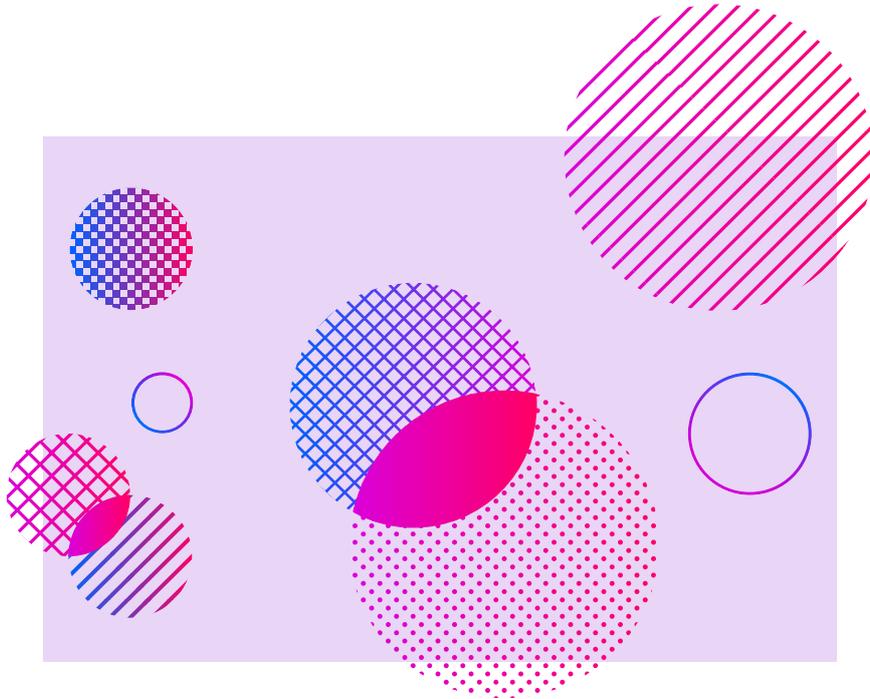


KANTAR



BRAND INCLUSION **INDEX 2024**

How inclusion grows
your brand

Inclusion is the future of brand growth

Imagine alienating a huge proportion of your customer base. That's what every brand is doing if they ignore inclusion and diversity. It's not just that you are failing to serve traditionally underserved audiences, but you are also alienating younger consumers who now expect brands to accept a wider range of identities.

We are living through a generational shift and the creation of new culture that demands everyone be welcomed and understood.

Our new global data shows that globally, diversity, fairness, and inclusion are now non-negotiable for Gen Z and Millennials as well as those who are part of high-growth, underserved populations.

The Brand Inclusion Index proves a truth that we've always known: inclusion is good for business and you need consumers to perceive that you are good at inclusion.

As experts in brand growth, we know that one of the fundamental tenets to scaling your brand is to predispose more people to it. If you stop excluding people, then new customers become much easier to find.

The world is making great strides in tackling inequalities and raising awareness of just how different people's experiences can be. But this challenge has no end point, and our industry can always strive to get better. Marketers should still be looking to the future, ensuring that they keep meeting the needs of undervalued groups.

Marketers need to future proof their brands by evaluating and improving how they are meeting the needs of underserved consumer groups as well as the expectations of younger consumers.

You need to find out if you are leaving opportunity on the table. If you take one data point away from our first global Brand Inclusion Index, make it this one: Perceptions of diversity and inclusion influences buying decisions for almost eight in 10 people worldwide.

In short, action on inclusion drives business growth.



Valeria Piaggio,
Head of DEI

Sustainable Transformation
Practice, Kantar

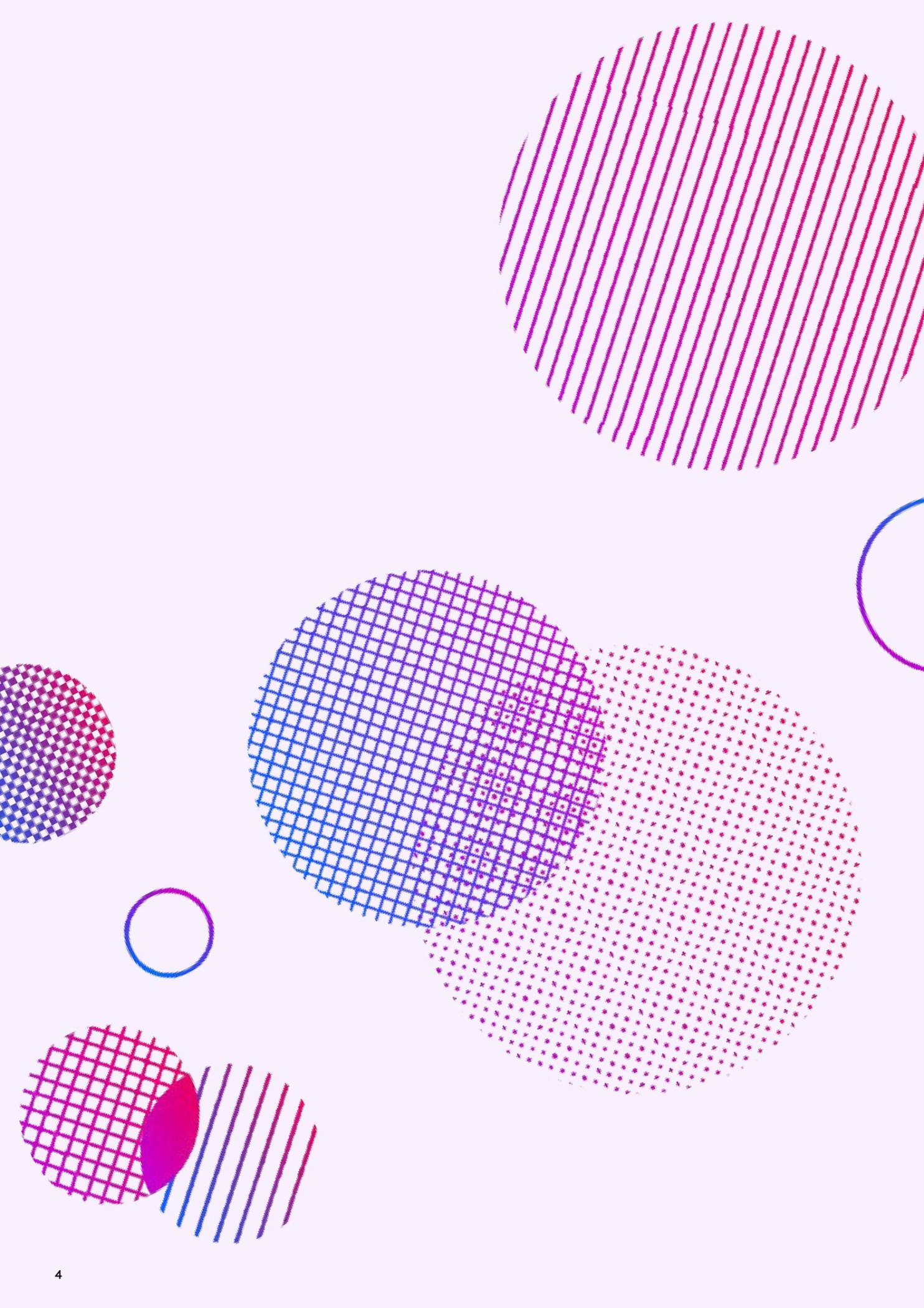


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What is the Brand Inclusion Index?

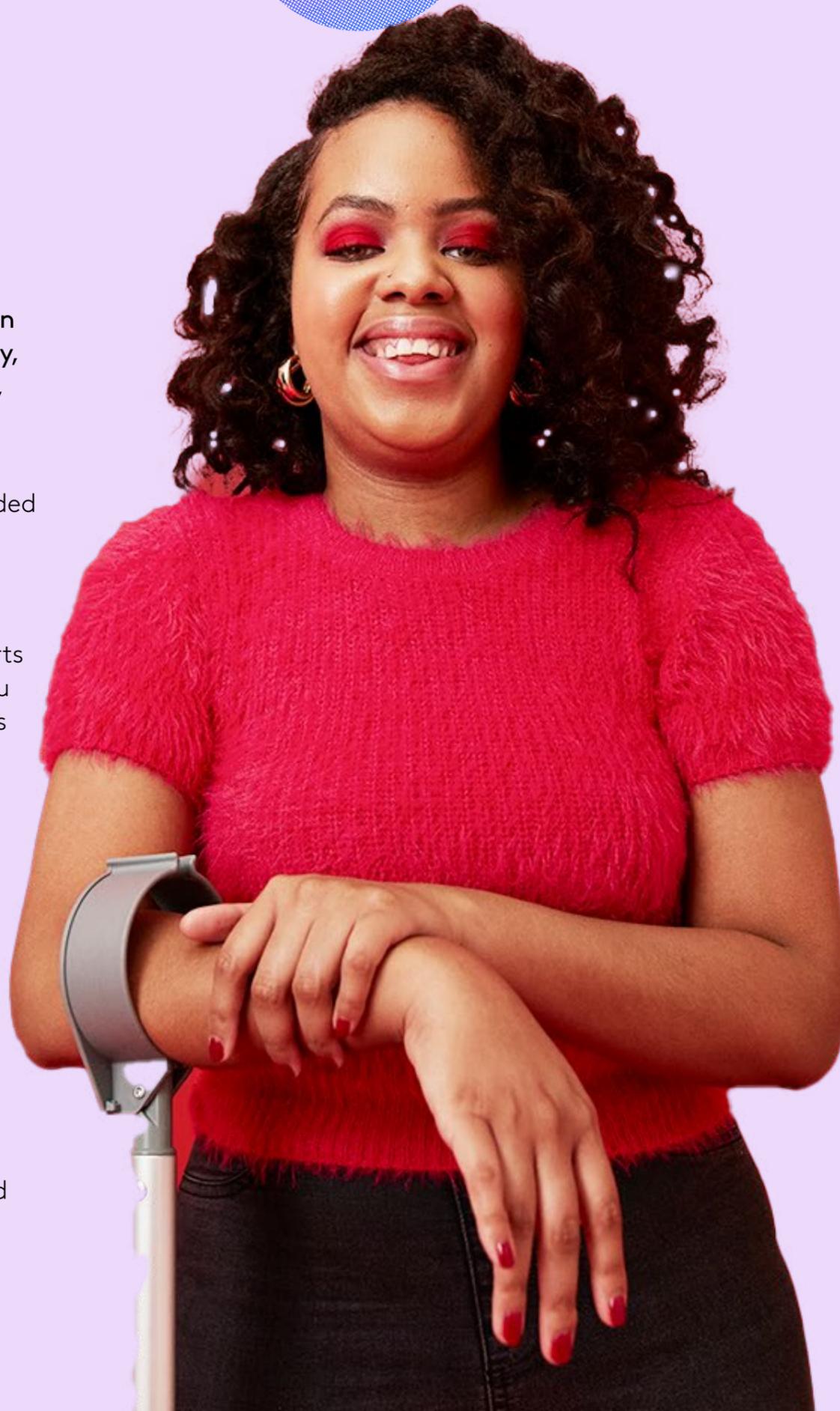
The new global Brand Inclusion Index focuses on people's perception of a brand's diversity, equity, and inclusion – what consumers see, feel, think, and how they consider the brand as a result.

It represents the under-represented to ensure the voices of those who have been traditionally excluded by brands are considered.

Diverse high-growth populations have big and growing spending power and the Brand Inclusion Index reveals how they perceive your brand's efforts on diversity, equity and inclusion. It will enable you to rank your performance against other brands as well as guiding you on the bestway to improve.

We assess your performance across four key dimensions – DEI strategy, diversity, equity and inclusion measured via nine indicators. Our analysis covers the absence of negative actions, the presence of positive initiatives as well as the brand bravery demonstrated when other groups feel threatened by the attention you are showing these groups.

It's the most inclusive global study ever done: accessible, in-language, culturally sensitive, and expansive in its definition of people's identity, covering age, gender, sexual orientation, race and ethnicity, physical appearance, social class, disabilities and religion.

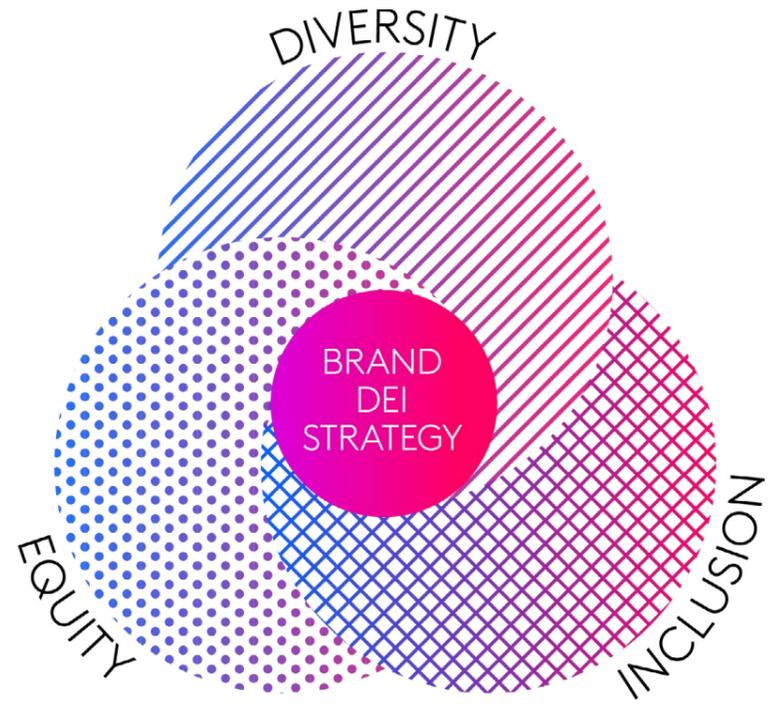


But we haven't stopped there because we've also looked into the impact of intersectionality, many of the underserved are members of multiple groups and these unique combinations are rarely taken into account by marketers.

Sadly, more often than not, nearly half of us find it hard to navigate the world without bias or discrimination.

Forty-six percent of the global population have experienced discrimination in the last year – a percentage that is significantly higher among key underserved demographics.

We may all wish this didn't happen but it's not enough to have a warm and woolly ambition, brands need a metric and a measure to track their performance so they can improve year on year. The Brand Inclusion Index provides that proof point.



20,300

Respondents

18

Countries

5

Regions

11

Languages

28

Categories



The Brand Inclusion Index Components

- 

DEI STRATEGY: how the brand shows up in the marketplace, and most importantly, how brave the brand is in relation to social issues.
- 

EQUITY: the systems the brand puts in place to operate and engage with people internally and in the marketplace. This could include empowering people via product/system innovations, eliminating barriers to access, or acknowledging past/present wrongdoings with the intention of making things better.
- 

DIVERSITY: the brand's intentional efforts to positively represent people of diverse backgrounds, celebrate individual's uniqueness, and treat everyone well and as equals.
- 

INCLUSION: the effort the brand makes to integrate everyone – especially those who tend to be left behind – and make people feel accepted, respected, and valued.

The Brand Inclusion Index data

We talked to more than 20,300 respondents across 18 countries and five regions. Our survey was carried out in 11 languages and covered 28 different categories.

We asked our respondents to assess brands in four key areas: **brand DEI strategy and bravery, diversity, equity, and inclusion**, covering both the absence of negative actions and the presence of positive initiatives.

We believe it is the most inclusive global study ever carried out. To discover how we ensured we represented the under-represented see page 22-23.



Key findings

Diversity, Equity, and Inclusion should be part of blueprint for growth worldwide

While most people say DEI is important, the numbers are even higher among GenZ and Millennials as well as in emerging economies in Africa, Latin America and Asia Pacific. These high growth populations that brands want to reach truly care about DEI and will support brands that do likewise.

Businesses have a responsibility to end discrimination

The place to start is within, looking at the experience of their employees as well as prospective employees, because that is where most discrimination experiences occur. They also need to pay close attention to the consumer experience as discrimination often happens in commercial settings when people are ready to spend their money.

Incidence of discrimination peaks in emerging markets

Our data shows that discrimination is much more significant in emerging markets compared to mature ones. The impact of discrimination is also much more important for under-privileged and under-represented people.

Discrimination happens at places of business all around the world

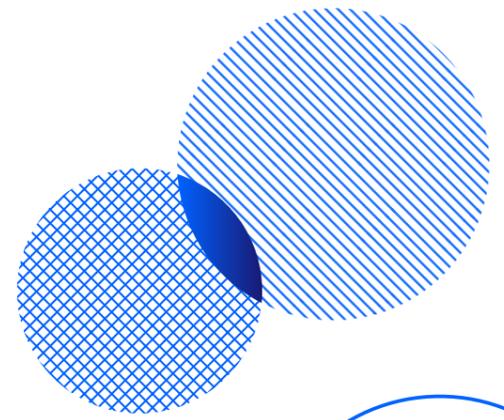
Among those who experience discrimination, the proportion that occur at commercial locations such as shops, stores, bars and hotels is remarkably similar around the world, regardless of level of market development or geographic location.

Most people around the world think brands are making an effort

Despite this almost every brand still has inclusion gaps to close and brand growth will only occur if brands close their inclusion gaps, improve the experience of employees and consumers in both emerging markets and with high-growth yet under-represented populations.

Consumer perceptions of diversity and inclusion drive purchase decisions

Nearly eight in 10 people agree, with even stronger numbers among GenZ and Millennials, people with thinking and learning differences, LGBTQ+ and people with disabilities. The influence of DEI on purchase behaviour peaks in Brazil and Kenya.





7/10

consumers say diversity and inclusion perceptions influence their purchase decisions

How inclusion drives growth

Getting inclusion right automatically encourages more people to buy your brand. That's because so many people make it part of their purchase criteria.

Three-quarters of people around the world agree with the statement:

"It is important to me that the brands I buy from actively promote diversity and inclusion in their own business or society as a whole."

Twenty-six percent "strongly agree", and the numbers rise among key groups such as Gen Z and Millennials as well as those who have traditionally been underserved by brands such as people with thinking and learning difficulties LGBTQ+ and those with disabilities.

Geographically we can see that in countries such as Brazil and Kenya the impact on consumer decisions is even higher. If you alienate huge groups and key markets such as these by your actions or your omissions, then you will struggle to predispose more people to buy your brand.

Our survey respondents said diversity and inclusion perceptions influence actual purchase decisions for seven out of 10 people sometimes, often, or all the time. For three out of 10 (**33%**), it's **"often or all the time"**.

Once again key emerging markets and demographics such as Kenya, South Africa and India show a stronger commitment to inclusion as a purchase criteria **"often or all the time"**, for people with thinking and learning differences, 25–34-year-olds, GenZ, Millennials, those with Mental Health Conditions, LGBTQ+, and under-privileged race/ethnic groups.



Where businesses need to act

Businesses have a responsibility to end discrimination and there is plenty they can do about it because much of it is happening in places they control.

The first place to look is close to home, understanding the experience of their employees as well as prospective employees, because that is where most discrimination experiences take place. Discrimination at work was recalled by **28%** of respondents or nearly three in 10 people in the last year. The level of market development has no effect and the worst country in this area is **South Korea (35%)**.

Furthermore, businesses need to pay close attention to their consumer brand experience as discrimination also often happens in commercial settings, places where people are able and ready to spend their money.

Six out of 10 people (**58%**) have experienced discrimination in a business environment and the numbers are higher for people with thinking and learning disabilities (**68%**), also hitting **61% for LGBTQ+**.

The proportion of people who experience discrimination at commercial locations is very similar around the world, regardless of level of market development or geographic region, although the country with the highest incidence is India at **68%**.

Some of these negative experiences include being treated badly at a store, bar or hotel. It also includes advertising, with people either not seeing someone like me represented in advertising, or feeling bad based on how they were represented.

Some brands also benefit from an inclusion boost – defined by people who have experienced discrimination giving a better rating to the brand vs. those who have not. This is the power that positive diversity, equity, and inclusion consumer perceptions are contributing to the brand and potentially to sales.

Key groups complain that they rarely see someone like themselves in brand communications. In the UK, **19%** of respondents say they are rarely or never well-represented, but a few groups skew higher than this including people with disabilities (**26%**) and people who have someone with a disability in the household (**27%**), **people 55 – 65 (25%)** and the rural population (**24%**).

Five areas for brand action

Closing inclusion gaps – the difference between the score for under-represented groups and the general population – means listening to the voices of the under-represented. We analysed their demands by using Kantar’s proprietary TextAI tool to reveal five clear demands for change:



1. Aspirational beauty

People are tired of aspirational beauty and want realistic representation that shows diversity of skin tones, body sizes, and hair textures.

2. Body inclusivity

Brands are advised to prioritize body inclusivity and age inclusivity. Ageism should be challenged and people as young as 40 demand visibility and respect.

3. Authentic representation

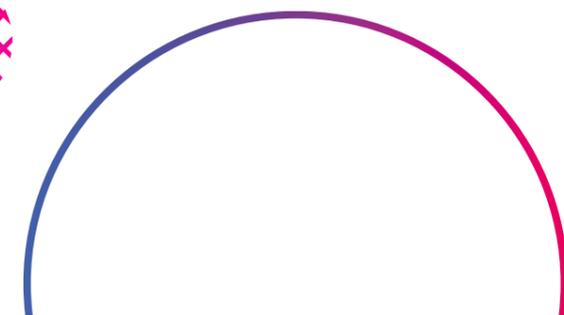
Brands should make diversity and inclusion feel natural rather than forced, making it an intrinsic part of the brand story. To achieve this, brands should focus on authentic representation, both in front of and behind the camera.

4. Local representation

In emerging markets such as Nigeria and Kenya, brands should prioritize local representation. This includes using diverse languages, dialects and accents within each country as well as the avoidance of colourism.

5. Marginalized communities

Marginalized communities such as Travelers in Spain and First Nations or Indigenous people in Canada want positive representation in brand communications.





Learnings from brave brands

The most inclusive brands around the world are also the most successful.

The brands chosen by people around the world as the most inclusive also lead their categories in terms of innovation, for the inclusion and diversity of their workforce, inclusive advertising, and fair customer experience.

As a result, they also enjoy financial success, such as large market share and high brand equity.

Top 5 Best brands in DEI

1#



2#



3#



4#



5#





The world's most inclusive brand

Google was chosen by people around the world both, prompted (ranking #1) and unprompted (ranking #10). In addition, it was also chosen as most inclusive brand in India.

From Nigeria to India, Colombia to Kenya, Mexico to Brazil, there was a consensus: Google is fair, open, and unwavering in its commitment to diversity and inclusion.

People see it as gender inclusive, racially inclusive and culturally inclusive. And as a member of the Unstereotype Alliance, it also works diligently to erase bias and discrimination in marketing.

Critically, Google's inclusivity also extends beyond marketing—it permeates its product offerings, with a range of diversity in products and leading-edge innovation for inclusion—as well as its workforce.

The company's approach reflects the fact that truly inclusive brands are inclusive inside and out, they have a holistic approach to DEI.

Google's standout performance was in marked contrast to the landscape as a whole. Just **60%** of U.S. respondents, for example, were able to spontaneously identify at least one brand.

Those brands that do stand-out in people's minds for being diverse, fair, and inclusive, are notable examples to examine and imitate, with **362 brands** spontaneously identified by our respondents.

The winner for spontaneous **DEI award** went to **Nike**, followed by **Amazon** and **Wal-Mart**.



"At Google, we build for everyone. Our commitment to creating inclusive, equitable and accessible products doesn't rest with one team, but is company-wide. The people we design for come from different places, ethnicities, socio-economic positions, and disability communities. With those varied backgrounds, come different mental models and contexts of use. This is why we continue to partner with communities to understand their needs directly and develop truly helpful products."

Annie Jean-Baptiste, Founder,
Director of Product Inclusion & Equity at Google



The world's most inclusive research

The Brand Inclusion Index is the world's most inclusive market research survey to date by using an accessible, all-encompassing research method to connect with underserved populations across the globe.

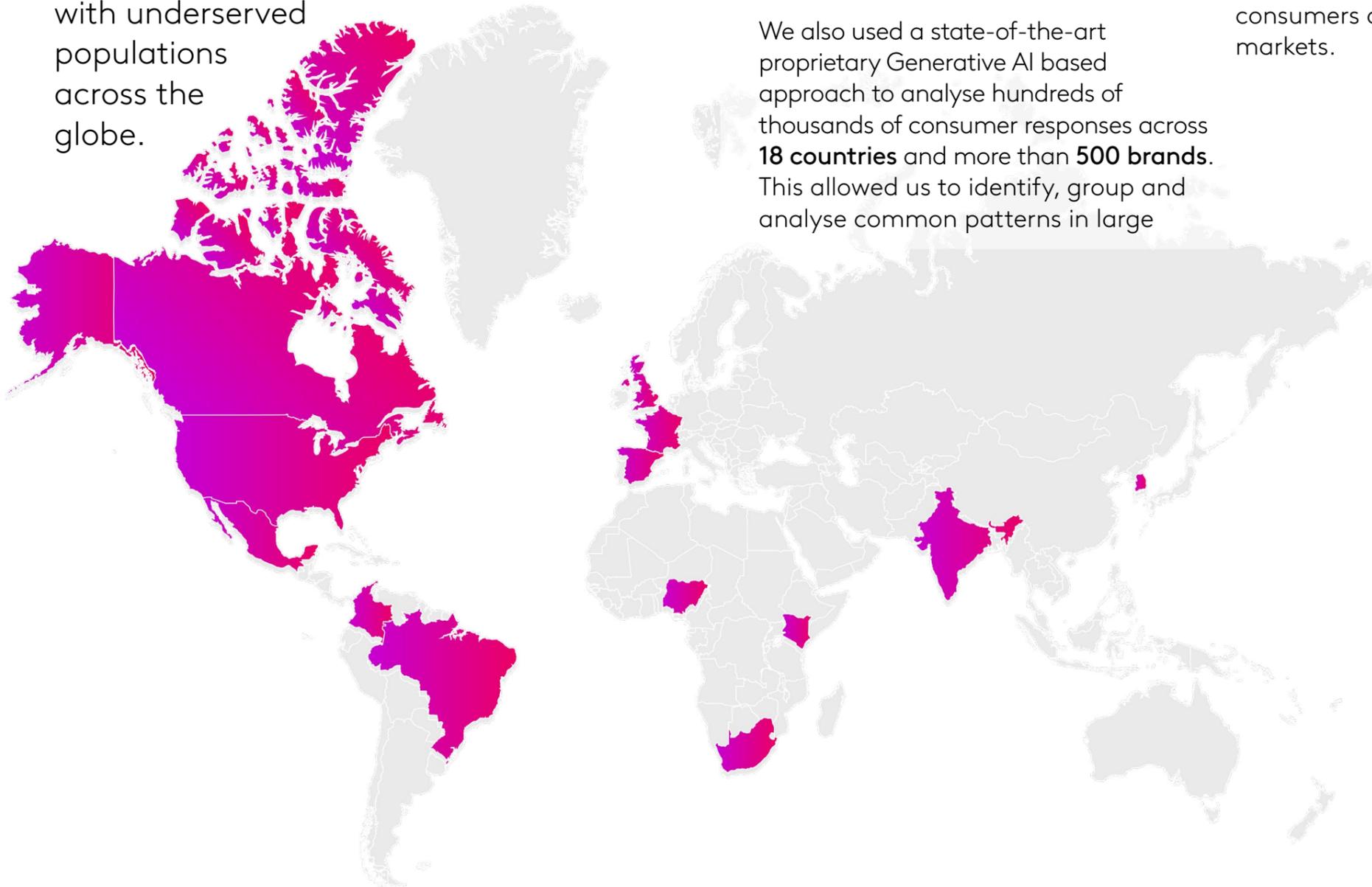
In a research first, the Brand Inclusion Index is a quantitative global study able to compare how the total population view a brand compared to each underrepresented group. It implements Kantar's best-in-class inclusive research practices, among them, a comprehensive view of people's identity and an inclusive way for respondents to tell us about it (e.g., gender expansive options, empathetic approach to ask about age or socio-economic situation, or tell us about their appearance); language options in countries where there's an important second or third language; and an accessible text version available to respondents identifying as having a disability.

bodies of text responses. It provides much more accurate, granular and actionable insights than traditional approaches, while maintaining high data privacy and security standards.

The result of these two approaches is a new product that reveals a generational shift, opening the door to a wider range of identities whilst also creating a new culture that demands everyone be welcomed and understood.

The Brand Inclusion Index allows marketers to evaluate if their brands are meeting the needs of undervalued consumer groups and if they are leaving opportunity on the table not just with these groups but with younger consumers and those in emerging markets.

We also used a state-of-the-art proprietary Generative AI based approach to analyse hundreds of thousands of consumer responses across **18 countries** and more than **500 brands**. This allowed us to identify, group and analyse common patterns in large



- Brazil
- Canada
- Colombia
- Czech Republic
- France
- Germany
- India
- Italy
- Japan
- Kenya
- Mexico
- Netherlands
- Nigeria
- South Africa
- South Korea
- Spain
- UK
- USA



Let us guide you on your inclusion journey

Kantar's Brand Inclusion Index provides seven clear benefits as you seek to predispose people both in under-served groups and the broader, growing population that expects greater equity:



We can help you understand people's broad expectations in terms of diversity and inclusion.



We can assess how specific brands are perceived when it comes to DEI.



We can help you understand industry benchmarks on inclusive marketing.



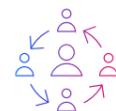
We can compare brand performance on DEI within your category against direct competitors.



We can help you close your inclusion gaps by identifying the key populations your brand needs to focus on.



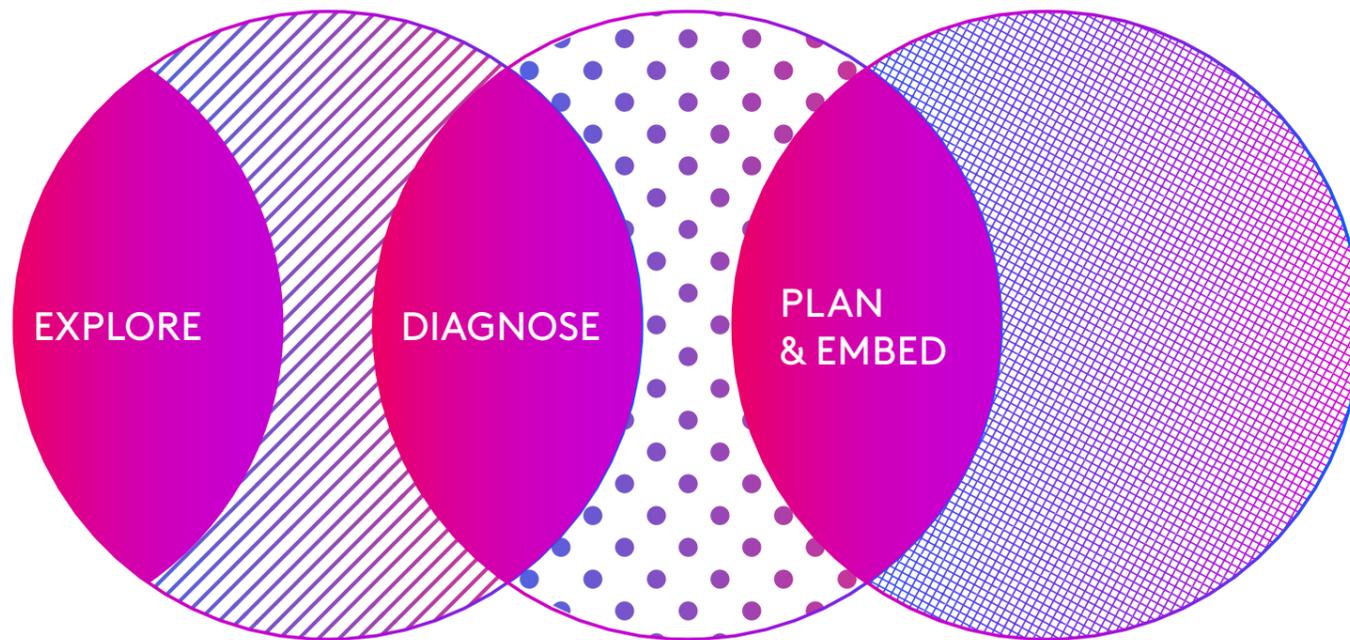
We can identify areas of strength that you can communicate and celebrate.



And we can help inspire your marketing organisation to take the lead on diversity, equity and inclusion.

How Kantar can help

We do this in three key stages, depending on your progress on the DEI journey.



First, we **explore** your current performance, digging deeper to unpack the state of inclusion at a more granular level through further quantitative and qualitative deep dives with under-represented communities.

We also deliver Creative Testing to understand how inclusive a brand's ads are perceived to be, i.e., how progressive do consumers perceive your portrayal of people to be.

Second, we **diagnose** where action is needed, determining how inclusive your brand is perceived to be and highlighting strengths, weaknesses, opportunities and blind spots when it comes to inclusion.

Finally, we **plan and embed** inclusion into your business, identifying the business opportunity and setting the ambition when it comes to a brand's inclusion commitments.

This includes using immersion sprints to build inclusion into the brand's strategy and activating against this, embedding the right learnings into the business to drive positive behaviours that fuel an inclusion marketing mindset.

Get in Touch

To know more about how can we help you in your inclusion journey contact our experts.



Valeria Piaggio

Head of DEI

valeria.piaggio@kantar.com



Dan Dexter

Business Development Director

dan.dexter@kantar.com

And visit <https://www.kantar.com/campaigns/brand-inclusion-index>

Kantar's Sustainable Transformation Practice works at the intersection of consumers, brands and environmental and social sustainability. In 2022 we worked with over 400 brands to catalyse action across multiple sectors and across the world.

