

CONSUMER STUDY

Diversity and Inclusion

Why the future of marketing must be inclusive

MARCH 2023



Diversity and Inclusion

Study objectives and design

Field Date

December 2022

Participation

n=541 SG online consumers

We are living in an increasingly diverse world. Diversity and inclusion (D&I) are key industry topics ushering in a new era of responsible marketing and advertising. In fact, more than 90%* of advertisers say that reducing bias and discrimination in marketing is now a priority.

Integral Ad Science ran an online survey among **Singapore** consumers to better understand consumer attitudes toward D&I overall and in digital advertising specifically.

This study explores why diversity matters in advertising and measures how inclusive messaging affects consumer sentiment, receptivity and purchase behaviour. Furthermore, this report gauges the impact that contextual adjacency has on consumer sentiment and behaviour in relation to brands' D&I efforts.

78%

of Singapore customers
consider **diversity and
inclusion** to be important
to them

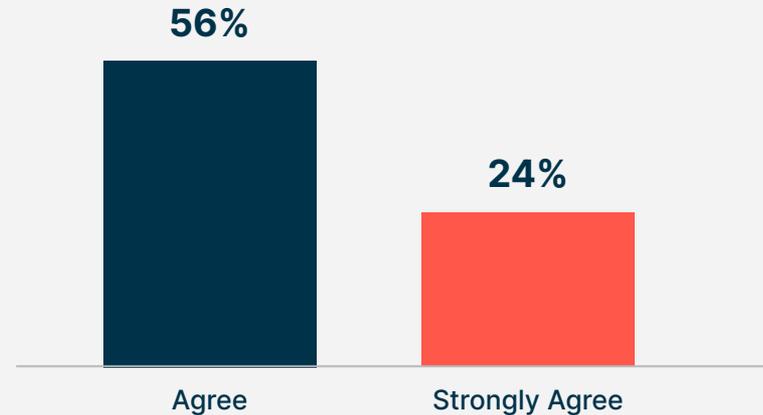
Q. How important is the topic of diversity and inclusion to you?

A vast majority of consumers agree that diversity is **important** to the future of their country

81%

of Singapore consumers agree that diversity is the future in their country

I believe that diversity is the future in my country



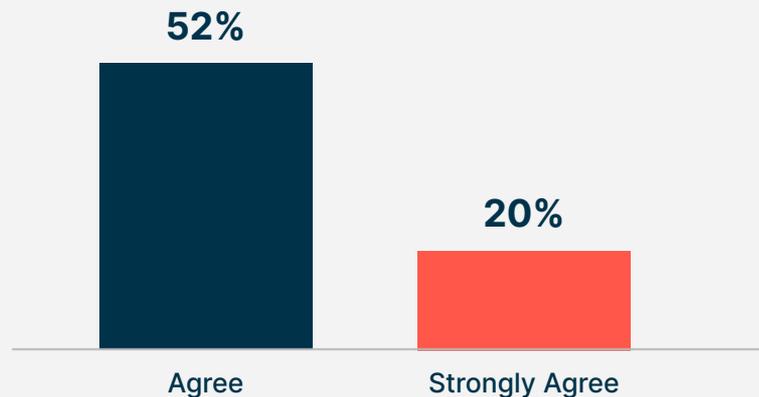
Q. Thinking about the topic diversity and inclusion generally, please indicate whether you agree or disagree with the following statements:
"I believe that diversity is the future in my country"

Nearly 3 in 4 consumers actively consume content related to D&I

72%

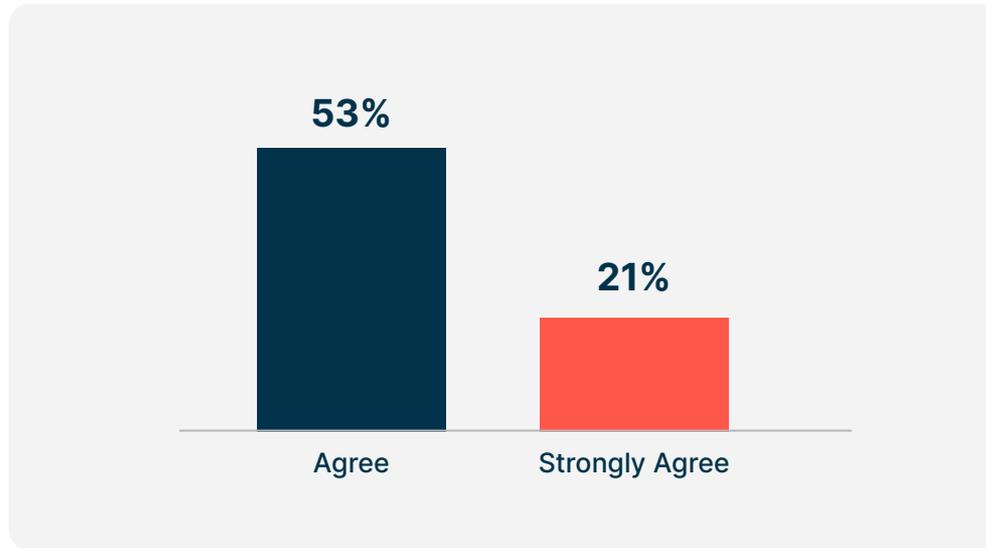
of Singapore consumers like content related to D&I issues

I educate myself and like to read up on articles and consume content on topics related to diversity and inclusion issues



Q. Thinking about the topic diversity and inclusion generally, please indicate whether you agree or disagree with the following statements:
"I educate myself and like to read up on articles and consume content on topics related to diversity and inclusion issues"

74% of consumers believe their individual actions have a significant impact in supporting diversity causes



Q. Thinking about the topic diversity and inclusion generally, please indicate whether you agree or disagree with the following statements:
"I believe my individual actions have a significant impact in helping support diversity and inclusion causes"
"I have changed my shopping or purchase habits to help support diversity and inclusion causes"

55%

of Singapore consumers say they have changed their shopping or purchase habits to help support D&I efforts

...and over half have changed their shopping habits to support D&I



81%

**of Singapore
consumers believe
that it's important for
brands to promote
diversity and
inclusion**

Q: Thinking about the topic diversity and inclusion specific to brands and advertising, please indicate whether you agree or disagree with the following statements: "It is important for brands to promote diversity and inclusion"

A large majority of Singapore consumers agree that brands should reflect modern culture, and also be involved in social conversations around **diversity and inclusion**

81%

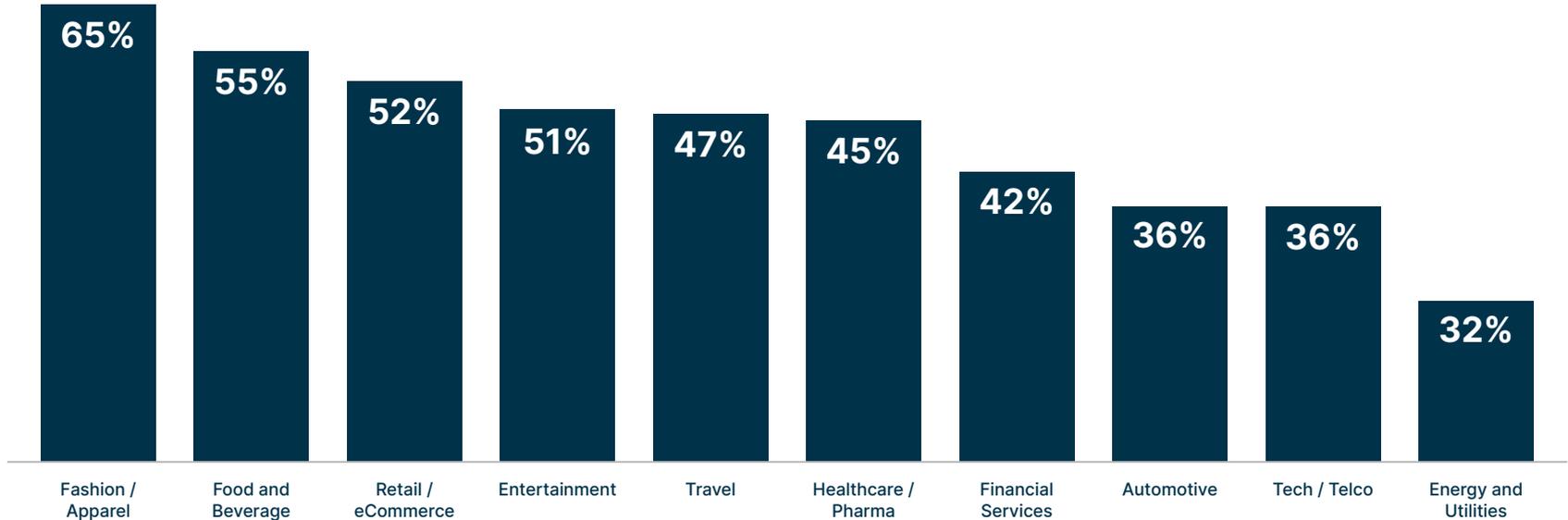
of Singapore consumers believe that brands have a responsibility to reflect our modern culture

78%

of Singapore consumers believe that brands should be engaged in the social conversation around diversity and inclusion issues

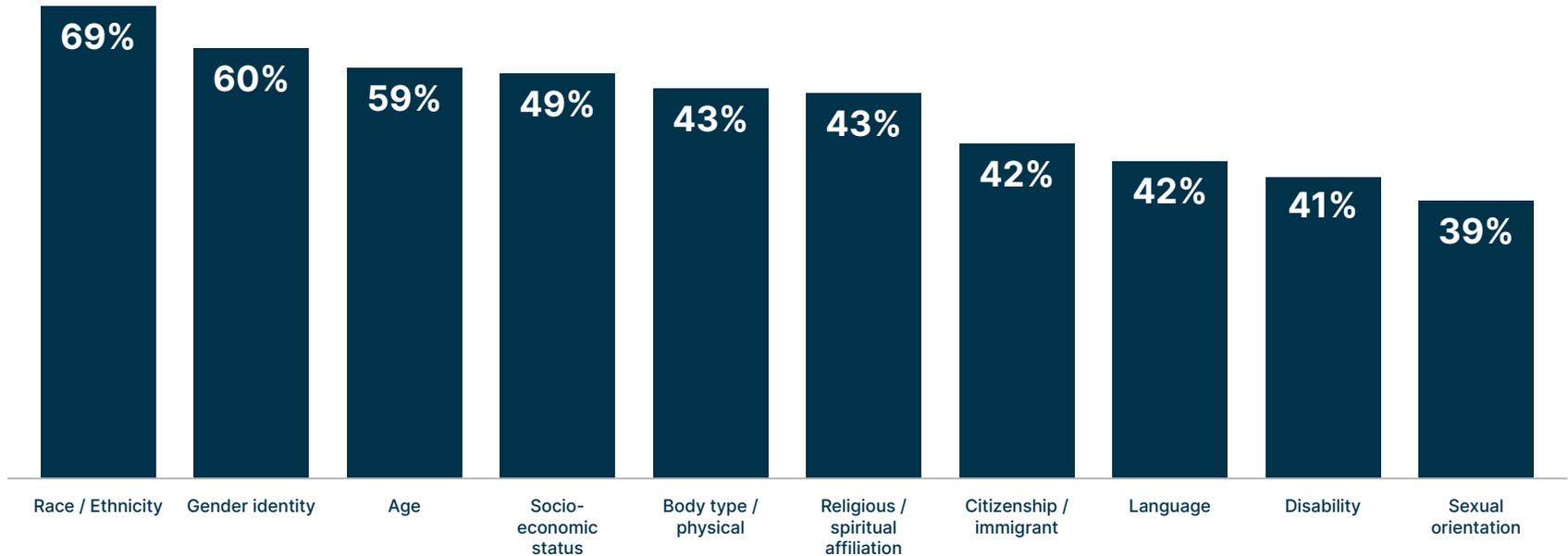
Q. Thinking about the topic diversity and inclusion specific to brands and advertising, please indicate whether you agree or disagree with the following statements: "Brands have a responsibility to reflect our modern culture"; "Brands should be engaged in the social conversation around diversity and inclusion issues"

Fashion, food/beverage and retail brands are the top advertisers consumers expect to advocate for D&I



Q. What types of companies/brands/advertisers should play a role in advocating for diversity and inclusion? Select all that apply:

Brands should consider many D&I factors in their campaigns, particularly **race, gender identity, age and socio-economic status**



Q. What factors should a brand consider in order to be diverse or inclusive in their ad campaign? Select all that apply:

**Singapore consumers
are wary of **hollow** or
inauthentic attempts to
address diversity in
advertising**

56%

**of Singapore consumers
agree that brands only use
diversity in advertising to
increase their profits**

Q. Thinking about the topic diversity and inclusion specific to brands and advertising, please indicate whether you agree or disagree with the following statements: "Brands only use diversity in advertising to increase their profits"

A significant number of Singapore consumers are likely to **take action against brands** that don't support diversity and inclusion

57%

of Singapore consumers would be likely to switch from a brand that demonstrates poor diversity and inclusion values, even if they have used that brand for a long time

47%

of Singapore consumers would be likely to boycott a brand that doesn't take diversity and inclusion seriously

Q. How likely are you to... "Boycott a brand that doesn't take diversity and inclusion seriously"; "Switch from using a brand that demonstrates poor diversity and inclusion values, even if you have used that brand for a long time"

88%

of Singapore consumers think advertisers/brands should make an effort to place ads around content that promotes diversity



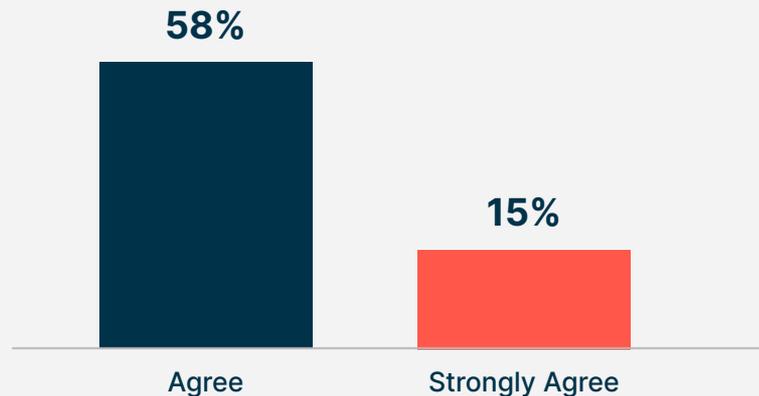
Q. Do you think brands/advertisers should make a concerted effort to place ads around content that promotes diversity?

Consumers can associate brands with the **content surrounding** an ad, leading them to believe that advertisers may be **endorsing** adjacent content

73%

of Singapore consumers believe advertisers approve of the content near their ads

I believe an advertiser approves of the content their ads appear next to



Q. Please indicate how much you agree with the following statement: "I believe an advertiser approves of the content their ads appear next to."

Brands benefit from **placing advertisements around content that promotes D&I**

63%

of Singapore consumers would be likely to **engage** with an ad that appears alongside content that promotes diversity and inclusion efforts

65%

of Singapore consumers would be likely to **purchase** a product/service from an ad that appears alongside content that promotes diversity and inclusion efforts

Q. If you see an ad that appears alongside content that promotes diversity and inclusion efforts, how likely would you be to engage with the ad (e.g., click on ad) to learn more about the product or brand?; If you see an ad that appears alongside content that promotes diversity and inclusion efforts, how likely would you be to purchase the advertised product/service?

Advertising near content that opposes D&I efforts can negatively impact consumer **favourability, ad engagement, and purchase intent**

35%

of Singapore consumers would feel **less favourable** towards a brand whose ad appears alongside content that opposes D&I efforts

38%

of Singapore consumers would be unlikely to **engage** with an ad that appears alongside content that opposes D&I efforts

40%

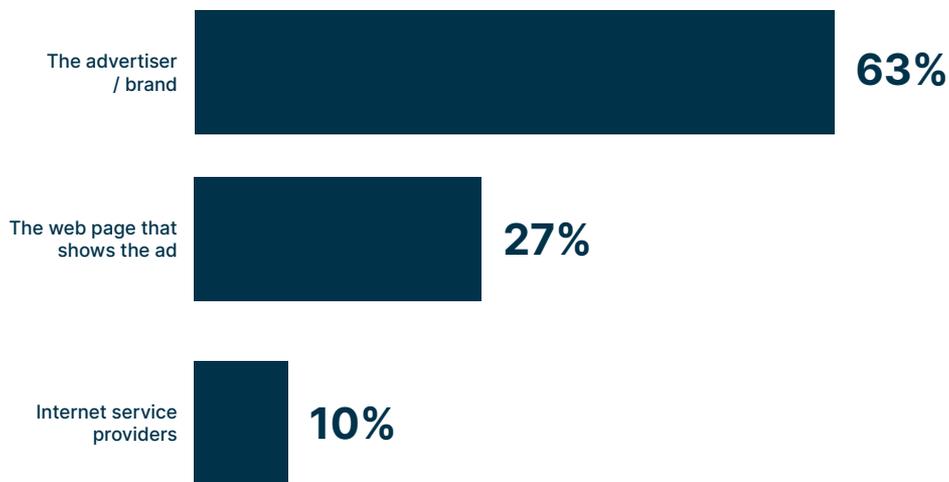
of Singapore consumers would be unlikely to **purchase** a product/service from an ad that appears alongside content that opposes D&I efforts

Q. If you see an ad that appears alongside content that opposes diversity and inclusion efforts, how likely would you be to engage with the ad (e.g., click on ad) to learn more about the product or brand?; If you see an ad that appears alongside content that opposes diversity and inclusion efforts, how likely would you be to purchase the advertised product/service?

Q. How would you feel towards a brand if one of their ads appeared alongside content that opposes diversity and inclusion efforts?

Ultimately, Singapore consumers hold **advertisers/brands** most responsible for the type of content ads appear with - but **publishers** also have a role to play

Who bears the most responsibility for the type of content ads appear next to online?



Q. Who do you believe bears the most responsibility for the type of content ads appear next to online?

KEY TAKEAWAYS

1
Singapore consumers care about diversity and inclusion and want to do more to help promote D&I causes

78%

consider diversity and inclusion to be important to them

74%

believe their individual actions have a significant impact in helping support diversity and inclusion causes

55%

of consumers have changed their shopping habits to help support D&I causes

2

KEY TAKEAWAYS

Singapore consumers feel that brands and advertisers should also play a part in advocating for D&I causes

81%

believe that it's important for brands to promote diversity and inclusion

65%

of consumers say fashion/apparel is the top vertical they expect to play a role in advocating for D&I

47%

of consumers would be likely to boycott a brand that doesn't take D&I seriously

3

KEY TAKEAWAYS

Singapore consumers believe that it's important for advertisers/brands to promote diversity and inclusion in their advertising and media buys too

88%

of consumers think advertisers/brands should make an effort to place ads around content that promotes diversity

81%

believe that brands have a responsibility to reflect our modern culture

63%

consumers hold advertisers most responsible for the type of content ads appear near

4

KEY TAKEAWAYS

The brand and content surrounding the ad can be linked in the minds of Singapore consumers, impacting ad performance and brand perception

40%

of consumers would be unlikely to interact with or purchase products from ads placed alongside content that oppose diversity and inclusion

38%

of consumers would be unlikely to engage with an ad that appears alongside content that opposes D&I efforts

35%

of consumers would feel less favourable towards a brand whose ad appears alongside content that opposes diversity and inclusion efforts

How IAS can help: Context Control **Avoidance**

Cognitive semantic
technology powered by the
**largest knowledge
graph** in verification

Precise classification of
content at scale, powered by
**sentiment and
emotion detection**

Classify
90+
specific emotions for true
contextual classification

150+
industry vertical and topical
segments available

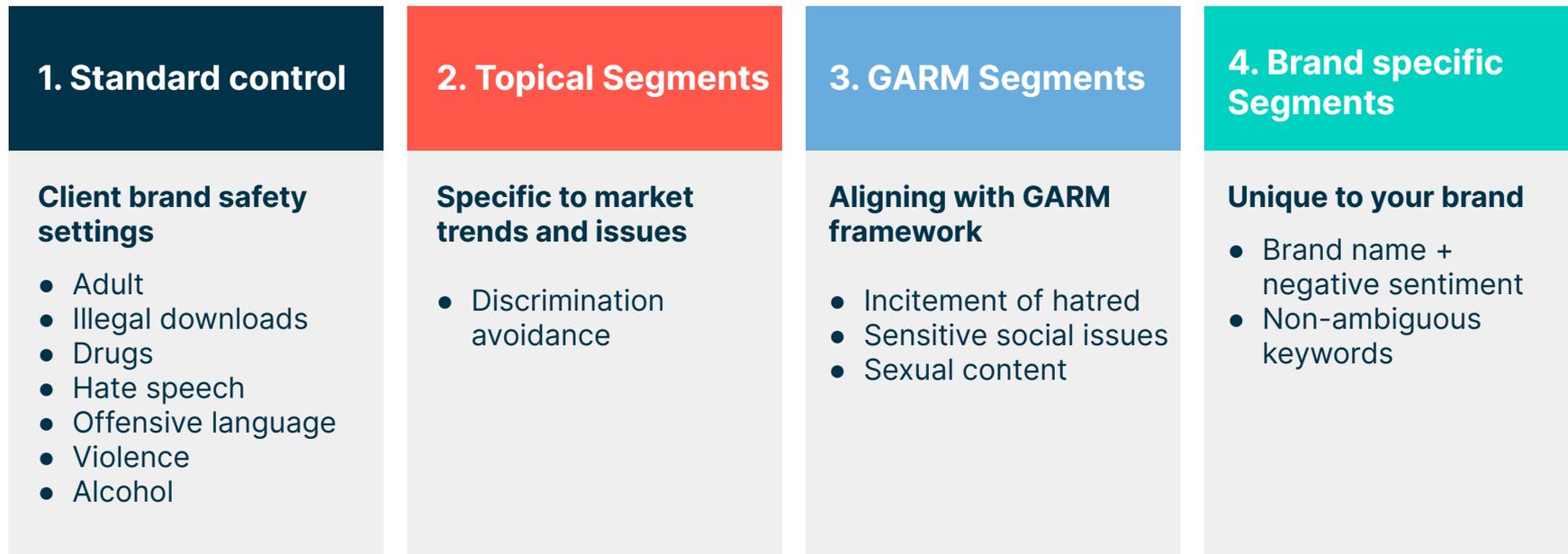
Comprehensive protection
from dynamic, real time
page-level scoring

Available in
all major global DSPs, in
45+
languages and over 50
countries

[GET STARTED](#)

Safety & Suitability: Avoidance strategy for D&I

Precise control over avoiding negative context at scale



Universal

Most brands want to avoid

Brand specific

Unique to a brand or industry

GET STARTED

*Remove KW list from ad server/DSP, but keep non-ambiguous KW's, e.g., brand names

Case Study: A “Top 40 Brand”

Words matter – use natural language processing to avoid blocking important LGBTQ+ content.

Three-pronged approach:

1. Revise KW strategy
2. Block negative content
3. Target positive articles pre-bid

= Increased access to content championing LGBTQ+

1,634

URLs blocked Jan-Jun 22 containing LGBTQ+ keywords at URL level

94%

of URLs were categorised as brand safe

100%

Implementing IAS Context Control pre-bid (Discrimination Avoidance segment) resulted in 100% passed LGBTQ+ positive sentiment articles

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