

BRAND INCLUSION **INDEX**

Learn from the UK's
most inclusive
brands



A more diverse world needs more inclusion-aware brands

The world is becoming more diverse, and many previously (apparently) monolithic societies now have much more varied populations. In the UK, white groups are now in the minority in Birmingham (**48.6%** identified as white in the last census) while just over half the populations of Manchester (**56.8%**) and London (**53.8%**) are now white.

But inclusion isn't just about ethnicity; it's also about gender, sexuality, age, disability and a host of other factors, including place of birth, nationality, socio-economic background and personal appearance.

The need to understand the full spectrum of diversity in each and every market means brands face a new challenge: the inclusivity imperative.

For many, this will mean a new focus on previously under-served populations that have the spending power to bring growth to their business. Women, for example, control **\$43 trillion** in global consumer spending, **1.3 billion** people with disabilities have **\$8 trillion** in their wallets, while the estimated **371 million** LGBTQ+ individuals have **\$3.9 trillion** to spend.

A successful appeal to such groups will require brands to be more inclusive in their strategy, innovation, communications and consumer experience to stay relevant, maintain engagement, and ultimately boost the bottom line.

Brands that fail to meet the needs of such groups will become culturally irrelevant and fail to grow.



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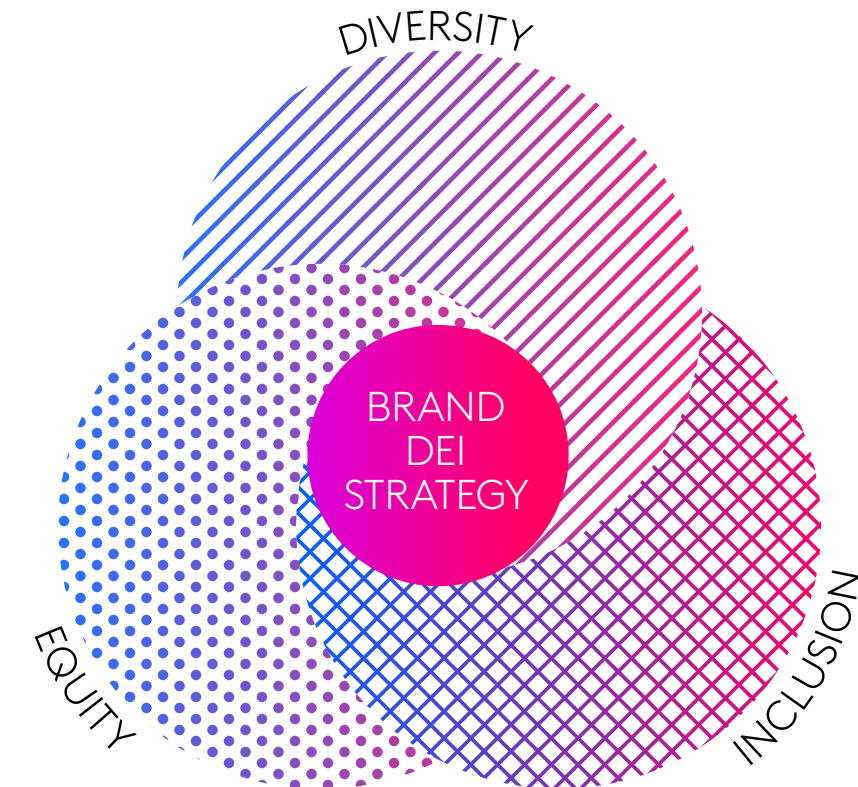
What is the Brand Inclusion Index?

We believe that inclusion matters not just for commercial reasons but also for social ones. And people agree with us. Globally, seven out of ten people agree that businesses and brands have a responsibility to make society fair to everyone.

But it's not enough to have a warm and woolly goal, brands need a clear measure to track their performance so they can improve.

Our new 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. The goal is to represent the under-represented to ensure the voices of those who have traditionally been excluded by some brands are considered.

The first phase comprises two key markets – U.K. and U.S. – with an international rollout to follow.



The Brand Inclusion Index Components



At the core, the **BRAND DEI STRATEGY** that informs how the brand shows up in the marketplace, and most importantly, how brave the brand is in relation to social issues. Brand bravery is what fuels and strengthens the brand's DEI initiatives.



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. Ultimately, to create a sense of belonging with the brand.



EQUITY: The systems the brand puts in place to operate and engage with people internally and in the marketplace.



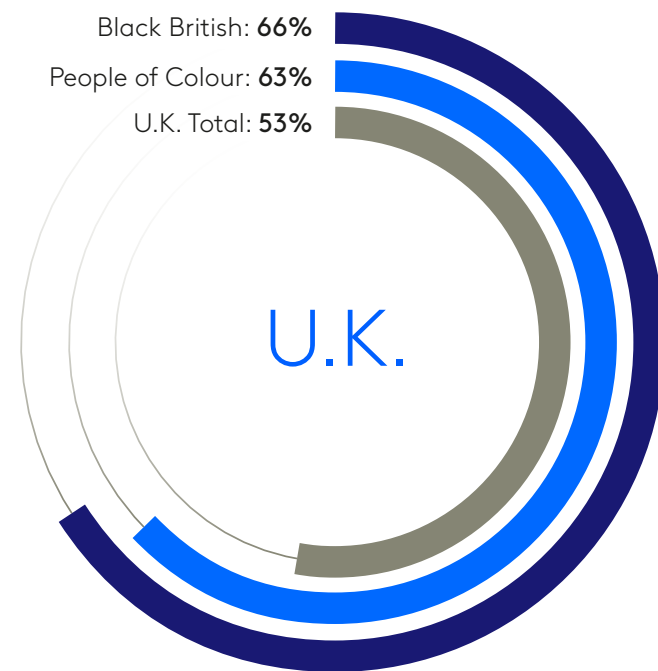
DIVERSITY: the brand's intentional attempt to positively represent people of diverse backgrounds, celebrate an individual's uniqueness, and treat everyone well and as equals.

UK Key Findings



DEI impacts what we buy

Half of all consumers (**53%**) say they make purchase decisions based on a brand's diversity and inclusion efforts.



Excluded groups are even more proactive

In the UK agreement 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"** is **66%** among Black consumers.

Experiences of discrimination are widespread

More than half of the population (**52%**) has experienced some level of discrimination in the last 12 months.

Brands have responsibility in discrimination experiences

About half (**51%**) of those who experienced discrimination say it happened at places where they might be in touch with a brand, and **28%** at commercial locations. This could include while shopping, when looking for a job, at a restaurant, hotel or other hospitality space, on social media or when applying for financial services products.

Under-represented groups bear the brunt

Key groups are much more likely to face discrimination. Among those scoring 10 percentage points above the average are People of Colour (**76%**), the young (**75%** among the under 24s), LGBTQ+ groups (**67%**) and those with disabilities (**64%**).

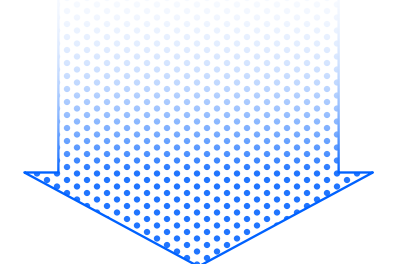
"I went into [a fashion outlet] with my friend and she is Black ... bearing in mind we're both like 30-year-old young professionals. The security guard, we know he was following us around the store and to the point where my friend actually said, 'Right, I'm leaving'... She didn't say anything to him but she was really, really mad about it ..." (QL)

Huge revenue opportunity at risk

15% of respondents have experienced discrimination at a commercial location in the last 12 months. Our estimate is that brands are potentially at risk of losing the spending power of these people. Estimates of consumer spend by group reveals that Minority Ethnic Groups have a consumer spend of **£61.3 billion**, People with Disabilities spend **£57.4 billion** and LGBTQ+ consumers spend **£33 billion** among LGBTQ+ consumers.

POTENTIAL LOSS OF

**£102
BILLION**



The best brands on inclusion in the U.K.

This is a sparsely populated field. Just over **50%** of respondents in the UK were able to nominate unprompted one or more brand that should be recognised for its DEI efforts. Less than a third could nominate a second brand unprompted.

Among those who could, Nike was the winner. Respondents praised its diverse and inclusive advertising as making everyone feel welcome at the brand. Inclusive marketing was also supported by a range of products that cater to diverse needs. Several respondents mention values of diversity, fairness and inclusion.

N0.1 Top of mind DEI brand: **Nike**



"Their recent work with the trans community and resulting ad campaign was the first of its kind in the sportswear industry."

"I think they've been consistent for a long period of time now."

"The models they use always represent multiple races. They treat everyone equally."

"They always have represented a variety of diverse people from all walks of life in their stores and in advertising."

Overall best brands by category

Best Brand Inclusion
Index Performance in:

Banking:



Skincare:

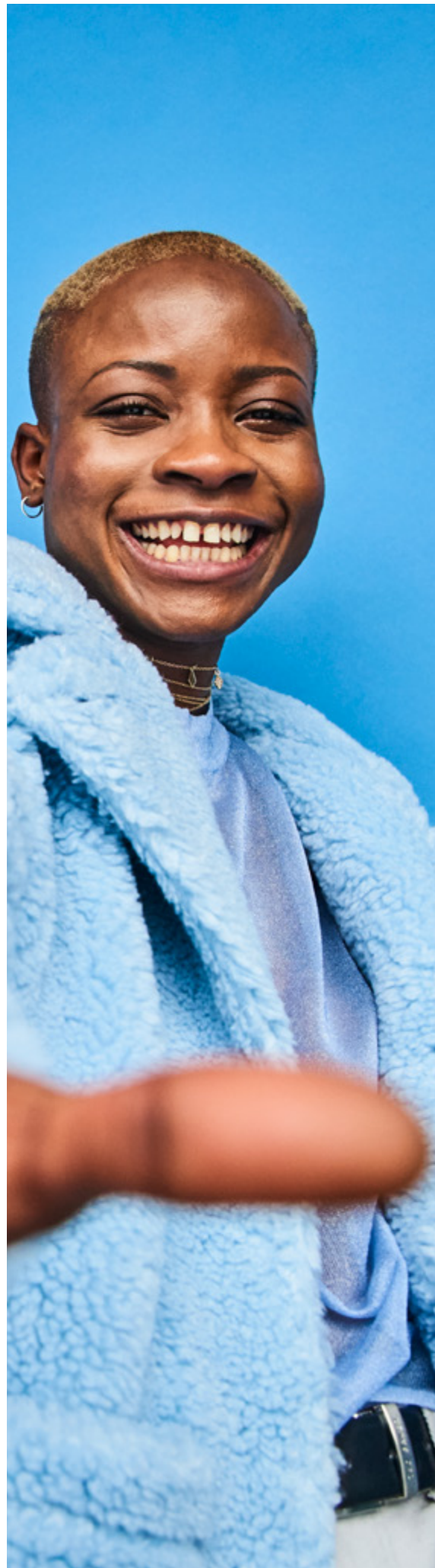


Sodas/Fizzy drinks:



Mobile:





The best brands on inclusion in the U.K.

Brand choices are not always made unprompted, so we also presented UK respondents with a list of 71 brands to assess. From this pool, Dove was selected both overall and by those who care and are engaged in DEI.

Behind Dove's win

Respondents cited the brand's inclusive advertising that represents people of different genders, body-size, skin colours and physical ability. Many also pointed to the fact that Dove was a trailblazer in diversity and inclusion because it has been positive about real beauty before "it was popular."

In addition to its inclusive advertising, Dove's success is built on a strong DEI strategy and the brand has been very good about communicating its values and doing so over time.

N0.1 Most inclusive brand: Dove



"Dove have always been about inclusion and body positivity, well before it became 'popular' and 'mainstream' to do it."

"I think they are one of the most diverse companies in how they present themselves, I think they are very inclusive."

"Their ads include different races and people with different skin conditions rather than just the 'norm'."

"I remember adverts over the years from Dove always using different ages, skin colours, body types. I feel they are very inclusive."

"They actively promote inclusivity and set a higher bar for the industry."

Overall best brands by population group

Best Brand Inclusion Index Performance for:

Women: 	People 55+: 
People of Colour / Minority Ethnic Groups: 	Rural populations: 
LGBTQ+: 	Low-income: 
People with Disabilities: 	

Indicative performance based on small sample sizes

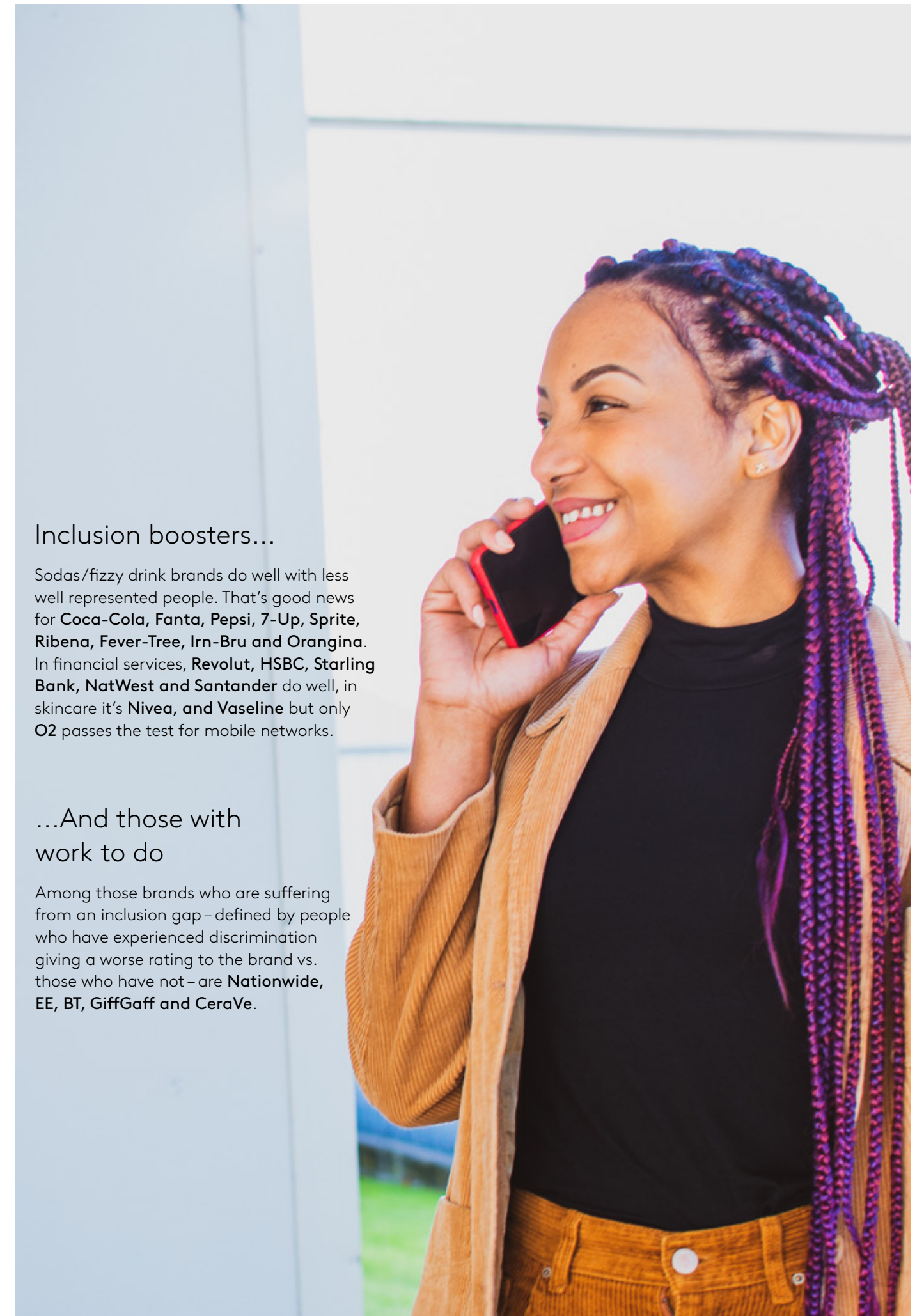


Who's winning and who needs to close the gap?

Even brands that tend to do well with the overall population need to keep working on their inclusion journey. When we analyse the responses from people who have experienced discrimination by brands, we can identify issues even with brands that perform well overall. They risk missing out on revenue that consumers from these groups might have spent with them.

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%).



Inclusion boosters...

Sodas/fizzy drink brands do well with less well represented people. That's good news for **Coca-Cola, Fanta, Pepsi, 7-Up, Sprite, Ribena, Fever-Tree, Irn-Bru and Orangina**. In financial services, **Revolut, HSBC, Starling Bank, NatWest and Santander** do well, in skincare it's **Nivea, and Vaseline** but only **O2** passes the test for mobile networks.

...And those with work to do

Among those brands who are suffering from an inclusion gap – defined by people who have experienced discrimination giving a worse rating to the brand vs. those who have not – are **Nationwide, EE, BT, GiffGaff and CeraVe**.

Next steps: Where brands need to take action

Inclusion is both a mindset and a cultural challenge. Getting this right means assessing how inclusive they are as a company and in their marketing efforts. Change requires brands to identify who they are leaving behind and what they need to do to change both working practices and consumer perceptions.

Typically, most brands need to look at seven critical workstreams to ensure inclusion is the automatic and natural choice.



Embedding DEI in all areas of business

Inclusion has to be part of every area of your business. This requires a comprehensive approach that challenges key pain points for consumers, employees, stakeholders and the brand.

Case in point, Google's efforts to make lived experiences better for people with disabilities, includes embedding inclusive and equitable practices throughout its business in areas as diverse as hiring, product innovation and inclusive communications.

Humanising marketing

The people who buy your products are humans not targets. Shifting your mindset means conducting inclusive research with the aim of understanding the needs of those groups who tend to be under-counted, excluded, or mis-understood.

Tesco in the UK ran a campaign during the month of Ramadan, called 'Together this Ramadan' to celebrate Iftar – the meal eaten by Muslims at the end of each day's fast. Large digital posters showed a series of empty plates that only filled up at sunset.

Mastering cultural intelligence

Traditions and heritage matter and it's a great way to appeal to under-served groups and show that brands understand their lives.

56% of people agree

that it's important or extremely important to celebrate and preserve their family traditions and cultural heritage.

You can boost cross cultural knowledge by learning the cultural identity and traditions of other cultures; adopting inclusive language and being respectful of individual/group preferences when using labels and using marketing that connects to consumers' cultural preferences.

Investing in inclusion for growth

Mapping out the scale of the opportunity represented by each group will help you identify the growth they can deliver to the category/brand.

This allows marketers to make smart choices based on a clear understanding of each group's potential, current and projected buying power as well as current and future population growth.

Bringing people together

The world may seem divided but there are also many things that bring people together. The top five global values cited as "extremely important" are: Family, Honesty, Health, Privacy and Opportunity.

Vaseline created a two-part documentary titled 'Visible Scars, Invisible Strength', which captured the spirit of elderly Singaporeans who have dedicated their lives to their craft. One featured a 71-year-old, female blade sharpener who had lost her fingerprints in the course of her life-long work.

Enforcing accountability

You can't make consistent progress without tracking DEI performance against clear goals, metrics and accountability frameworks. Having these in place will also help improve trust levels, especially among sceptical consumers and the younger generation.

Globally 54% of people agree that "Brands have an important part to play in the social conversation about issues like gender equality, race or immigrant relations".

Diageo is a good example of a brand that communicates DEI well. From the diverse talent they recruit, develop and retain, to the way they source services to ensure an inclusive supply chain, its ESG strategy has inclusion at its heart. The company aims to have **50%** representation of women in leadership roles by 2050.

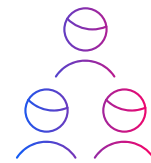
Being a brave brand

Inclusive brands and inclusion marketing practitioners need to be brave. That means standing strong for the brand's values, vision, and mission on DEI because there will be challenges on this journey.

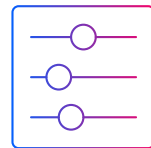
Being a brave brand also means standing strong when things don't go well, when unintentional mistakes happen (and you need to also be humble, and apologise), or when extreme but vocal people voice their anger in social media.

The best way to do this is to be clear why you are doing it and how the initiative aligns with your own and your company values.

Representing the under-represented



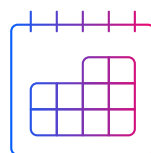
In this study we applied Kantar's best practices and expertise in inclusive research to ensure the under-represented were fully represented.



We used inclusive demographics that took into account gender expansive, age inclusive, disability (individual and household), socio-economic, geographic, LGBTQ+, political ideology and other factors.



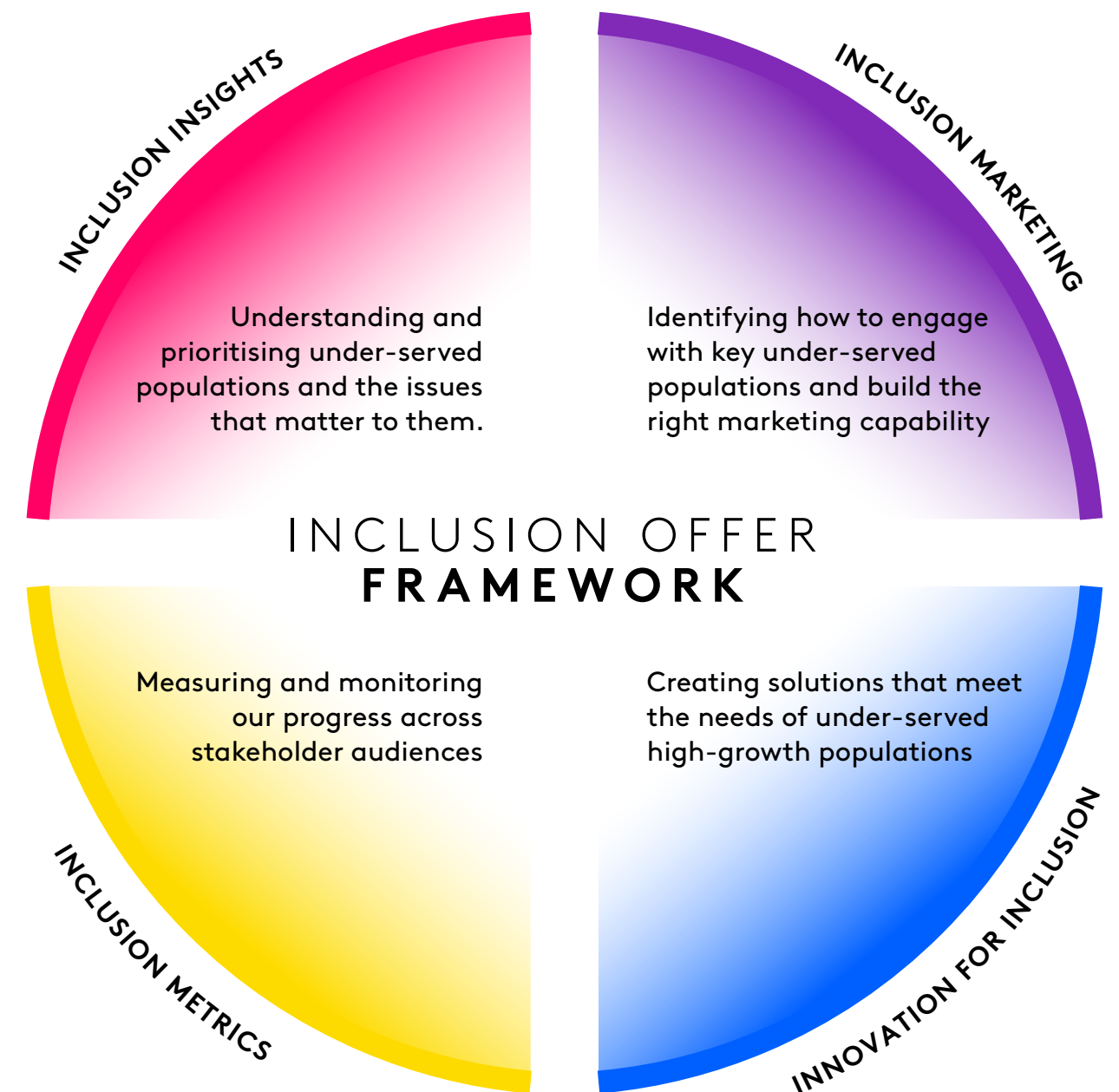
In the US respondents had a choice of language – English or Spanish – and in both markets an accessible text version was available to respondents identifying as having a disability.



Fieldwork was carried out in April 2023.

How Kantar can help

Kantar offers solutions in four areas to drive sustained growth via inclusion.



Get in Touch

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



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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.