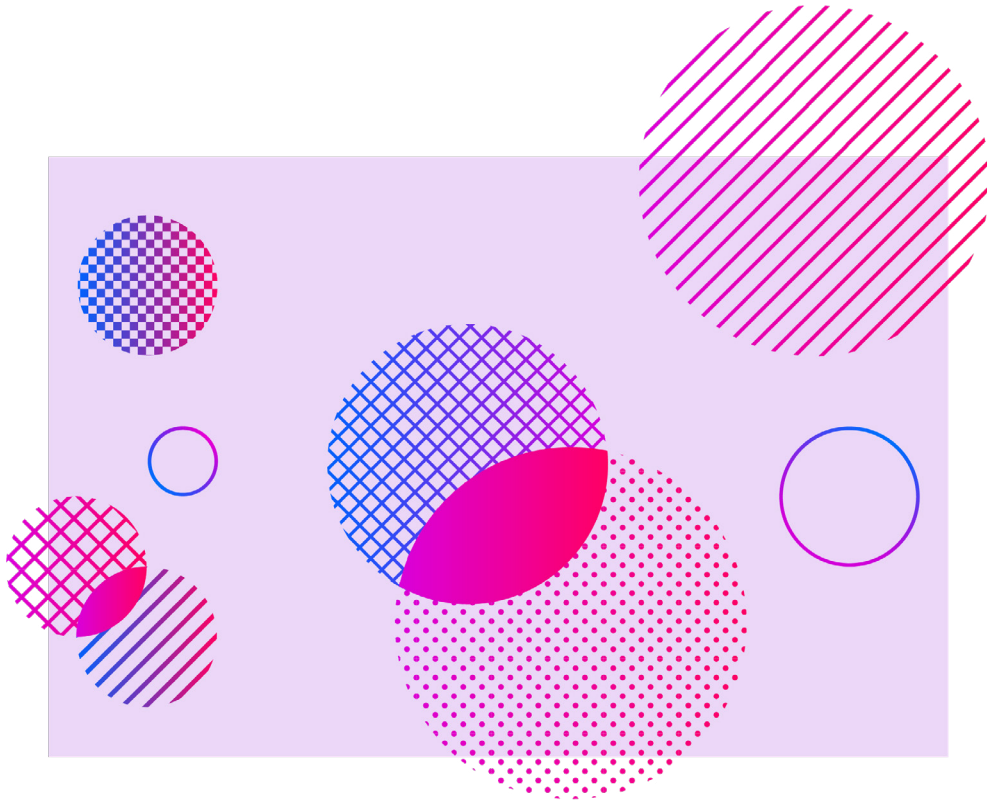




BRAND INCLUSION **INDEX**

How inclusion grows
your brand

Inclusion is the Future of Brand Growth

At Kantar, we know how brands grow: by meaningfully engaging more people, distinguishing themselves, and becoming more relevant. Embracing high-growth populations without alienating existing consumers is essential for fostering growth via inclusion.

This represents a big opportunity, but also a challenge in highly divided and polarized social environments. And while many brands would wish to grow by selling more to the customers they already know, that's not a viable strategy in most categories, or for brands that rely on young segments.

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

Our data shows that globally, social sustainability and inclusion are now non-negotiable for Gen Z and Millennials as well as those who are part of high-growth populations.

The Brand Inclusion Index proves a truth that we've always known, inclusion is good for business and consumers must see you as inclusive.

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 the global Brand Inclusion Index, make it this one: Perceptions of brand inclusion influences buying decisions for almost eight in 10 people worldwide.

In short, inclusive marketing is expansive marketing fuelling business growth.



Valeria Piaggio,
Global Head, Inclusive Growth,
Sustainable Transformation
Practice

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What is the Brand Inclusion Index, and how it can benefit your brand?

The Brand Inclusion Index focuses on people’s perception of brand inclusion – what consumers see, feel, think, and how they consider the brand as a result. It stems from the brand’s inclusive marketing efforts, as well as the customer experience it offers. It is a great metric to evaluate your brand performance and identify potential consumer frictions.

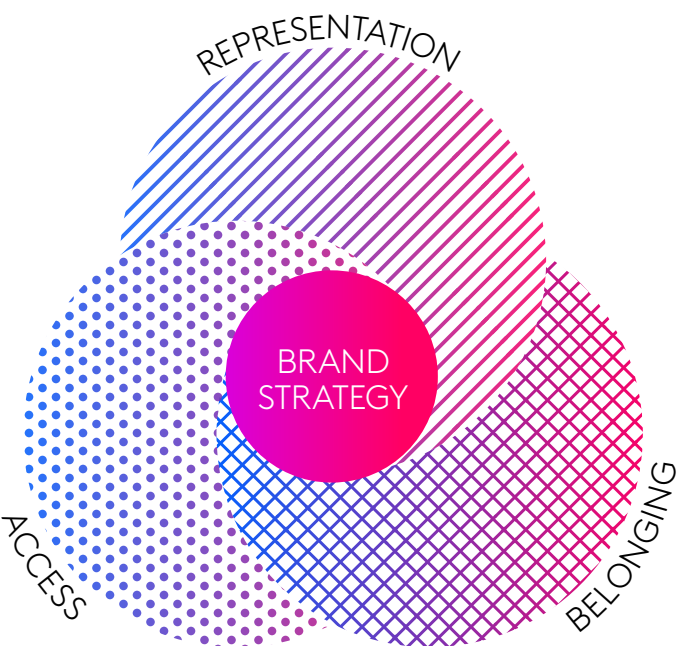
“Brand inclusion” refers to ensuring that all individuals are considered, regardless of gender, age, race, ethnicity, sexual orientation, abilities, neurodiversity, or other identity characteristics. Advancements in access, representation, and belonging benefit all consumers collectively, without disadvantaging anyone. It is a collaborative effort rather than a zero-sum game.

Given this premise, the BII represents all consumer perspectives, including those who tend to be under-represented in marketing research. This principle permeates the research, analysis, and reporting to ensure the voices of those who have been traditionally excluded by brands are considered. Brands need to pay special attention to diverse high-growth populations who have big and growing spending power, and the Brand Inclusion Index ensures their perspective is heard and understood by your brand.

The study is the most inclusive global research ever undertaken: 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.

The Brand Inclusion Index establishes category benchmarks for inclusion, making it an essential KPI. This means that for the first time, you will be able to rank your performance against other brands in your sector, as well as identify the areas to improve.

We assess brand performance across four key dimensions – brand strategy, representation, fairness and belonging measured via nine indicators. Our analysis covers the absence of negative actions, as well as the presence of positive initiatives.



The Brand Inclusion Index Components

- BRAND STRATEGY:** informs how the brand shows up in the marketplace and how it communicates the values it is committed to.
- ACCESS:** the operational systems – technological, financial, organizational – the brand puts in place to communicate with and engage consumers.
- REPRESENTATION:** the brand’s intentional attempt to positively represent people of all backgrounds, celebrate individual’s uniqueness, and treat everyone well and as equals.
- BELONGING:** the effort the brand makes to integrate everyone – especially those who tend to be left behind – and make people feel accepted, respected and valued. Ultimately, to create a sense of belonging with the brand.

20,300

Respondents

18

Countries

5

Regions

11

Languages

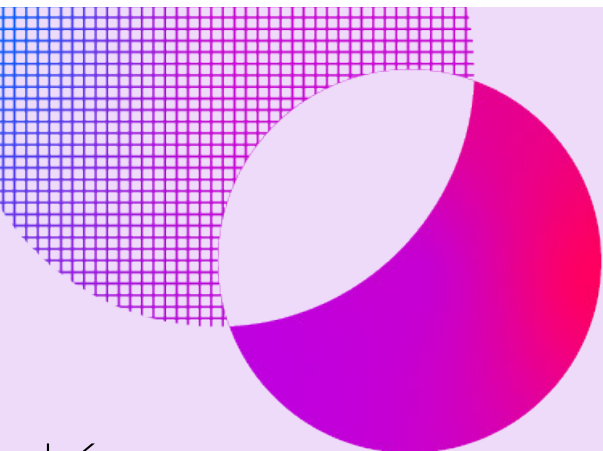
28

Categories

The Brand Inclusion Index data

In the foundational Brand Inclusion Index study, 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 Strategy, Access, Representation and Belonging, 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 14-15.



Key Findings



Inclusion should be part of blueprint for growth worldwide

While most people say “diversity and inclusion” is important to them, the numbers are even higher among Gen Z 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 diversity and inclusion and will support brands that do likewise.

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.

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.

Consumer perceptions of representation and inclusion drive purchase decisions.

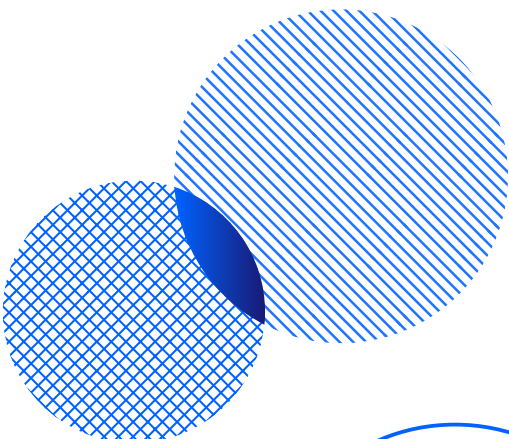
Nearly eight in 10 people agree, with even stronger numbers among GenZ and Millennials, people with thinking and learning differences, LGBTQ+ and people with disabilities. The influence of DEI on purchase behavior peaks in Brazil and Kenya.

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

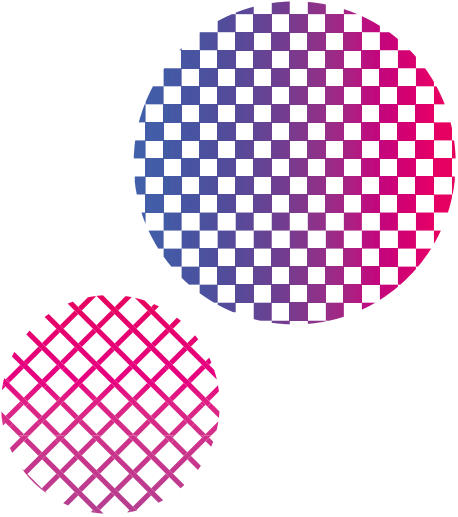
Among those who experience discrimination, the proportion that occur at commercial locations such as shops, stores, bars and hotels is remarkably similar around the world, regardless of level of market development or geographic location.





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.



6/10

people (58%)
have experienced
discrimination
in a business
environment

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.

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 analyzed their demands by using Kantar’s proprietary TextAI tool to reveal five clear demands for change:

1. Real beauty

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

2. Body inclusivity

Brands are advised to prioritise 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 inclusive representation, especially showcasing diversity, feel natural rather than forced, making it an intrinsic part of the brand story. To achieve this, brands should focus on genuine and authentic representation, both in front of and behind the camera.

4. Local representation

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

5. Marginalized communities

Marginalised communities such as First Nations or Indigenous people want positive representation in brand communications.

23%

About a quarter of the global population (23%) are quite satisfied with advertiser’s representation because they say they are “always” well represented. The happiest country is America where 33% approve of how they are represented on screen.

8%

Proportion of people globally who feel advertisers never represent them well. That rises to two in ten in Japan where people are particularly doubtful or negative about advertisers’ inclusive marketing efforts.

65%

Nearly two thirds of people think most brands are making an effort to be more diverse and inclusive.

The world's most inclusive brand

In 2024, 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.

N0.1
Google

"At Google, we build for everyone. Our commitment to creating inclusive and accessible products for all 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. We are so delighted to win this award, and we will continue to embed inclusive practices into our design and development processes."

**Annie Jean-Baptiste, Founder,
Director of Products for All at Google**

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 **inclusive brand award** went to **Nike**, followed by **Amazon** and **Walmart**.

Top 5 Most Inclusive Brands

- 1# **Google**
- 2# **amazon**
- 3# 
- 4# **Dove**
- 5# 

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.

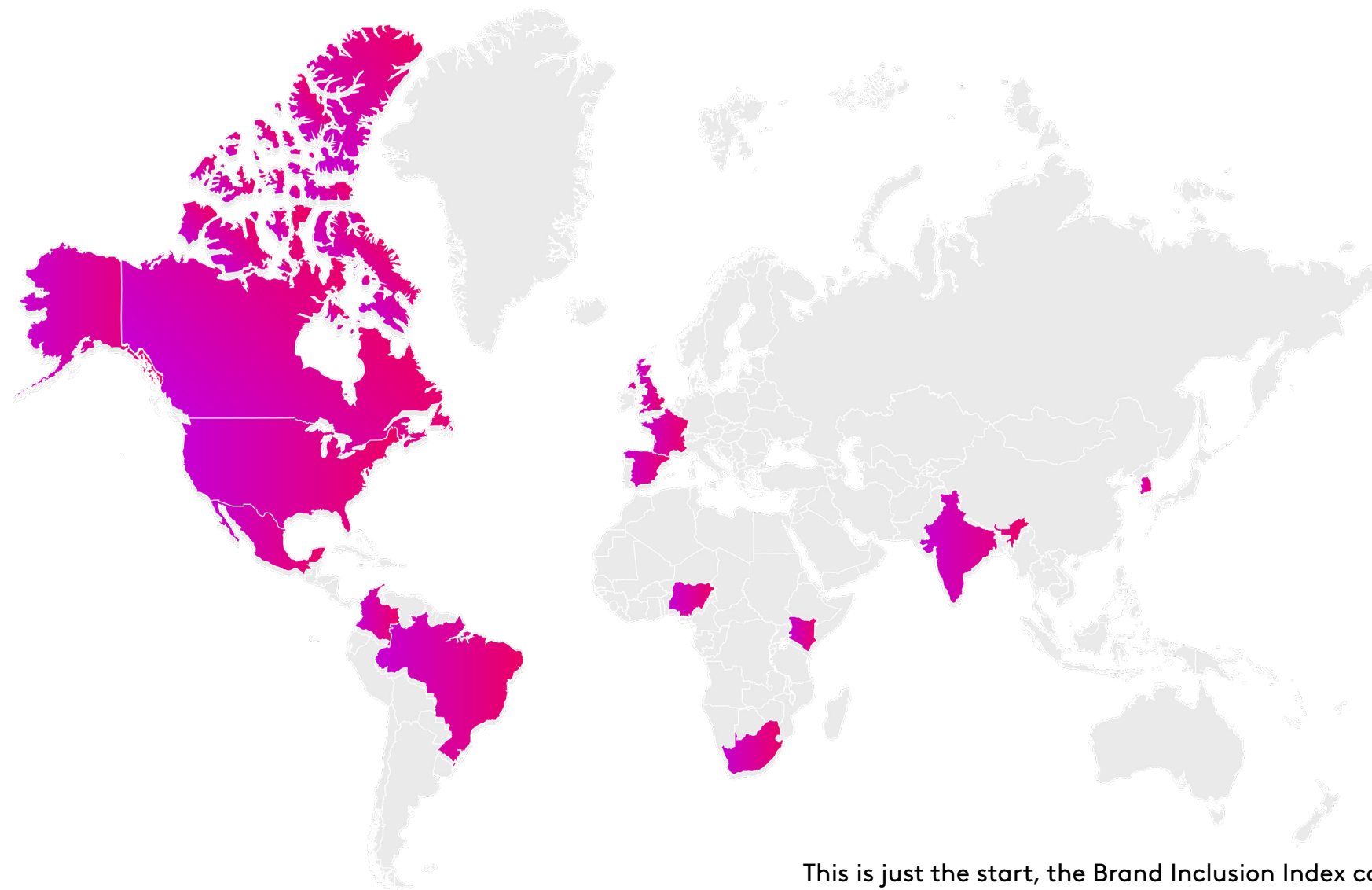
The Brand Inclusion Index is a quantitative global study able to compare how the total population view a brand compared to each high-growth population segment. It implements Kantar's best-in-class inclusive research practices, among them, a comprehensive view of people's identity and an inclusive way 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.

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 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.



This is just the start, the Brand Inclusion Index can be tailored to different markets, categories and under-represented groups depending on your research needs.

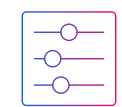


Let us guide you on your inclusion journey

Kantar's Brand Inclusion Index provides seven clear benefits as you seek to predispose more people:



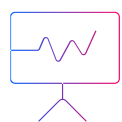
We can help you understand people's broad brand expectations in terms of the brand's access, representation, belonging, and overall strategy.



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



We can help you understand industry benchmarks on inclusive marketing.



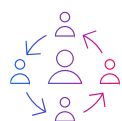
We can compare brand performance on inclusion within your category against direct competitors.



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



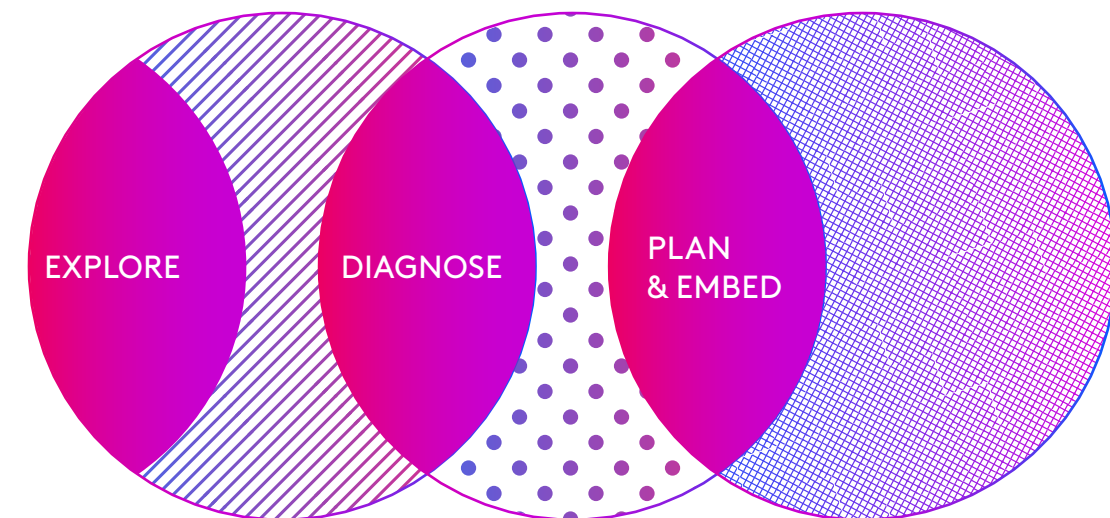
We can identify areas of strength that you can communicate and celebrate.



And we can help inspire your marketing organization 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 inclusion 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 high growth segments.

We also deliver Creative Testing to understand how inclusive a brand's ads are perceived to be, i.e., how positive 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, and opportunities 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 involves 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 behaviors 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

Global Head, Inclusive Growth, Sustainable Transformation Practice,
valeria.piaggio@kantar.com



Dan Dexter

Commerical Director, Kantar Sustainable Transformation Practice,
dan.dexter@kantar.com

And visit www.kantar.com/sustainability

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.

