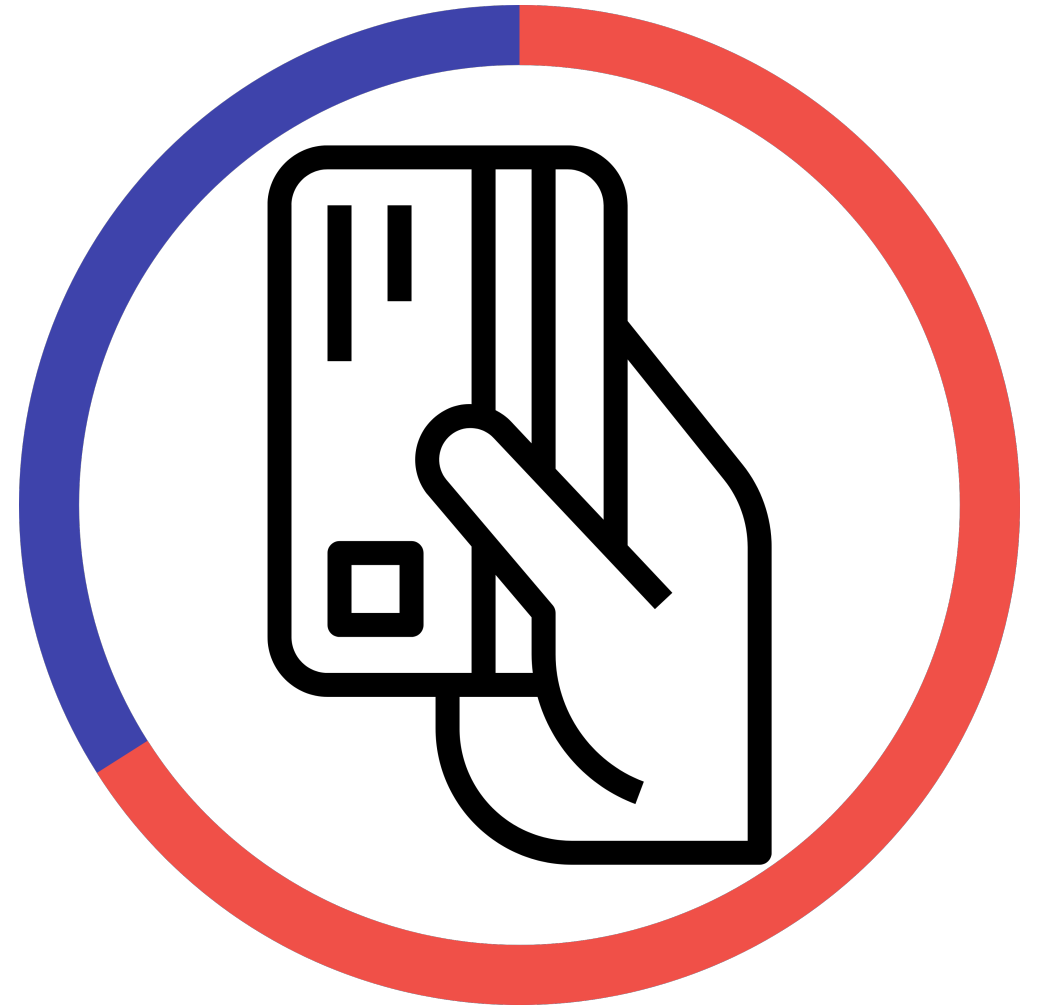
# DISABILITY

74% of people with disabilities cannot have their condition identified externally and is considered invisible.[10]

A disability is invisible when it is not noticeable or cannot be perceived without communication. Some examples include cognitive or psychological disabilities such as autism, dyslexia, and attention deficit hyperactive disorder (ADHD), psychiatric disabilities, and other conditions such as chronic pain or diabetes.[7]

People with invisible disabilities are vastly underrepresented in marketing and advertising media.

The representation that the community does have in the media is often focused on the disability itself and not an accurate depiction of someone living with the condition.
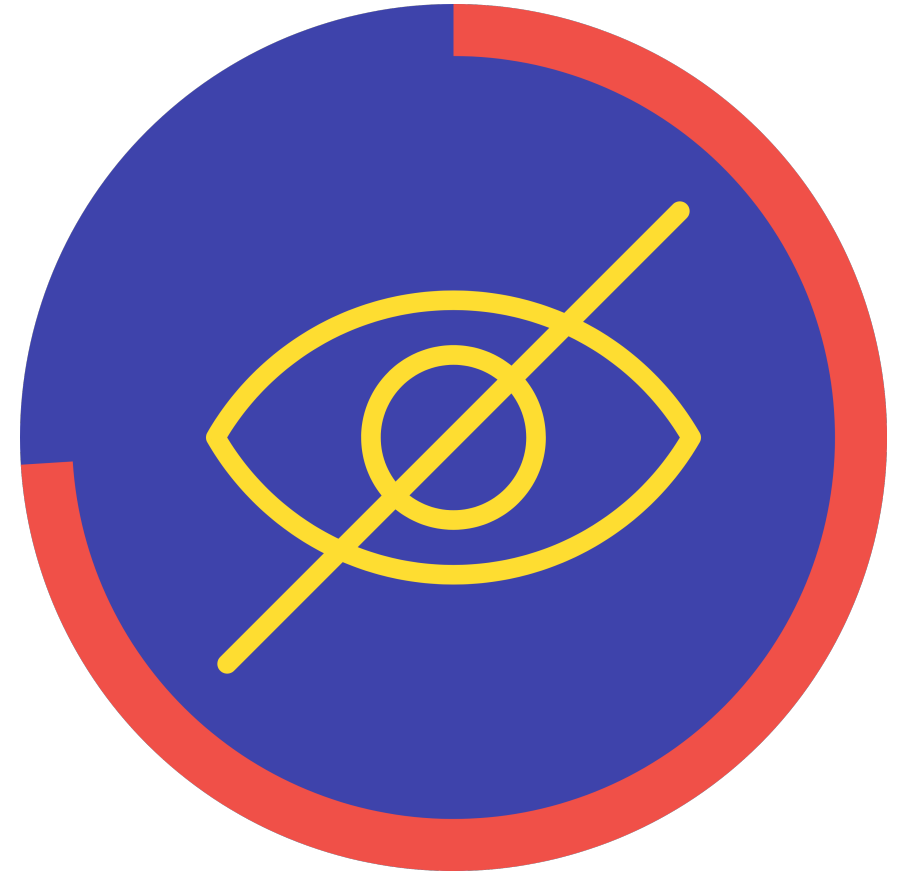
# DISABILITY
## DESIGN

Creative development can prioritize disability representation by casting more disabled people and developing more inclusive storylines.

Present a variety of disabilities across your marketing, not just mobility. Consider casting someone with vision or hearing loss, or a cognitive condition. Advertising should include a variety of disabilities. An example can be casting someone with an invisible disability.

There are common misrepresentations for disabled people in advertising. Make sure depictions are accurate. This includes using modern wheelchairs and not putting dark glasses on people with visual conditions.[5]

It's important that the advertisement or story avoids becoming "inspiration porn." This is when media tries to motivate non-disabled people at the expense of the disabled experience.[5] Examples often include disabled people overcoming a challenge.

# DISABILITY
## DESIGN

Beyond the story, creatives can produce various media formats and include accessibility features that accommodate a broad range of disabilities. Here are some common disability types to keep in mind when creating inclusive and accessible marketing:

– **Visual conditions** like blindness, various types of low vision, and color blindness

– **Motor or mobility conditions** like amputation, paralysis, tremors, and loss of fine muscle control due to conditions like Parkinson's disease, muscular dystrophy, and stroke

– **Hearing conditions** like deafness and being hard of hearing

– **Photosensitive epilepsy**, which can be triggered by flashing effects

– **Cognitive conditions**, including developmental disabilities like cerebral palsy, cognitive disabilities like autism, and learning difficulties like dyslexia

– **Socioeconomic conditions** that limit a person's access to internet bandwidth, speed, and hardware

# DISABILITY
## DESIGN

Website accessibility is one of the top issues for inclusive design formatting. There are four principles of web accessibility:[22]

- **Perceivable:** All users should be able to perceive all of your content and user-interface components. For example, videos should have captioning for users with hearing conditions.

- **Operable:** You should design each experience so that all of your users can perform every action.

- **Understandable:** No part of your content, design, interface, or interaction should be beyond any user's understanding.

- **Robust:** Your content should be robust enough that it can be interpreted by a wide variety of user agents, including screen readers and other assistive technologies.

## 97.4% of the top one million websites have accessibility failures [22]

# DISABILITY
## TECHNOLOGY

Assistive technologies are important for inclusive advertising. If they are not considered during development, advertising content may be incompatible with them. This further inhibits consumers from interacting with your content.

Assistive technology is any item, piece of equipment, software program, or product system that is used to increase, maintain, or improve the experience of persons with disabilities.[2]

This includes high-end technologies like specialized digital devices, such as refreshable braille displays or screen readers, hardware, such as prosthetic limbs, or no-tech solutions like paper flashcards, large print, canes or walkers.[2]

# DISABILITY
## TECHNOLOGY

Here are common assistive technologies to consider when creating content:[2]

- **Screen reader:** Primarily used by people who are blind or have low vision. It converts text, buttons, images, and other screen elements into speech or braille.

- **Captions:** The visual display of the audio component of video programming, allowing people to read spoken dialogue, and non-speech information, like music or sound effects.

- **Keyboard navigation:** Allows people who are unable to use a mouse to navigate content by using key functions on their keyboards such as various commands, and the arrow keys.

- **Voice control:** Enables people to convert speech into text on the screen, and also map voice commands to mouse and keyboard actions.

- **Color modification:** Allows people to change colors to a more suitable display. This includes high contrast versions, or inverted color settings that may allow for better readability- such as a black background with bright text and links.

+

# AGEISM

# AGEISM

# 75 million Americans over the age of 55 control 70% of wealth in the United States[19]

The 75 million Americans are classified as active agers. They are people over the age of 55 who are active mentally, socially, and digitally.

Active agers makeup 75% of all Americans over and at the age of 55.

Despite their economic influence, 66% of the community believes that their group is not adequately represented in advertising and marketing.[13]

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# AGEISM

**70% of people over the age of 50 are more likely to buy from brands that represent their age in advertising[23]**

– 62% of people 50+ would consider switching to a brand they feel represents people their age[23]

– 63% of people 50+ are more likely to recommend brands that feature people their age in advertising[23]

Including all ages in advertising is not only influential to audiences over the age of 50, but also to the younger demographics in their social circles.

Perceived ageism prevents consumers age 50+ from connecting with brands. This means companies face both opportunity costs and setbacks when the branding is not inclusive of all ages.

– 69% of people 50+ feel people their age are under-represented in media imagery[23]

– 69% feel media images are ageist[23]

**80% of people 50+ say that marketers [23] assume their lifestyle based on stereotypes**
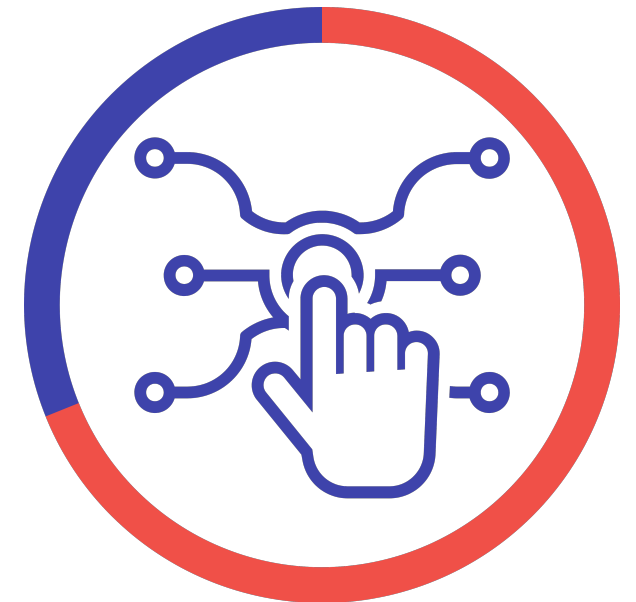
# AGEISM

Active agers find three predominant stereotypes in advertising and marketing that are harmful to their community:

1. Technological incompetence

2. Physical weakness

3. Mental inferiority, forgetfulness

These stereotypes in advertising and marketing weaken a brand's affinity and relationship with this consumer base.

68.9% of active agers reported that advertisements portray them as unable or ineffective to use modern technology.[19]

However, most consumers over the age of 55 have standard technology skills. Furthermore, the vast majority of Americans over age 55 are online shoppers.[19]

# AGEISM
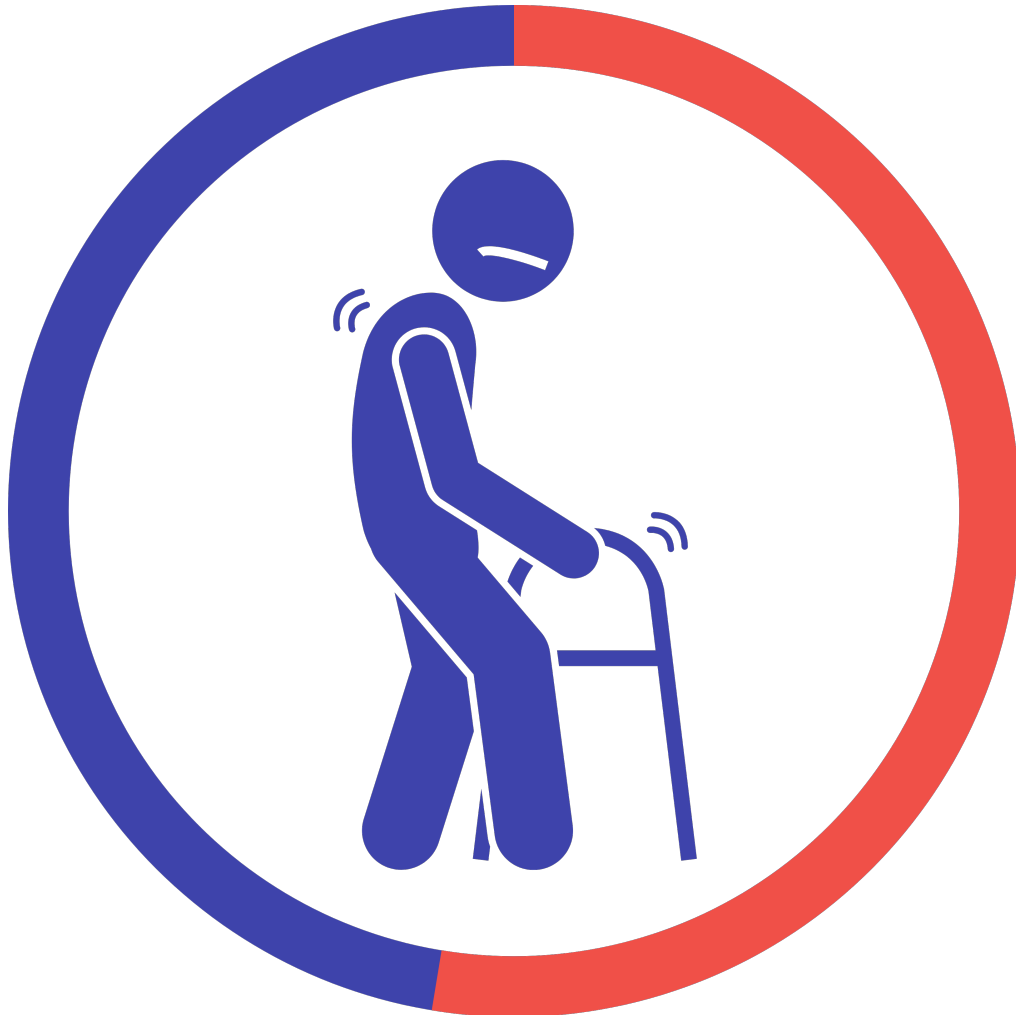


52.6% of active agers reported that advertisement portray them as physically weak.[19]

This is not only harmful to the community but to businesses as well because active agers will be disinclined to support them.

This misidentification in active agers is especially prevalent when you consider that:
- 95% exercise weekly[19]
- 29% exercise daily[19]
- 45% exercise a few times per week[19]

This consumer segment has standard mobility and will be more engaged with brands who represent this in their media.

# AGEISM

All consumers overwhelmingly prefer a mix of ages in ads

- 81% of people 18+ feel better about brands that feature a mix of ages in their ads[19]

- 71% of people 18+ are more likely to buy from brands that feature a mix of ages in their ads[19]

Beyond the influence of 50+ consumers themselves, consumers across all ages are going to be more loyal to brands that prioritize age inclusivity in their marketing.
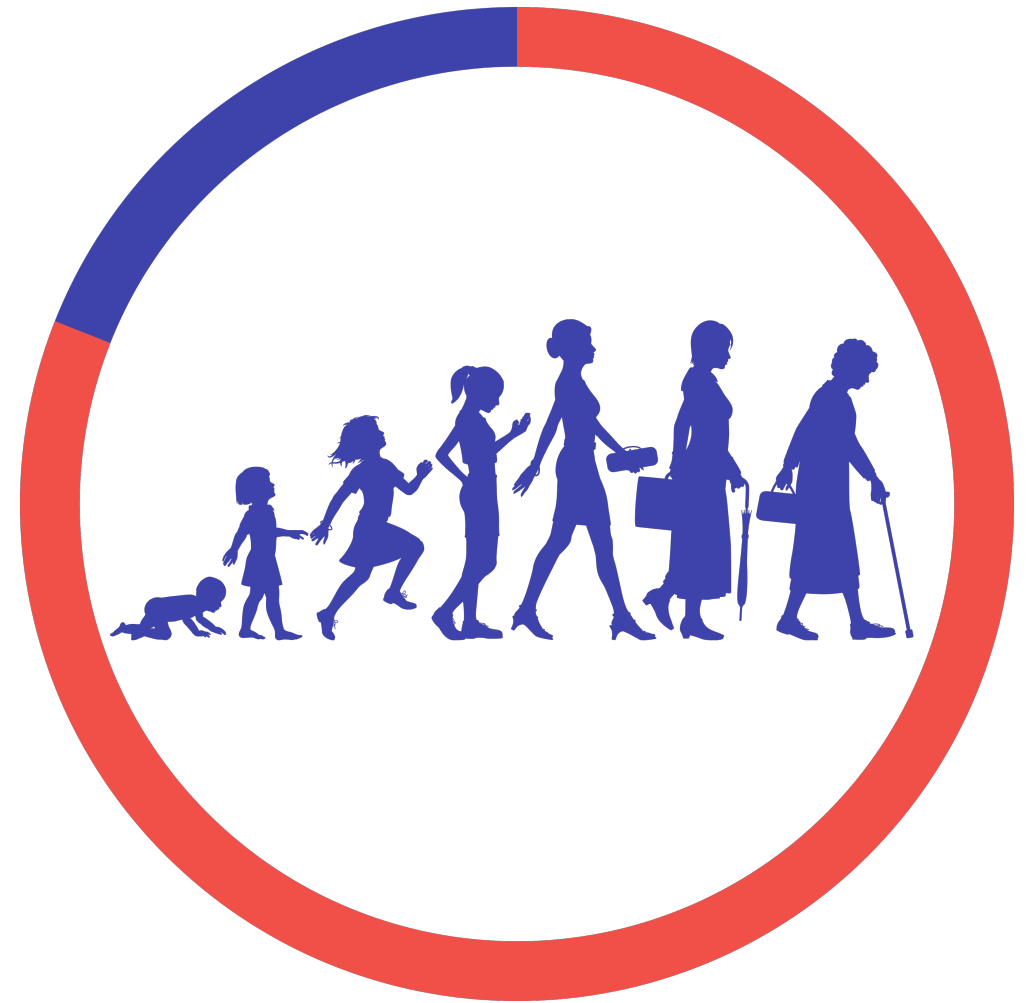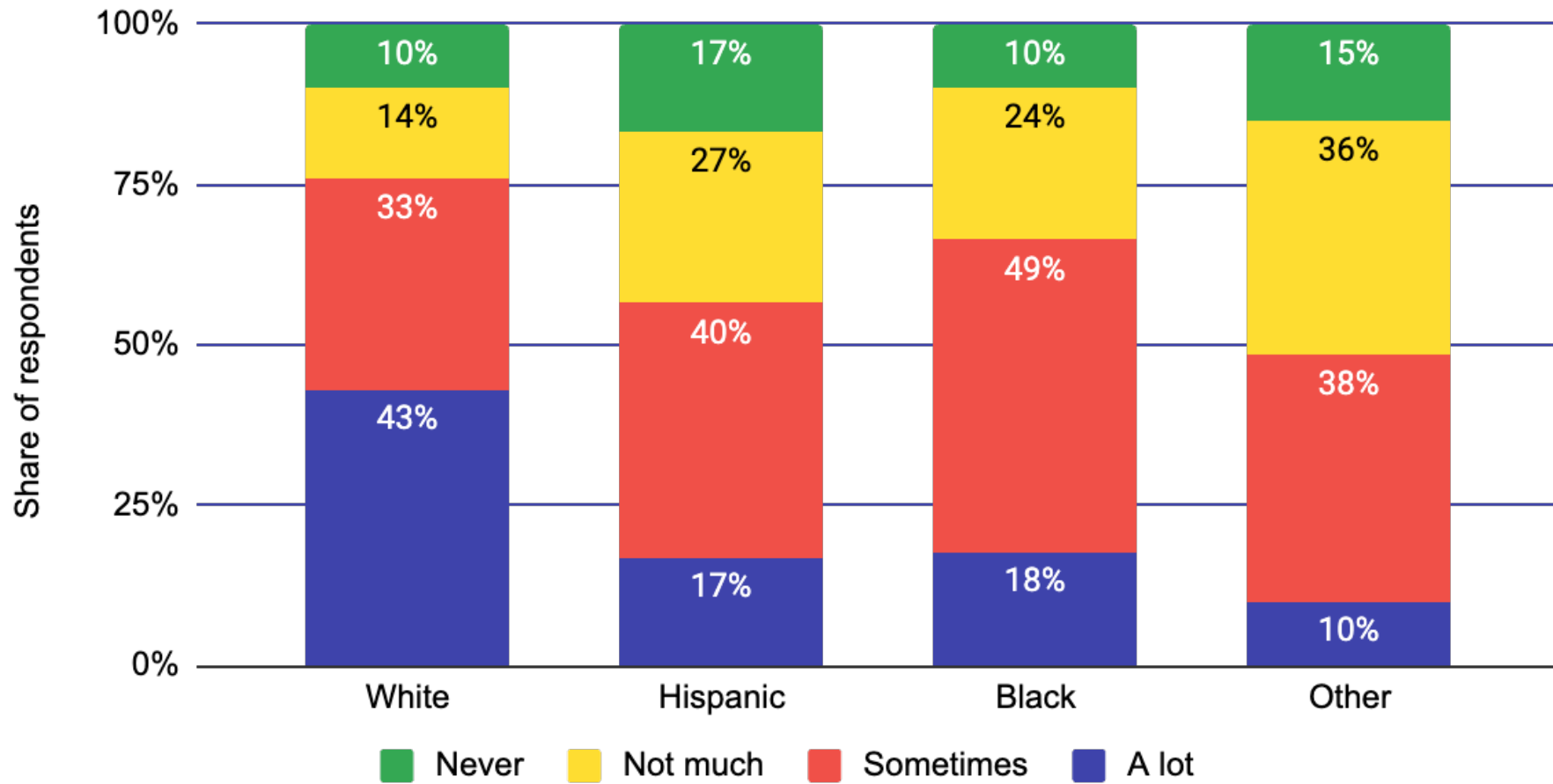
# RACE & ETHNICITY

# RACE & ETHNICITY

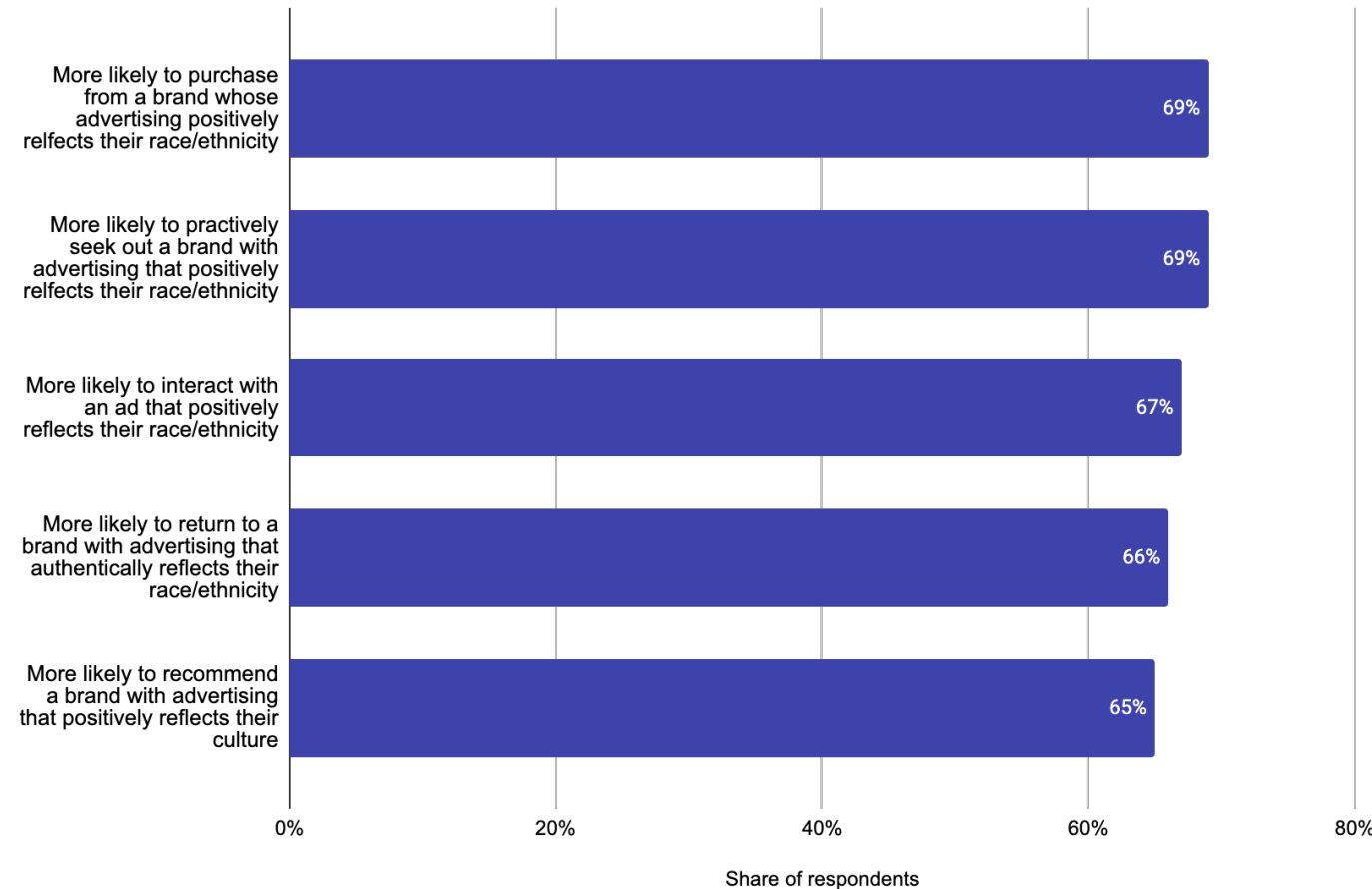Frequency of U.S. adults witnessing their race and ethnicity portrayed in promotional materials[16]

# RACE & ETHNICITY
## BLACK AMERICANS

– 49% of Black consumers report that they "sometimes" witness their race and ethnicity portrayed in advertising in the United States.[16]

– 24% reported "not much," and 10% said they "never" see themselves in advertising.[16]

– Only 18% of Black Americans reported witnessing their race and ethnicity "a lot."[16]

This is important because a large majority of Black Americans are more likely to buy from brands representing their race and ethnicity, along with higher brand loyalty and giving brand recommendations.
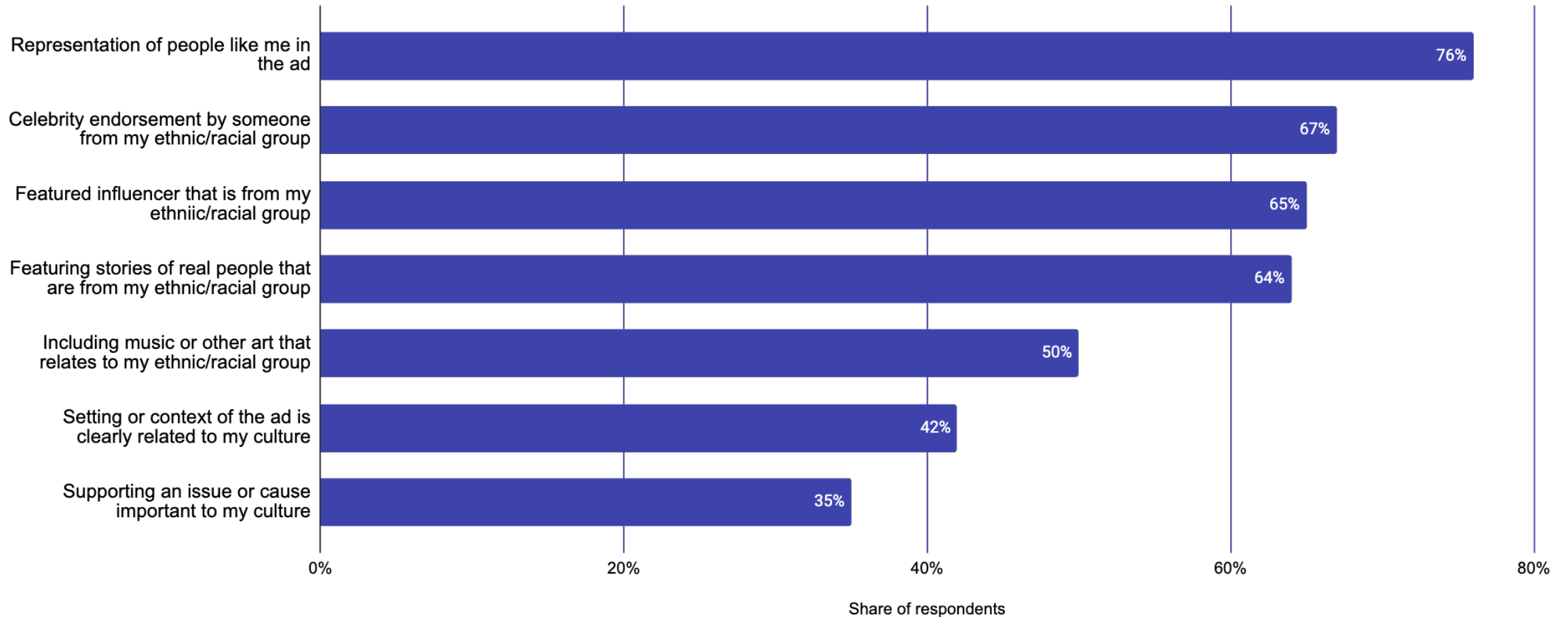
Impact of positive race representation in adverising on brand related actions of Black consumers in the U.S.[9]



More likely to purchase from a brand whose advertising positively relfects their race/ethnicity — 69%

More likely to practively seek out a brand with advertising that positively relfects their race/ethnicity — 69%

More likely to interact with an ad that positively reflects their race/ethnicity — 67%

More likely to return to a brand with advertising that authentically reflects their race/ethnicity — 66%

More likely to recommend a brand with advertising that positively reflects their culture — 65%

Share of respondents

# RACE & ETHNICITY
## BLACK AMERICANS

Leading advertising elements capturing the attention of Black audiences in the U.S.[11]



| Advertising element | Share of respondents |
|---|---|
| Representation of people like me in the ad | 76% |
| Celebrity endorsement by someone from my ethnic/racial group | 67% |
| Featured influencer that is from my ethniic/racial group | 65% |
| Featuring stories of real people that are from my ethnic/racial group | 64% |
| Including music or other art that relates to my ethnic/racial group | 50% |
| Setting or context of the ad is clearly related to my culture | 42% |
| Supporting an issue or cause important to my culture | 35% |

Share of respondents

# RACE & ETHNICITY
## ASIAN AMERICANS

U.S. Census data shows that Asian Americans represent 5.9% of the population, and they also have $1.2 trillion in buying power.[1]

Both of these metrics have increased exponentially, with their buying power growing by 267% since 2000.[14] Asian Americans are the fastest growing minority market in the United States.

**62% of Asian Americans said they rarely or never see themselves in advertising**

# RACE & ETHNICITY
## HISPANIC AMERICANS

Hispanic Americans are the second-fastest growing minority market, with an increase of 212% since 2000. Their buying power in the U.S. is $1.5 trillion. But 62% don't think brands target them enough. When they do, 52% of hispanic consumers said brands assume "we all look the same."[14]

– 69% of Hispanic consumers in the U.S. said the most important feature in an ad is relevant messaging that speaks to their interests.[14]

– Another 25% said the same of advertisements that include people who look like they do.[14]

– 45% reported that ads are "speaking more to my parents/elders than me"[14]

Hispanic consumers are some of the youngest in the United States. 61% are under the age of 35.[14]
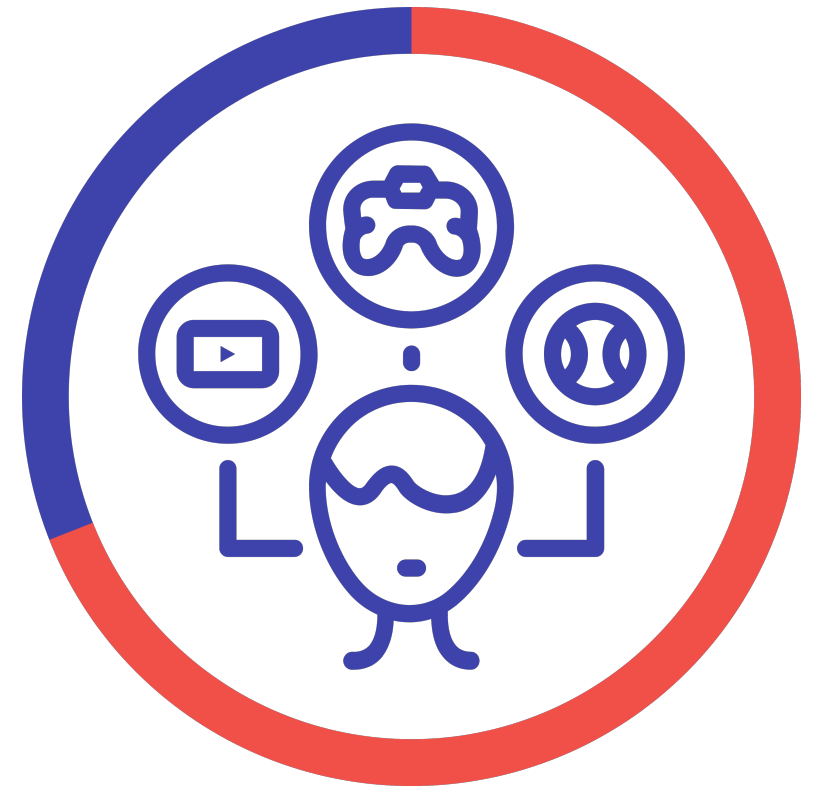
# LGBTQ

# LGBTQ+



## LGBTQ+ representation in advertising has increased, but misrepresentation still occurs

- The LGBTQ+ community is the fastest growing consumer market in the U.S.[24]

- Census data shows it is also the fastest growing minority population segment[25]

- LGBTQ+ buying power in the U.S. for 2021 was above $1.4 trillion[25]

# LGBTQ+

Leading ways inclusion can be improved in advertising according to consumers worldwide[18]



Legend: ■ LGBTQ+ ■ Non-LGBTQ+

**Avoid stereotyping individuals in advertising**
- LGBTQ+: 51%
- Non-LGBTQ+: 40%

**Be more authentic/realistic in depictions of LGBTQ+ individuals**
- LGBTQ+: 46%
- Non-LGBTQ+: 29%

**Use of more LGBTQ+ individuals in advertising**
- LGBTQ+: 40%
- Non-LGBTQ+: 25%

**Ensure LGBTQ+ inclusivity is ingrained in all areas of a company, not just advertising**
- LGBTQ+: 40%
- Non-LGBTQ+: 23%

**Involve the LGBTQ+ community when creating advertisements**
- LGBTQ+: 40%
- Non-LGBTQ+: 27%

X-axis: 0% 20% 40% 60%

Share of respondents

# LGBTQ+

**Be inclusive and diverse**
Whenever people are shown, include LGBTQ individuals, family members, friends and couples that reflect varied ages, races and genders, etc. Language references to family or relationships should not only include heterosexuals.

**Be sensitive to lesbian, gay, bisexual and transgender stereotypes and avoid positioning LGBTQ people as a perceived threat for humor**
Advertising often stereotypes, but beware of over-simplifying. An unbalanced depiction of extremely effeminate gay men or extremely masculine women are old ideas that alienate many.

**Do good market research**
When conducting market research or forming new mainstream campaigns, LGBTQ perspectives should be considered and included. Don't limit yourself to male-targeted research and messages. For example, Subaru surveyed its consumers and found a strong lesbian base.

**Go national**
Consumers outside of major coastal cities are often improperly considered lacking the sophistication to handle LGBTQ themes.

**Be consistent and confident**
Modifying or withdrawing ads after negative criticism from conservative groups suggests waffling and alienates LGBTQ consumers. Respond to any criticism with business rationales, such as diversity and the bottom line. Avoid time-restricted airings of commercials unless they legitimately deal with sexual situations that are inappropriate for youth.

# WOMEN

# WOMEN
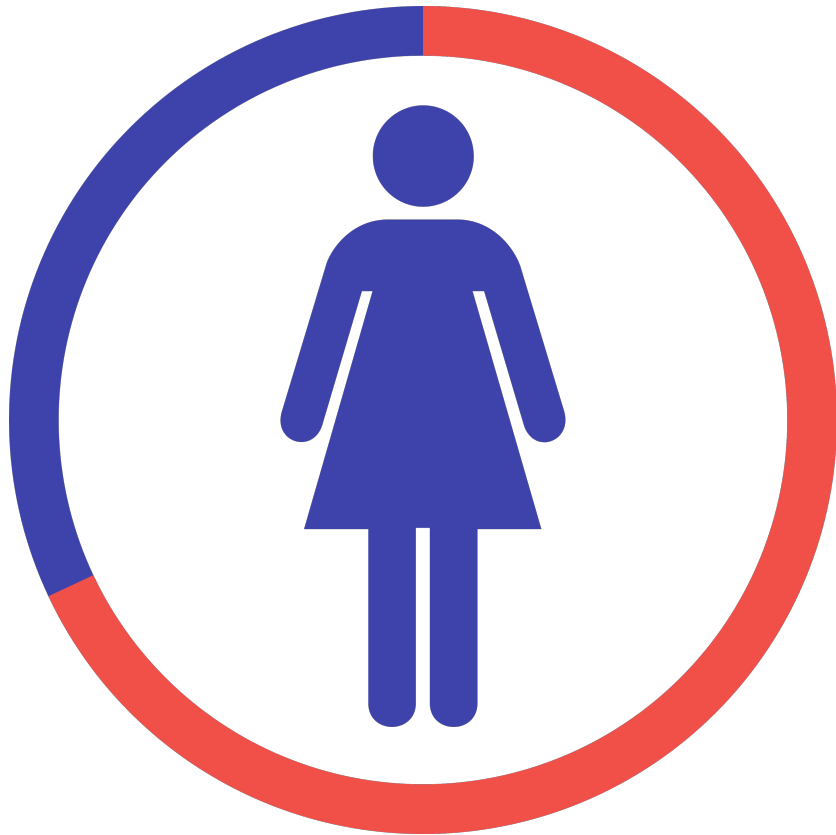
## 68% of Women do not feel represented in advertising[21]

Only one in 10 ads feature a woman, despite women being responsible for three quarters of all consumer purchases.[21]

The majority of women believe that advertising as it stands is not only unrepresentative, but damaging.[21]

75% believe that the way models look in advertising is making women feel bad about themselves and can be harmful. 63% believe advertising is partly to blame for eating disorders.[21]

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# WOMEN

**85% of the women shown in advertisements are slim, pretty, usually white, with clear skin and shiny hair.**[21]

**How women feel seen:**

25% of all ads that feature women present them in a sexualized way[21]

More than half (59%) of the women surveyed say advertising has an out-dated view of women.[21]

Women featured in ads also tend to be young, with 68% saying there aren't enough older women in advertising.[21]

The vast majority of women in the U.S. (81%) said they want to see all types of women used by brands to promote their goods.[21]

**How women want to be seen:**[21]

Companies need to modernize and prioritize accurate depictions of women in advertising.

Rather than the outdated representations, the four greatest aspirations women have today are:

– To feel comfortable in their own skin

– To be financially independent

– To be able to make their own decisions

– Travel the world
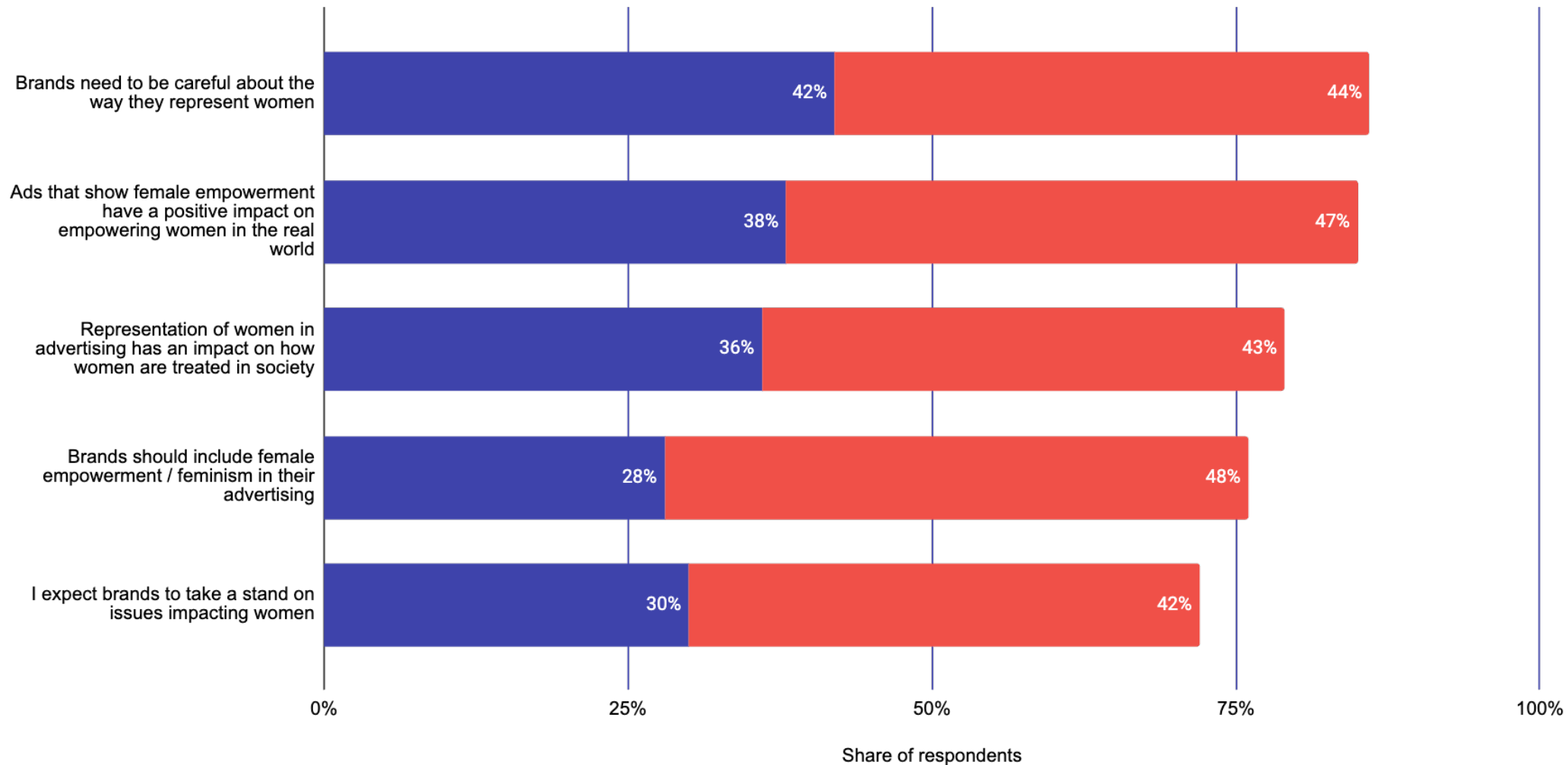
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