KANTAR
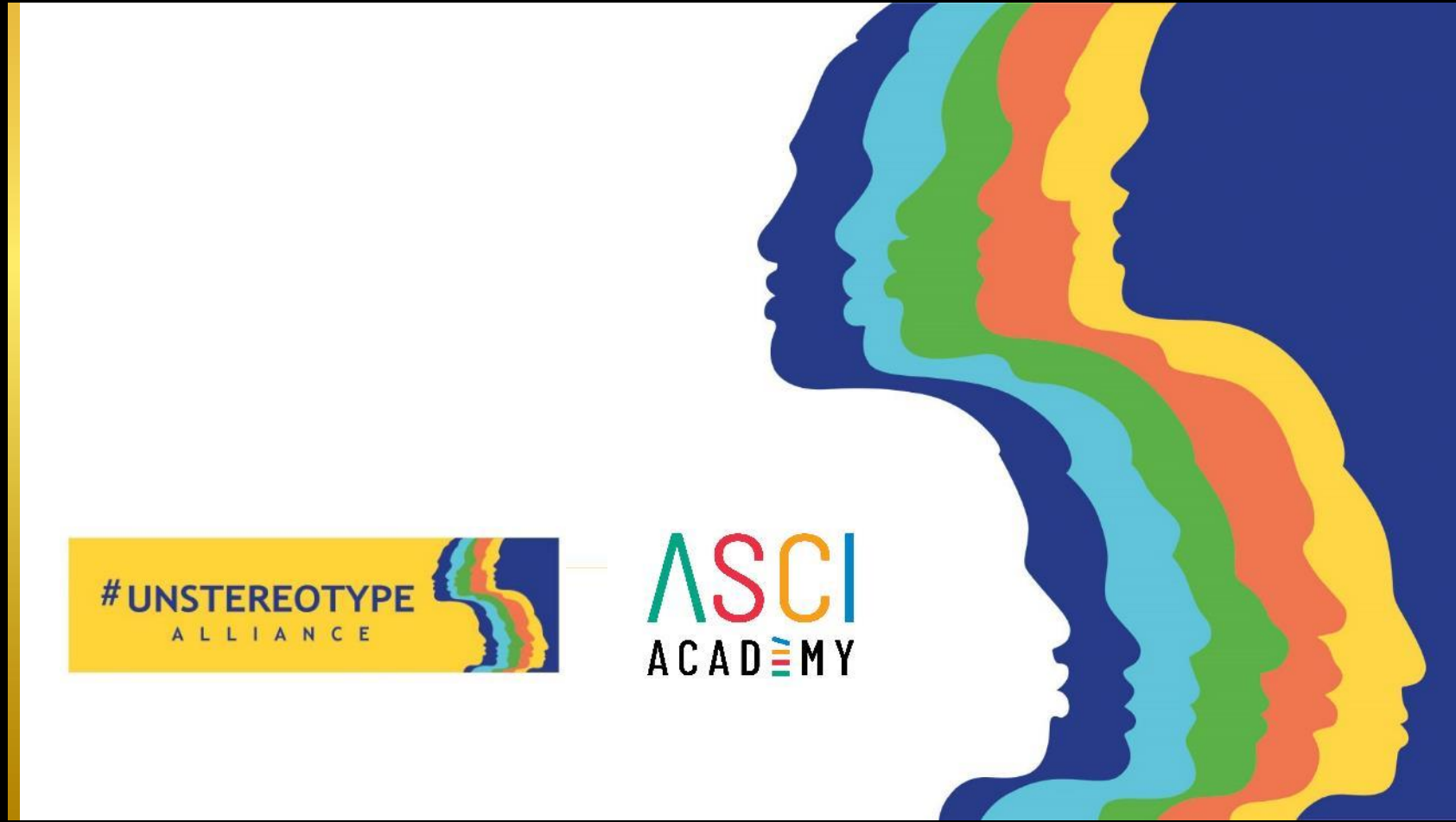
DI landscape of Indian advertising

December 2023

What we will cover

—What do Indian consumers want from advertising when it comes to D&I?

—How are we doing?
  — Ads launched in Oct'23
  —Ads tested by Kantar over the last 5 years

—Is there a strong business case for greater diversity and inclusion in advertising?

—Opportunity pathways for brands to progress on D&I agenda in advertising
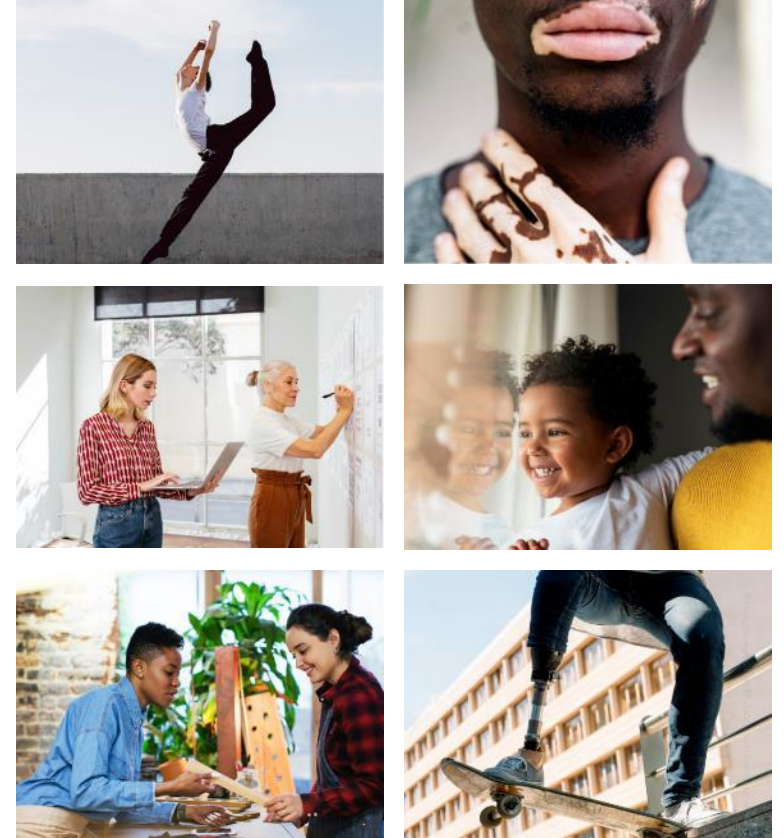
Kantar Global Monitor

The objective of the 28 DEI Country Factbooks is to provide companies with a basic understanding of the diversity landscape and the key equity and inclusion issues.

Primary data sources

Most quantitative findings are based on the 2023 Global MONITOR survey. The survey is collected among 36,000+ consumers, age 13+, in 28 markets around the world.

Other key sources cited

World Factbook

WEF Gender Gap Index

Gallup Poll

Social Progress Index

World Bank

Ipsos Poll

* Markets included: Argentina, Australia, Brazil, Canada, China, Colombia, Egypt, France, Germany, India, Indonesia, Italy, Japan, Malaysia, Mexico, Nigeria, Philippines, Poland, South Africa, South Korea, Spain, Sweden, Taiwan, Thailand, Turkey, United Kingdom, United States and Vietnam
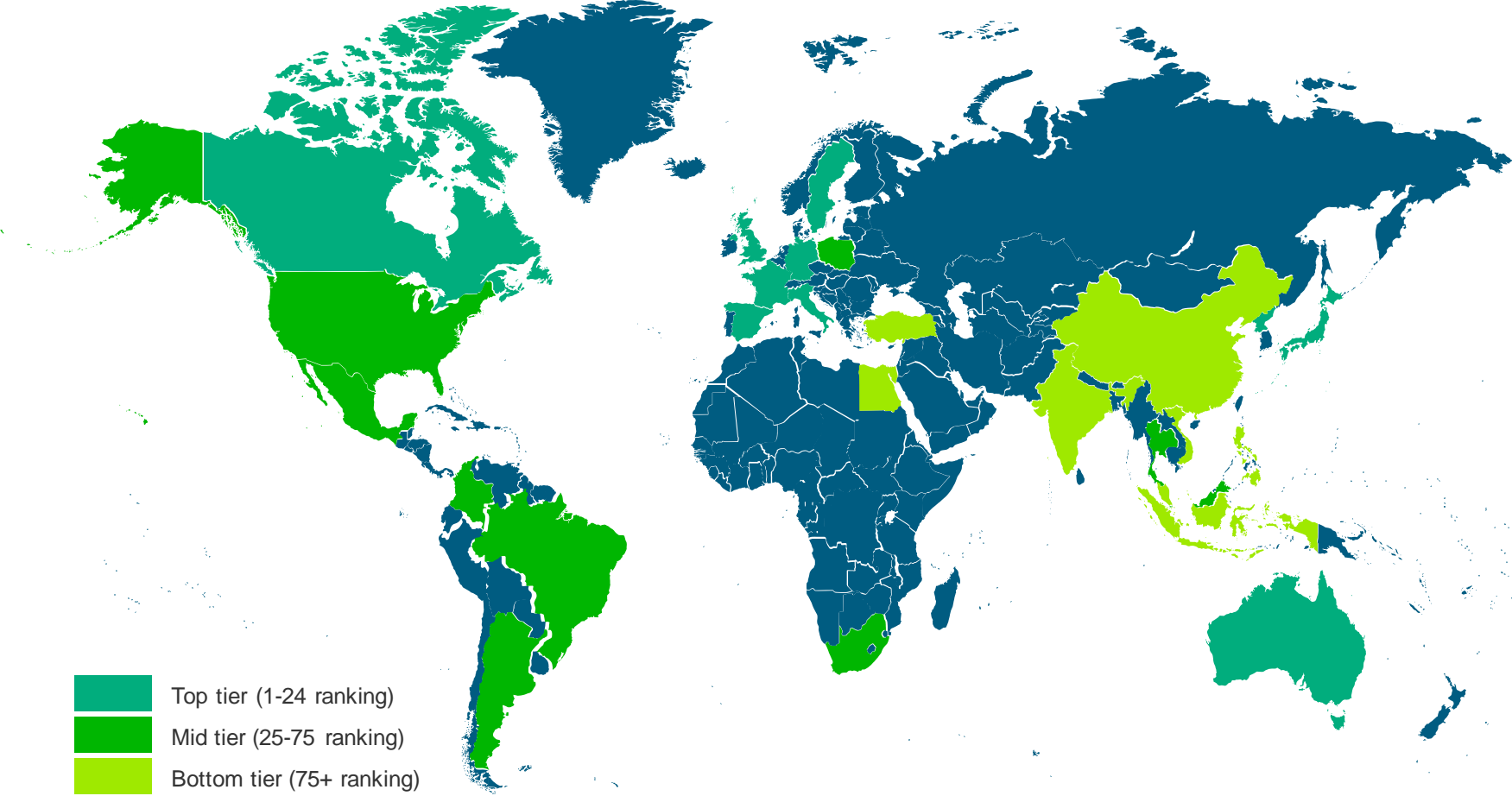
Kantar studies 8 key parameters of D&I

- Age
- Gender
- Sexual orientation
- Race/ethnicity
- Physical appearance
- Social class
- Disabilities
- Religion
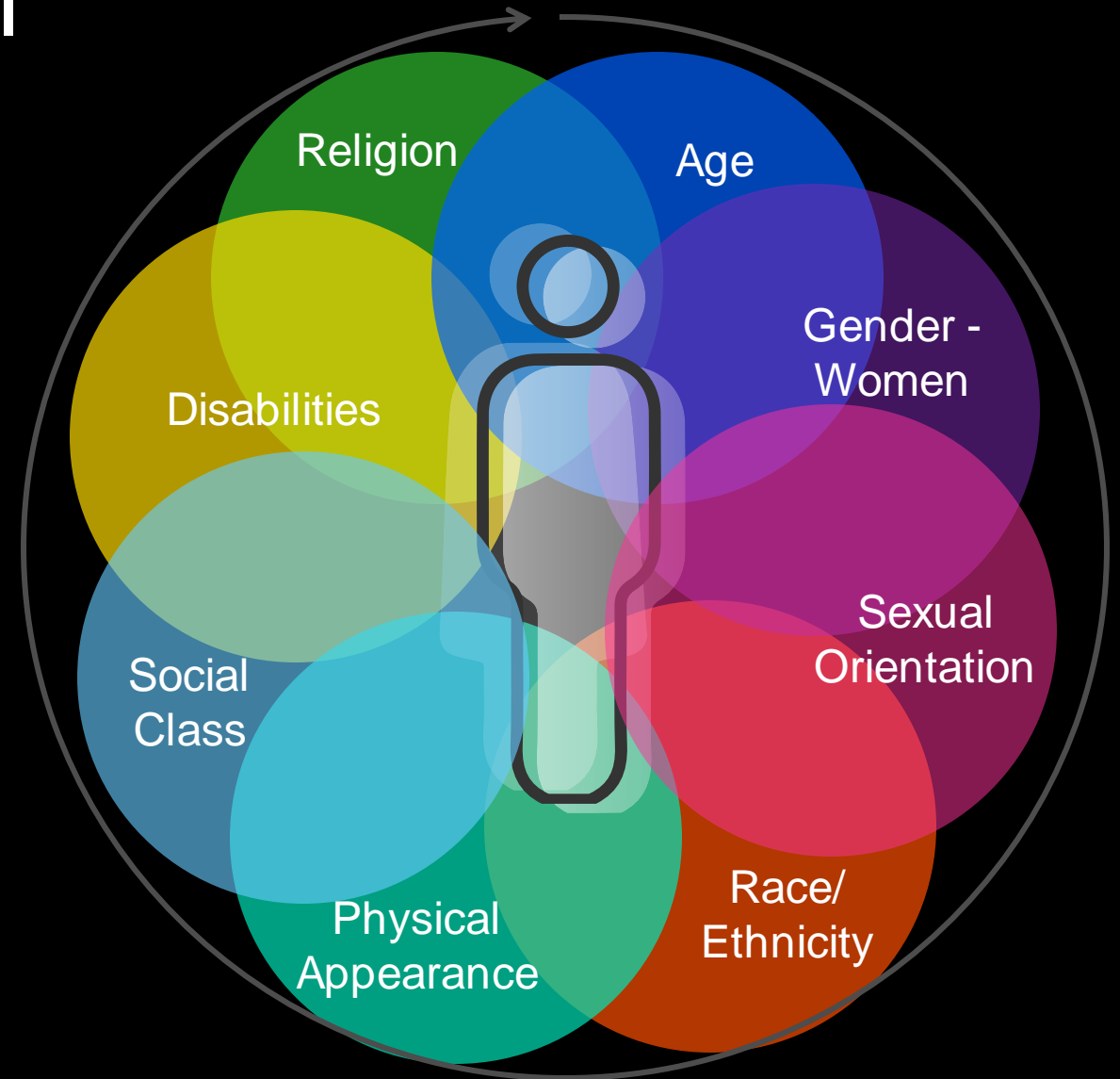
Overall Inclusivity – a big Challenge!

India emerges to be in the lower tier of Inclusiveness as per the Social Progress Index

Top tier (1-24 ranking)

Mid tier (25-75 ranking)

Bottom tier (75+ ranking)

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Consumers –
Yeh Dil Maange More!

Perceptions of brand representation

48%

Vs. **33%** Globally

of consumers agree **"not enough brands do a good job of representing people similar to me or my community"**

India

Almost half of Indians would like to see brands do a better job in representing people who look like them or their community, significantly higher than the global average.
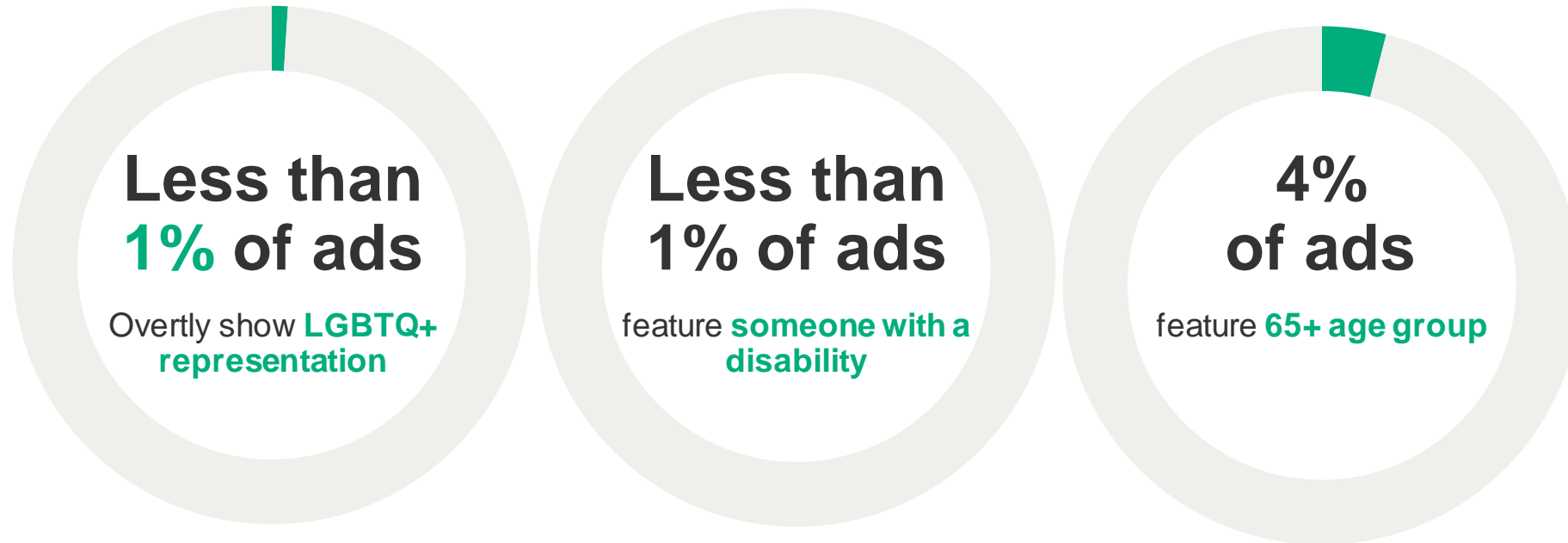
KANTAR   #UNSTEREOTYPE ALLIANCE

But what they get…?

Can you guess?

Diversity and Inclusion are starkly absent

Less than 1% of ads

Overtly show **LGBTQ+ representation**

Less than 1% of ads

feature **someone with a disability**

4% of ads

feature **65+ age group**

Review of all new ads that went on air on mainstream television in Oct'23 in India (261 ads)

Within depiction of men and women, women characters more stereotyped and shown as fair versus men

58%
Females shown with lighter skin tones

compared to
25%
Male counterparts

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ALLIANCE
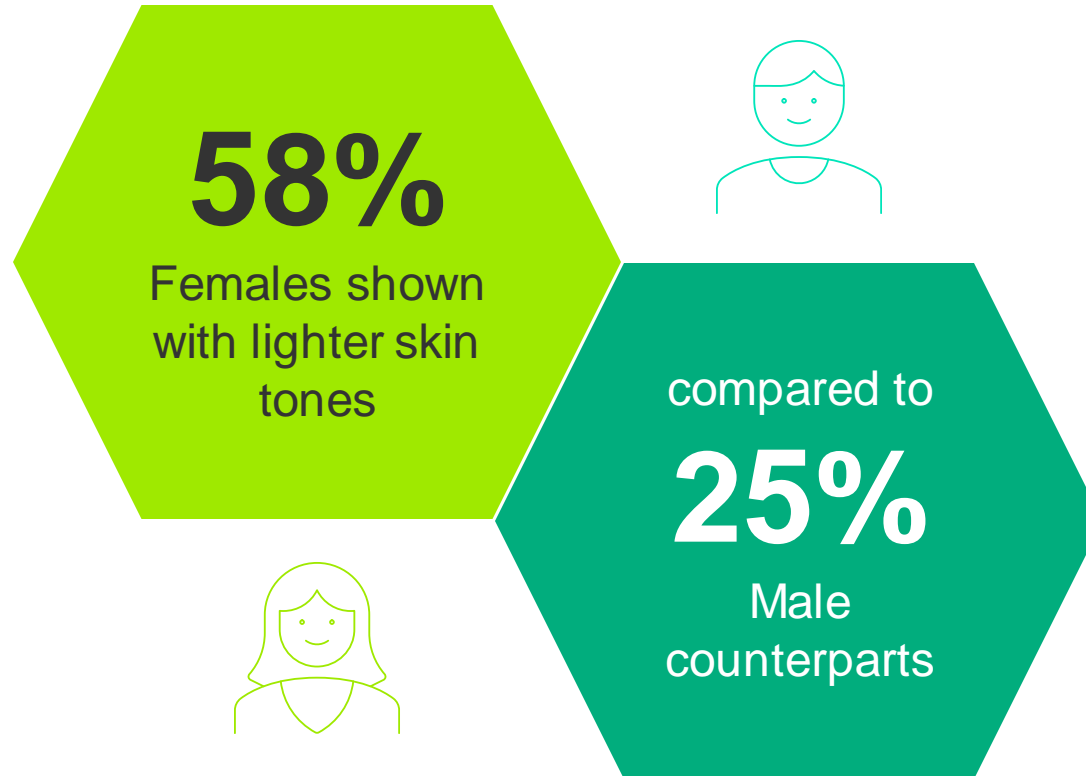
Women also shown as younger & conforming to more stereotypical definitions of beauty

86%
Females shown between age group 20-39 yrs

compared to
62%
Male counterparts

35%
Female characters are **2.5 X** likely to be shown as 'young/'very attractive

versus
14%
of the male characters

Review of all new ads that went on air on mainstream television in Oct'23 in India   (261 ads)

Portrayal of women remains closely anchored to care

Male characters are likely to be

———

Female characters are likely to be shown as

1.5X

more caring than male counterparts

17.5%

Female characters are likely to be shown as sole care givers

compared to

3.5%

Male characters

Portrayal of women remains closely anchored to care

Male characters are likely to be

3X

More authoritative than female characters

Female characters are likely to be shown as

1.5X

more caring than male counterparts

17.5%

Female characters are likely to be shown as sole care givers

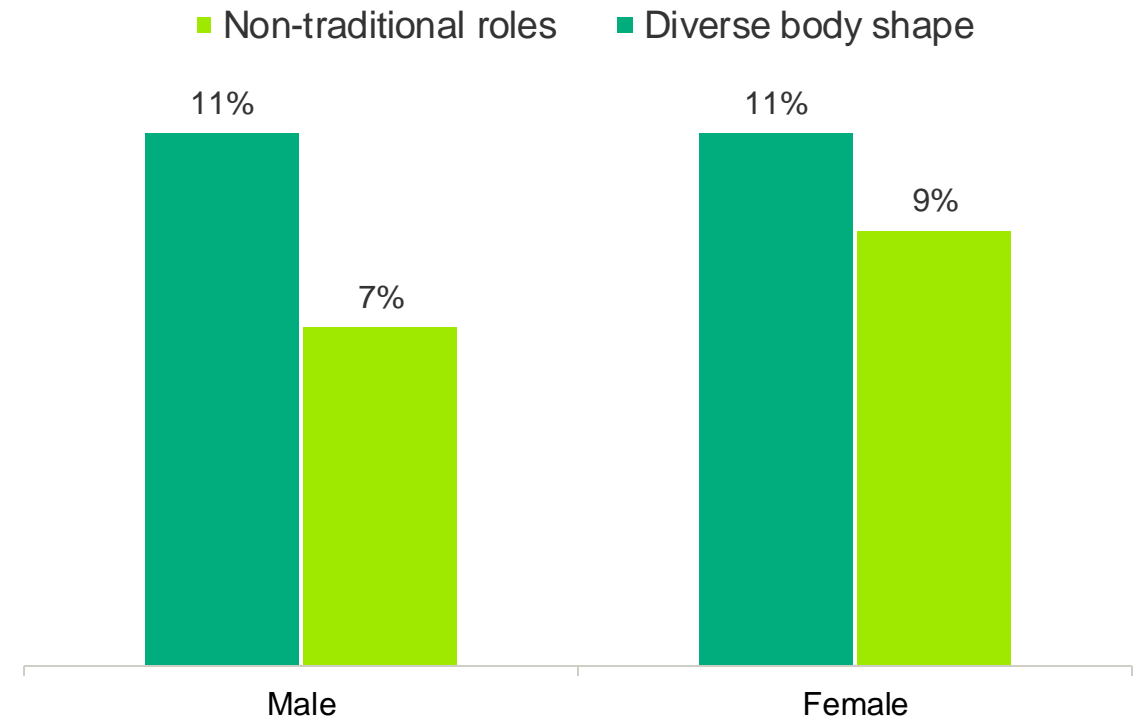compared to

3.5%

Male characters

Nearly half of the ads (48%) feature progressive themes while one-third follow status quo codes. Non-Hindi ads exhibit 2.5 times more adherence to the Status Quo codes compared to Hindi advertising .
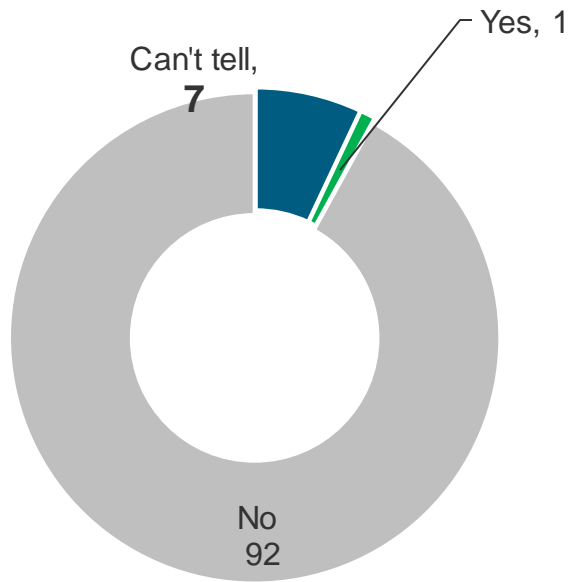

Gender Portrayal

- Firebrand/ Progressive, **3%**
- Not part of narrative , **17%**
- Regressive codes, **4%**
- Status Quo Codes **32%**
- Psuedo-Progressive, **23%**
- New normal slice of life, **22%**

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ALLIANCE
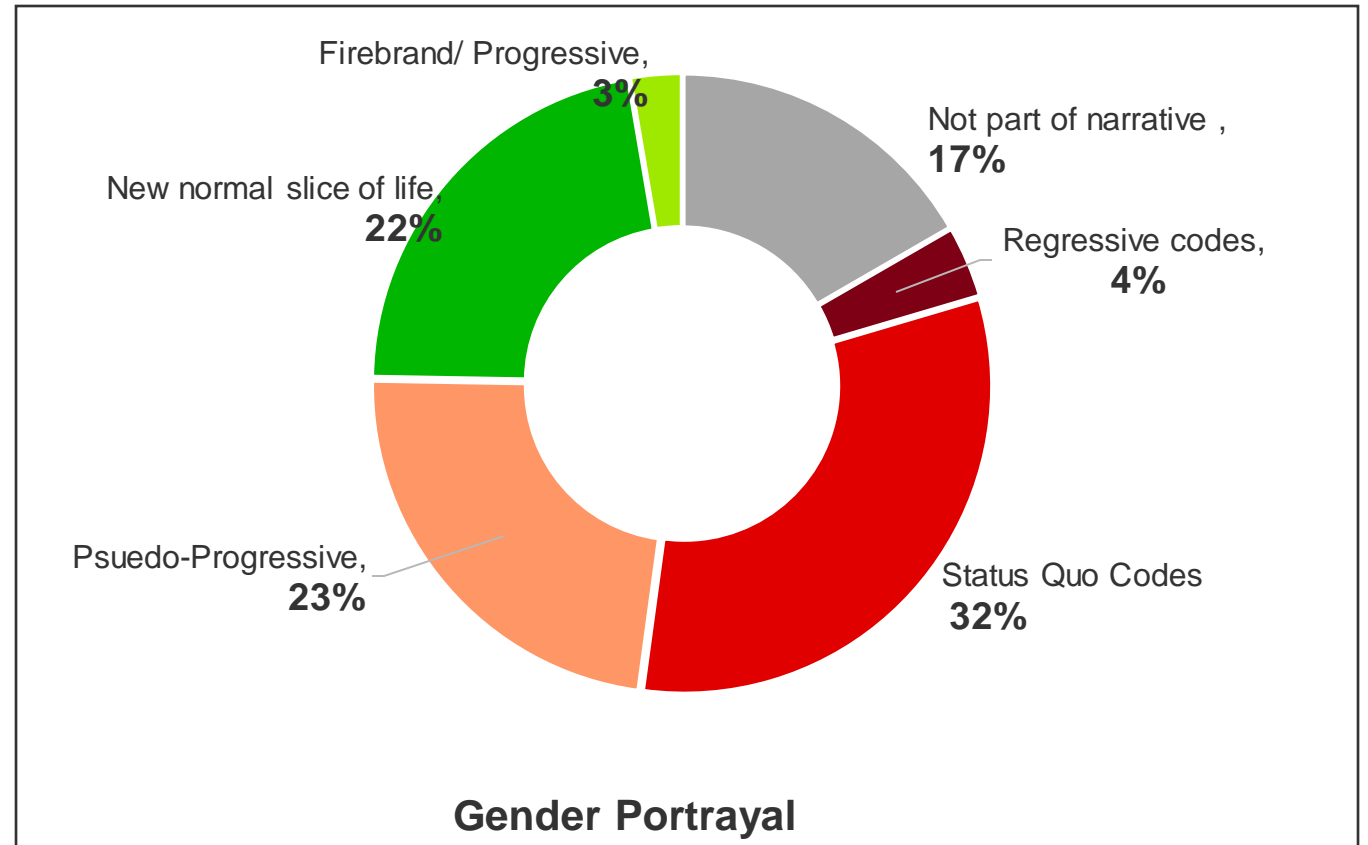
Across genders,
1. Traditional roles dominate narratives
2. Diversity of body type is extremely low

■ Non-traditional roles   ■ Diverse body shape

	Male		Female	
Diverse body shape	11%		11%	
Non-traditional roles		7%		9%

Kantar Link database (India) – Last 5 years

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Limited representation of diverse ethnicities and religion – a flattening of identities

Any religious cues or context in the ad

Yes, 1

Can't tell, **7**

No 92

Mixture of different ethnic origins

Different ethnic origins, **2**

Diversity of skin colours, 3

Diversity of skin colours, different ethnic origins 1

Neither, **94**

Different ethnic origins
- 36%
- 28%
- 36%

Different skin colours
- 31%
- 24%
- 44%

■ **In a lead role** ■ **In the background** ■ **Both**
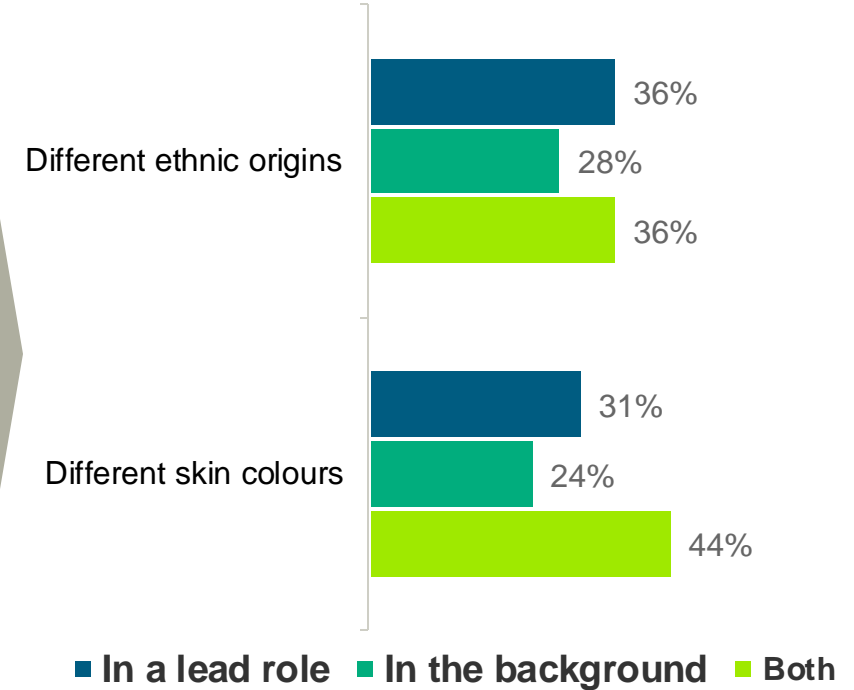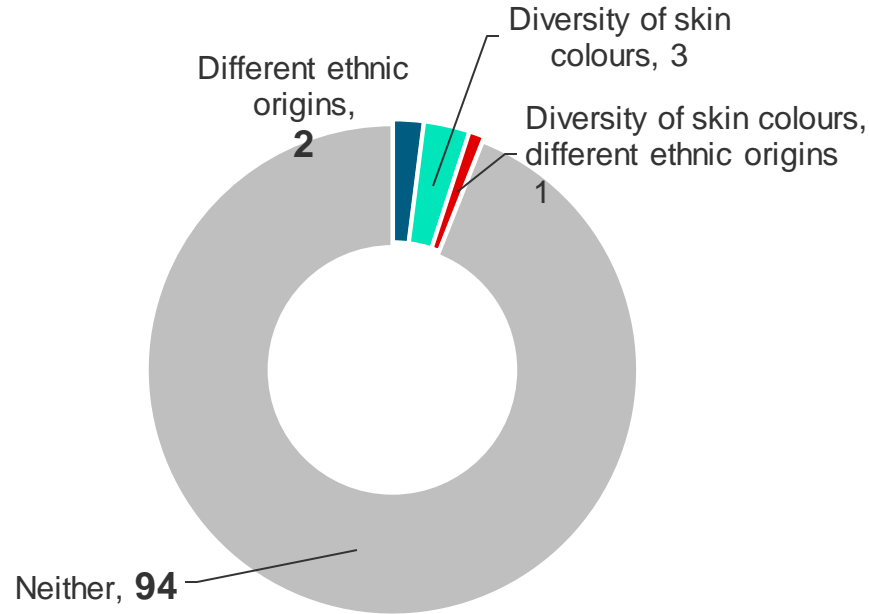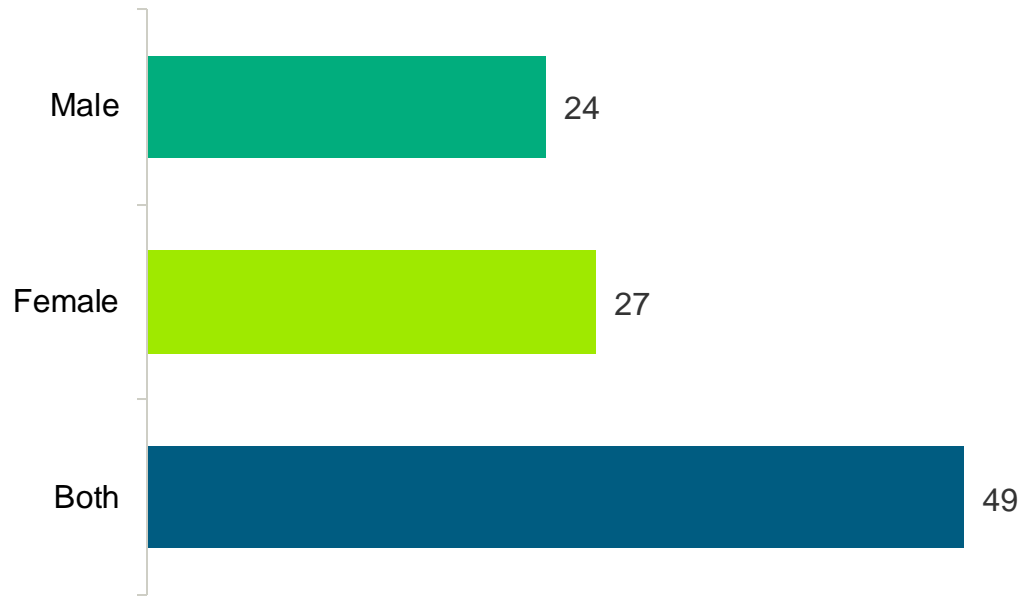
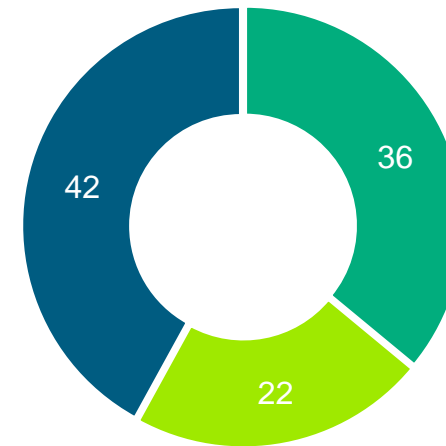Kantar Link database (India) – Last 5 years

Is the news all grim?

When we put our minds to it, we do make mighty strides –
For example: Gender Presence now not an issue

Who's present in the ad?

Category	Value
Male	24
Female	27
Both	49

2X solo Female presence ads seen in non-Hindi advertisements relative to Hindi

Who's the most prominent person?

- Male: 36
- Female: 22
- Equal: 42

Legend: ■ Male ■ Female ■ Equal

Base: Ads having presence of both genders 119

KANTAR #UNSTEREOTYPE ALLIANCE Review of all new ads that went on air on mainstream television in Oct'23 in India.

Is it worth it?

The Unstereotype Metrics – question wording

Consumers provide ratings after they view a piece of advertising content – the GUM is asked first, followed by the PUM

The Gender Unstereotype Metric (GUM)

This advertising presents a positive image of the female character/s that sets a good example for others

- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree

Same question is repeated for **Male** character/s, if present in the ad

"How much do you agree with the following statement?"

The Progressive Unstereotype Metric (PUM)

The way people are presented in the ad represents a modern and progressive view of society

- Strongly agree
- Somewhat agree
- Neither agree nor disagree
- Somewhat disagree
- Strongly disagree

Both Unstereotype Metrics are reported on an individual ad tested basis as the % agreeing with each of the 5 points on the scale, plus a mean score to summarise the scale. This mean score can then also be reported as a percentile (to allow for comparability across markets)

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Gender Unstereotyping in INDIA delivers massive increases in ROI

India	More positive Female UM ♀	More positive Male UM ♂
Brand Equity (Power)	+54	+59
Short Term Sales Likelihood	+32	+38

Kantar uses two composite metrics to predict the effectiveness of creatives in both the short term and the long term. The **STSL** is validated in driving sales and the **Brand Power** score provides a validated prediction of an ad's potential to build equity in the longer term.

Difference in average percentile for ads in the top quartile and bottom quartile on Unstereotype Metric, Ads Tested by Kantar in 2022

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Massive results seen for inclusive advertising too at a global level

+3 on Power
+2 on STSL

+53 on Power
+30 on STSL

Just showing under-represented groups has **no impact** on the ads' ability to build brand equity or increase short-term sales

Showing underrepresented groups in **a positive way**

Global Link database

These factors are probably some of the most potent in improving advertising effectiveness

So, what kind of copy would you rather spend your Ad budget on?

Opportunity pathways for brands to progress on DI

#UNSTEREOTYPE
A L L I A N C E

Opportunity **pathways** for brands to progress on DI

Inclusive casting

– Start including characters diverse in terms of skin tone, body shape, age, ethnicity, geography, sexual preferences

– Choosing central characters from underrepresented groups without the story centering around their identity

– Make progress at a pace that works for your brand/ culture

Inclusive story

– Illustrating the brand message with a story centered around characters' identity

Inclusion as purpose

– Tackling stereotypes and inspiring social change

– Provoke questions on regressive values

– Call to act